

The Dutch Consumer and Sustainable Food Consumption

- Current Affairs 2022 -



About the research

In 2018 we conducted our **first large-scale consumer research** exploring the current affairs on consumer behaviour and sustainable food consumption in the Netherlands. Much has happened since then: climate protests and tractors parked at the Malieveld in the Hague, a worldwide pandemic, inflation, and war around the corner. Such changes and developments have large impacts on people's behaviour, the choices they make, and why they make those choices. With these developments, consumers' long-term perspective on sustainability may fall on the back-burner. Luckily, many initiatives exist that aim to help our food supply become future-proof. Governments, scientists, NGO's, and many other intermediaries in the supply chain, are taking action.

One aspect that needs more attention though, is about consumer preferences. Knowing how to motivate, engage and support consumers to make better food choices are more crucial than ever. This is because improvements in the food supply chain will eventually only be impactful when it reaches consumers too. To be able to influence the behaviour of consumers, we will need to consider the choices consumers make as an important aspect of the larger food system. The consumer is one of the most important stakeholders for changes to occur in the food system.

The consumer is taking action. Because we can compare data from 2022, we can see in which areas changes have taken place (and in which areas it has not).

We want all food producers, brands, retailers and policy makers to be able to use the know-how, barriers, triggers and insights from our research. That's why we offer this report for free, because that's how we achieve maximum impact. The more organizations set their course based on consumer insights, the faster the transition to a future-proof food system will happen.

Durk Bosma – Future of Food Institute



Research methodology



Quantitative online research

- Sample n=1300
- Representative in age, gender and education level
- Online panel (panelinzicht)

Fieldwork

May/June 2022

Desk research

- Literature & media
- Online platforms
- www.futureoffood.institute

Fieldwork

May 2022/ April 2023



Report content

- Conclusions and recommendations
- `Sustainability is low on the list of priorities for consumers´
- `Knowledge and understanding of the impacts of food choices are by no means extensive, but improving´
- `Consumers currently have little trust in policies and innovations´
- Appendix



Conclusions



Knowledge and perception of the need for sustainability has increased, but sustainability remains low on the list of priorities

More urgency

The Dutch feel the urgency of climate change more now than they did in 2019. At the same time, there is also more doubt about the role that humans play in climate change (and therefore also in counteracting it).

Individual responsibility

About two-thirds of the Dutch population find that consumers, as individuals, are responsible for making the effort to reduce their own impact on the environment. This percentage is higher than the percentage that find that the responsibility lies with corporations (45%) and the government (38%).

More impact

Knowledge about the impact of the food supply chain has increased. Nonetheless, the impact the most important aspect of a sustainable diet (less animal-based, more plant-based), is still underestimated.

But still no change

The Dutch still do not consume foods more sustainably now compared to in 2019. Moreover, in total we are actually eating less sustainably. Still the consumption of local and biological foods have slightly increased. Additionally, there are more consumers that are consciously eating less meat and animal products, but the difference is small.

Price is the dominant factor in food choice

Generally, price is the most important consideration when shopping and eating. Forward-looking considerations such as sustainability and health play a lesser role. The importance of price also leads to declining support for price measures that could promote more sustainable (or healthier) choices.

Little trust in innovations

There is a growing distrust of technological agricultural innovations (in a general sense). Despite this, there is an increased willingness to try new products, such as cultured meat or products from vertical farming.



Sustainability is low on the list of priorities for consumers



There is less scepticism about climate change, but also more uncertainty

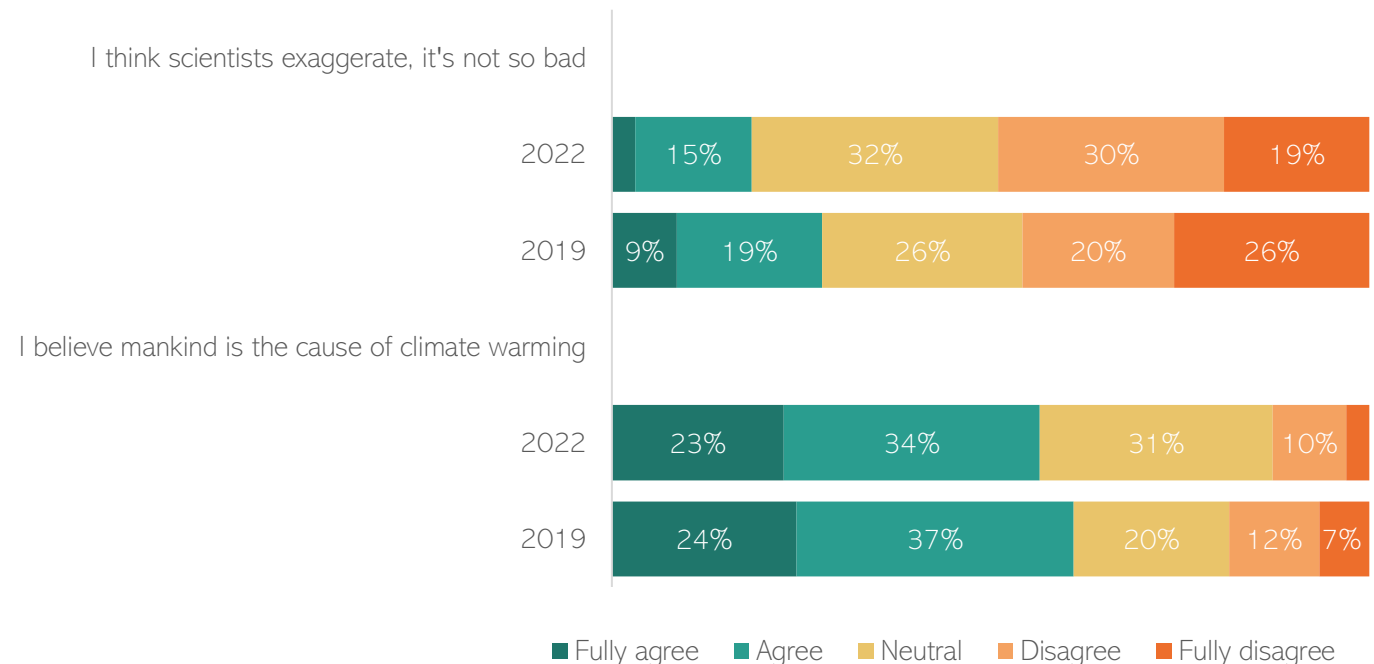
For the making of sustainable food choices, the belief that it is necessary to take action for the climate is a prerequisite. This belief is increasing.

The percentage of climate sceptics (those that find scientists to exaggerate) has strongly decreased since 2019, from 28% to 18%

More than half of the Dutch population believes that humans cause climate change. Compared to 2019, this number has lowered slightly. We notice an especially sharp increase in the percentage of people who neither agree nor disagree with this statement (from 20% to 31%).

This increase in the 'neutral' reactions gives an indication of increasing uncertainty or ambiguity about the role of humans in climate change (and therefore also in mitigating it).

Urgency about climate



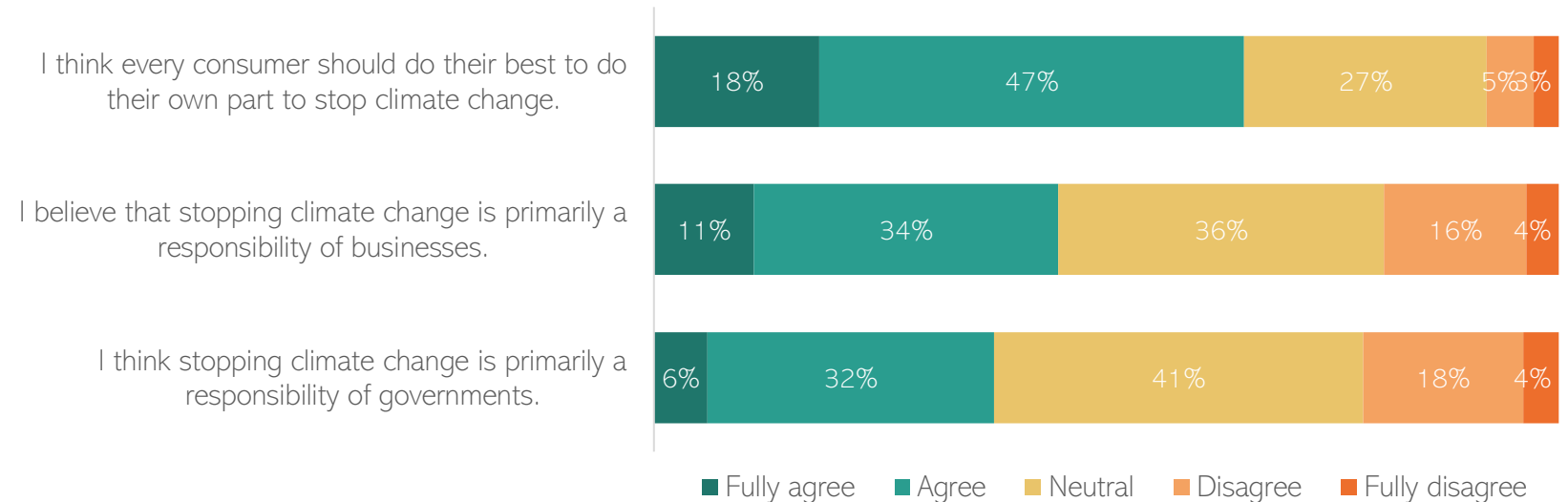
The Dutch believe in individual responsibility when it comes to mitigating climate change

About two-thirds of the Dutch population find that consumers, as individuals, are responsible for making the effort to reduce their own impact on the environment.

This percentage is higher than the percentage that find that the responsibility lies with corporations (45%) and the government (38%).

This indicates a lack of confidence in the decisiveness of governments and companies. At the same time, it indicates that there is strong support among consumers for making individual contributions.

Personal responsibility

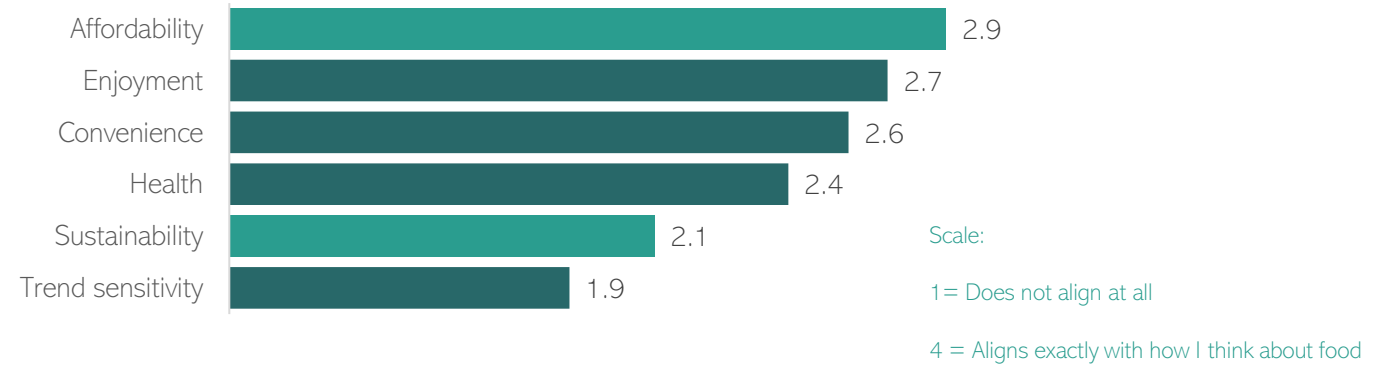


Affordability is currently the most important consideration in making food choices

Affordability is currently the most common consideration for Dutch consumers when making food choices, followed closely by enjoyment and convenience. These are aspects that provide short-term benefits for consumers.

Aspects that provide longer-term benefits such as health and sustainability are currently less relevant.

Important factors for food choice

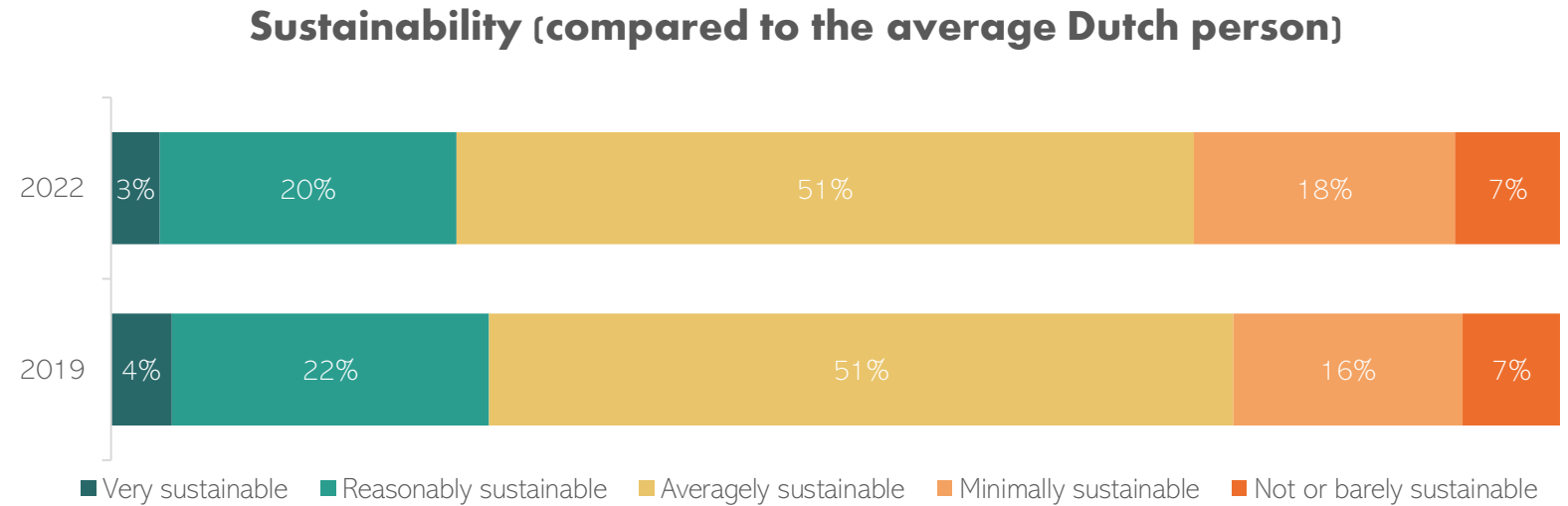


| Trend sensitivity | Sustainability | Health | Convenience | Enjoyment | Affordability |
|---|---|--|---|--|---|
| When I hear about new things in food, I want to try them. | I avoid certain products because they are bad for the climate. | I know exactly what my body needs in terms of nutrition. | I'm not difficult about food | That the food is tasty is the most important factor in my food choices | Paying a lot of attention to discounts |
| Am well informed about new things and trends in terms of nutrition. | I worry a lot about the future of the world, climate and environment. | I make sure my body is getting what it needs. | Not spending too much time buying and preparing food. | Eating is a moment of pure pleasure. | saving money by smart planning. |
| I am often one of the first to try new products and trends. | I pay attention to how choices affect the rest of the world. | I avoid ingredients that are bad for me. | Buying and preparing food should be especially easy | Eating delicious food preferably with others. | Not wanting to spend too much money on food |



Self-perceived sustainability has decreased slightly since 2019

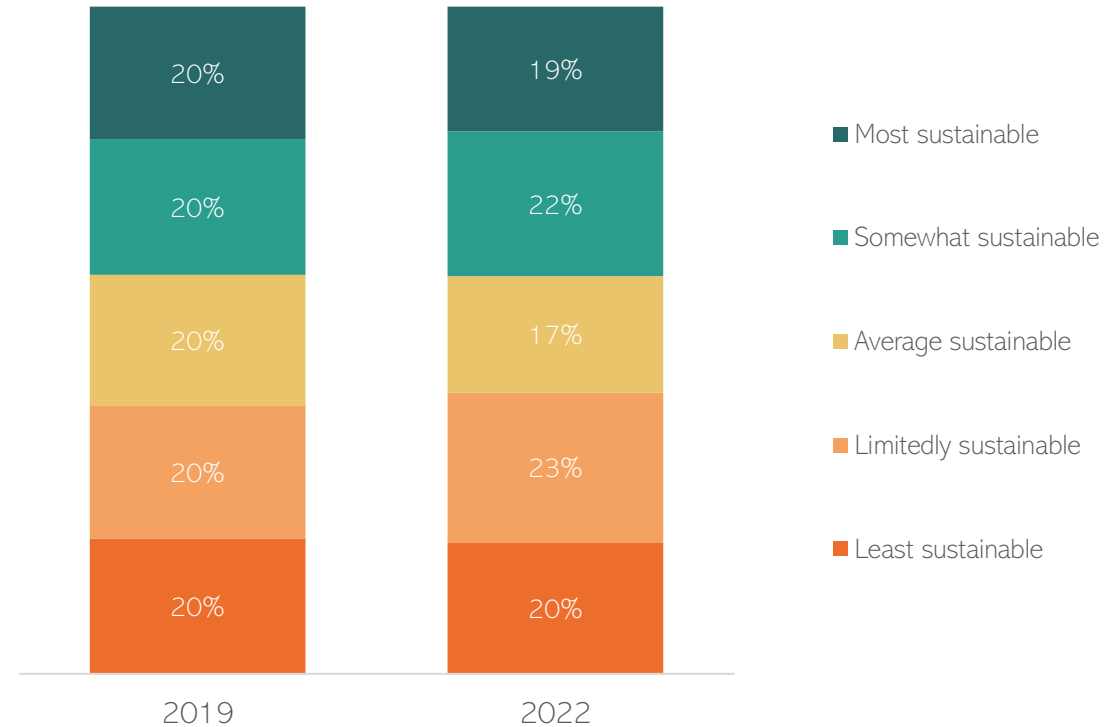
On average, Dutch consumers think they have started living less sustainably compared to the average Dutch person. In 2019, 26% thought they were living more sustainably than average; in 2022, this figure is 23%.



On average, the Dutch food consumption pattern has hardly changed since 2019

Since 2019, on average, Dutch people have become slightly less sustainable in their diets, but the differences are small.

Actual sustainability* regarding food choices



*The score for actual sustainability is a weighted average of the scores on the 12 behaviors shown on the next page. Five equal groups were created in 2019 to serve as the 0 measurement.

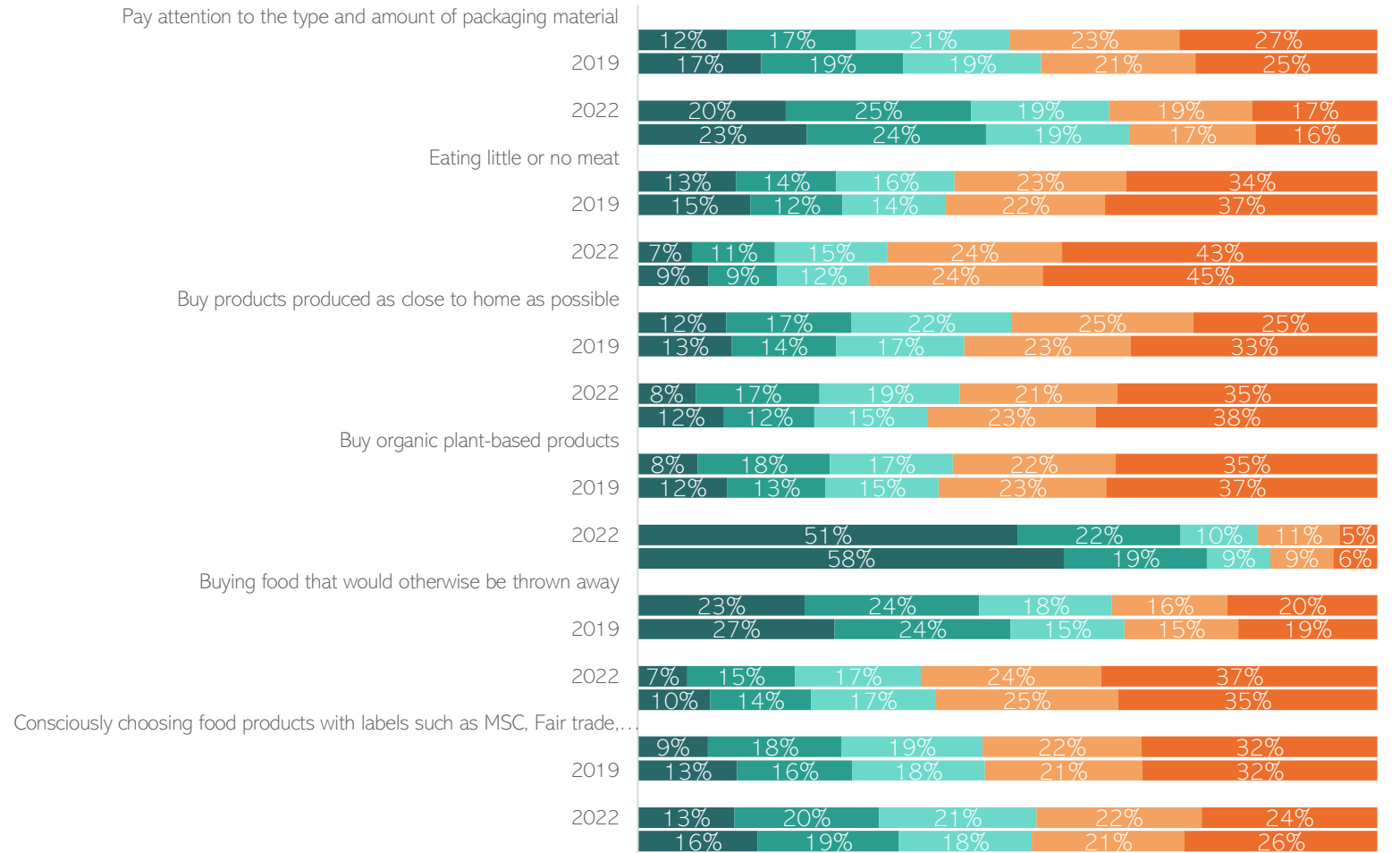


The Dutch are actually eating a little less sustainably compared to three years ago

Compared to 2019, Dutch consumers reportedly eat less sustainably on several aspects: they pay less attention to the type or amount of packaging material, whether products are in season and throwing away as little food as possible.

In contrast, consumption of local and organic food increased slightly. There are also more consumers who consciously eat less meat and animal products, but this difference is small

Sustainable behaviour



■ To a large extent ■ To a reasonable extent ■ To some extent ■ To a limited extent ■ Never or barely



Knowledge about the impact of food choices is by no means complete, but it is increasing



What does a sustainable diet look like, according to experts?

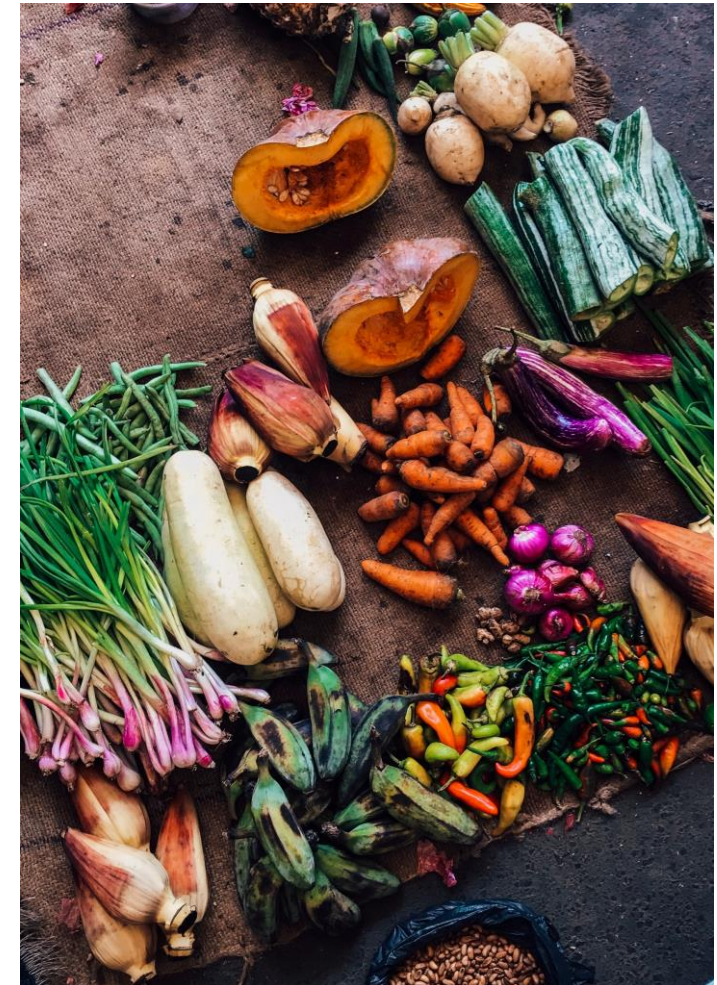
Much has been written about what a good diet looks like, whether it is intended to optimize human health or the health of the planet. A truly sustainable menu consists of food that has the least possible impact on the environment while at the same time providing humans with sufficient nutrients.

The [EAT-Lancet](#) report¹ is the first comprehensive scientific overview of what constitutes a healthy diet from a sustainable food system.

A sustainable diet means eating more plant-based foods, consuming only what we really need, wasting as little as possible, eating more seasonal fruits and vegetables and more local produce from the Netherlands or Europe. The impact ladder on the next page shows the impact in order, from large to small.

But do Dutch consumers view food sustainability in the same way?

¹The EAT-Lancet Commission consists of 19 commissioners and 18 co-authors from 16 countries in various fields, including human health, agriculture, political science and environmental sustainability.



A sustainable diet according to experts

Plant-based

The impact of plant-based products is many times lower than that of animal products such as meat and dairy. Within animal products, a serving of meat, then cheese and then eggs creates the greatest impacts on the planet. Among meat products, the total impact of chicken or insects is the lowest. The impact of pork is higher and that of beef is even higher.

No waste

Eating more economically. In a sustainable menu, we eat 80% per person of the amount we ate in the Netherlands in 2010. Currently, we as end users are responsible for 15% of food waste. The waste can be reduced if we handle portion sizes differently and better organize the pantry.

Seasonally

Seasonal produce requires less energy to grow because fewer greenhouses are needed. Seasonal produce from the field is the least environmentally damaging.

Local products

The less transportation, the better. Transportation can negate a good portion of impact saved elsewhere. Consider products that are in season on other continents and are transported here.

Packaging

Although overrated by consumers, packaging usually has the smallest share of a product's impact.



Impact according to experts vs impact according to consumers 2022

Impact according to experts



Relative to expert opinion, consumers overestimate the impact of packaging and avoiding waste.

The impact of reduced meat, reduced animal dairy and chicken instead of pork or beef is underestimated by consumers.

On this line, consumers roughly agree with experts on relative impact. Below the line, consumers overestimate the impact relative to experts; above it, they underestimate the impact.

Impact according to consumers



Estimated impact of behaviour on the climate is increasing

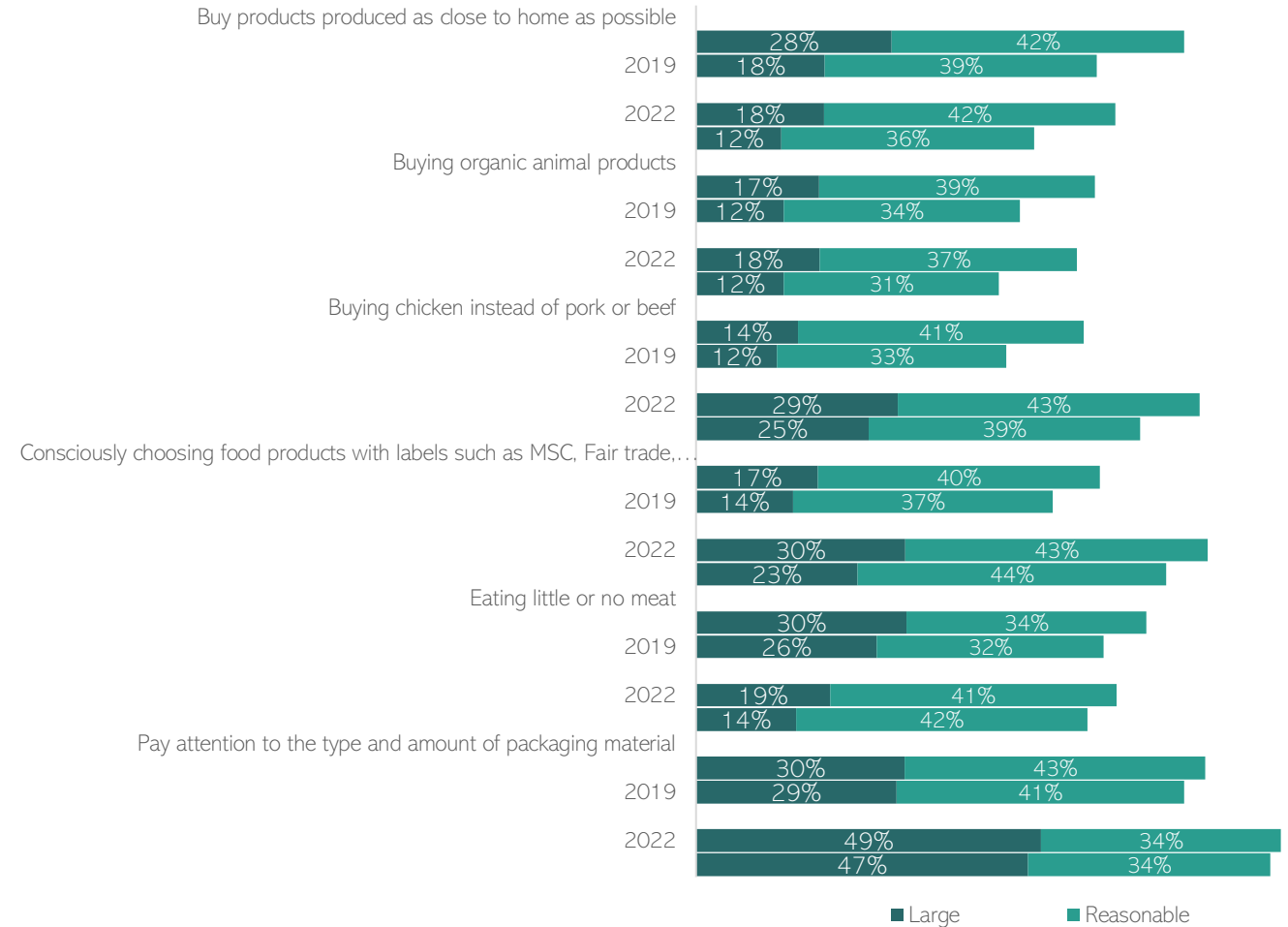
Overall, Dutch consumers' estimation of the impact various food aspects have on the climate has increased since 2019. In other words, Dutch consumers think food has a greater impact on the climate than it did three years ago.

The biggest changes are in the perceptions of the impact of food transport (up 12%) and of both plant and animal organic foods (12%).

Prevention of food waste is seen as the most impactful for the climate and has remained stable since 2019; a similar trend is seen for use and type of packaging material.

*The order of the statements is from largest to smallest increase in perception of effect on sustainability.

Perception of the impact of food



Consumers currently have little confidence in policies and innovations



Attitude toward innovation and action

Between 2019 and 2022, food insecurity increased. With COVID and the Russian invasion of Ukraine, food prices rose in the Netherlands, as they did elsewhere in Europe and around the world.

Technological innovations in food and agriculture can potentially lower food prices and increase food security, but this is still unclear. And importantly, there must be support for these innovations. Trust is an important factor for this.

The government can also encourage the consumption of sustainable (and healthy) products through policies and measures. However, Dutch consumers, who are currently very price-sensitive, find the idea of influencing sustainable food choices via price a lot less attractive than in 2019.



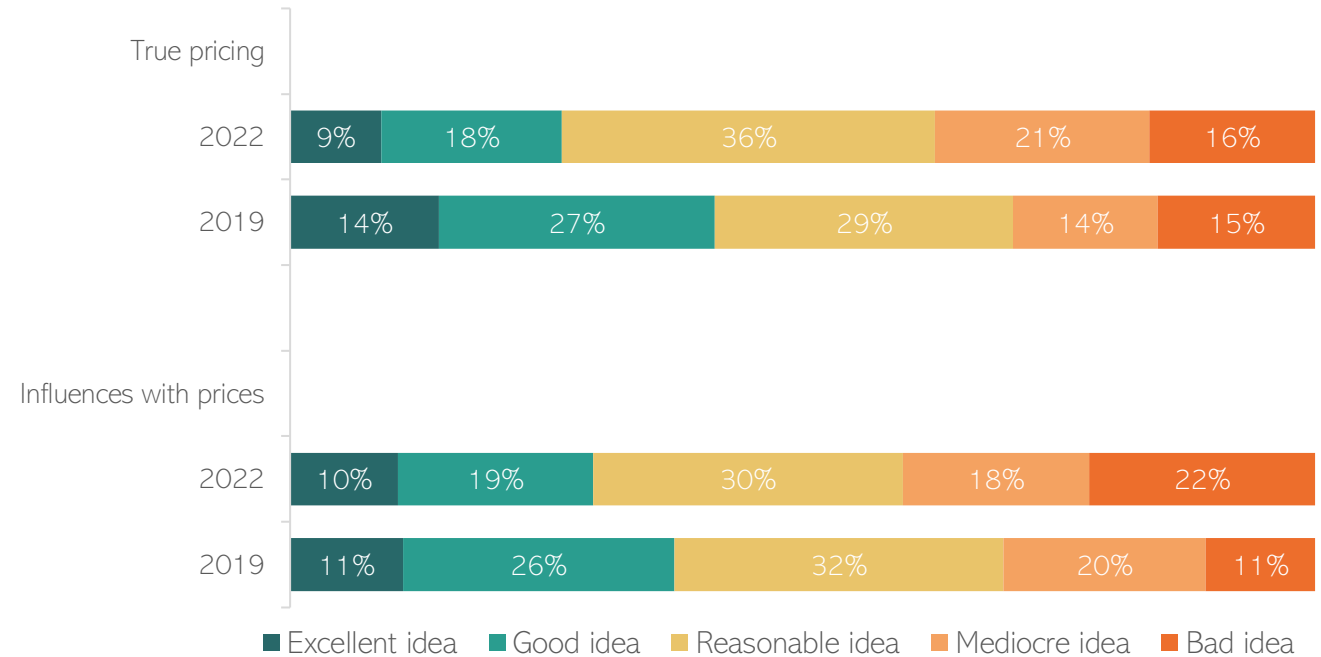
Fewer Dutch consumers want their food choices influenced by pricing policies, even if it leads to more sustainable choices

There are several ways to influence consumer behavior. Pricing measures is one of them. Acceptance of influencing choice behavior through price adjustments has fallen sharply since 2019. Since price is currently a greater motivator for food choice than sustainability and food prices have risen sharply over the past year, it is no surprise that more consumers are resisting external influences on the price of food.

True pricing means that the price of a product includes the environmental and social costs caused by its production and use. Support for this has declined. In 2019, 41% of Dutch consumers thought this was a good or excellent idea, in 2022 only 27%.

Influencing consumer behavior through price is broader; for example, it could mean governments subsidizing healthier and more sustainable food and/or taxing less healthy or less sustainable food. Support for this also declined, from 37% to 29%.

Attitude towards price measures



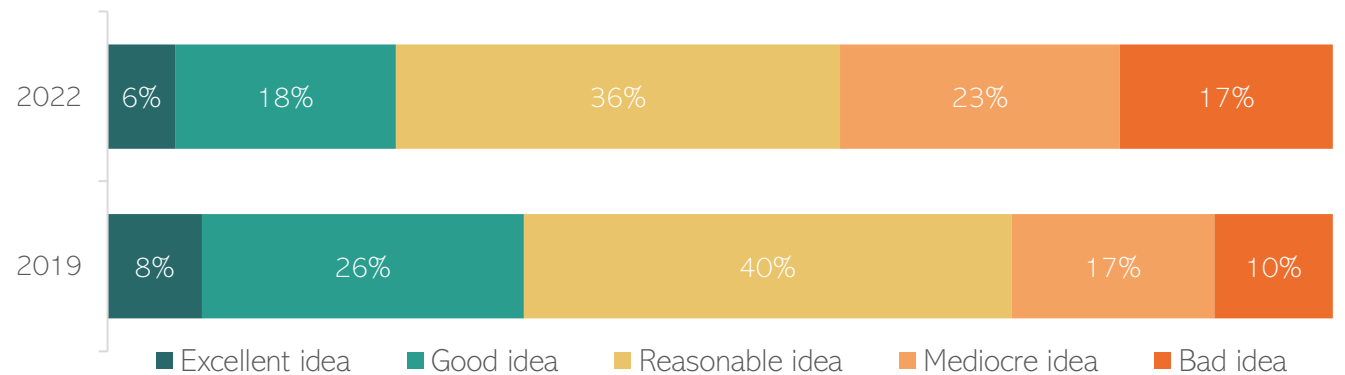
Acceptance of high-tech agriculture is declining

One way to provide for our food supply in the future is through technological agricultural innovation. This might involve agriculture no longer taking place in the field, but in factory-like laboratories, where optimal conditions can be created for crops to grow. In addition, crops can be modified to maximize yields with as few resources as possible.

In this way, agricultural yields can be optimized and as few raw materials as possible are needed to produce food.

Acceptance of this form of agriculture dropped significantly between 2019 and 2022. Whereas before 34% thought it was a good or excellent idea, now 24% do. Outspoken opponents have also increased in number. Where before just over a quarter thought it was a moderate or bad idea, that is now 40%

Opinion about technological agriculture



However, acceptance of technological food trends is increasing (steadily)

Between 2019 and 2022, there is a slight increase in acceptance for various food technologies.

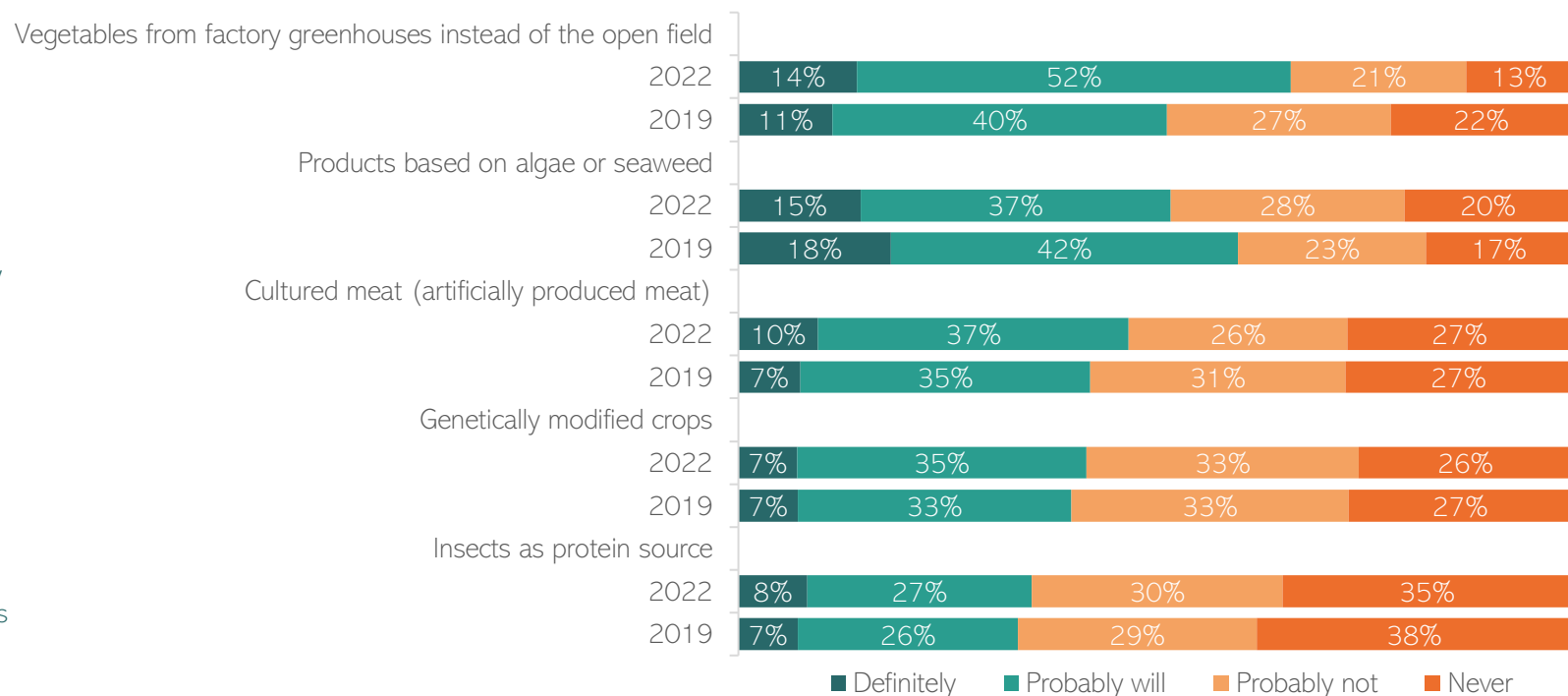
Vertical farming has seen the biggest jump in acceptance, of 15%.

Products based on algae or seaweed are the second most popular technological innovation, but their popularity has declined slightly.

Acceptance of cultured meat increased slightly (5%), but the percentage of consumers who would never eat it remained constant. This indicates that consumers who were somewhat reluctant in the past are now open to trying lab-grown meat. Acceptance of GMO crops and insects as food has remained nearly stable.

*Original wording (2019) was "Vegetables from labs instead of the open field."

Would you try the below listed products if you had the possibility?



Our mission:

We help sustainable food companies innovate faster and communicate with greater impact. We do this by providing accessible and crystal-clear insights into consumer behavior.

- Specialised in **consumer insights** in **sustainable food**.
- **Flexible** and **customized** range of research instruments, both **qualitative** and **quantitative**
- We are knowledgeable about what happens in the food supply chain.

Our expertises:



Strategy & Positioning



Innovation



Branding & Communication

Our toolbox:



Quantitative & qualitative insights



Trends, media & knowledge



Network organisation



Field studies & Experiments

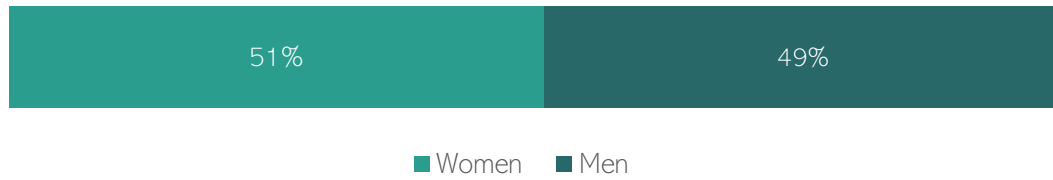


Appendix

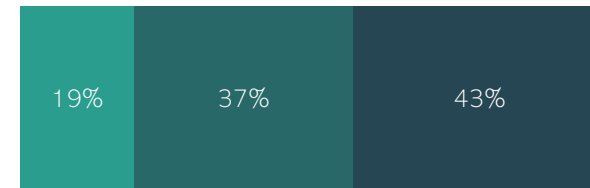
Information about the research population



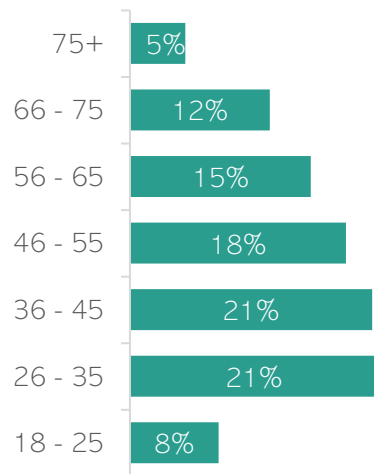
Gender



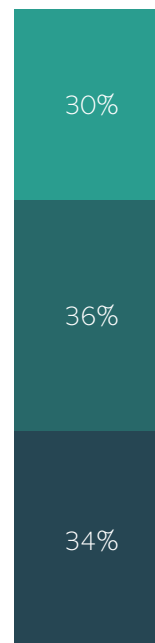
Education



Age



Living environment



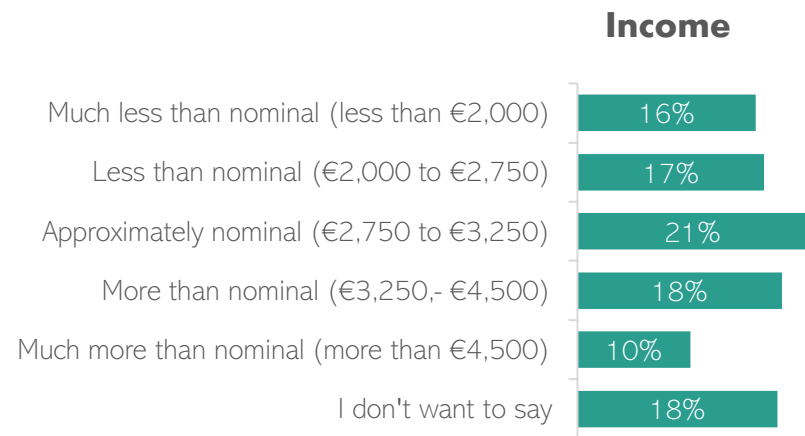
■ Low ■ Middle ■ High

■ Urban (in a big city)

■ A smaller city

■ Rural (countryside or a village)





Household

