

About this Research

Understanding consumer behaviour

In order to achieve food consumption change, it is crucial to better understand the motivations and contexts behind consumer behaviour and how this relates to the rest of the food value chain.

Understanding food value chains and network dynamics is highly relevant to identify pathways for a sustainable, healthy and nutritious food future in Europe. Eating and food purchase patterns have been known for years to account for at least 25% of the already oversized average carbon footprint of European citizens¹. In addition, there is also growing concern that current mainstream consumption patterns contribute to unfair trading practices in food value chains across the EU. In this context, the **“Food consumption behaviours in Europe” report**, through research, consumer focus groups and expert interviews, brings together evidence and deeper understanding of EU food consumption behaviours, particularly in relation to the consumption of food products such as beef, salmon, dairy products, tomatoes and bread. The results provide further knowledge about consumption patterns, drivers, barriers as well as current trends. This understanding helps to kickstart the discussion in regards to potential interventions that can be implemented by different stakeholder groups, to support a behavioural shift towards environmentally friendly food consumption and more fair and sustainable food value chains.

General Key Insights

Why European consumers buy food the way they do and which are the most influential drivers of their consumption behaviours?

Food consumption behaviours are complex and influenced by a combination of drivers, not being possible to identify one single reason behind food purchases. However, an overview of the main drivers that seem to influence consumers the most have been identified in the aforementioned report and summarised below:

- **Price** was identified as a key driver of food purchasing patterns. Behaviours do not seem to be necessarily driven by the cheapest price, but price considerations count among the main determinants of purchasing decisions.
- The **social context** and **habits** have a considerable influence in food consumption behaviour. The eating habits of the family or other social members around an individual are important in shaping food purchasing and consumption behaviours.
- **Health** was identified as playing an increasingly important role in shaping food consumption behaviours.

Intention-action gap

“If you survey people at the entrance of the supermarket what the consumer would like to buy and then check what they bought at the exit, it won’t match: what I think differs from what I do”

(interviewed stakeholder)

¹ Leppänen, J., Neuvonen, A., Ritola, M., Ahola, I., Hirvonen, S., Hyötyläinen, M., ... & Lettenmeier, M. (2012). Scenarios for sustainable lifestyles 2050: from global champions to local loops. Report D4. 1 Future Scenarios for New European Social Models with Visualisations of the Project SPREAD Sustainable Lifestyles, 2050

Price as a behavioural determinant

Price consideration count as a main behavioural determinant of food purchasing decisions and suggests that monetary and economic instruments have a role to play in making behavioural shifts towards sustainable food consumption.

Pro-environmental considerations

Environmental awareness still exists but is not at the top of the list of consumer considerations.

Shifting to plant based diets

There is a necessary food consumption shift towards plant-based foods, while substantially limiting animal sourced foods.

- **Environmental awareness** exists, but is not top of the list of consumers, as other factors seem to take precedence, such as price considerations, lack of time and food shopping habits.
- **Sustainability trends** are developing over time, including veganism and vegetarianism, local consumption and slow food movements, but have a limited impact in the mainstream food industry. Therefore, it is important to foster ways to boost their scalability.
- The **structure of current food systems** is not oriented towards sustainability. Most farmers and manufacturers perform for years within a “conventional” food production and consumption system, in which there are nearly no incentives for changing the direction of focus.

Country Specific Insights

Through focus groups, food consumption behaviours of European citizens were analysed in four EU countries: Germany, Italy, France and the United Kingdom. Below are the “top 5” insights on food consumption behaviours from each of these countries.

Germany	<ul style="list-style-type: none">• Sustainability related considerations still do not fit into citizens daily life routines and habits, mainly due to time pressure related to family and work.• Status quo, personal taste and habits, together with health and prices are largely valued.• Regional take precedence over organic food products.• Similarly, less packaged products are preferred over organic ones.• Convenience is preferred over sustainable products.
Italy	<ul style="list-style-type: none">• Trust in familiar corporate brands and retailers is an important aspect when purchasing food.• Taste is a key driver of food consumption.• Seasonality is affiliated to healthy diets.• Price is a key driver of food purchasing.• Family food habits and preferences drive food selection.
France	<ul style="list-style-type: none">• Health is the single most important factor driving food consumption choices, across all socio-economic and age categories.• “Fair” products are positively perceived by consumers from all socio-economic categories.• Price and accessibility are key factors in purchasing decisions, thus influencing their decision on selecting sustainable products.• Many consumers doubt the trustworthiness towards organic products (and food products in general).• Divergent conceptions of “sustainable” and “ecological” consumption exist among consumers.
United Kingdom	<ul style="list-style-type: none">• Family, personal health and price concerns are the most important drivers.• Mistrust towards organic products is widely spread.• Knowledge or consideration about fairness is rather low.• Perception that sustainability should be a responsibility of the government rather than consumers.• Habits, brand quality and lifestyles are other relevant food consumption drivers.

Food Consumption Insights per Food Category

Beef consumption determinants

The motivations for beef consumption are around the 4Ns: it is generally natural, nice, normal and necessary. For male consumers, masculinity plays a role, it seems to be a matter of identity: ‘in order to feel like a man, I need to eat meat’. And that’s a barrier to change behaviours also in families where the husband holds the family hostage of fulfilling his masculinity needs.

EAT-Lancet Report: targets towards sustainable food systems

“Global consumption of fruits, vegetables, nuts and legumes will have to double, and consumption of foods such as red meat and sugar will have to be reduced by more than 50%”²

By means of an extensive desktop research across the most relevant reviews and databases, insights on consumer food purchasing behavioural patterns as well as further contextual factors were collected for the following product categories: beef, dairy products, salmon, tomatoes and bread. With regard to the geographical scope, the work aimed at understanding consumption patterns at both European and national levels, the latter including Germany, the UK, France, Italy, Iceland, and the Czech Republic.

Beef	<ul style="list-style-type: none"> • Price and marketing factors. • Food characteristics related to health, quality and sensory attributes. • Personal factors such as preferences, habits and socio-demographic background. • Trend: changing dietary patterns towards more plant-based proteins.
Dairy	<ul style="list-style-type: none"> • Food characteristics such as health aspects, quality, country of origin and means of production. • Personal factors including preferences, habits and socio-demographic background. • Price and marketing factors. • Trend: consumption of plant-based milk alternatives in the market.
Salmon	<ul style="list-style-type: none"> • Sensorial characteristics of food such as appearance and freshness. • High prices contribute to lower fish consumption. • The origin of the food product (including product labelling and certification schemes). • Personal factors such as convenience, culture and traditions. • Trend: blockchain technology enabling for consumers an increased traceability and transparency of the fish product they consume.
Tomato	<ul style="list-style-type: none"> • Sensory characteristics such as texture, appearance, colour, size, freshness, taste and smell. • Origin of tomatoes, means of production and price. • Personal factors such as convenience, lifestyles and health/wellness. • Trend: consumers are increasingly supporting locally and organic produced tomatoes as well as new business models (e.g. farm boxes).
Bread	<ul style="list-style-type: none"> • Price and purchasing power of populations • Changing lifestyles of consumers: modern lifestyles, including mobility, flexibility, cultural diversity, understanding of foreign cultures and culinary diversity are factors decreasing bread consumption. • Health factors (e.g. perceptions of health and wellness from bread). • Trend: consumers seeking quality bread from craft bakeries and new business models and innovations (e.g. ‘from baker to consumer’).

Pathways towards a Sustainable EU Food Consumption

On basis of interviews with experts from the key food stakeholder groups, potential “pathways” or opportunities towards enabling more sustainable food consumption practices in the EU were identified. These are summarised below:

1. Improve the engagement of consumers with producers. Fostering a stronger communication channel between producers and consumers, with the potential of empowering

² Willett, W., Rockström, J., Loken, B., Springmann, M., Lang, T., Vermeulen, S., ... & Jonell, M. (2019). Food in the Anthropocene: the EAT–Lancet Commission on healthy diets from sustainable food systems. *The Lancet*, 393(10170), 447-492

consumers to learn more about the impacts of food value chains, could help them to appreciate more what they eat and accordingly avoid unsustainable food consumption patterns.

Bringing consumers and producers closer

“The closer the relationship between producers and consumers, the stronger and more resilient the whole food chain”

(interviewed stakeholder)

2. Develop policies that trigger sustainable food consumption. Developing and implementing top-down policy measures (e.g. regulations and incentives) could support the food products.

3. Use behavioural research evidence to improve public policy. Besides focusing on improving production in food value chains, the public sector has the potential to drive strategic measures for improving or influencing sustainable food consumption at the consumer level, hence the demand side of food value chain. Relying on and considering behavioural insights and evidence when designing such policies holds a great potential to improve their practical implementation.

4. Encourage retailers to demand more sustainable food production processes. Retailers have an important role to play in the sustainability transition, due to their negotiation power in the whole food system. Increasing retailers’ engagement, knowledge and understanding of their role in shaping food systems could propel the much-needed food sustainability transition.

5. Start at the local level. Food consumption behaviours float between individualistic and collective parameters, however, largely localised. As such, policies or action plans should reflect such characteristic of food consumption and start from local/national policies and then scale up to regional, European or broader levels.

6. Enable work-life balance. Nowadays, especially in metropolitan areas, lifestyles have become quite dynamic and in the context of food consumption, leaving very little room for citizens to plan their meals. Enabling a better work-life balance would support citizens to engage better with sustainable food consumption.

Key sources for further information

This brief has been prepared on basis of the Valumics report ‘Food consumption behaviours in Europe. Mapping drivers, trends and pathways towards sustainability.

To discuss the research presented in this brief, please contact the authors of the report or email mariana.nicolau@scp-centre.org

Deliverable and Report:

Nicolau, M., Esquivel, L., Schmidt, I., Fedato, C., Leimann, L., Samoggia, A., Monticone, F., Prete, D.M., Ghelfi, R., Saviolidis, M.N., Olafsdottir, G., Sigurdardottir, H., Aubert, P.M., Huber, E., Aditjandra, A., Hubbard, C., De, A., Gorton, M., Čechura, L., Bogason, G.S., Brimont, L., Odene, J. & Schamari, D. (2021). Food consumption behaviours in Europe. Mapping drivers, trends and pathways towards sustainability. The VALUMICS project funded by EU Horizon 2020 G.A. No 727243. Report based on Deliverable: D6.1, CSCP, Wuppertal, 87p. DOI: 10.5281/zenodo.5011691

Nicolau, M., L. Esquivel, I. Schmidt, C. Fedato, L. Leiman, A. Samoggia, F. Monticone, M. D. Prete, R. Ghelfi, N.M. Saviolidis, H. Sigurdardottir, G. Olafsdottir, L. Brimont, P.M. Aubert, E. Huber, P. Aditjandra, C. Hubbard, Arijit De, J. Odene, D. Schamari, M. Gorton, L. Čechura, H.V. Viet, Bogason, S.G. (2020). Food consumption behaviour in Europe Mapping drivers, trends and pathways towards sustainability. The VALUMICS project funded by EU Horizon 2020 G.A. No 727243. Deliverable: D6.1, CSCP, Wuppertal, 214 pages.

Disclaimer:

This brief and report reflect only the authors' view and the EU Funding Agency is not responsible for any use that may be made of the information it contains.

H2020 VALUMICS – Understanding Food Value Chains and Network Dynamics

University of Iceland, Dunhagi 5, Reykjavik, Iceland – <https://www.valumics.eu>



“This project has received funding from the European Union’s Horizon 2020 research and innovation programme under grant agreement No 727243”