The EIT Food Trust Report

2021

Sustainable food choices and the role of trust in the food chain

eit Food

Co-funded by the European Union

Foreword by Saskia Nuijten

Citizens are at the heart of our mission to make Europe's food system healthier and more sustainable. Helping to build trust between consumers and the food sector is critical for us to work together and improve food for everyone.

COP26 highlighted the importance of sustainable agriculture, forests and land use. EIT Food was present in Glasgow to discuss these issues related to food footprint and encourage action. We believe that these high level talks and negotiations related to the United Nations' 17 Sustainable Development Goals need to mirror citizens' points of view. We can reach a more sustainable food system only with citizens' involvement, and the food system, in turn, needs to earn people's trust.

For this reason, we developed the EIT Food TrustTracker® tool with our partners in 2018 – an annual survey of European consumers to explore how much trust they have in the food system and what different parts of the sector could do to improve that trust. We also carry out yearly qualitative studies to dig deeper into citizen's perception of the food system.

This quantitative and qualitative approach allows us to gather a growing repository of data to better understand the drivers of people's behaviour in relation to trust. In this report, we have given greater room to the results of our citizen studies and focus groups, which have explored the relationship of Europeans to sustainable eating and food innovations. We believe their views are key to building a consumer-centric food system.

We have developed a consolidated picture of the barriers citizens face and learned which changes are needed to earn people's trust in food. We have realised that Europeans value sustainability, but find it hard to implement in everyday life, falling in the so-called "attitude-behaviour gap". To bridge this gap, we need the contribution of all food stakeholders.

Food systems transformation calls for innovation, but citizens need and want access to better and clear information. We see a growing desire for simplicity and clarity, as well as community values, perhaps reflecting the impact of the pandemic. In particular, participants value transparency at every stage of the food chain, which is also at the core of EIT Food's efforts.

This report contains recommendations and takeaways for the actors in the food chain – farmers, retailers, manufactures and policy makers – as well as communicators.

Saskia Nuijten

Director of Communication and Public Engagement at EIT Food

About this report

Since 2018, EIT Food has been studying the issue of consumer trust in the food system and the role of trust in adopting innovations. From this extensive quantitative and qualitative research, this report paints a detailed picture of European consumers and their trust in the food chain, as well as the impact of health and sustainability factors on their dietary choices.

In this report, we present the highlights of the work conducted in 2021. We start by exploring what choices European consumers make and how motivated they are to make healthy and sustainable food choices. We then dig into how people see innovation in the food chain. Are they open to it and how can the willingness to adopt new food and new food technology be improved? One crucial condition for the adoption of innovation is trust. Trust in general, confidence in food technology and trust in the actors in the food chain. In the last two chapters we explore the subject of trust in the food chain and how it can be improved.

A quantitative survey of 20,326 consumers across 18 countries coordinated by the TrustTracker® team, which includes the University of Reading, the European Food Information Council (EUFIC), Aarhus University, KU Leuven, and the University of Warsaw. The survey was conducted in 2021 by Ipsos. In order to compare changes over time the report uses the consistent 13-country (BE, CH, DE, DK, ES, FR, FI, IE, IL, IT, PL, SP, UK) sample that has been surveyed by the TrustTracker® every year since 2019.

A qualitative online study including more than 200 participants from 18 countries (BE, CH, CZ, DE, DK, ES, FI, FR, GR, IE, IL, IT, NL, PL, PT, RO, TR, UK), conducted by the Future of Food Institute in 2020 and 2021.

In-depth focus groups of 38 consumers across Europe, executed by the Future of Food Institute in November and December 2021 in 15 countries (BE, CZ, DE, DK, ES, FI, FR, GR, IE, IT, NL, PL, PT, RO, TR, UK).

Contents

Executive summary 5

Motivation to live a more sustainable life 9

Making sustainable and healthy food choices 15

Adopting innovations 23

Confidence in integrity of food and food technologies 31

Trust in actors 36

Country reports 48

Methodology 67

Executive summary

Sustainable food choices

the role of trust in the food chain

76% of Europeans are motivated to live a sustainable life. Consumers are concerned about the global environment, they feel that it is a moral obligation to use environmentally friendly products and are concerned that people do not care enough about the environment. This number has been stable over the last four years. In the past year, however, this percentage shows a small but statistically significant decline (-2%), indicating that Europeans have become slightly less motivated to live sustainably.

There is a gap between being motivated to live sustainably and making sustainable choices, known as the 'attitude-behaviour gap'. Consumers need help to overcome this divergence and translate motivation into actual behaviour. When it comes to sustainability, barriers and confusion result in a reality where aspiration exceeds real-life behaviour.

51% of Europeans take sustainability into account when making food choices, but many struggle to make healthy and sustainable food choices.

When thinking of food sustainability, many different aspects of sustainable food production come to mind, including greenhouse gas emissions, water usage, land use, kilometres travelled, ecosystem damage (incl. deforestation), food waste and sustainable packaging. Most consumers realise that food sustainability is not a straightforward or easy concept to judge. Consumers generally believe that in order to achieve a sustainable diet, they need to rely on the actions of the other food-chain actors.

37% of Europeans are open to adopting new foods, but most Europeans are hesitant. The topic of innovation in food sparks much less enthusiasm amongst respondents than other topics in relation to food. What surfaces is a lack of trust and scepticism.

Many people have reservations when adopting food innovations because they do not know what's in it for them and want solid confirmation about long-term health effects. There is a weariness towards innovations that are seen as too industrial, unnatural or 'fake'.

Interestingly, when consumers think of 'new' ways to produce food they often refer to old-fashioned methods: circular, organic, home grown and using only natural resources. There is a belief that innovation does not necessarily need to mean advancement in technology. Innovation can also mean looking back at what worked in the past, for example fermenting foods for preservation, or going back to pre-industrial farming methods.

When making the distinction between technological innovation in food (e.g lab meat or plant-based protein) and technological innovation in production (e.g. aquaponics or vertical farming), it becomes clear that the barriers are mostly against innovation in the food itself, rather than innovation in production.

47% of Europeans say they have confidence in the integrity of our food products. In general, consumer trust in the European food system is rather low, but this does not have an important impact on day-to-day purchase decisions. Since 2019 consumer confidence in food

integrity and food technologies has increased slowly, but consistently from 45% in 2019. When asked to judge confidence in food's taste, safety, health, authenticity and sustainability, our study participants had confidence in the taste of food the most. This is something that consumers can easily ascertain for themselves. However, they cannot easily check the sustainability or the authenticity of food. Therefore, confidence in the sustainability of food is the lowest.

67% of Europeans trust farmers. They are the most trusted group of actors in the food chain. Authorities and manufacturers are trusted by less than half of consumers (48%). Since 2019, trust in all food system actors has (slightly) increased.

Trust is determined by several factors. In general, small, open organisations that are close to the consumers and led by motives other than financial gain are trusted the most.

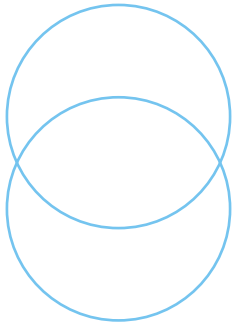
Authorities are currently not highly trusted when it comes to their role in food sustainability, however they are perceived as being an influential source of potential for change. They are seen as actors that do a lot of talking, but not much doing. Our participants also believe that authorities' actions are not visible enough to the average consumer.

Farmers, retailers, manufacturers and authorities were measured on their competency (expertise, public track record, and independence), openness (effective communication, honesty, and public records), and care (listening to consumers and experts, and showing genuine care for the environment). By fulfilling these criteria the actors can increase public trust.

Main Lessons

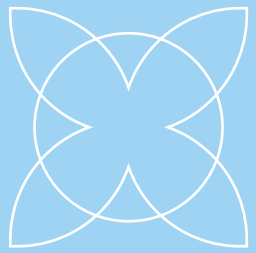
Increase knowledge about sustainability

If consumers are uncertain about what exactly 'eating sustainably' means, they cannot be expected to make sustainable choices. They want clarity, together with reliable, easily accessible and unambiguous information about what constitutes sustainable food.



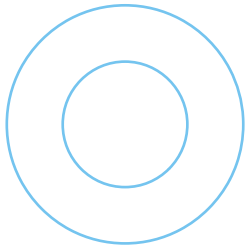
Communicate the impact of technology

Consumers are more concerned about technologies that directly affect what they eat (e.g. meat replacements) than they are with technologies related to the production of food (e.g. aeroponics). When innovating, attention should be given to communicating the impact of the technology on the nutritional values of the food.



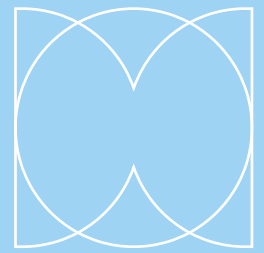
Innovate using traditional ways

Consumers are more reluctant about highly technological innovations and processed foods, and more open to innovations in farming and food production that are associated with the past. They associate organic farming and regenerative farming to the ways their grandparents used to grow their food. Innovators can benefit from this liking for nostalgia by using elements of the past.



Provide proof of sustainability

As the word 'sustainability' becomes increasingly popular, it also seems to be losing its meaning. What does 'sustainable food' mean exactly? Actors in the food chain need to make concrete claims and offer verifiable proof that the food they produce is actually produced in a sustainable way.



Take collective action

Authorities are seen as food-chain actors with significant potential to improve the food chain. Authorities are deemed responsible for innovations to be successful, and for the food chain to produce healthy and sustainable food. Consumers think that it's only a question of wanting to take action together.

Motivation to live a more sustainable life

Motivation to live a sustainable life

Three-quarters of Europeans:

- **say they are concerned about the global environment,**
- **feel that it is a moral obligation to use environmentally friendly products and**
- **are concerned that people do not care enough for the environment.**

There is a gap between being motivated to live sustainably and making sustainable choices. This gap is known as the *'attitude-behaviour gap'*. Consumers need help to overcome this gap and translate motivation into actual behaviour. But there is a limited willingness to change lifestyles. When it comes to sustainability, barriers and confusion result in a reality where aspirations are not met by real life behaviours.

The motivation to live a sustainable life has been stable over recent years. The past year however shows a small but statistically significant decline. Europeans have become slightly less motivated to live sustainably.

The biggest change is related to the statement 'I am concerned about the development of the global environment', which decreased 3% in 2021 compared to the last year.

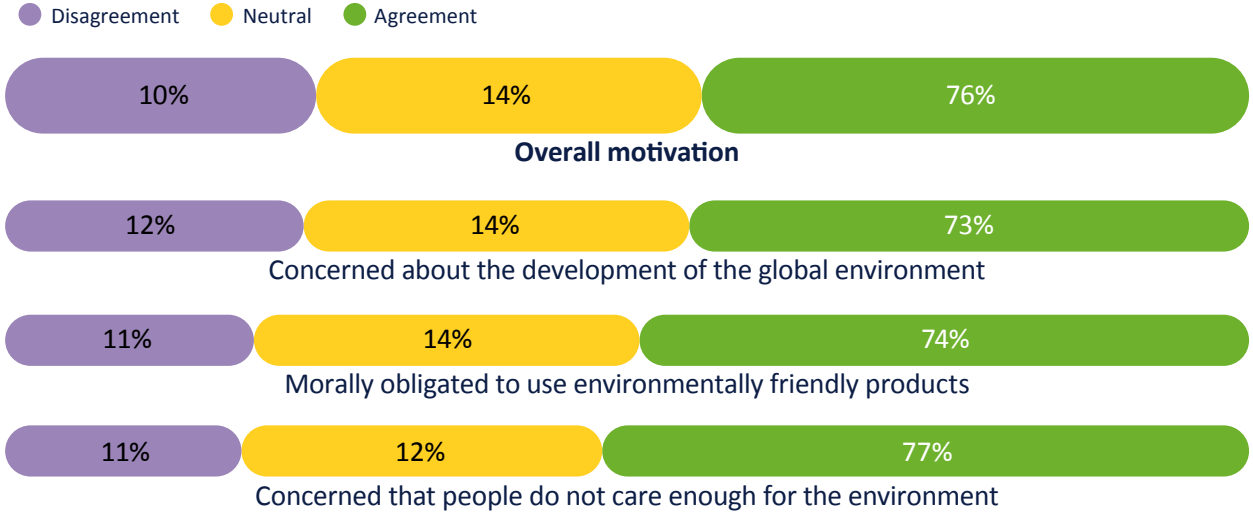
Barriers for a more sustainable life

Barriers hinder the ease of adopting a new lifestyle. If local foods are hard to find or very expensive, then people are less likely to buy them. For example, if you want to eat healthy food that is also sustainable, but the cheapest healthy foods are imported, then you must be extremely dedicated to picking the more expensive, healthy local foods. Thus, sustainability is a criterion of choice that is easily overpowered by limiting realities, as well as other, urgent motivations linked to price and convenience.

Moreover, there is considerable confusion as to what sustainable behaviour truly is. Sometimes what was thought to be sustainable, may turn out not to be so sustainable after all.

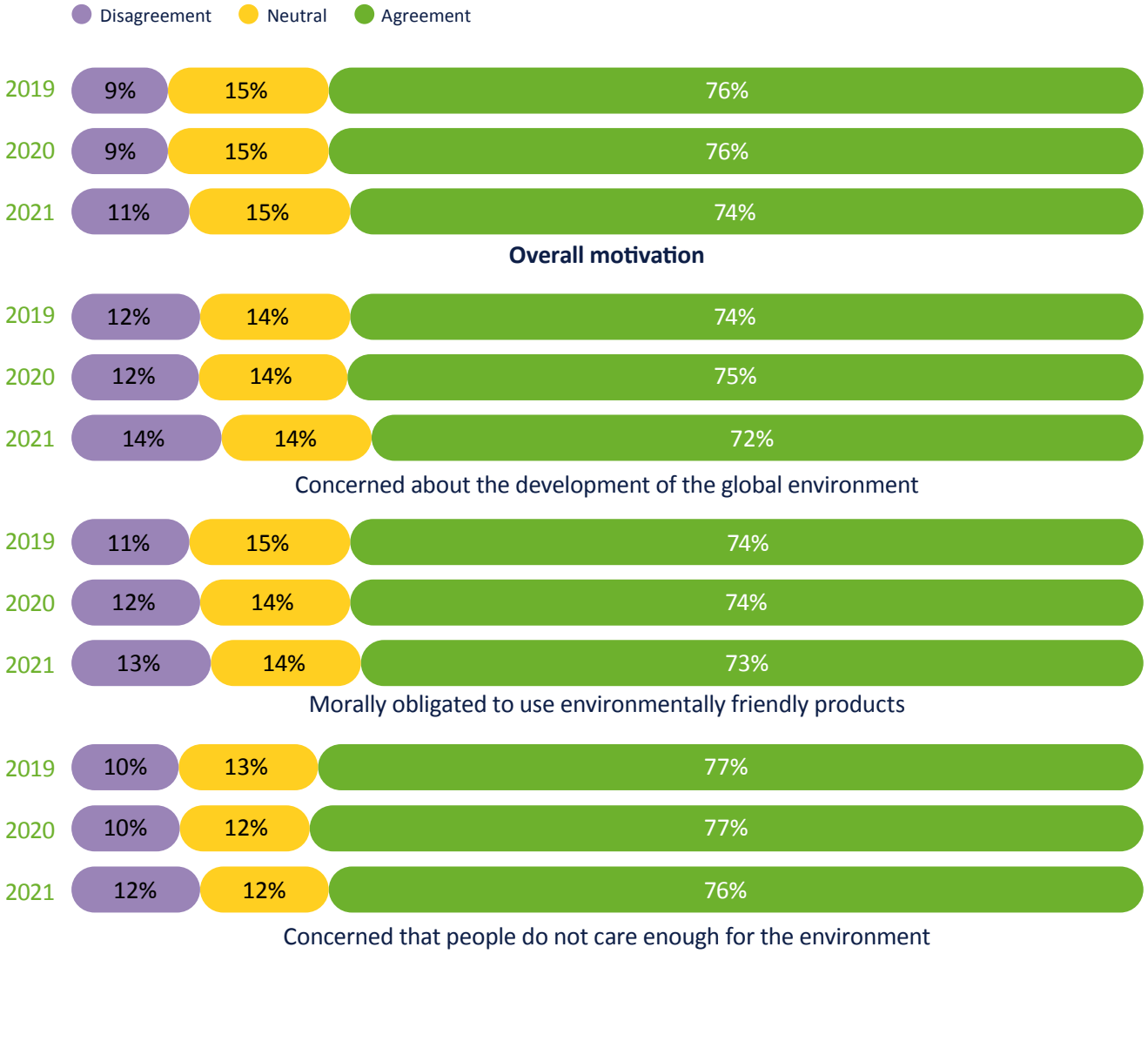
Due to rounding, numbers presented throughout this document may not add up precisely to the totals provided and percentages may not precisely reflect the absolute figures.

Motivation to live a more sustainable life



Source: Quantitative study

Motivation to live sustainably



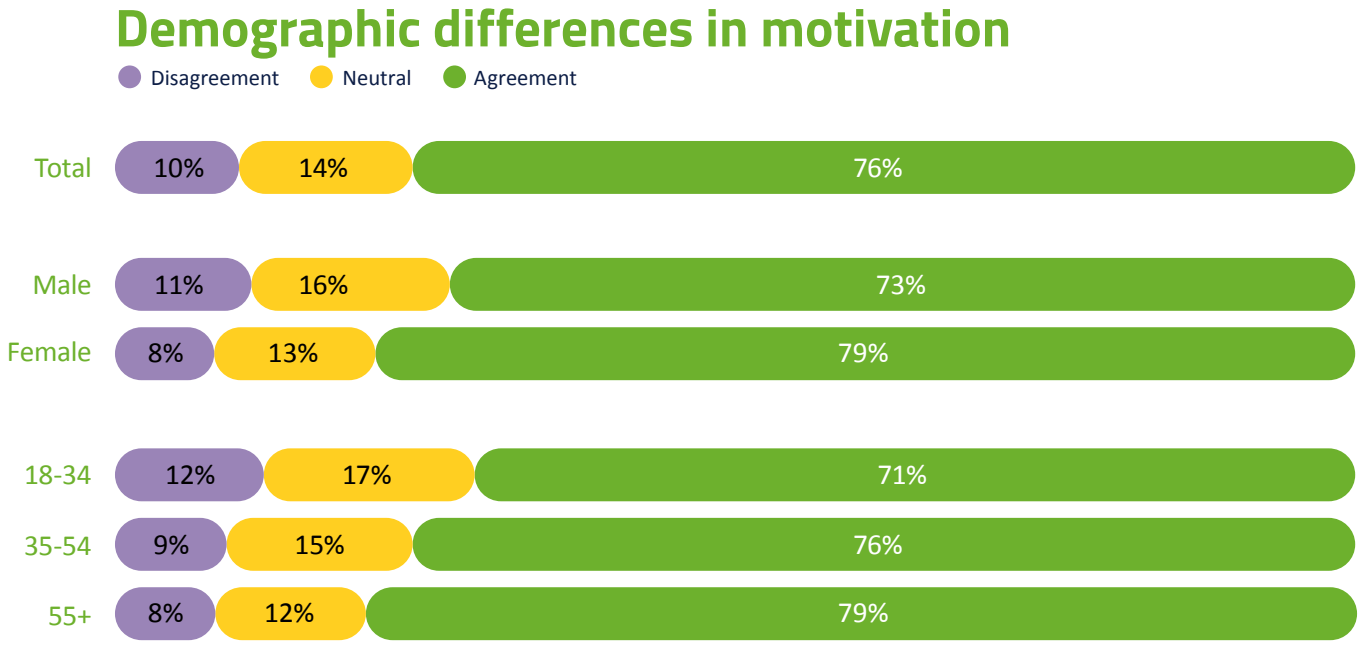
The graphs in this report show developments over time since 2019. Throughout the years, more countries have been added to the quantitative study. When we compare different years, we only take into account the countries that have been included in the sample in all the years of comparison. This is why the total scores in 2021 (see previous page) can slightly differ from the total scores in 2021 in the year-by-year comparison.

Demographic differences in motivation

Some demographic differences in the motivation to care about the environment were observed. The most notable differences are between men and women, where women appear to be more motivated, and younger and older citizens, where the latter appear to be more motivated.

Some other relevant and statistically significant differences:

- The more highly educated consumers are, the more motivated they are to live sustainably.
- The more urban the environment people live in, the more motivated they are to live sustainably.
- Consumers who eat a vegan or vegetarian diet are more motivated than those who don't have any dietary restrictions.



Source: Quantitative study

Sustainability isn't a simple matter. There are several factors involved, and therefore a consumer has a lot of things to consider.

Anne (29), Finland

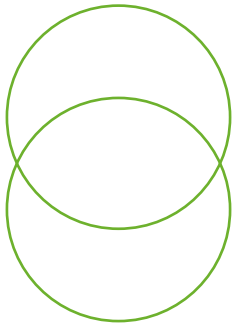
Participant qualitative study 2021

Main lessons

about motivation to live a more sustainable life

Aim to motivate all demographics

Women and older people are generally more motivated to lead sustainable lives, while men and younger people will need more encouragement. It's important to reach different demographics with targeted communication campaigns that boost motivation and ability to make the right choices.

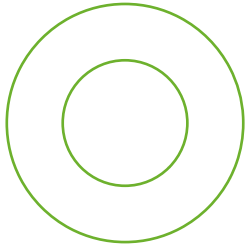


Don't assume motivation will remain

At the moment the intention to live sustainably is high. But this doesn't mean it will always remain this way, as we have seen with the decline in 2021.

Clarify the meaning of sustainability

What sustainability means exactly is still not clear for most. The general idea is understood as "better for the planet", but how that translates to specific choices is largely unknown. It is important to clarify what sustainability looks like and communicate that.



Leverage consumers' intentions

Intention to lead a more sustainable life is one step, and taking action towards this is another step. It is easier to activate consumers who are already motivated to make sustainable choices. Motivated consumers' intentions can be leveraged in promoting sustainable foods or habits (e.g. reducing food waste).

Understand motivation of older adults

Older adults are in general more motivated to lead sustainable lives. Understanding the reasons that motivate older people can be useful to engage an increasingly ageing population, but also to find patterns that may also activate younger generations.

Making sustainable and healthy food choices

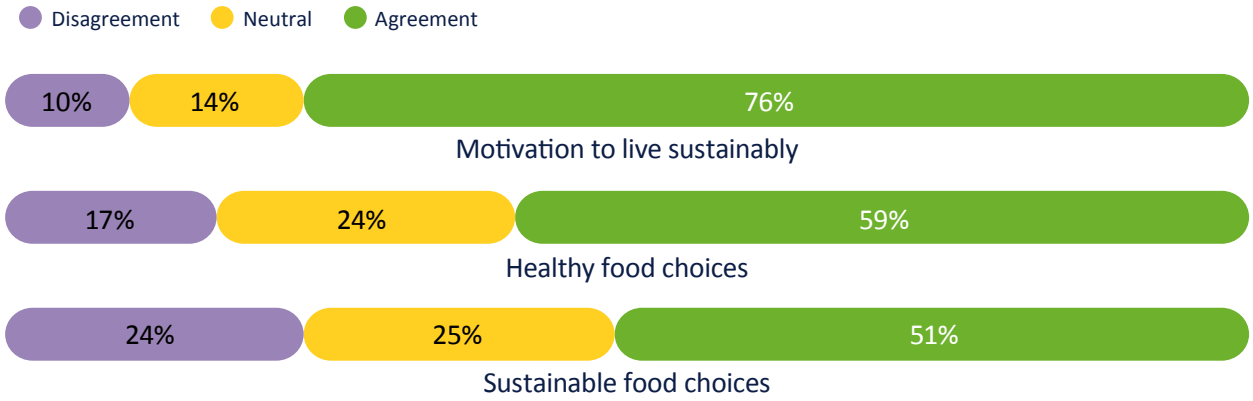
Intentions to make sustainable food choices

Just over half of Europeans make sustainable food choices, but sustainability is often not the primary consideration when making food choices. In general, adoption of a healthy diet is slightly more popular than a sustainable one: in the quantitative study, 59% of the participants say they make healthy food choices, and 51% say they make sustainable food choices.

Most consumers have a good idea of what a healthier diet means. Many people learn about healthy and unhealthy food from a young age. This knowledge is passed down from generation to generation and built up during a lifetime. There are, however, large differences in people's ability to eat healthily. Some consider it rather easy (and are already doing this), but many struggle. Junk food can be tempting, and temptation is everywhere. There is a substantial group of consumers who are highly motivated to adopt a healthier lifestyle but consistently fail to do so. This group requires special attention.

Food sustainability is a complicated matter and knowledge is key to increasing the number of people who choose a sustainable diet. Consumers are motivated to help the food chain become more sustainable by making the 'right' choice, but they do not always feel supported by the other food chain actors.

Motivation to live sustainably vs. healthy and sustainable food choices



Source: Quantitative study

Consumer eating habits

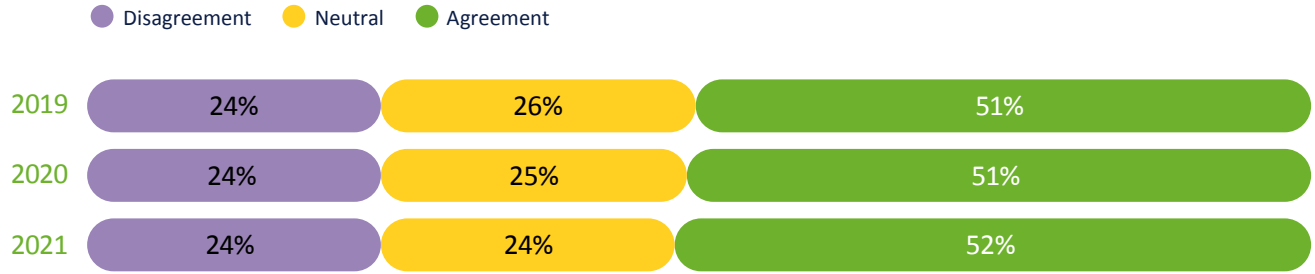
"Sometimes things are organic, which is healthy, but then they may not be sustainable, or they're wrapped in plastic; it is not always clear what to do."

Niamh (35), Ireland

Participant qualitative study 2021

Despite a growing intention to live a more sustainable life, eating habits appear to have been consistent since 2019. Many consumers want to eat healthily and sustainably. However, what is healthy is not always sustainable. There appears to be confusion and scepticism about what sustainability really is. The fact that retailers and manufacturers are increasingly using sustainability as a marketing claim damages their trust. Some of the respondents wonder whether sustainable food is a possibility at all.

Consumer efforts to eat sustainably



Consumer efforts to eat healthily

Source: Quantitative study

Making sustainable food choices

A complicated matter

When thinking of food sustainability, many different aspects of sustainable food production come to mind, including greenhouse gas emissions, water usage, land use, kilometres travelled, ecosystem damage (incl. deforestation), food waste and sustainable packaging. Most consumers realise that food sustainability is not a straightforward and easy topic. In achieving a sustainable diet, consumers feel they need to rely on actions by the other actors involved.

There seems to be a consensus that local food, grown without pesticides, is healthy and sustainable. The best way to know that food has been locally grown and without pesticides, is to grow it yourself or buy it from a well-known local farmer. However, this is time-consuming and more expensive than buying food in the supermarket. This may also not be a solution for everyone, in particular for those living in dense cities. To feed that many mouths, we may have to rely on mass production, which is thought of as less sustainable.

More than just the environment

Even though most participants cited environmental aspects of sustainability, other aspects were also mentioned. Animal welfare, fair pay and good working conditions, and most often health. Eating sustainably was linked by many participants to eating healthily.

Greenwashing

Some consumers know retailers and manufacturers take actions to appear more sustainable, when in fact they are not. This practice has added to the confusion about when a product is actually sustainable or whether it is a marketing ploy.

Some aspects of food production are perceived as more influential on sustainability than they are in reality. Some of the prominent themes that participants mentioned make sense intuitively but are not necessarily the biggest culprits when it comes to environmental footprint. For example, the effects of packaging and transportation were often cited as problematic, whereas land and water use was scarcely mentioned.

"In Germany, we had reports in the media that supermarkets unwrapped food in order to sell unwrapped food in the shopping area... So, the packaging material is produced and wasted..."

Michael (55), Germany"
Participant qualitative study 2021

Ingrained sustainable behaviours

Some participants noted that they avoid plastic or try to minimise food waste, but do not consciously associate those actions with sustainability. Furthermore, opting for whole food instead of ready-made meals, or processed foods, is seen as an action that is primarily for the benefit of the individual (health, taste), but coincidentally also more sustainable.

Sense of duty

Many participants believe that food sustainability is an important matter, and that consumers have a certain responsibility to take it into account when shopping for food. A few participants even showed some guilt for not taking sustainability into consideration. Sustainability is not everyone's first priority, and this was often expressed with regret.

Shared responsibility

Participants agree that communal effort is needed to make a real difference. Participants seem to feel a sense of shared responsibility to influence the sustainability of the food chain through their purchases.

Source: Qualitative study

Changing diets

Sustainable products may be more expensive, or require more effort for a consumer to find. If the biggest benefit of a specific choice is its environmental impact, this is not particularly beneficial to an individual, but rather to an entire community. In this context, we tested different communication strategies related to the reduction of food packaging to find out which one works best to change unsustainable behaviours:

- Communication stressing the benefits for the community
- Communication stressing individual benefits
- Neutral, factual communication (control group)

The power of persuasive communication

Participants exposed to the benefits of reducing food packaging paid more attention to it when shopping for food, and bought fewer packaged products. These changes were stronger when participants were made to feel like they belong in a community, and the benefits of reducing packaging affect the community and not just them. Participants' belief in the ability of consumers to make a positive change also increased after taking part in these discussions, particularly when we discussed the communal benefits of sustainability.

Test the strength of the individual benefit

Do sustainable choices give consumers any individual benefits? Communicators need to test this and find out whether these individual benefits are convincing enough. Consumers need to understand that this new sustainable choice they are about to make is worthwhile.

A sustainable choice may be beneficial for consumers if it is cheaper, more convenient, tastier, or healthier. However, if a sustainable choice barely meets these criteria, it does not offer a strong individual benefit. In this case communal benefits might be more persuasive.

We are all in this together

When people believe that they are part of a community that cares for the environment and whose members are expected to behave sustainably, they will more likely make sustainable choices. Members of such a community should feel they are not the only ones making a 'sacrifice', but that their sustainable choices have a collective benefit.

Choosing to bring your own bag to the store or avoiding packaged foods can be perceived as either an individual burden, or a step towards a better future for the community. In order to encourage the latter, consumers need to feel like they are not the only ones making sustainable choices.

Source: Qualitative study

It's difficult to make sustainable choices if it means sacrificing things we enjoy, particularly when others are not.

Michael (55), Germany

Participant qualitative study 2021

COMMUNICATING SUSTAINABILITY EFFECTIVELY

Which communication strategy works best for encouraging consumers to reduce food packaging?

ATTITUDE

Motivated, but people feel a lack of support by food chain actors:
manufacturers, authorities and retailers should do more to reduce

Food waste
taken seriously
(environmentally + morally)

Food packaging
important, but less motivation and belief in ability to reduce

METHODOLOGY

18 countries

232 participants

- desk research
- online community
  - open discussions
  - photo assignments
  - questionnaires

OUTCOME: PERSUASIVE COMMUNICATION

Discussing communal benefits
makes people pay more attention and reduce buying packaged food

In a community setting
bigger changes are seen

Biggest change is
the perception of consumer ability to create change

RECOMMENDATIONS for communicators

Test the strength of the individual benefit(s)

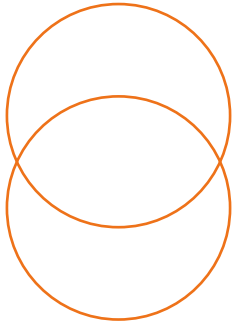
If those are not persuasive, then use the power of community

Main lessons

about sustainable and healthy food choices

Leverage the link between healthy and sustainable eating

Sometimes sustainable eating and healthy eating are related. Organic production, plant-based proteins, whole grains and a dietary focus on local, seasonal fruit and vegetables is often both healthy and sustainable. These are positive facts for consumers wanting to make both sustainable and healthy food choices which can be emphasised.

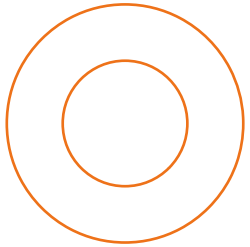


Test the strength of the individual benefit

Individual benefits of a sustainable or healthy choice are not inherently persuasive enough to change consumer behaviour, especially when the benefits are long-term or preventative. Immediate benefits, such as low cost or convenience, are the most persuasive in encouraging behaviour change.

Invoke the feeling of community

When consumers are not convinced by individual benefits of sustainable choices, communal benefits play a stronger role. However, in order for societal benefits to be persuasive, consumers need to feel like they belong in this community. Invoking a feeling of 'we are in this together' can increase this perception.



Increase knowledge about what is sustainable

By now most consumers are familiar with the concept of sustainability and have a general idea of what it means. But the specifics are not always clear. Is an organic vegetable wrapped in plastic more or less sustainable than a non-organic vegetable without packaging? Consumers need to learn specific tips on how to make more sustainable choices.

Encourage a sense of duty

For many participants, avoiding food waste was loaded with a sense of morality and duty. This is a sensitive topic for many, since it is not only about pollution, but also about resource waste, especially when others do not have access to such resources. Increasing this sense of morality and duty can be a way to encourage other sustainable choices.

Adopting innovations

Hesitations to adopt new foods

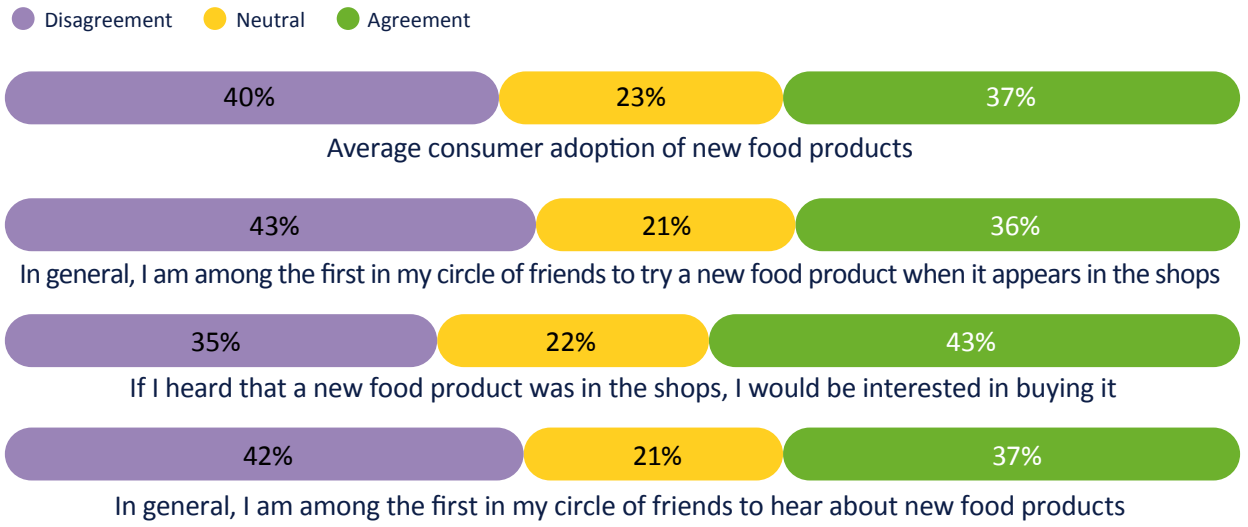
Consumers believe there is a need for more sustainable foods. Still, only 37% of Europeans are open to adopting new foods. The topic of innovation in food sparks much less enthusiasm amongst respondents than other topics regarding food. What surfaces are distrust and scepticism, and **sustainability does not appear to be an important trigger or motivation in adopting new foods.**

Many people have reservations when adopting food innovations because they feel they do not know what is in the product and want more information about the potential long-term effects of the innovation. There is a weariness towards innovations and they are seen as too industrial or unnatural. In particular, technological food innovations are associated with elite, big-city culture and are not perceived as relevant to everyone.

Interestingly, when consumers think of 'new' ways to produce food, they often refer to the old-fashioned ways of doing so: circular, organic, using only natural resources, homegrown. There is a sharp contrast between these changes (often associated with healthier food and increased sustainability) and technology centred approaches, which is often seen as scary. Food produced using innovative techniques can be labelled as 'fake' or not 'real food'.

Consumers also associate innovation with new ingredients (e.g. insects, mushrooms as meat substitutes, seaweed), plant-based meat, plant-based dairy alternatives, and lab-grown meat. Innovative techniques related to agriculture, such as aquaponics or the use of agrobots, were also mentioned.

Consumer adoption of new food products



Source: Quantitative study

Adoption of new food products

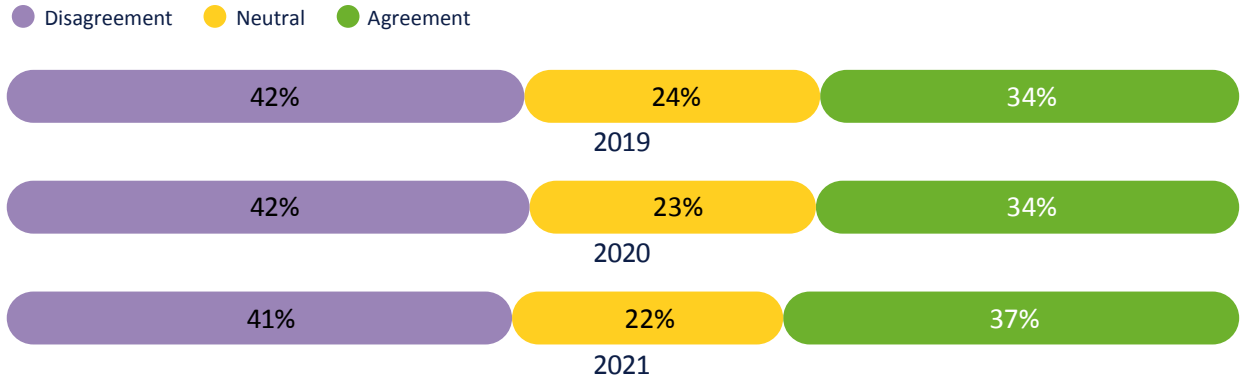
Since 2019 the willingness to adopt new food products has remained more or less stable, with a small (+3%) increase since 2020.

There is a correlation between age, education, urbanisation and the willingness to adopt new food products.

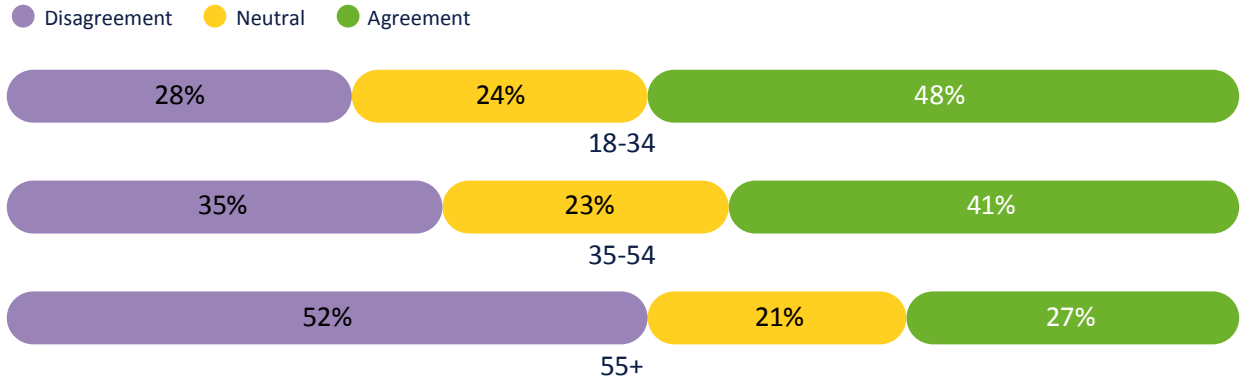
- Consumers under 35 years old are much more likely to adopt new food products than consumers over 55.
- Consumers living in large cities are more likely to adopt new food products than consumers living in rural areas.
- Consumers with higher education are more likely to adopt new food products than consumers with a lower education.

The same demographic groups indicated that the COVID-19 pandemic has influenced their eating habits. This could be a possible explanation to the increase in adoption of new food products.

Willingness to adopt new products over time

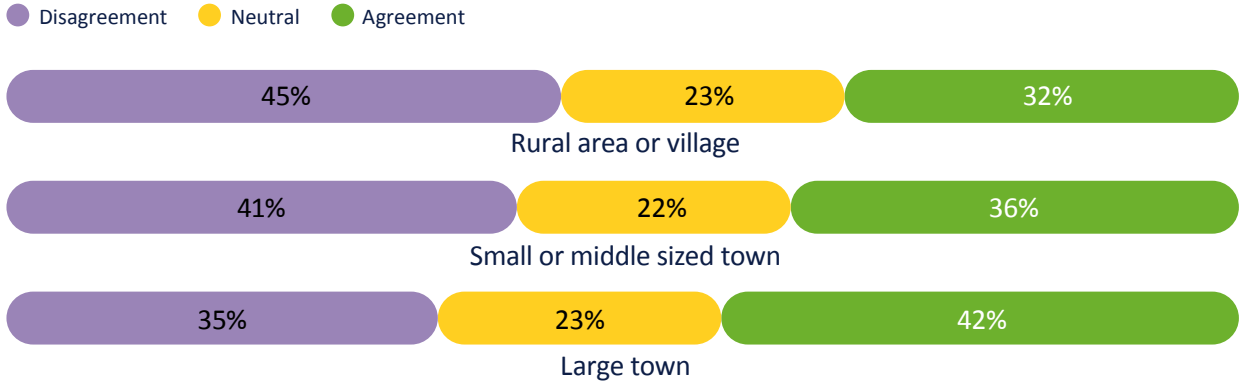


Willingness to adopt new products by age

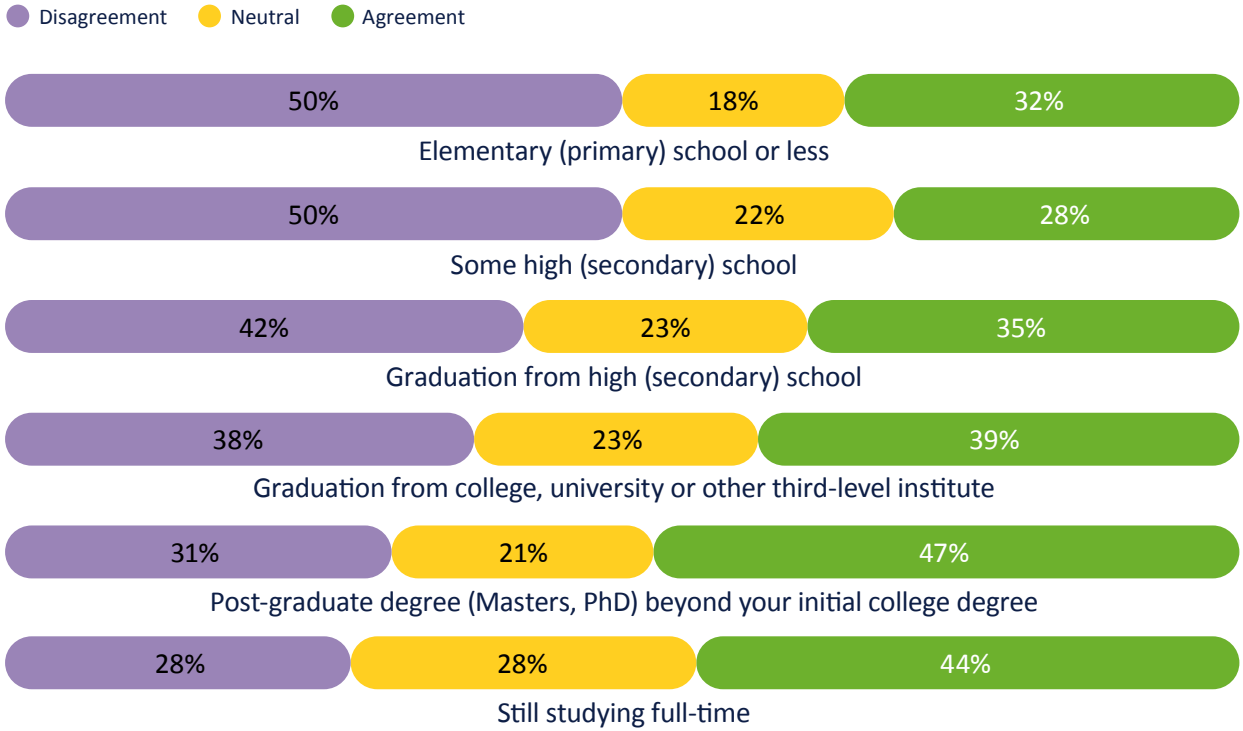


Source: Quantitative study

Willingness to adopt new products by location



Willingness to adopt new products by level of education



Consumer attitudes towards innovation

Acceptance of innovations

The need for innovation is understood – most participants of the qualitative study perceived the current food system as inadequate and are aware of the sustainability challenges we are facing. The majority hold positive attitudes towards technological innovations, however a small number of people believe that the solutions to true sustainability will not be found in more technology.

Technology for young urbanites

Food innovations, particularly those based on technology (e.g. lab-grown meat) are associated with a young, affluent, city-dwelling demographic. The primary sustainability driver is partly seen as caring for the planet, but also as a trend. Younger participants in this study have generally shown more optimism about the role that technology can play in producing sustainable, healthy food.

Resentment towards 'forced' innovation

Some participants felt that they do not have much control on the type of innovations that make it to the market, and as a result onto their plates. They felt some innovations are forced on consumers by campaigns and advertising. A small group of participants expressed concern for the future of food, and whether it will be completely artificial and overprocessed. They also expressed concern about whether meal replacement drinks, insects, genetically modified crops, and lab-grown meat will become necessary sources for nutrients if the soil becomes depleted.

Reinventing old ways

Many participants support innovations that are based on natural techniques, as well as innovations that take care of the planet in addition to providing healthy food. There is a belief that innovation does not necessarily need to mean an advancement in technology. Innovation can also mean looking back at what worked in the past, for example fermenting foods for preservation, or going back to pre-industrial farming methods.

"I believe that innovation is necessary and useful because it makes our lives easier, allows us to try and achieve more. Maybe they are a bit scary because they are new and unusual to us, and everything new scares us a little."

Sandra (29), Switzerland
Participant qualitative study 2021

Source: Qualitative study

STIMULATING ADOPTION OF SUSTAINABLE INNOVATION

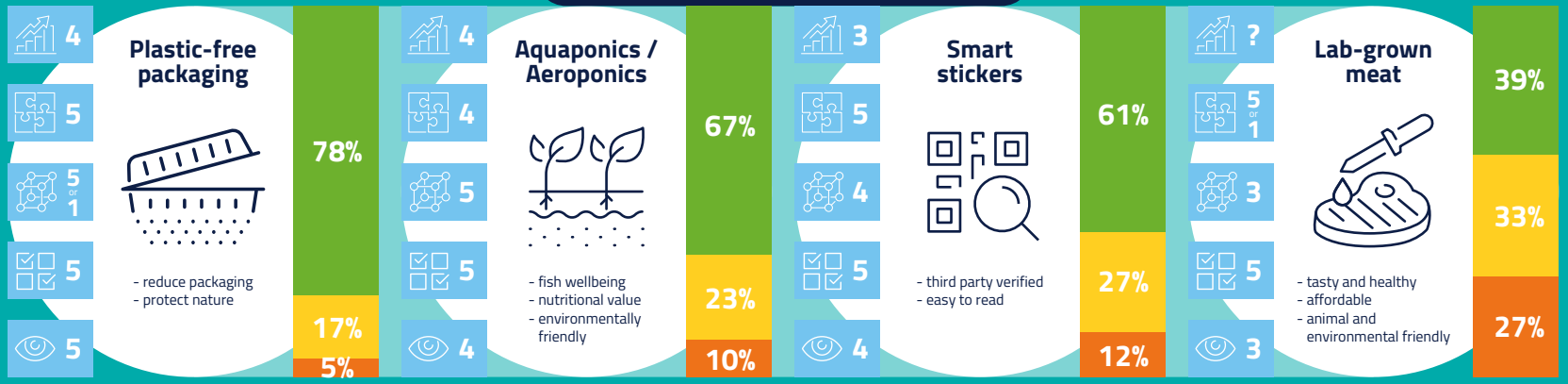
What does innovation mean to people?

ATTITUDE

- Need for sustainable innovation is clear
- Weariness towards too industrial and unnatural, look for innovations closer to nature
- Technological innovations associated with city-culture

ADOPTION POTENTIAL

Rejectors / Neutral / Acceptors



Attributes based on Rogers' Theory of Diffusion of Innovation — Relative advantage | Compatibility | Complexity | Trialability | Observability

1 = none 5 = very much ? = unclear yet

METHODOLOGY

18 countries

217 participants

- online community
  - open discussions
  - photo assignments
  - questionnaires

5 LESSONS

1. **Make benefits tangible in the present**
2. **Verify claims of sustainability**
3. **Leverage consumers' existing behaviours**
4. **Consider all alternative motivations**
5. **Create opportunity for trial**

ROLE OF FOOD CHAIN ACTORS

Transparency trailblazers

RisingFoodStar
CONNECTING FOOD

Technology can be used to transparently relay information by removing the risk of innovation and tampering, which can build consumer trust as a result. EIT Food RisingFoodStar Connecting Food has created a digital platform that can follow a product in real-time, allowing it to verify if a product is truly compliant with its requirements. At the end, consumers can access information about every stage of the product's journey from farm to fork by simply scanning a QR code on the packaging.
Since its creation in 2016, Connecting Food has raised around €5 million, and is continuing to accelerate and scale its products to improve traceability and transparency in the food system.

RisingFoodStar Alum
ALEPH FARMS

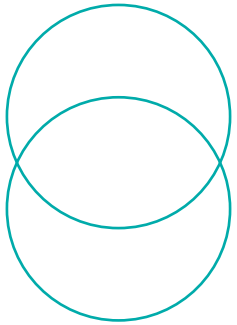
Leading in the field of cultivated meat, RisingFoodStar Alum Aleph Farms grows beef steaks from the cells of cows, without any harm to animals and with far less impact on the environment. Through its automated, traceable production process and sterile environment of manufacturing, the startup has not only produced the first cultivated beef steak, but is also actively working to strengthen consumer trust in its food products and the wider food system.
Aleph Farms aims for its cultivated steaks to be available to consumers by the end of 2022, pending regulatory approval.

Main lessons

for increasing adoption of food innovation

Bring attention to present problems

Innovations such as plastic-free packaging and lab-grown meat target problems that are visible to consumers in the present. Communication of plastic pollution in land and oceans has emphasised the urgency of plastic-free packaging amongst consumers. Innovations that target distant problems or future uncertainties need to communicate their present value.

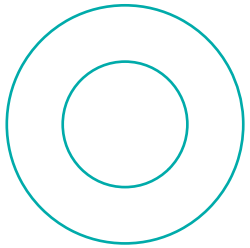


Verify sustainability

Consumers have high expectations about upcoming sustainable developments. Importantly, they want to be able to judge quickly if an innovation is sustainable. They expect authorities to verify that innovations are truly sustainable, and not merely 'greenwashing'. Innovations will need to provide guarantees (e.g. sustainability labels) to meet consumer expectations.

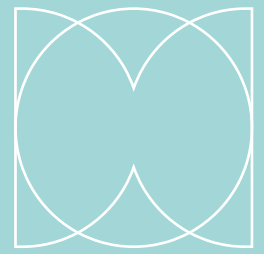
Leverage existing consumer behavior

Consumers are willing to change their habits, but it is not easy to break patterns. Innovations need to leverage consumers' current behaviours and beliefs. Many consumers today believe in the importance of sustainability.



Consider different consumer values and concerns

There are different reasons behind why different consumers might opt for the same product. They might value different aspects of the product, or see different benefits in the same feature. For example, lab grown meat may appeal to environmentally conscious consumers, animal lovers, and consumers concerned about meat safety or food security. Targeted communication can reach different groups.



Provide opportunities to try

It is important that consumers can easily try an innovation without having to commit to it. By providing suitable trial opportunities, for example by including a novel food in popular food boxes or selling novel products in smaller quantities, consumers are able to gain an experience of the innovation without committing to it.

Confidence in integrity of food and food technologies

Trust in the food system

Consumer trust in the European food system is rather low, but this does not have a big impact on day-to-day purchase decisions. Generally, consumers are not concerned about food safety when buying food because the quality of food supplies and the way this quality is checked is so high.

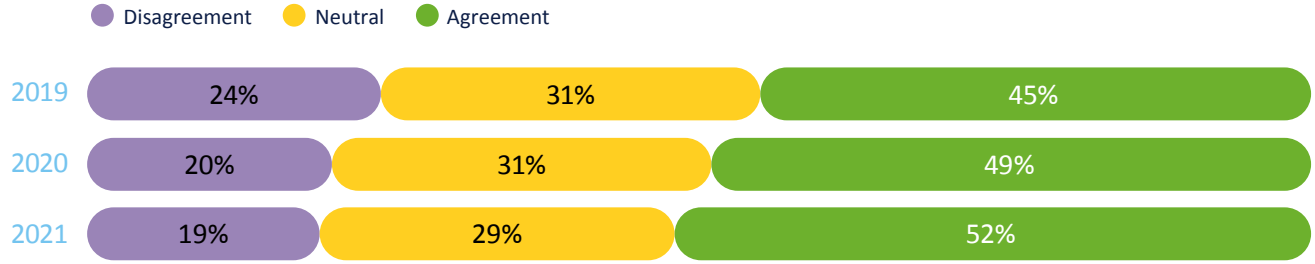
Apart from food safety, the longer-term effects of the food on consumer health needs attention. Consumers are also wary of the innovations that might be able to tackle issues of food production that deplete natural resources.

More trust is needed for consumers to accept innovations more easily. Since 2019, the confidence in food and food technologies has increased slowly, but consistently. Yet, only half of Europeans say they have confidence in food.

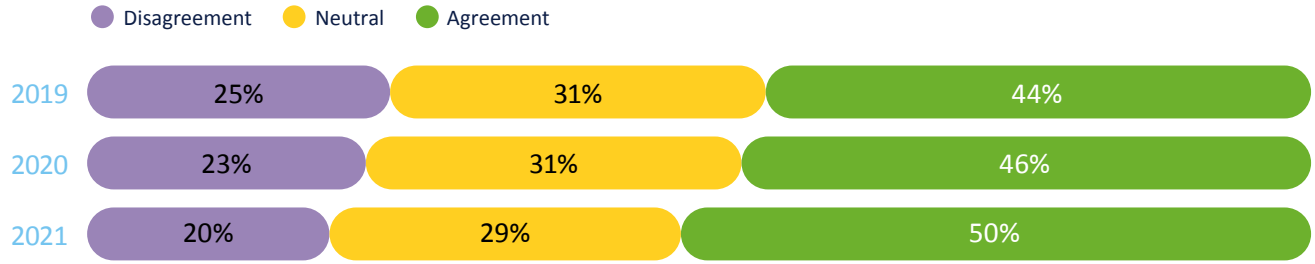
When making the distinction between technological innovation in food (such as lab-grown meat or plant-based protein) and technological innovation in production (such as aquaponics or vertical farming), it becomes clear that the barriers are mostly against innovation in food itself, rather than innovation in the production methods. Whereas most consumers agree that innovation in food production is necessary to grow the amount of food necessary to feed the world, they are more hesitant to embrace innovations in food itself.

The barriers against innovation in food itself seem to have to do in part with a lack of knowledge, not knowing equates to not trusting.

Confidence in food products



Confidence in food technology



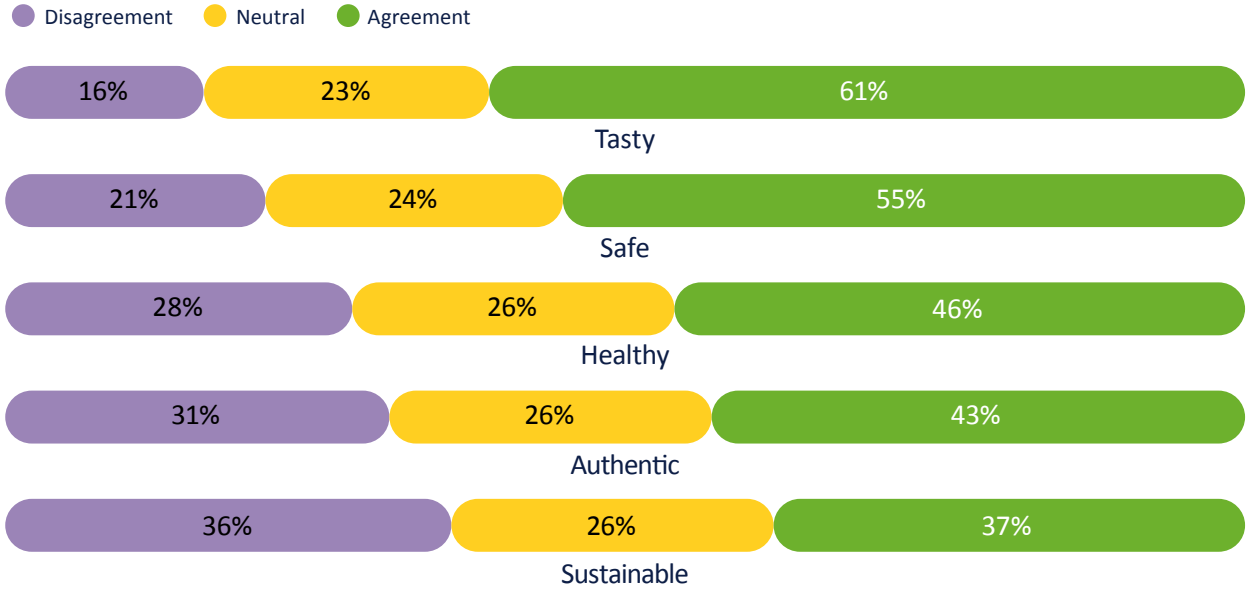
Source: Quantitative study

Confidence in the integrity of food products

The quantitative study also questions the confidence consumers have in the food they buy. This is done by evaluating consumer confidence in food integrity – measured by a combination of five factors: taste, safety, healthiness, authenticity and sustainability.

People have the most confidence in how the food system produces tasty food. This is something that consumers can easily ascertain themselves. However, when it comes to the sustainability of food or its authenticity, consumers must rely on external forms of confirmation. Therefore, confidence in the sustainability of food is the lowest of all elements.

Confidence that the food produced is...



Source: Quantitative study

Transparency trailblazers

EIT Food Project
Co-creating initiatives to increase consumer trust in food

In collaboration with FoodUnfolded®, EIT Food is working on a platform for dialogue to enable consumers to voice their needs and concerns regarding trust in the food system. The aim of this project is to increase consumers' trust in the food system and its actors by enabling consumers and food industry representatives to directly debate important issues related to trust in food. With consumers driving the project at each stage, are engaging with food companies and other stakeholders across five countries in Europe and Israel to co-design a series of trust initiatives, and will communicate the insights gained from the project, publicising and implementing those that are successful.

TRACOD
EIT Food Project

Retailers are looking for screening technologies that are easy to use, while also rapidly measuring food quality at a lower cost. EIT Food's TRACOD is a model-based tracking system that combines a spectrometer and a cloud platform to monitor food quality and authenticity of cod and other fish. The aim is to offer detailed information (e.g. key nutritional and authenticity information) and increase transparency at all points along the food supply chain, including to the consumer at the point of sale via a mobile app.

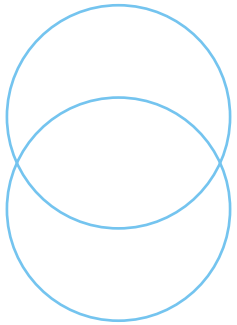
Main lessons

to increase confidence in the integrity of food and food technology

Confidence in food technology is challenging

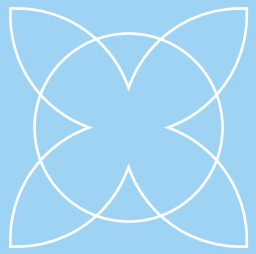
It will take some time to win consumer confidence in food technology, particularly when the technology is embedded in the food itself (e.g., cultured meat) rather than just in the production (e.g., agrobots*).

*agrobots are robots and drones applied in agriculture.



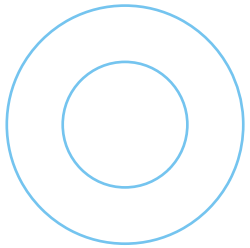
Verify sustainability

The food chain must provide certainty that their food production methods lead to a healthier or more sustainable diet, preferably by presenting scientific evidence. The long-term effects of new technology cause uncertainty, so consumer concerns about them need to be taken seriously.



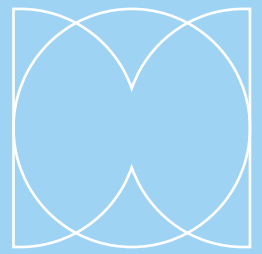
Highlight methods in balance with nature

'Old' ways of producing food, in balance with nature, are trusted much more than new ways. To win consumers' trust it is imperative to emphasise how innovations can help humans become more connected to the natural environment e.g. with innovative fertilisers that are less harmful to the environment.



Avoid excessive marketing

Over-the-top marketing and branding bring about scepticism in consumers. If it is over-the-top, it is not perceived by consumers to be credible.



Counter the negativity bias

Consumers need positive news about the food chain. Ideally, the positive news should outweigh negative news.

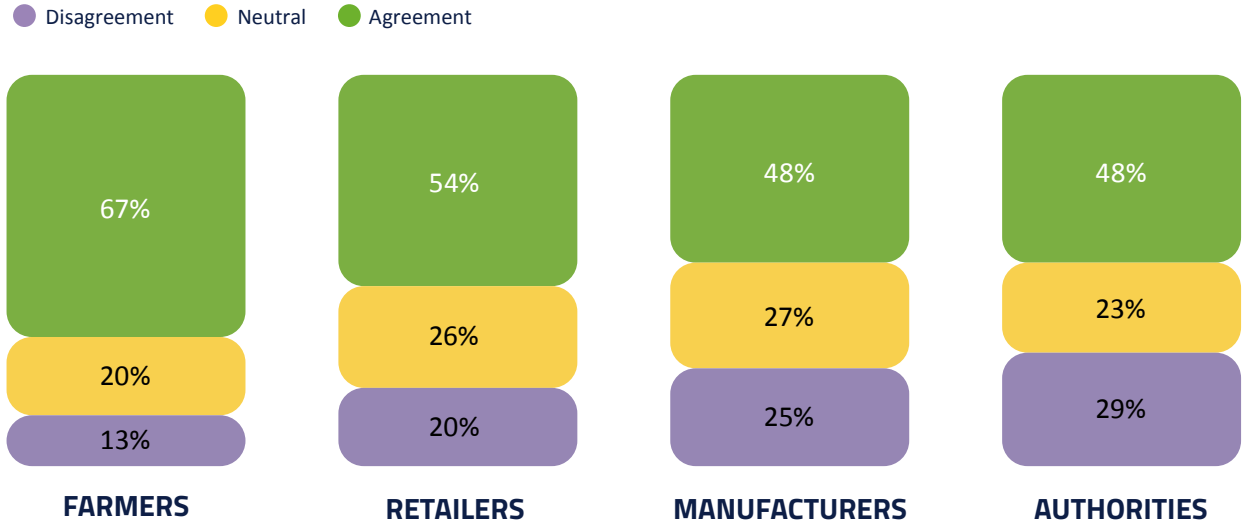
Trust in actors

Trust in food chain actors

All four groups of food chain actors can still improve consumer trust in them. Farmers are the most trusted actors, while authorities are the least.

Though farmers are generally trusted, one-third of Europeans show a lack of trust in them. The distrust in retailers, manufacturers and authorities is even bigger, with less than half of consumers trusting the last two groups of actors.

Overall trust in actors



Source: Quantitative study

Consumer trust in all groups has risen since 2019, with the biggest increase visible between 2019 and 2020.

We learned how people perceive the different actors:

Big vs. small

Participants tended to trust smaller organisations more than larger ones. They generally found smaller companies easier to sympathise with and their perception was that smaller companies care more and have to try harder. On the other hand, participants felt that larger organisations have greater financial means to invest in quality control and in general, they work to higher standards. However, the participants agree that both small and large companies can neither be trusted or distrusted completely.

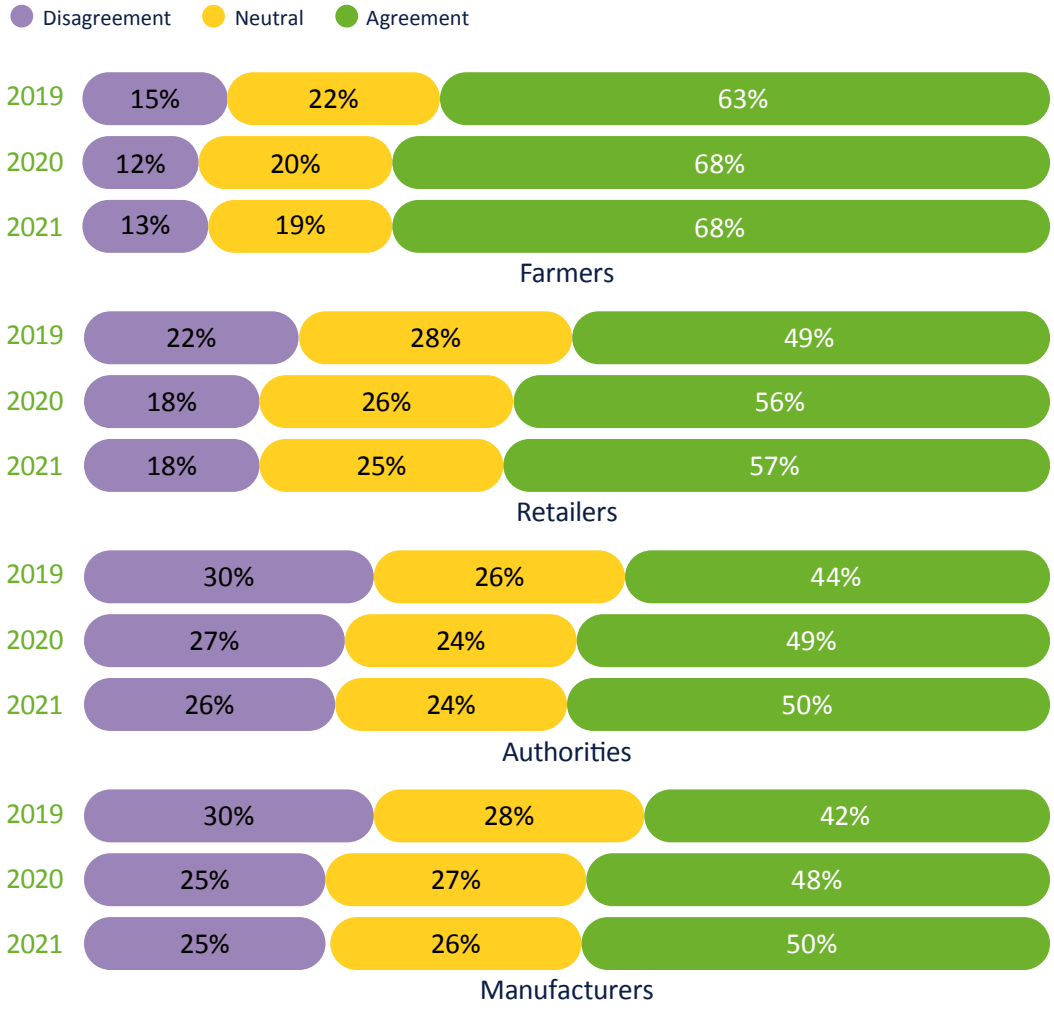
Near vs. distant

Participants tended to trust people rather than anonymous organisations. Participants mentioned, 'if we can look someone in the eyes then we can decide whether or not this person is trustworthy.' When a person represents an actor in the food chain, the likeability factor can be a strong motive to support this person's business.

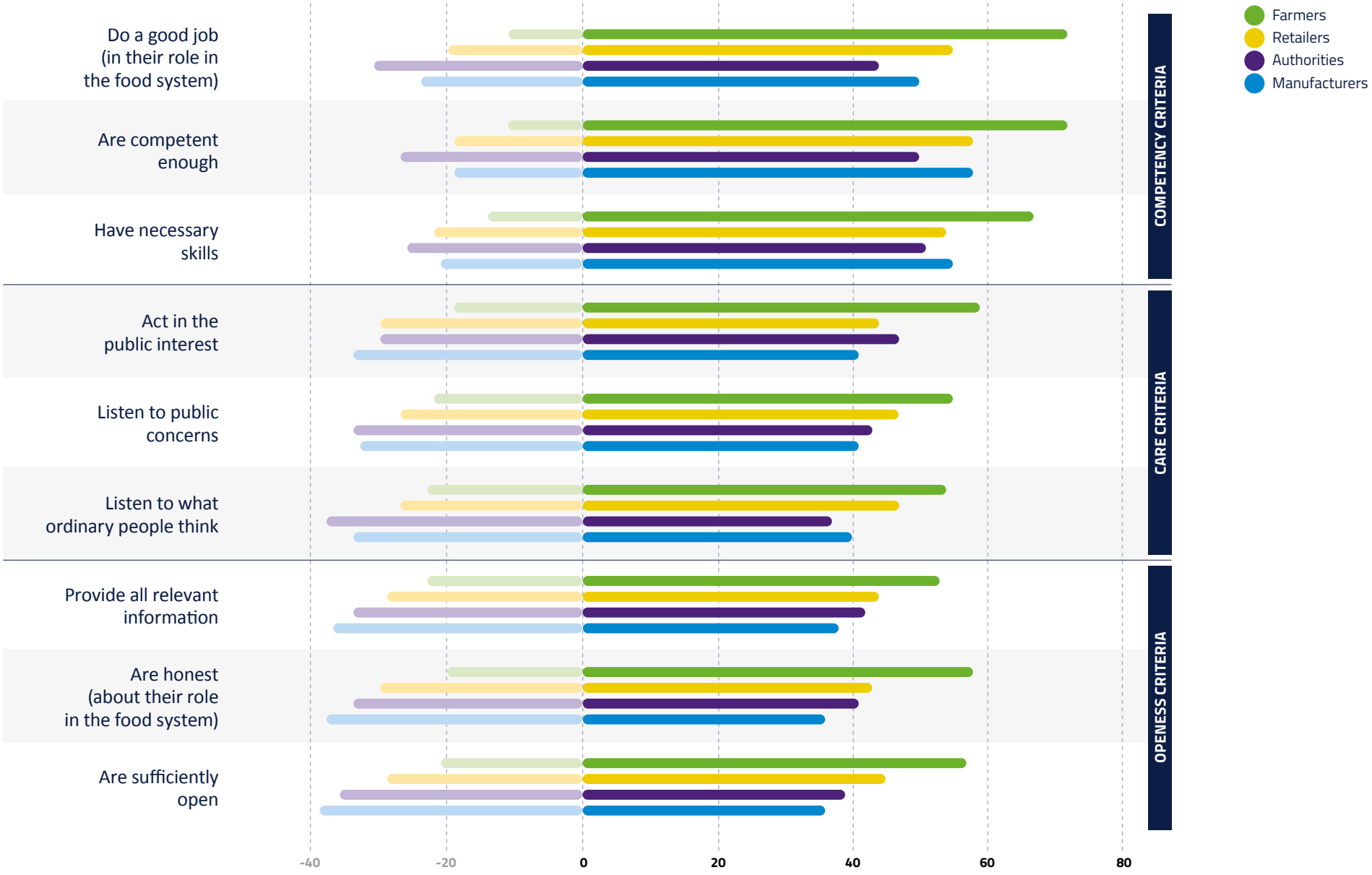
Led by monetary interests

People mentioned that whenever an organisation is primarily led by (or is believed to be led by) financial goals, there is the risk of placing these financial goals above the interest of the public.

Trust in actors over time



Trust in actors



Trust in farmers

In general, farmers are the most trusted actors in the food chain, particularly small local farmers that use environmentally friendly production methods to grow food. Many consumers have a romanticised picture of farmers being hardworking and in touch with nature.

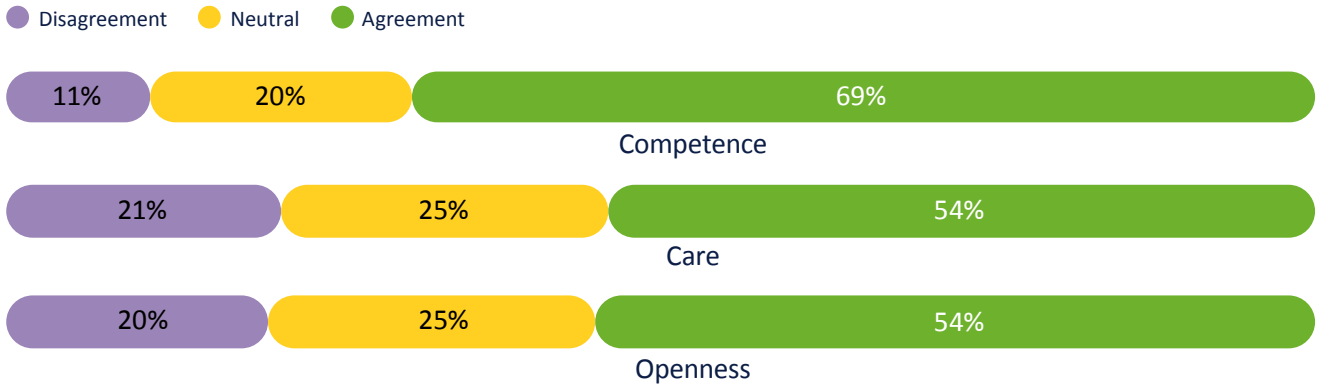
Crop farmers are often viewed as being marginalised actors in the food chain, being exploited by their customers – often large companies with more bargaining power.

Large-scale industrial farming is viewed differently altogether and they are seen as the cause of many problems, such as the loss of biodiversity. They are accused of working against nature, for example by (over) using chemicals.

Organic regenerative farming is considered the holy grail of farming. There is little appreciation for the high productivity of more industrialised farms.

Animal farmers are perceived in a different way. They are judged with growing scepticism for how they treat their animals.

Local small farms are considered the most trustworthy: If you can visit them, you can see for yourself how they work. People want to buy from local and small scale operations, but cannot always afford it. Local regulations are also believed to be tougher than those in other countries (particularly non-EU).



Trust in retailers

People generally trust European retailers to bring safe foods to the market. Discount supermarkets are trusted less than corner shops. Our participants do like retailers to show that they care about the health and the planet, for instance by giving free fruits to children, adding more vegan products, or highlighting local products.

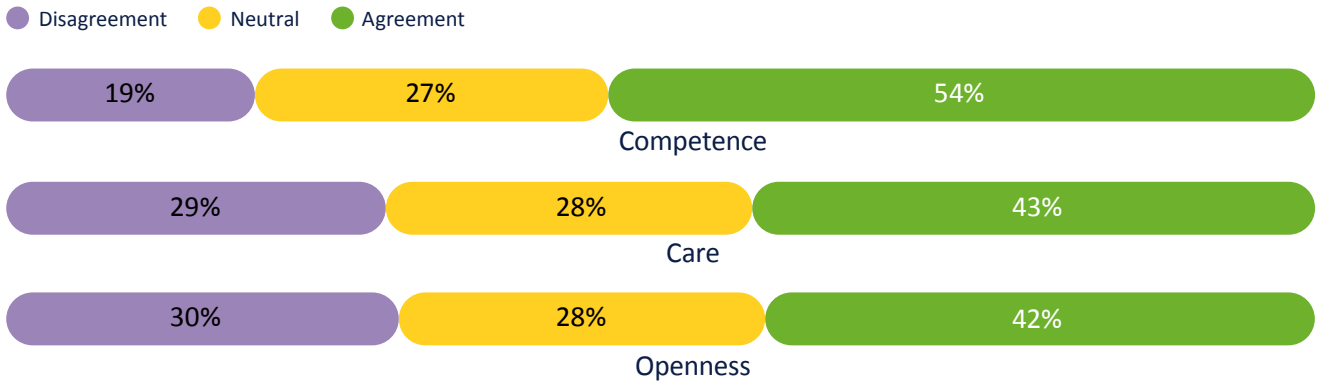
Consumers expect retailers to do more to influence consumer choice by promoting healthy, local and sustainable food with less packaging and minimising waste. But at the same time, they expect retailers to keep prices at affordable levels. Most consumers realise that price is an important mechanism to support sustainable and healthy choices.

Some of the participants think that many foods in the supermarket are not fresh and are being tampered with to last for longer. Fresh products sold in supermarkets are considered to be lower in quality than those sold in specialist shops. Sometimes this can be a reason to avoid buying (fresh) food in supermarkets.

Participants want retailers to adhere to ethical concepts and wonder how they treat employees. They also wonder which margins they grant their suppliers. However, most consumers do not realise that high margins for suppliers do not always lead to affordable prices.

The supermarket is not considered the right place for elaborate food education. Information should be short and visual, so that it helps people make the right decisions faster, rather than adding time to the shopping trip. However, information should be honest, easy to find, and clear for those who do look for more data.

An important development is the rise of direct sales channels where farmers can sell their products with fewer steps between them and the consumer. Participants trust smaller, local shops more than chains. This development was strengthened by lockdowns, which led to a desire to “support your locals”.



Trust in manufacturers

Participants generally trust European manufacturers to bring safe foods to the market. They trust that the EU has strict regulations that manufacturers must adhere to.

Small and local manufacturers are trusted more than multinationals. Manufacturers, particularly large multinationals, are perceived to be primarily money-driven and willing to compromise sustainability or the health benefits of their products in order to be more profitable.

Participants feel that manufacturers, especially the large ones, should be forced to share more of their profits to help create a healthier and more sustainable world. They appreciate (small) manufacturers' attempts to be more sustainable (e.g. recycled packaging), but the resulting products are also perceived to be expensive, thus not suitable for everyday use for everyone.

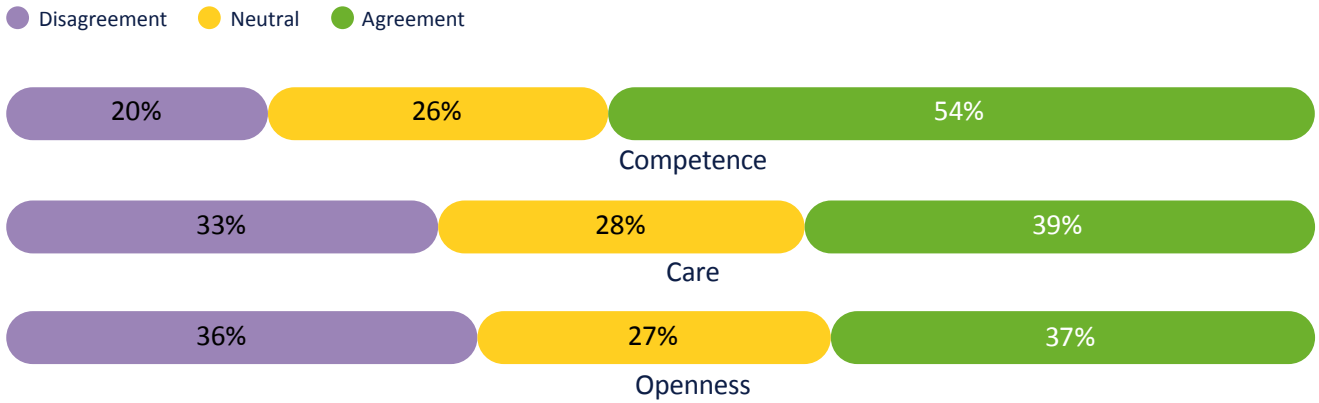
Furthermore, manufacturers are thought to be under authorities' strict control and afraid of damage to their reputation. The fear of losing money as a result of bad media coverage limits their options to cut corners. Nevertheless, the participants associate this group of actors with scandals.

Participants are very aware of the possibility of greenwashing. They also believe that manufacturers are intentionally creating complex labels that the average consumer is unable to understand. They believe this will only change when regulations about labelling change, because manufacturers are "lawful, but not ethical". Consumers urge them to be more transparent in many ways.

Participants want manufacturers to share more of their profits with farmers and employees, and to invest in healthier products.

The issue of lobbying was mentioned often in relation to manufacturers. Consumers assume that large companies can gain exceptions and positive circumstances by influencing politicians behind the scenes. This adds substantially to the distrust and perceived lack of transparency.

Some of the participants are personally boycotting some multinationals as a result of distrust.

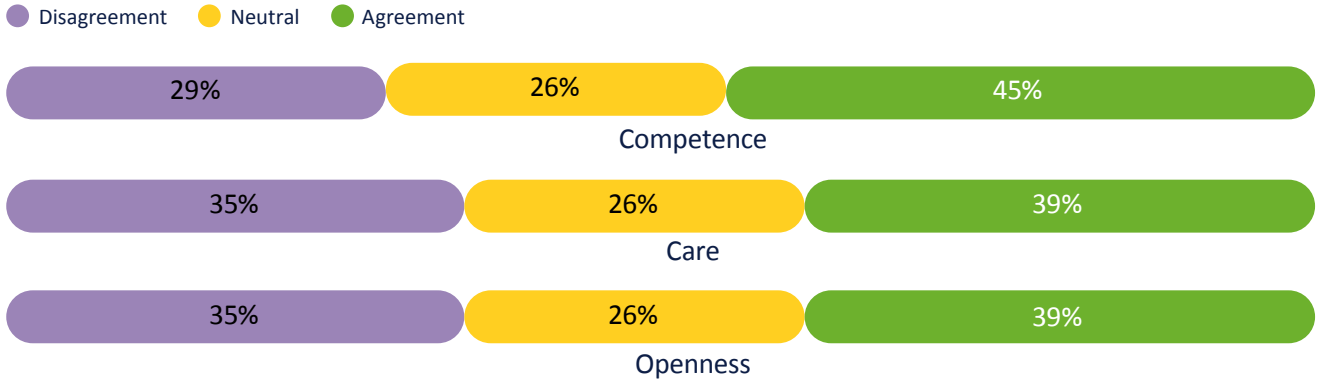


Trust in authorities

Authorities have the final responsibility on whether food is safe and meets the health and sustainability standards advertised. Participants agree that some form of independent inspection is necessary to ensure the safety, quality, and sustainability of the food chain. Authorities are the only party they can rely on to do this. In general, consumers trust that authorities are doing a good job controlling the health and safety of the food supply. On the other hand, they indicate they have no way of checking whether rules and regulations are enforced. Such uncertainty can create distrust.

The EU is generally trusted: Most participants believe that the EU has good, strong regulations that help create high food standards, and they believe that regulations on a European level are necessary. However, some participants feel that certain regulations may be too strict, possibly leading to a "one size fits all" approach to farming, where local approaches might be more sustainable.

Some participants also suggested a code of conduct to restrict or prohibit lobbying, and would like authorities to declare any potential conflict of interest. Raising taxes on unhealthy and/or non-sustainable ingredients was mentioned as a way in which some countries are trying to steer the food industry into the right direction. In this sense, many feel that too little is being done and that it is too late.



Improving trust in authorities

Authorities are currently not highly trusted when it comes to their role in food sustainability, however they are seen as holding significant potential for change.

While consumers want to make more sustainable choices, they often find them difficult. Even though all the food chain actors can play a role in making sustainable choices easier, authorities are seen as the actor who can have the greatest impact.

Currently, authorities are seen as an actor that under-delivers on actions. Consumers also believe that the actions authorities do take, are not visible to the average person.

Most participants believe there should be some form of institution that has authority over the food chain's sustainability.

Participants suggested that such an institution would be responsible for food sustainability and influence on new legislation. They imagine a multidisciplinary institution, which should be made up of different stakeholders including representation for farmers, manufacturers, retailers, NGOs, as well as citizens. This institution should be non-partisan, and independent of business and political interests. There was disagreement about whether politicians should be involved or not.

A new stakeholder that was mentioned during the discussion about a food sustainability institution was scientists - both environmental and nutritional. They are seen as the most credible, and least political and profit-driven.

Authorities and a potential sustainability institution are expected to show competency (through expertise, public track record, and independence), openness (through effective communication, honesty, and public records), and care (through listening to consumers and experts, and showing genuine care for the environment). By fulfilling these criteria authorities can gain back trust from the public.

Sources: Qualitative study, Focus Group

AUTHORITIES AND SUSTAINABILITY

How do consumers perceive authorities' approach to sustainability?

ATTITUDE

Lowest trust

High potential for change

IDEA: What could a European Food Sustainability Institute look like?

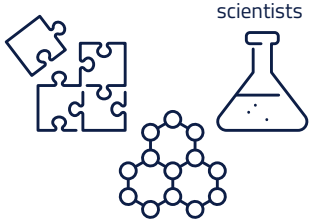
85% thinks there should be some kind of food sustainability institution

Responsible for food sustainability and legislation

Non-partisan, independent of business and political interests

Multidisciplinary

New stakeholder: scientists



Overarching holistic framework

How to gain back trust?

Competence
- Expertise
- Public track record
- Independence

Openness
- Effective communication
- Honesty
- Public records

Care
- Listen to consumers and experts
- Genuine care environment

METHODOLOGY

18 countries

232 participants

- desk research
- online community
  - open discussions
  - photo assignments
  - questionnaires

RECOMMENDATIONS for authorities

1 Make green choices easier
- ban unnecessary packaging
- invest in sustainable innovation
- educate children

2 Less talking, more action
- make strides
- communicate effectively

3 Listen actively
- listen to experts and citizens
- take input seriously
- make it visible and give feedback

4 Keep easy access records
- original source and data from literature, study and data from farmers and retailers

5 Prove independence
- act in interest of the public and the environment seperated from financial benefits

Difficulties of sustainable choice

Easiest

create less food waste and eat more in season

Most difficult

buy less packaged foods, eat more organic and eat less meat

The Finnish government is good at enforcing food regulations and companies are often penalised for not meeting standards. Therefore, I trust our logos and food information.

Päivi (63), Finland

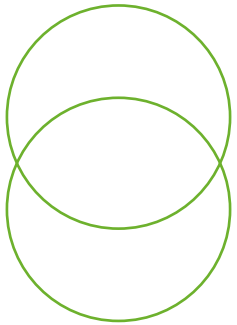
Participant qualitative study 2021

Recommendations for authorities

to increase trust

Make the sustainable food choice the easy choice

Consumers would like for it to be easier to make sustainable food choices. Authorities could consider three main priorities: banning unnecessary packaging, investing in sustainable innovation, and educating children about food sustainability.

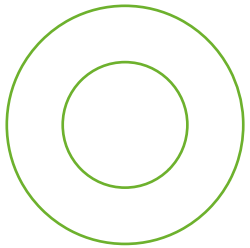


Less talking, more action

Participants perceive authorities as an actor that under-delivers on action. It is important to make strides, but it is also important to communicate to the public which actions are taken, what impact is made, and when results are successful.

Listen actively

Whether it is listening to experts, or the average citizen, participants want authorities to represent their best interests. They want to be heard, not only through the choices they make as consumers, but also through the values they hold as citizens. They also want to see that their input is taken seriously, and to receive feedback on how it is put into action.



Keep easy-to-access records

Authorities need to be able to easily and quickly redirect citizens to the original source and data upon which they base their policies and decisions. This can be scientific literature, a consumer study, or even data gathered from farmers and retailers.

Demonstrate independence

A big part of trust in authorities is based on the independence of their work from business. Authorities are expected to act in the interest of the public and the environment, and be completely separate from the financial benefit of big corporations. Authorities can earn trust by demonstrating this independence.

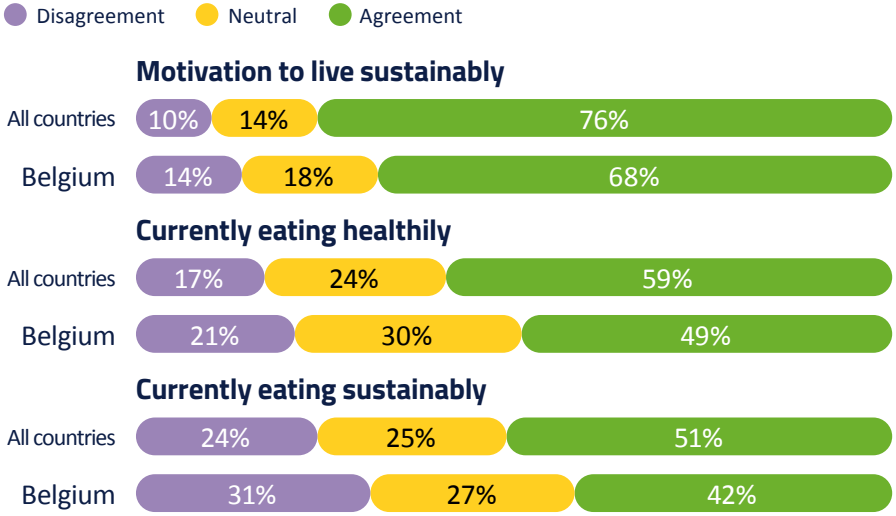
Sources: Qualitative study, Focus Group

Country reports

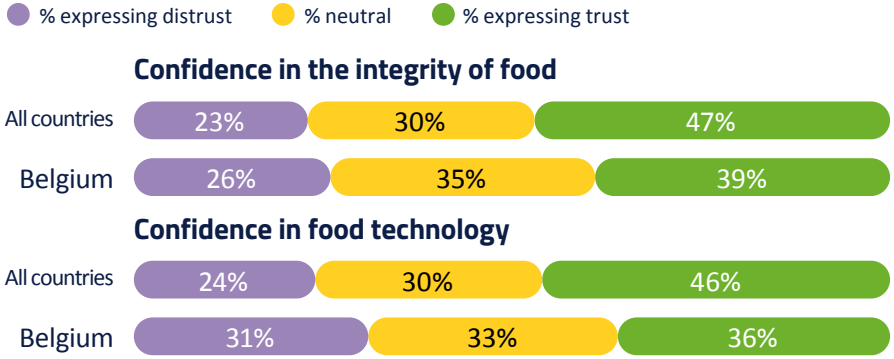
2021 Quantitative Results - Belgium

- Sample size: n=1,130, total n=20,326
- Nationally representative in terms of age, gender and region
- Countries involved: Belgium, Czech Republic, Denmark, Finland, France, Germany, Greece, Ireland, Israel, Italy, The Netherlands, Poland, Portugal, Romania, Spain, Switzerland, Turkey, UK
- The graphs show the total of the 18-country sample compared to the Belgian results.

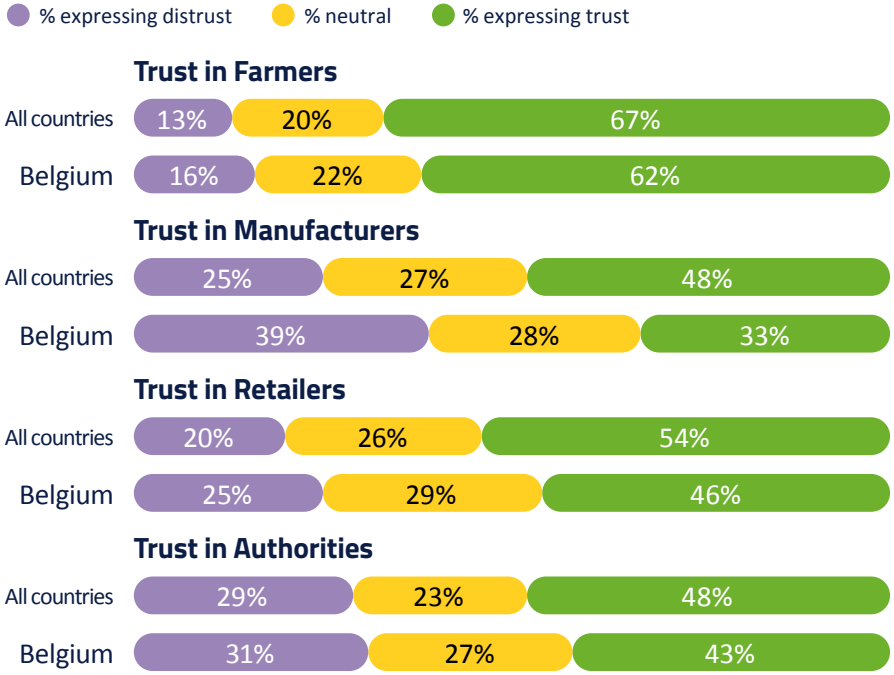
Consumer motivation and behaviour



Confidence in food products and food technology



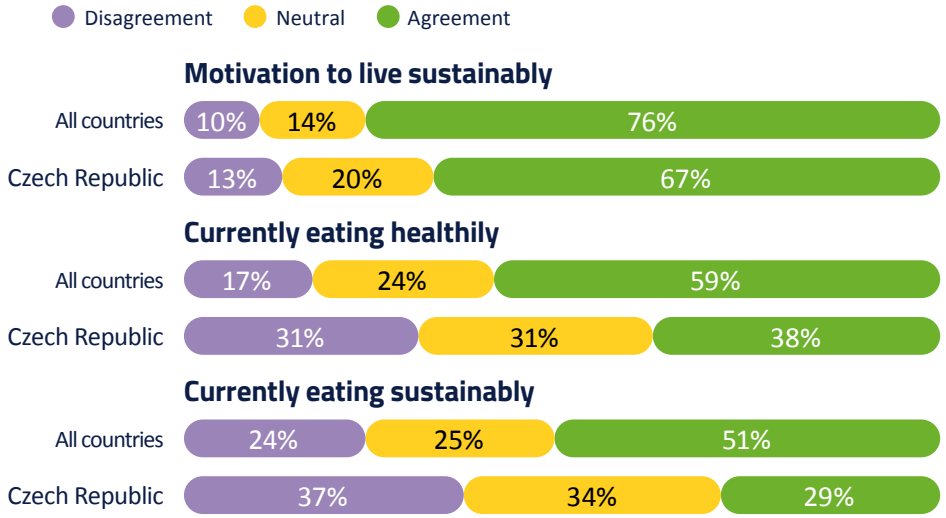
Trust in actors



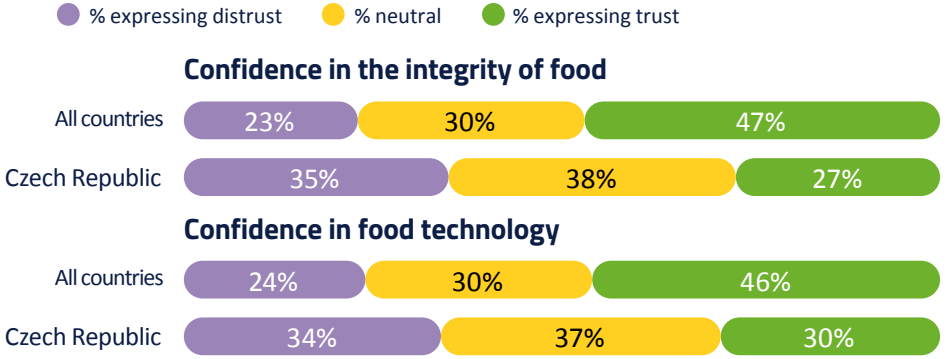
2021 Quantitative Results - Czech Republic

- Sample size: n=1,130, total n=20,326
- Nationally representative in terms of age, gender and region
- Countries involved: Belgium, Czech Republic, Denmark, Finland, France, Germany, Greece, Ireland, Israel, Italy, The Netherlands, Poland, Portugal, Romania, Spain, Switzerland, Turkey, UK
- The graphs show the total of the 18-country sample compared to the Czech results.

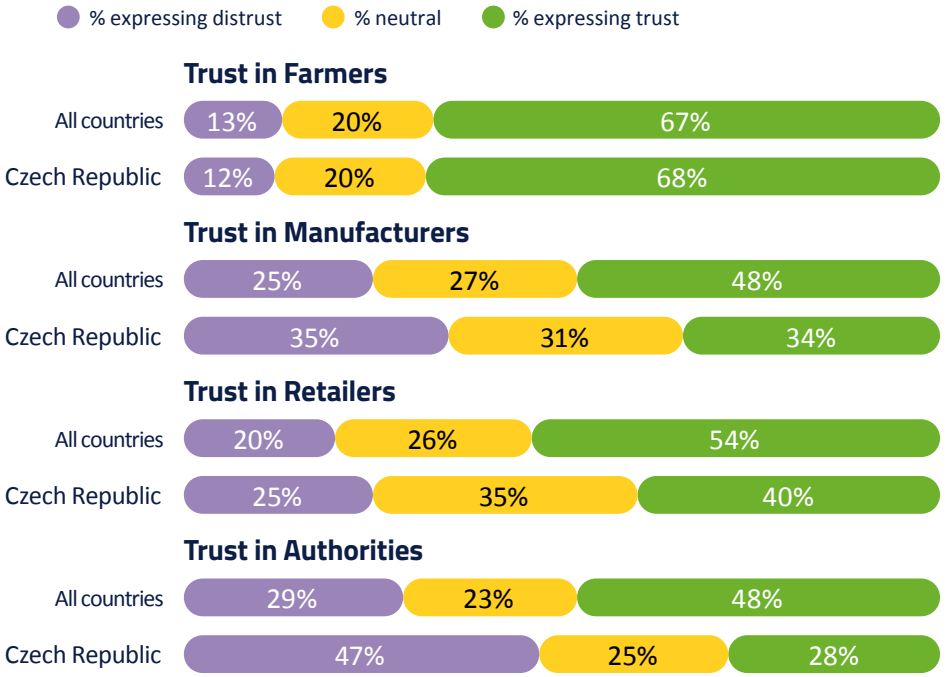
Consumer motivation and behaviour



Confidence in food products and food technology



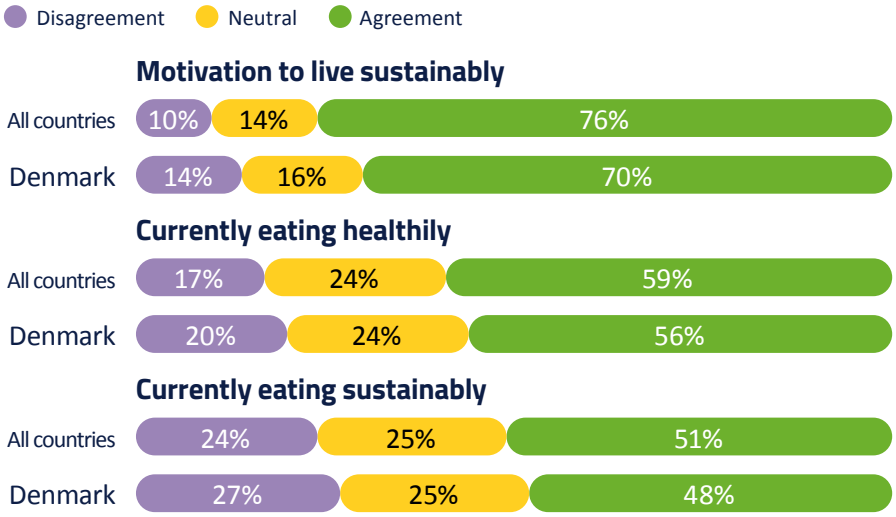
Trust in actors



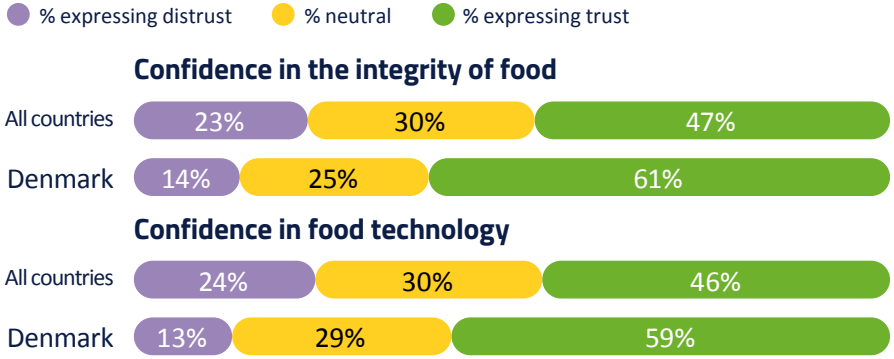
2021 Quantitative Results - Denmark

- Sample size: n=1,130, total n=20,326
- Nationally representative in terms of age, gender and region
- Countries involved: Belgium, Czech Republic, Denmark, Finland, France, Germany, Greece, Ireland, Israel, Italy, The Netherlands, Poland, Portugal, Romania, Spain, Switzerland, Turkey, UK
- The graphs show the total of the 18-country sample compared to the Danish results.

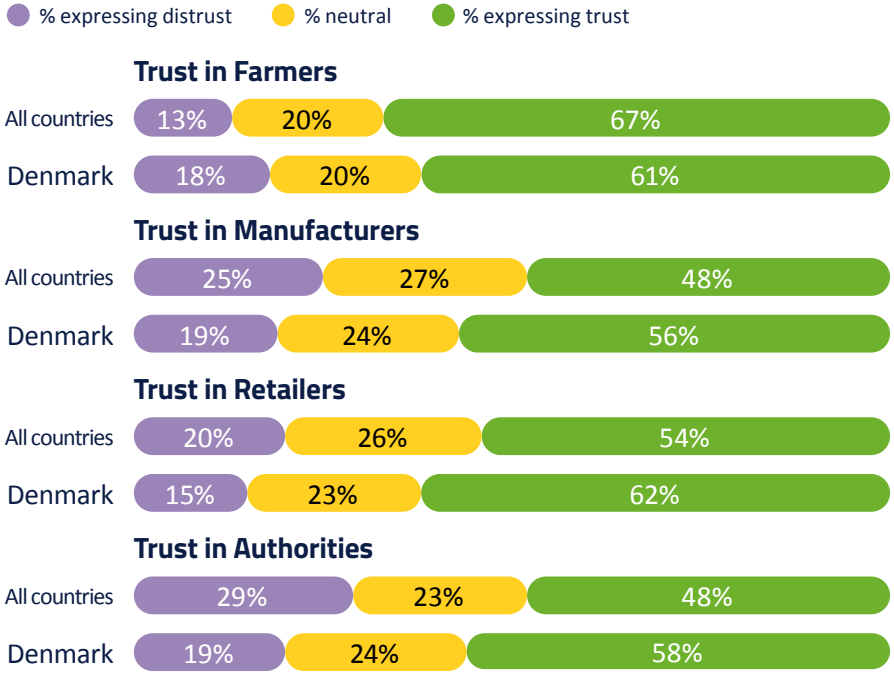
Consumer motivation and behaviour



Confidence in food products and food technology



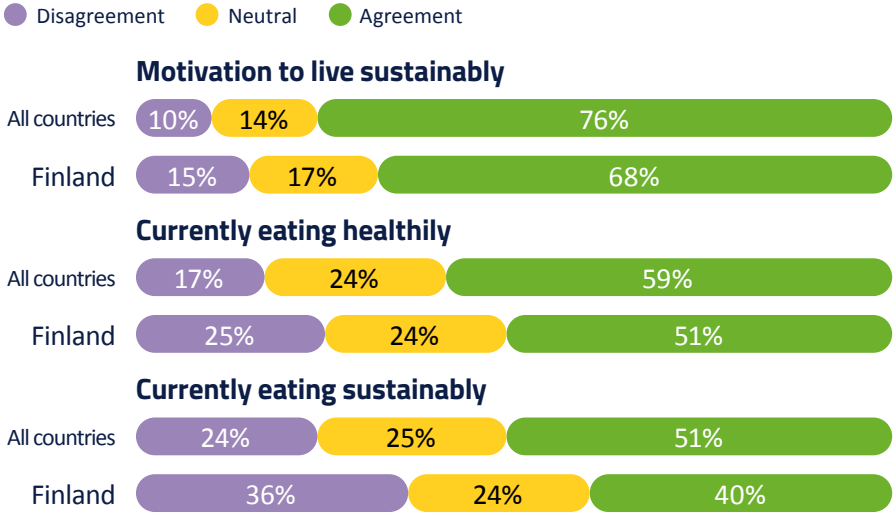
Trust in actors



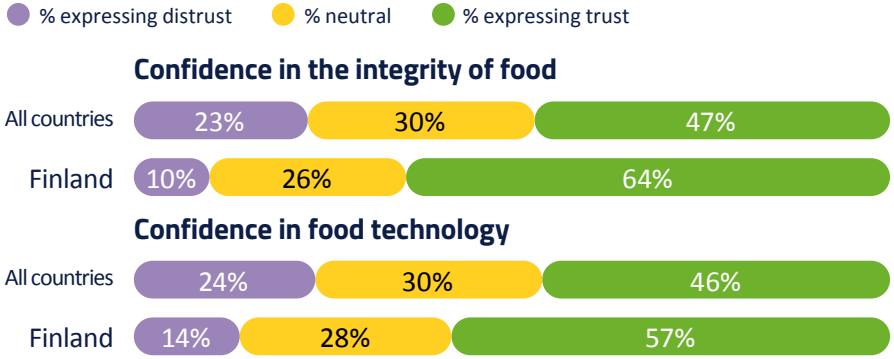
2021 Quantitative Results - Finland

- Sample size: n=1,130, total n=20,326
- Nationally representative in terms of age, gender and region
- Countries involved: Belgium, Czech Republic, Denmark, Finland, France, Germany, Greece, Ireland, Israel, Italy, The Netherlands, Poland, Portugal, Romania, Spain, Switzerland, Turkey, UK
- The graphs show the total of the 18-country sample compared to the Finnish results.

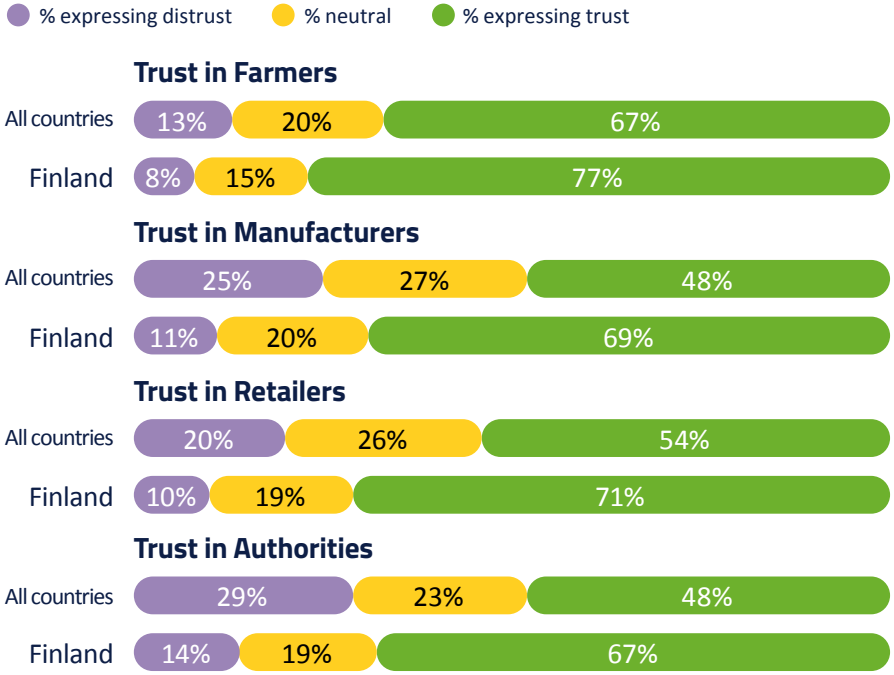
Consumer motivation and behaviour



Confidence in food products and food technology



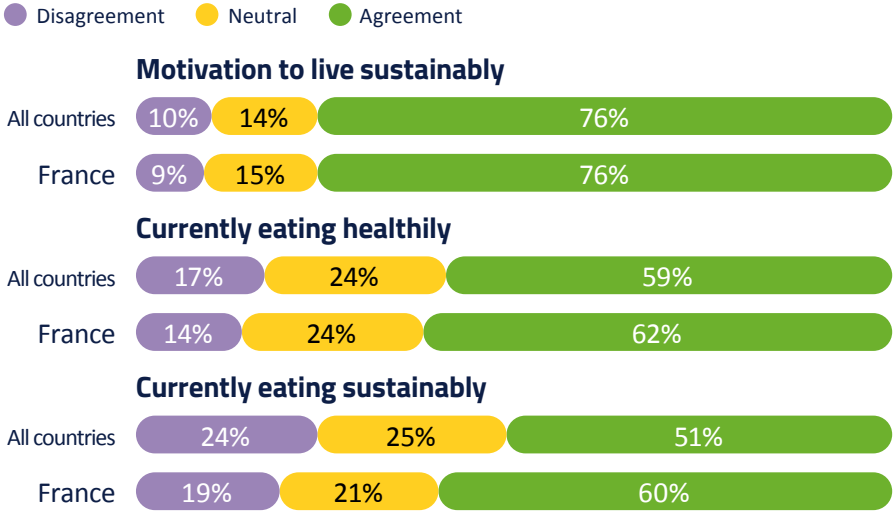
Trust in actors



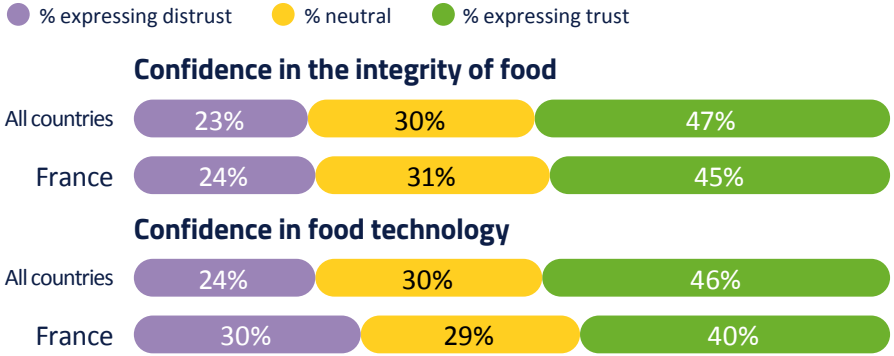
2021 Quantitative Results - France

- Sample size: n=1,130, total n=20,326
- Nationally representative in terms of age, gender and region
- Countries involved: Belgium, Czech Republic, Denmark, Finland, France, Germany, Greece, Ireland, Israel, Italy, The Netherlands, Poland, Portugal, Romania, Spain, Switzerland, Turkey, UK
- The graphs show the total of the 18-country sample compared to the French results.

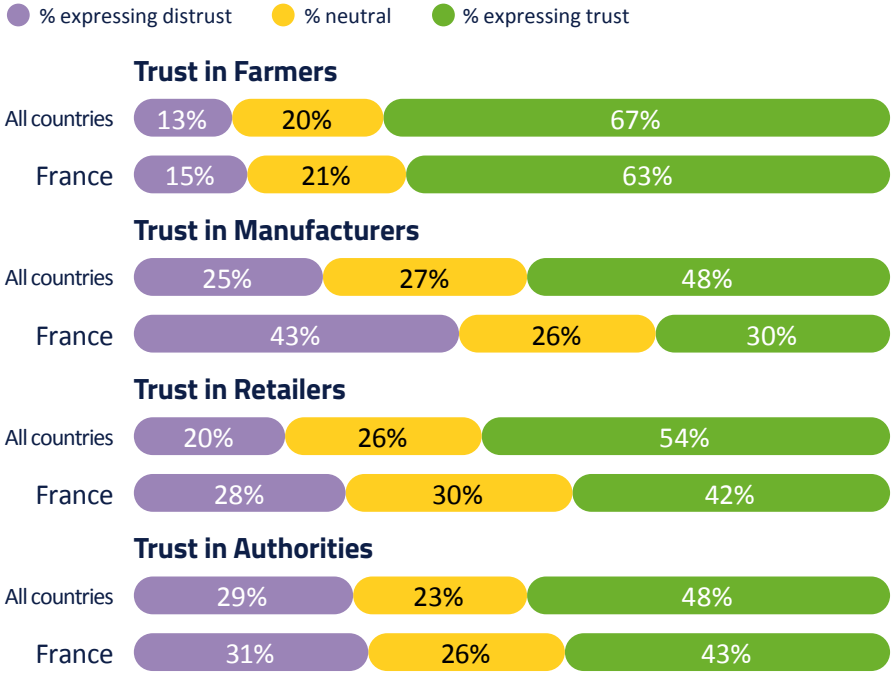
Consumer motivation and behaviour



Confidence in food products and food technology



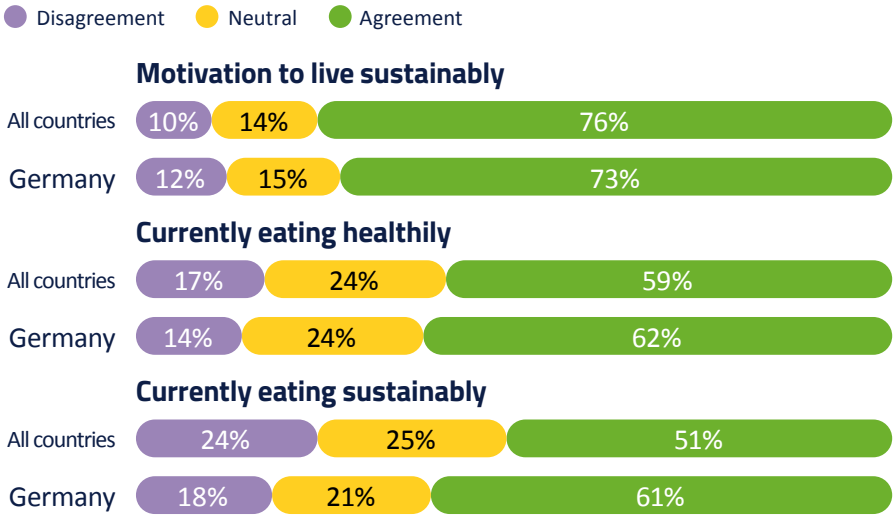
Trust in actors



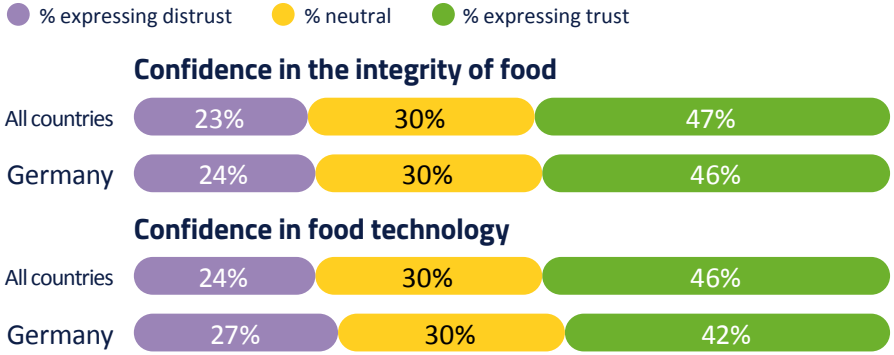
2021 Quantitative Results - Germany

- Sample size: n=1,130, total n=20,326
- Nationally representative in terms of age, gender and region
- Countries involved: Belgium, Czech Republic, Denmark, Finland, France, Germany, Greece, Ireland, Israel, Italy, The Netherlands, Poland, Portugal, Romania, Spain, Switzerland, Turkey, UK
- The graphs show the total of the 18-country sample compared to the German results.

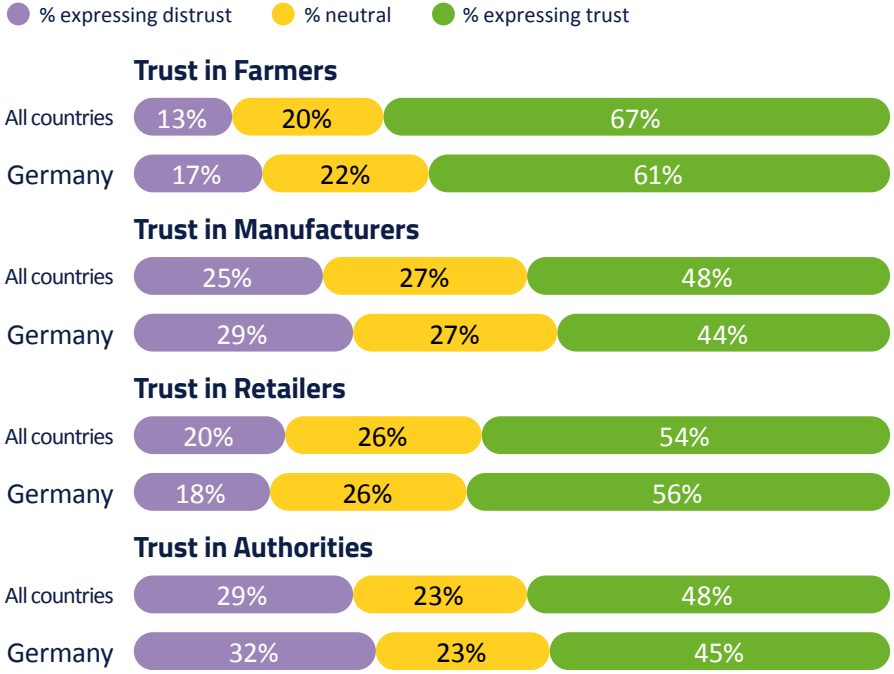
Consumer motivation and behaviour



Confidence in food products and food technology



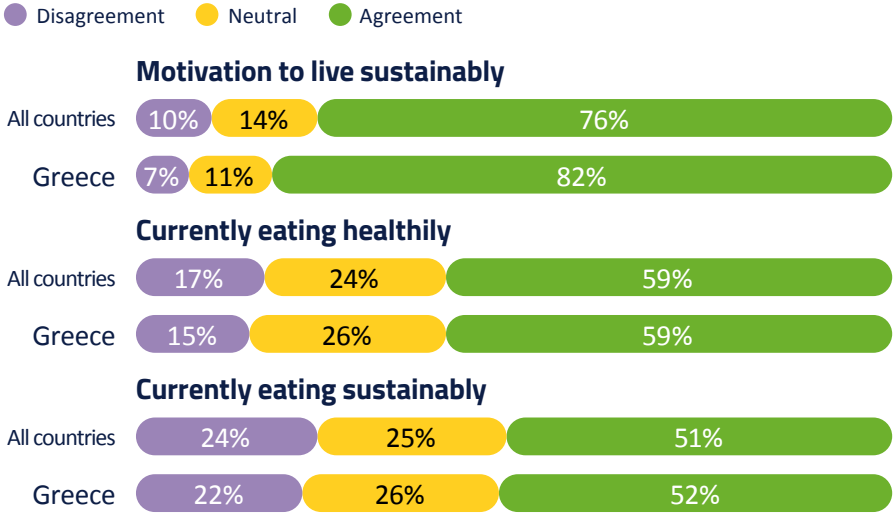
Trust in actors



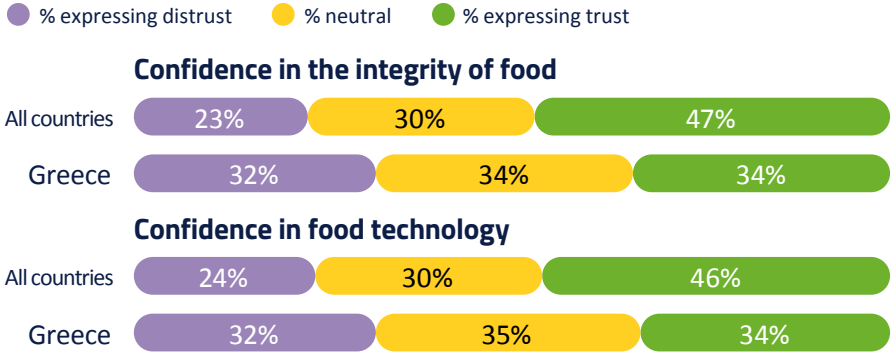
2021 Quantitative Results - Greece

- Sample size: n=1,130, total n=20,326
- Nationally representative in terms of age, gender and region
- Countries involved: Belgium, Czech Republic, Denmark, Finland, France, Germany, Greece, Ireland, Israel, Italy, The Netherlands, Poland, Portugal, Romania, Spain, Switzerland, Turkey, UK
- The graphs show the total of the 18-country sample compared to the Greek results.

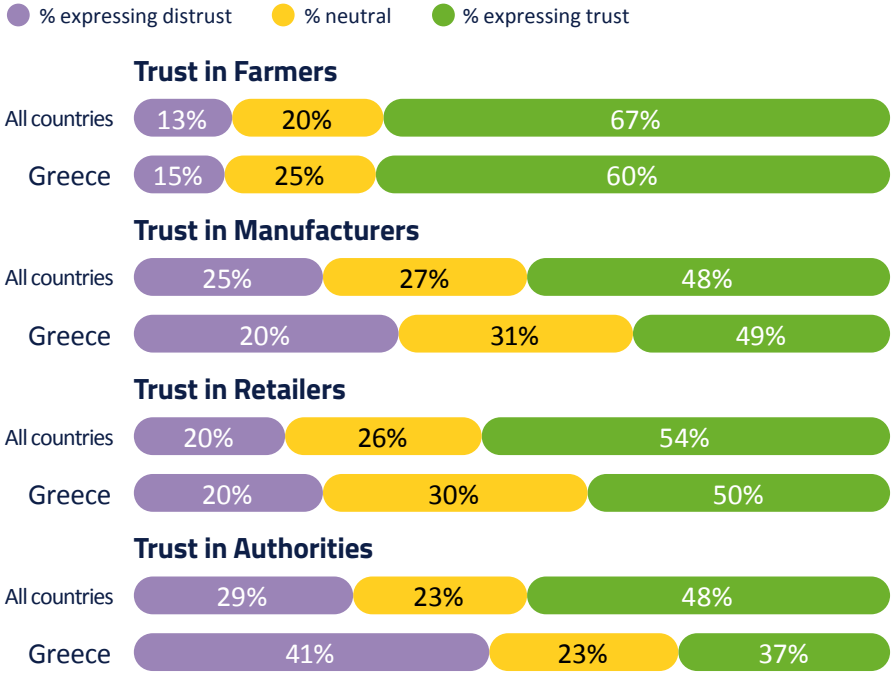
Consumer motivation and behaviour



Confidence in food products and food technology



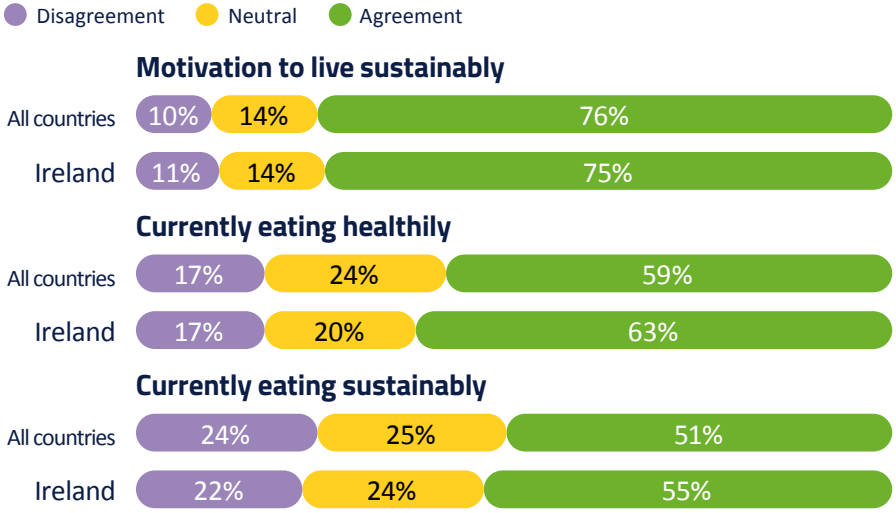
Trust in actors



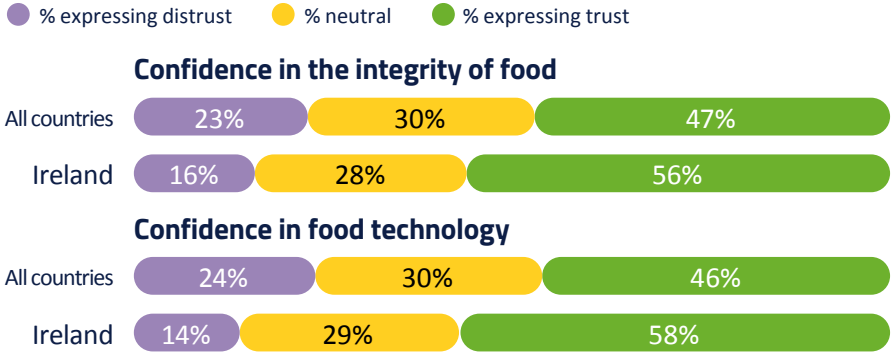
2021 Quantitative Results - Ireland

- Sample size: n=1,130, total n=20,326
- Nationally representative in terms of age, gender and region
- Countries involved: Belgium, Czech Republic, Denmark, Finland, France, Germany, Greece, Ireland, Israel, Italy, The Netherlands, Poland, Portugal, Romania, Spain, Switzerland, Turkey, UK
- The graphs show the total of the 18-country sample compared to the Irish results.

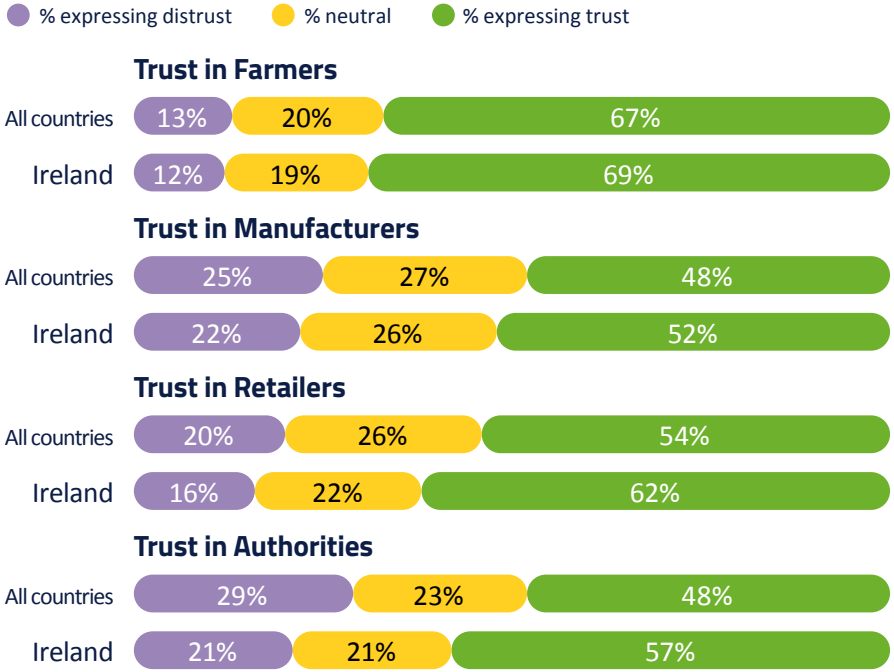
Consumer motivation and behaviour



Confidence in food products and food technology



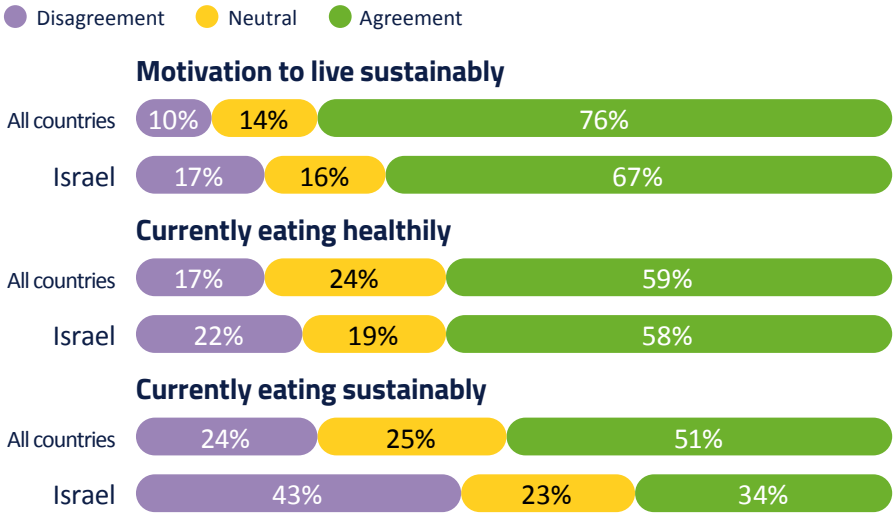
Trust in actors



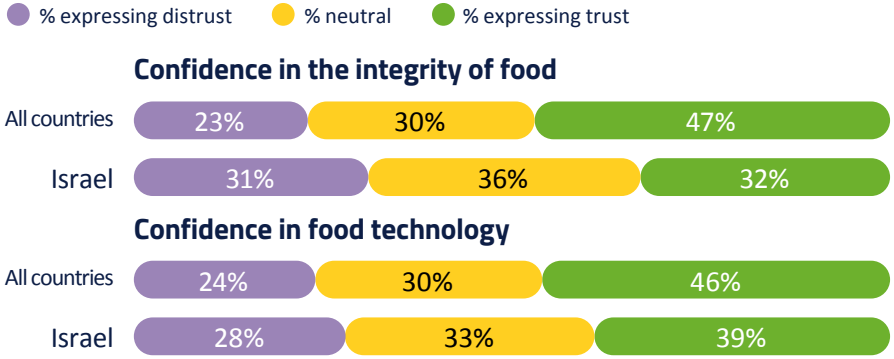
2021 Quantitative Results - Israel

- Sample size: n=1,130, total n=20,326
- Nationally representative in terms of age, gender and region
- Countries involved: Belgium, Czech Republic, Denmark, Finland, France, Germany, Greece, Ireland, Israel, Italy, The Netherlands, Poland, Portugal, Romania, Spain, Switzerland, Turkey, UK
- The graphs show the total of the 18-country sample compared to the Israeli results.

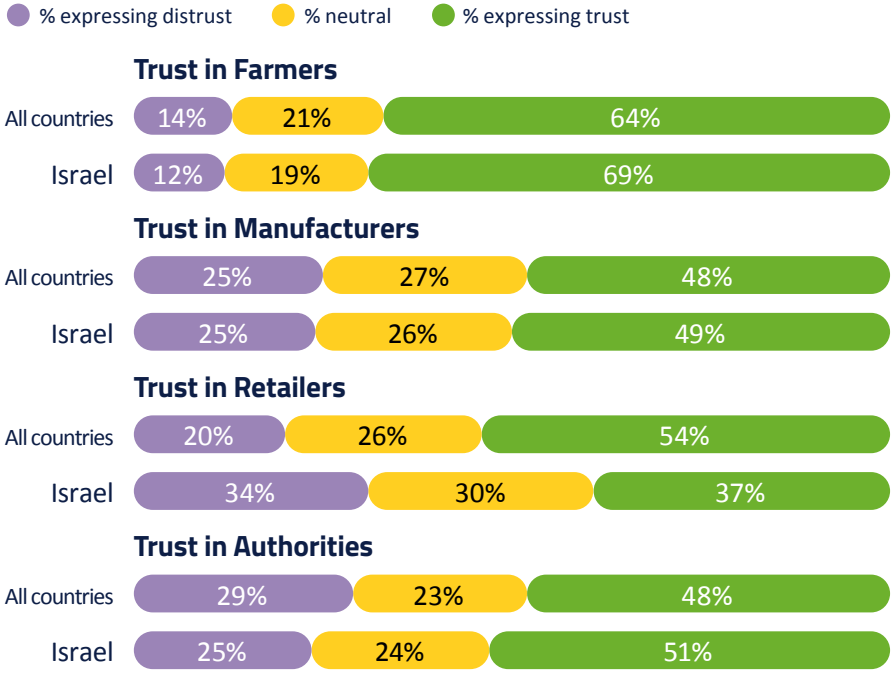
Consumer motivation and behaviour



Confidence in food products and food technology



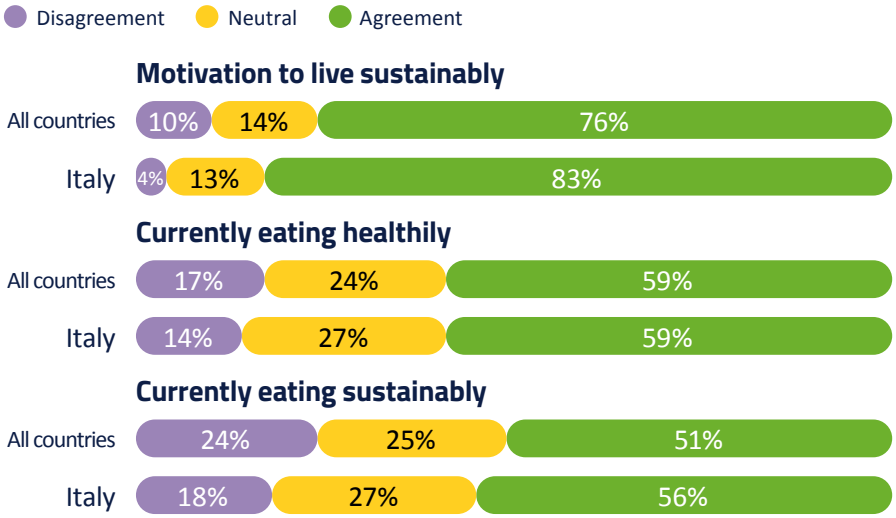
Trust in actors



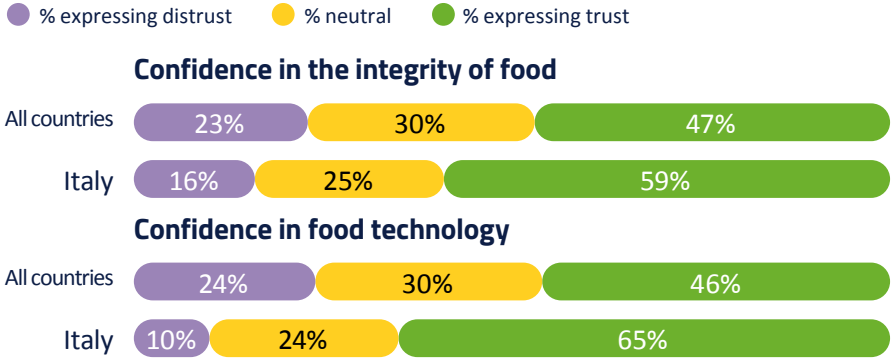
2021 Quantitative Results - Italy

- Sample size: n=1,130, total n=20,326
- Nationally representative in terms of age, gender and region
- Countries involved: Belgium, Czech Republic, Denmark, Finland, France, Germany, Greece, Ireland, Israel, Italy, The Netherlands, Poland, Portugal, Romania, Spain, Switzerland, Turkey, UK
- The graphs show the total of the 18-country sample compared to the Italian results.

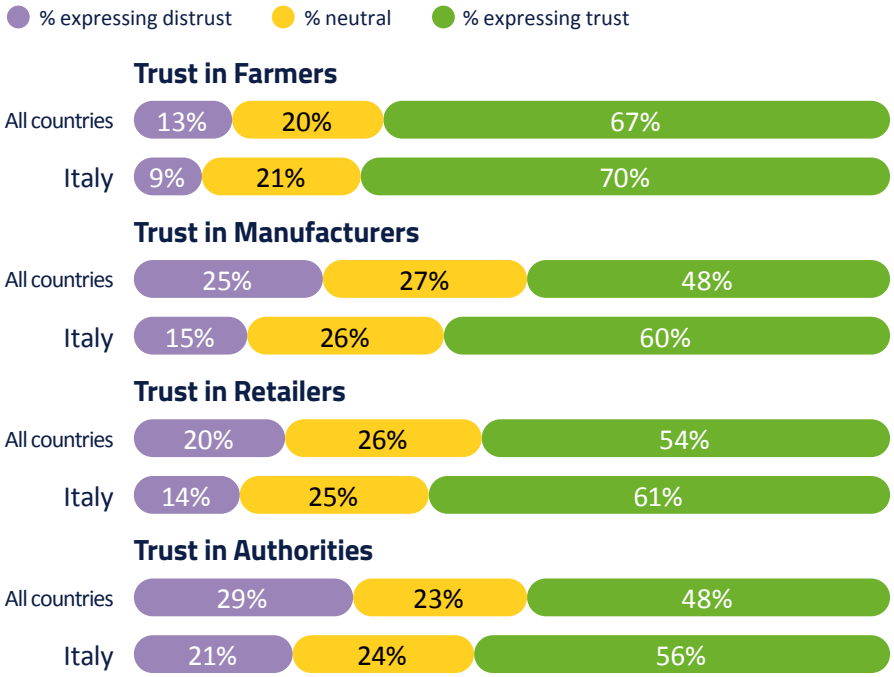
Consumer motivation and behaviour



Confidence in food products and food technology



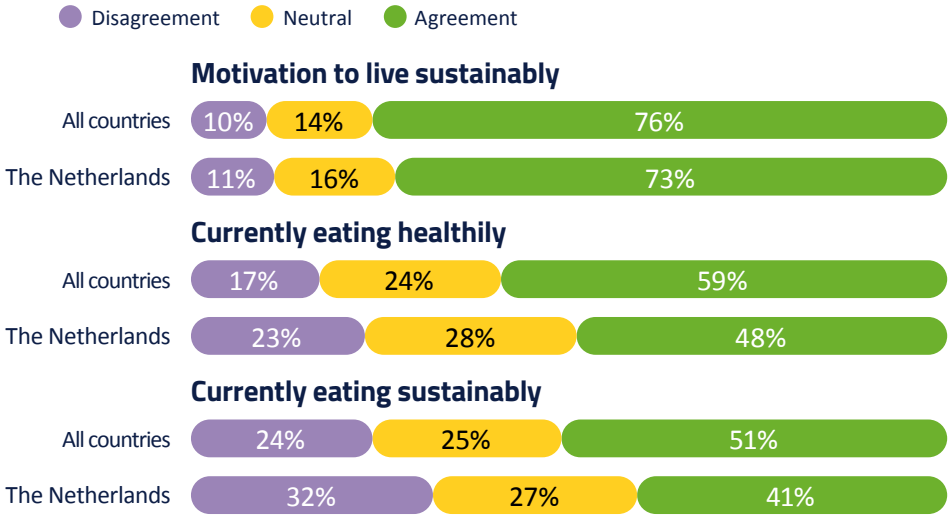
Trust in actors



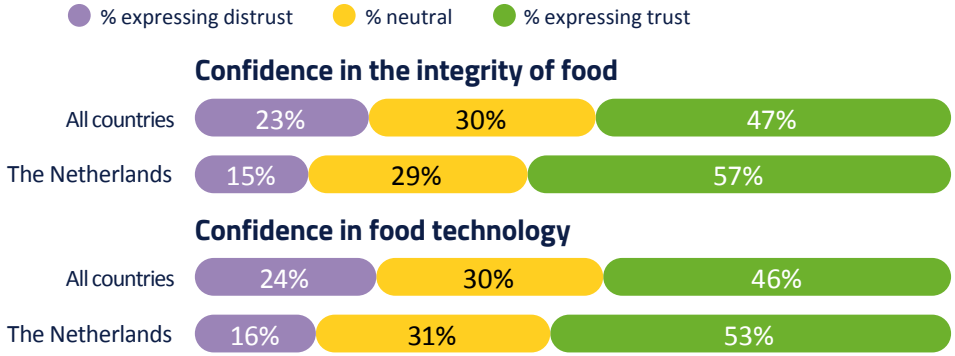
2021 Quantitative Results - The Netherlands

- Sample size: n=1,130, total n=20,326
- Nationally representative in terms of age, gender and region
- Countries involved: Belgium, Czech Republic, Denmark, Finland, France, Germany, Greece, Ireland, Israel, Italy, The Netherlands, Poland, Portugal, Romania, Spain, Switzerland, Turkey, UK
- The graphs show the total of the 18-country sample compared to the Dutch results.

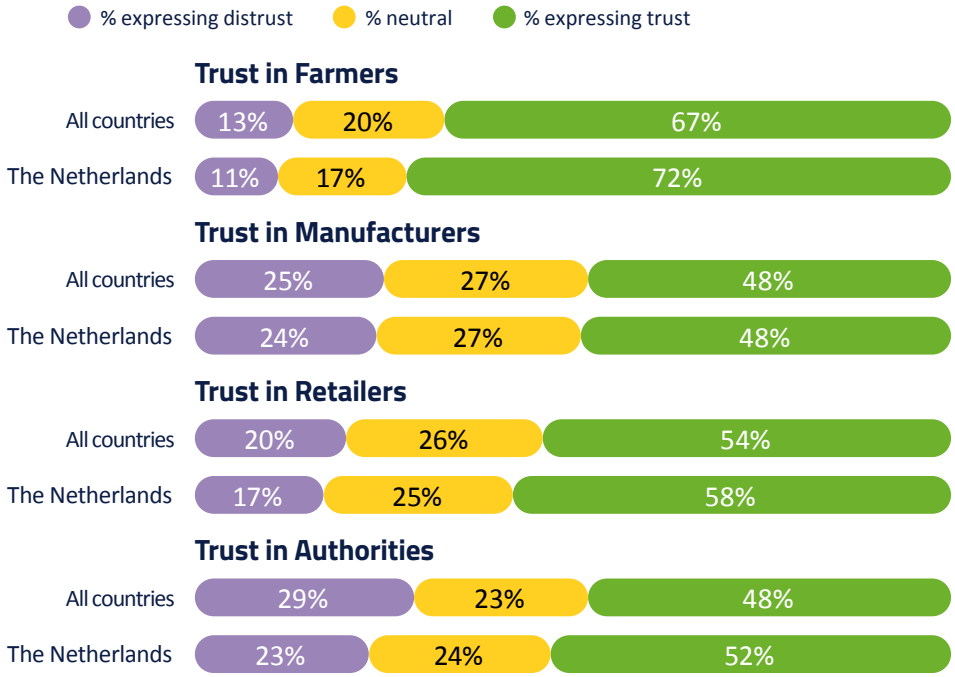
Consumer motivation and behaviour



Confidence in food products and food technology



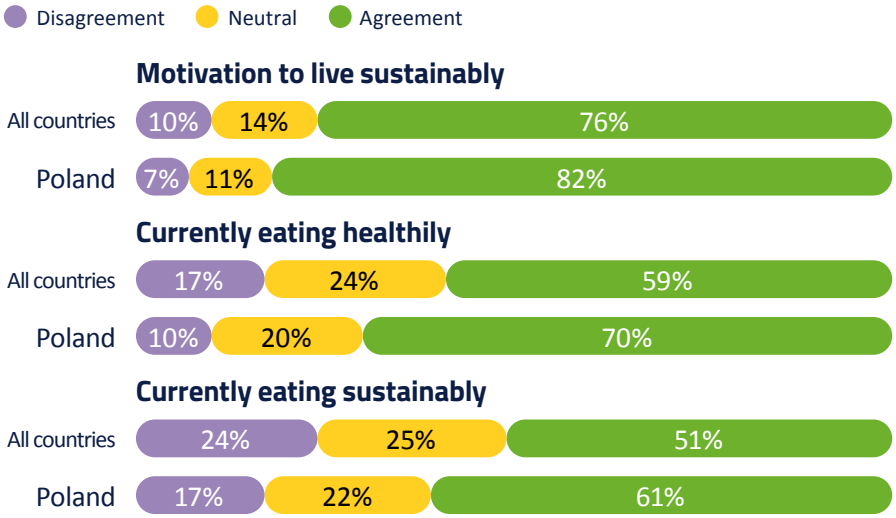
Trust in actors



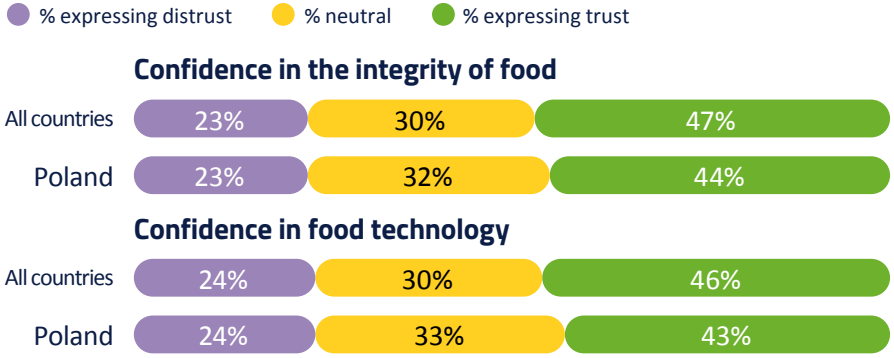
2021 Quantitative Results - Poland

- Sample size: n=1,130, total n=20,326
- Nationally representative in terms of age, gender and region
- Countries involved: Belgium, Czech Republic, Denmark, Finland, France, Germany, Greece, Ireland, Israel, Italy, The Netherlands, Poland, Portugal, Romania, Spain, Switzerland, Turkey, UK
- The graphs show the total of the 18-country sample compared to the Polish results.

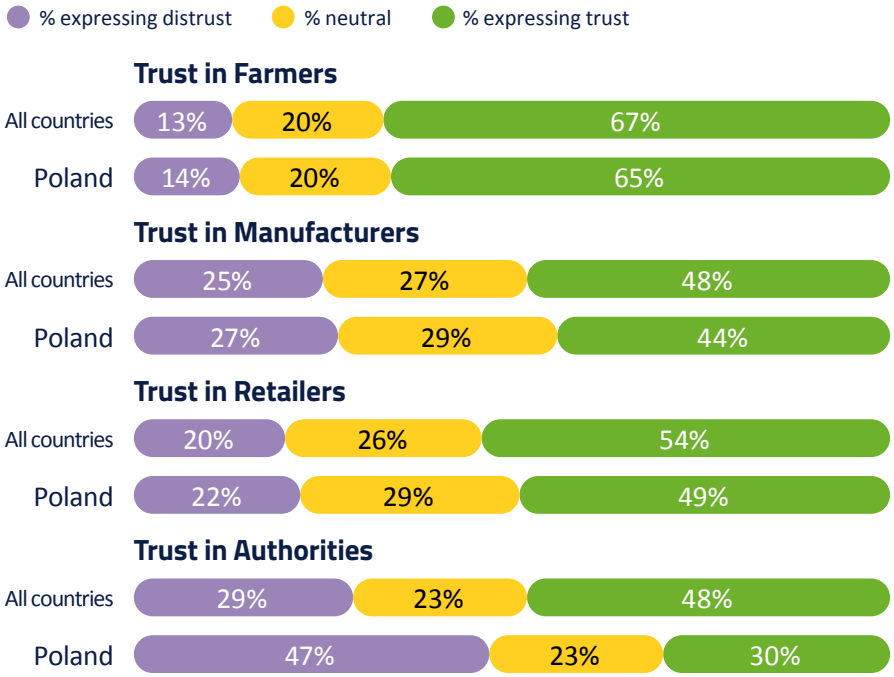
Consumer motivation and behaviour



Confidence in food products and food technology



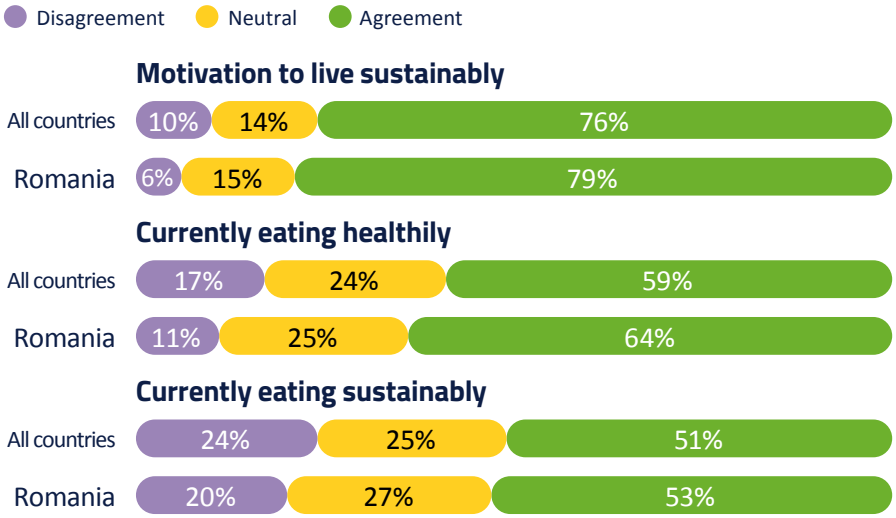
Trust in actors



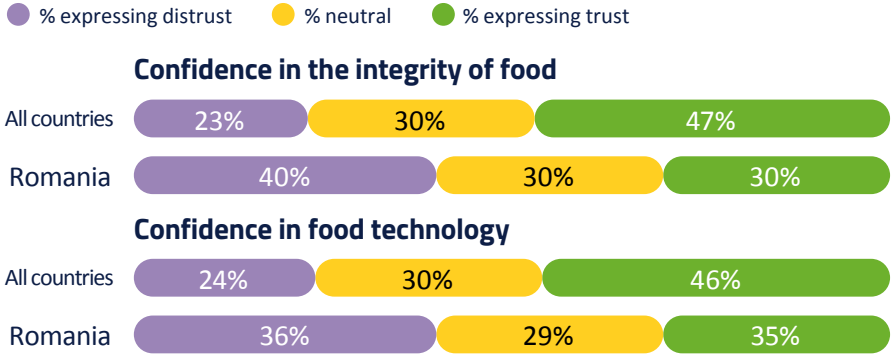
2021 Quantitative Results - Romania

- Sample size: n=1,130, total n=20,326
- Nationally representative in terms of age, gender and region
- Countries involved: Belgium, Czech Republic, Denmark, Finland, France, Germany, Greece, Ireland, Israel, Italy, The Netherlands, Poland, Portugal, Romania, Spain, Switzerland, Turkey, UK
- The graphs show the total of the 18-country sample compared to the Romanian results.

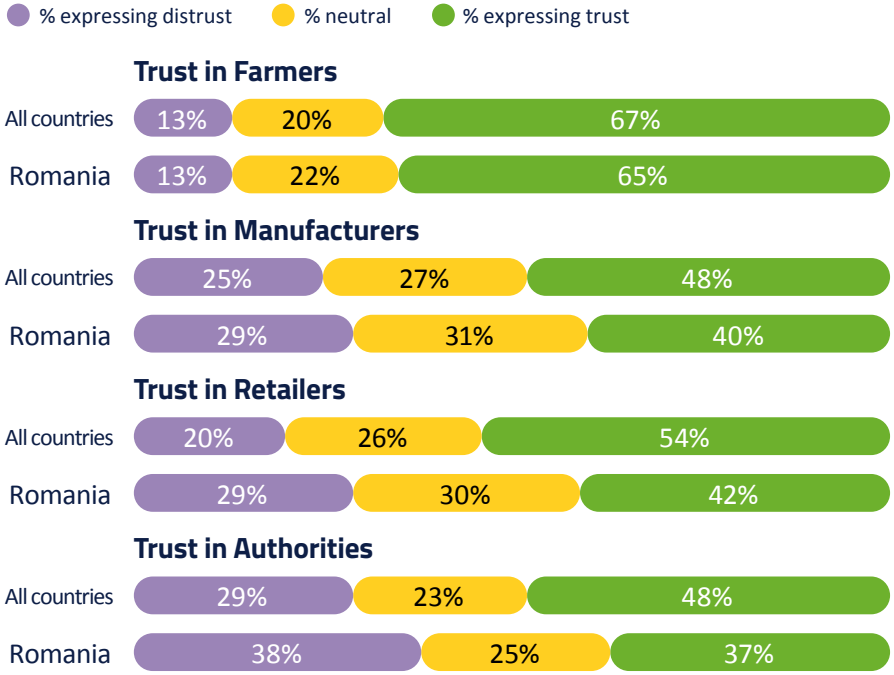
Consumer motivation and behaviour



Confidence in food products and food technology



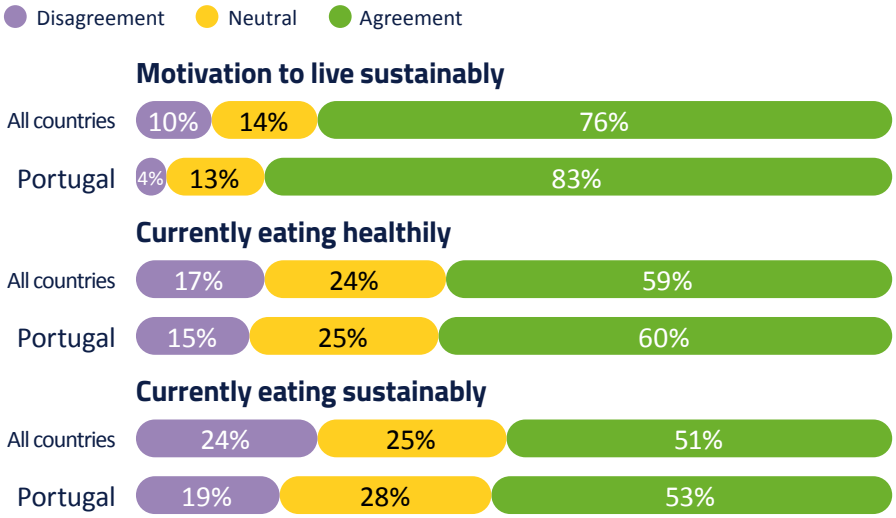
Trust in actors



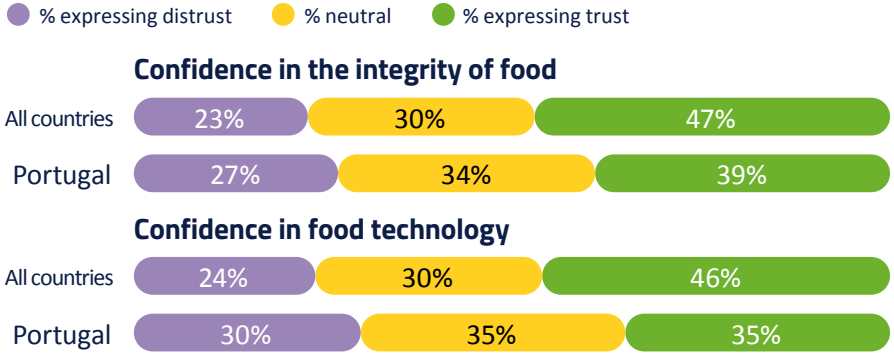
2021 Quantitative Results - Portugal

- Sample size: n=1,130, total n=20,326
- Nationally representative in terms of age, gender and region
- Countries involved: Belgium, Czech Republic, Denmark, Finland, France, Germany, Greece, Ireland, Israel, Italy, The Netherlands, Poland, Portugal, Romania, Spain, Switzerland, Turkey, UK
- The graphs show the total of the 18-country sample compared to the Portuguese results.

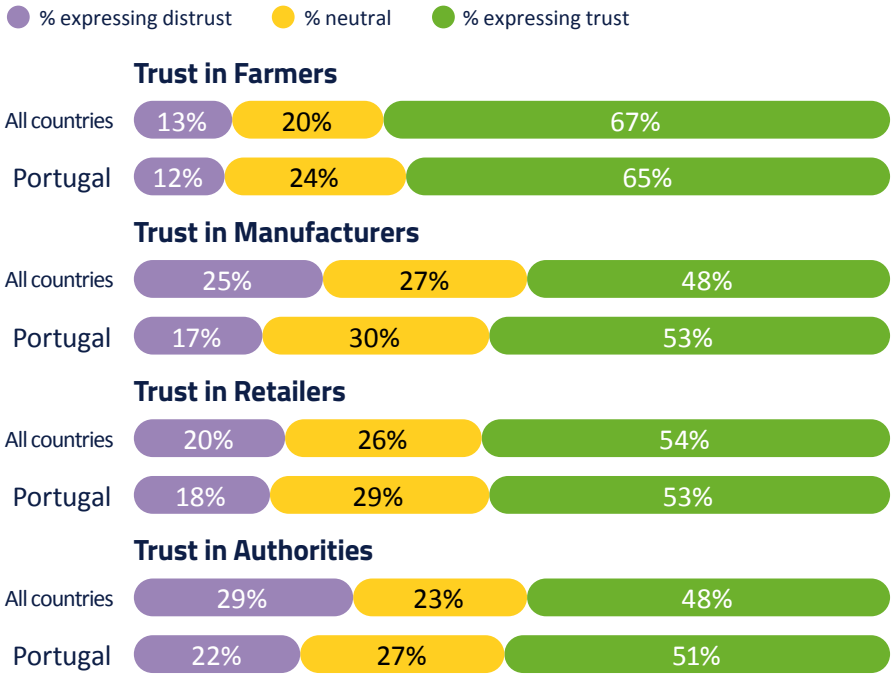
Consumer motivation and behaviour



Confidence in food products and food technology



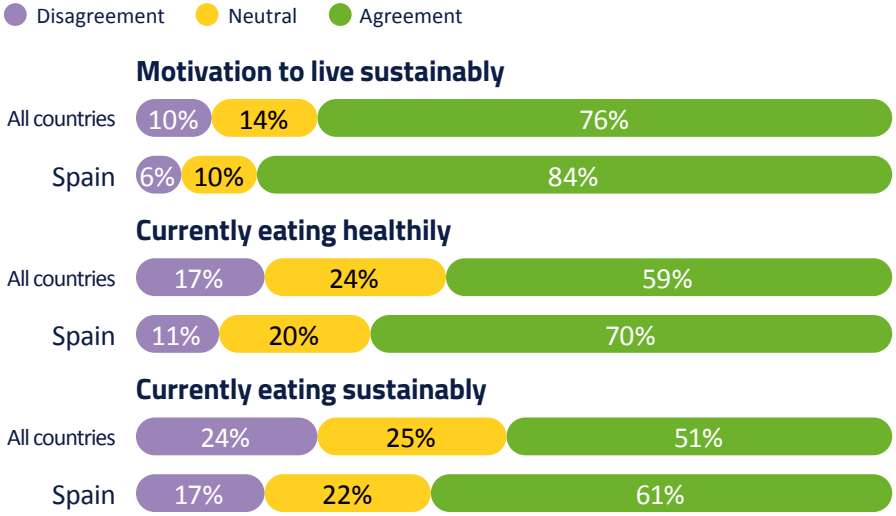
Trust in actors



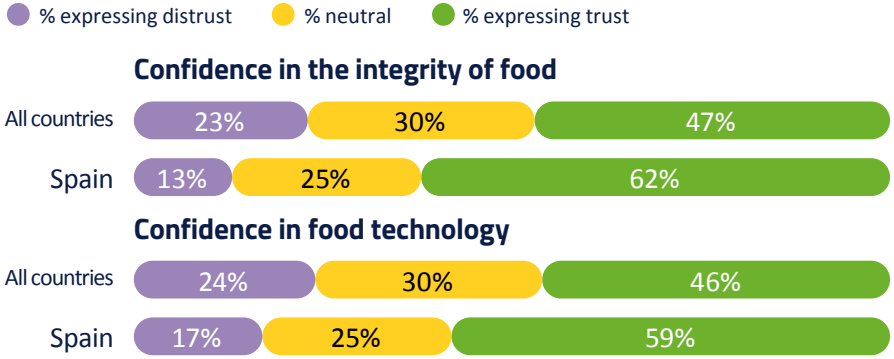
2021 Quantitative Results - Spain

- Sample size: n=1,130, total n=20,326
- Nationally representative in terms of age, gender and region
- Countries involved: Belgium, Czech Republic, Denmark, Finland, France, Germany, Greece, Ireland, Israel, Italy, The Netherlands, Poland, Portugal, Romania, Spain, Switzerland, Turkey, UK
- The graphs show the total of the 18-country sample compared to the Spanish results.

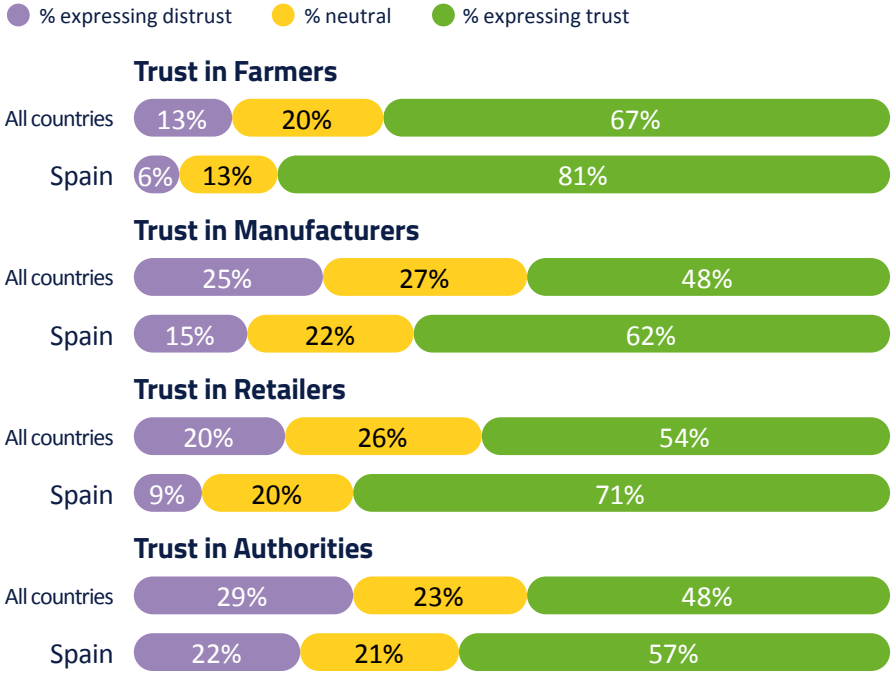
Consumer motivation and behaviour



Confidence in food products and food technology



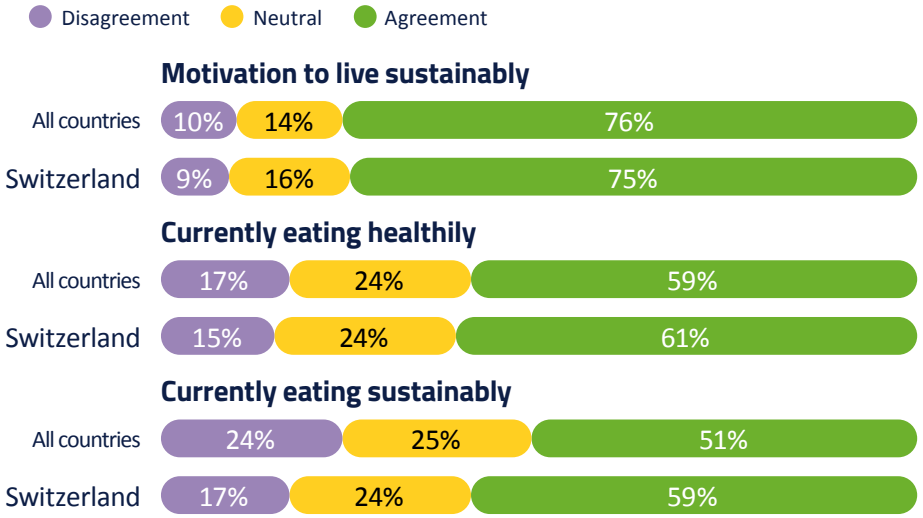
Trust in actors



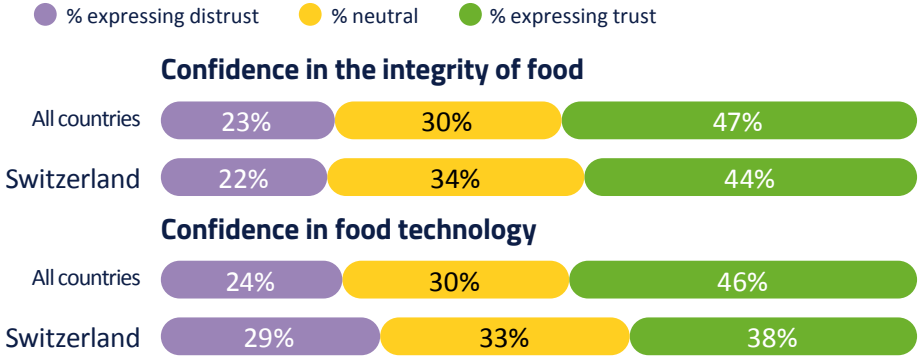
2021 Quantitative Results - Switzerland

- Sample size: n=1,130, total n=20,326
- Nationally representative in terms of age, gender and region
- Countries involved: Belgium, Czech Republic, Denmark, Finland, France, Germany, Greece, Ireland, Israel, Italy, The Netherlands, Poland, Portugal, Romania, Spain, Switzerland, Turkey, UK
- The graphs show the total of the 18-country sample compared to the Swiss results.

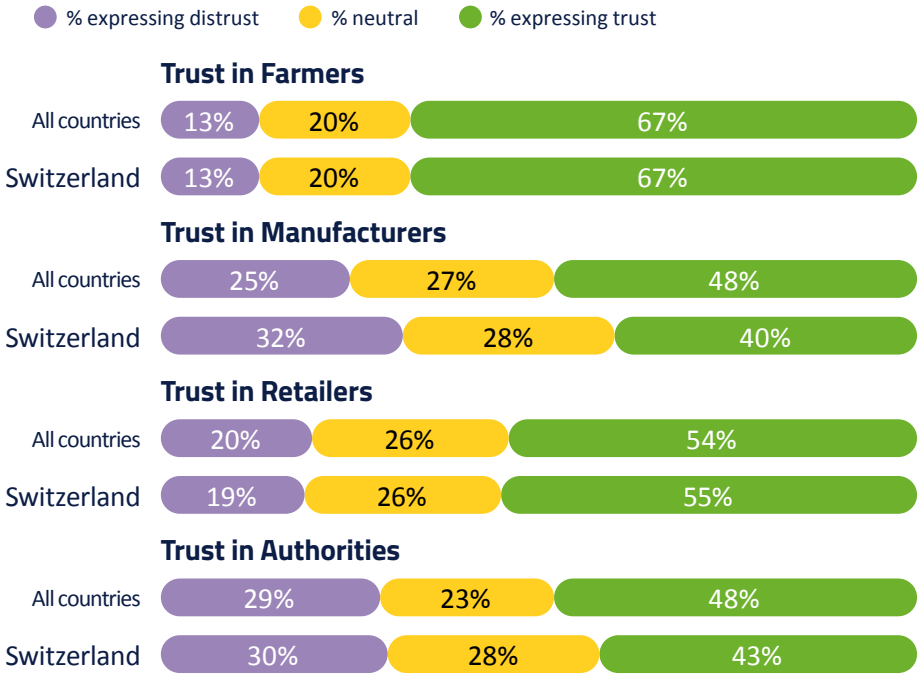
Consumer motivation and behaviour



Confidence in food products and food technology



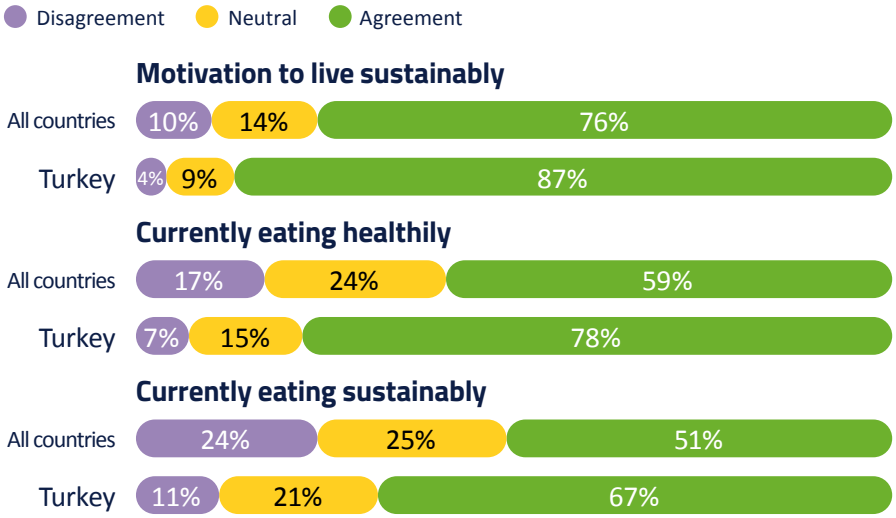
Trust in actors



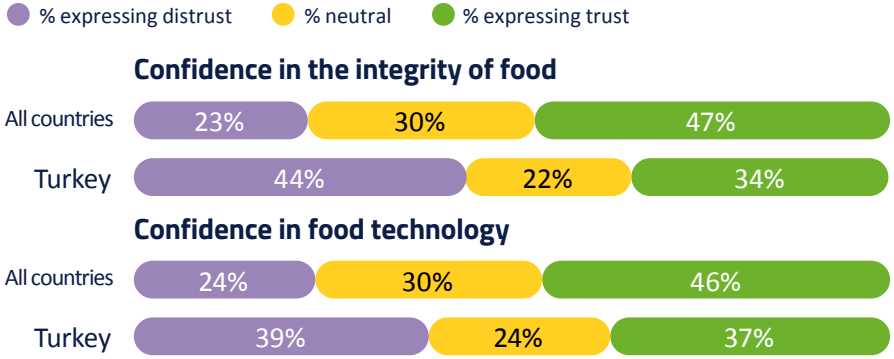
2021 Quantitative Results - Turkey

- Sample size: n=1,130, total n=20,326
- Nationally representative in terms of age, gender and region
- Countries involved: Belgium, Czech Republic, Denmark, Finland, France, Germany, Greece, Ireland, Israel, Italy, The Netherlands, Poland, Portugal, Romania, Spain, Switzerland, Turkey, UK
- The graphs show the total of the 18-country sample compared to the Turkish results.

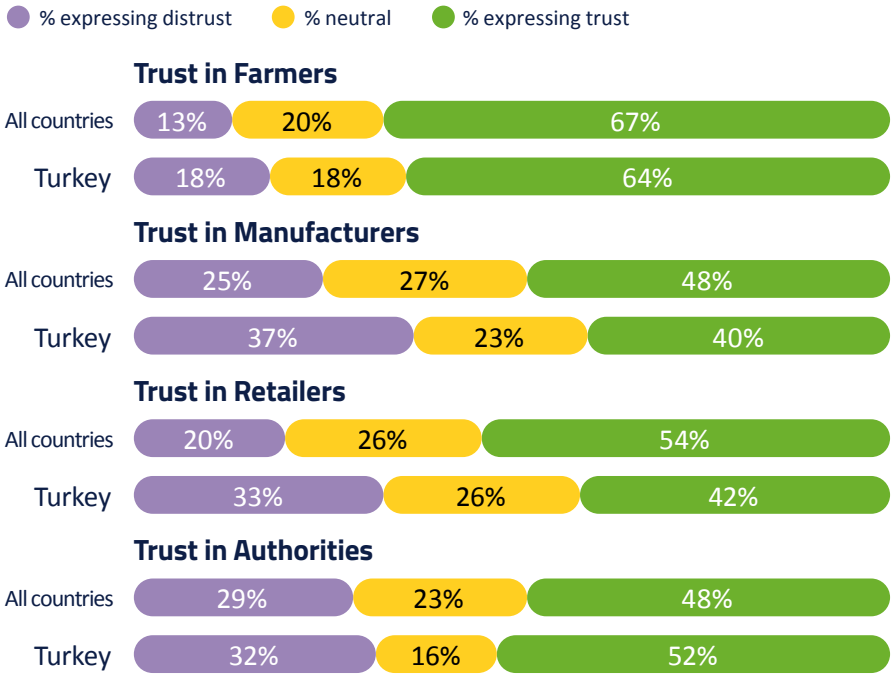
Consumer motivation and behaviour



Confidence in food products and food technology



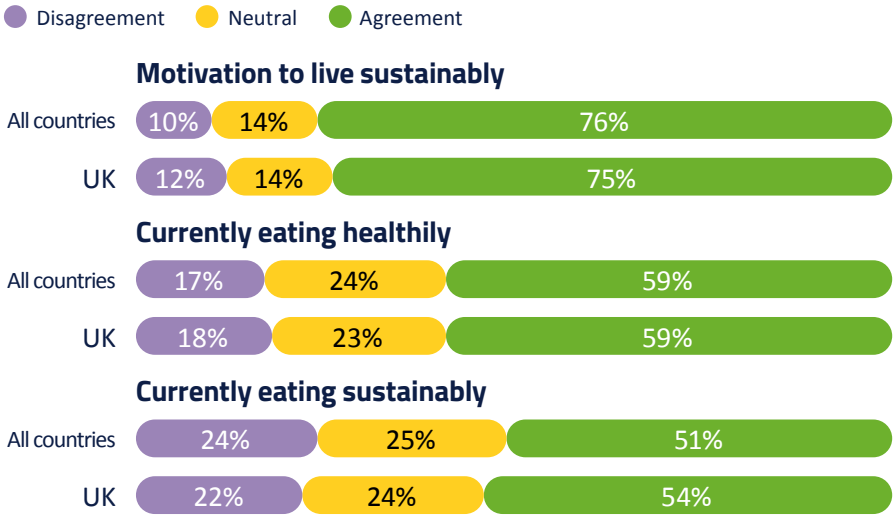
Trust in actors



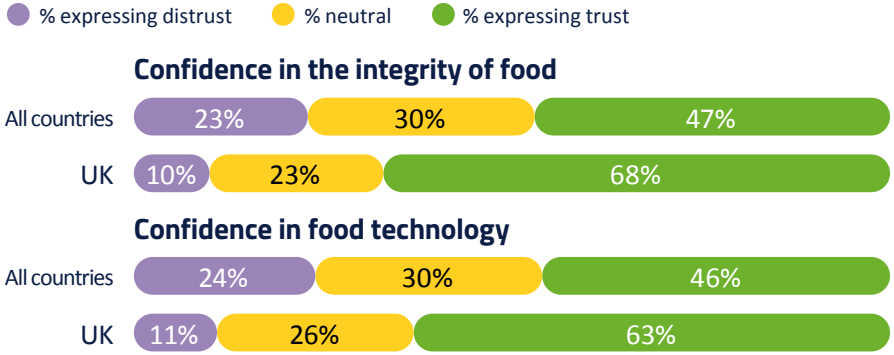
2021 Quantitative Results - UK

- Sample size: n=1,130, total n=20,326
- Nationally representative in terms of age, gender and region
- Countries involved: Belgium, Czech Republic, Denmark, Finland, France, Germany, Greece, Ireland, Israel, Italy, The Netherlands, Poland, Portugal, Romania, Spain, Switzerland, Turkey, UK
- The graphs show the total of the 18-country sample compared to the UK results.

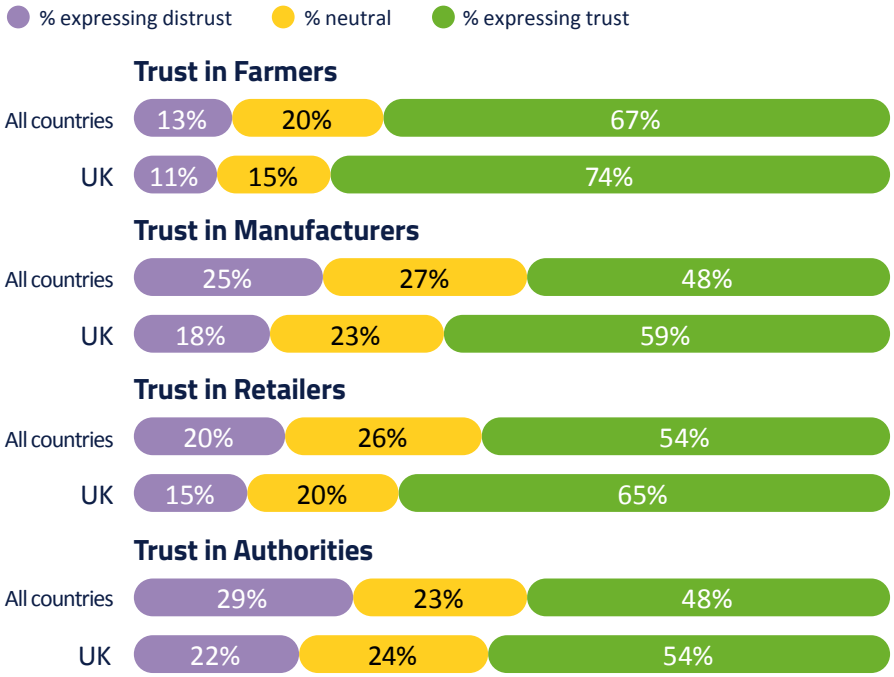
Consumer motivation and behaviour



Confidence in food products and food technology



Trust in actors



Methodology

Quantitative research

The EIT Food TrustTracker® study is an evidence-based, peer-reviewed tool for measuring consumer trust. It maps European consumers' trust in the food value chain by country and over time using validated measurement scales - including beliefs about the competency, care and openness of its actors, and confidence in the integrity of food products (authenticity, health, safety, sustainability and taste). In its first year in 2018, the TrustTracker® surveyed over 5,000 consumers online across 5 European countries. In 2019, this expanded to over 11,000 consumers across 13 European countries, and in 2020, to 19,800 consumers across 18 European countries: Belgium, the Czech Republic, Denmark, Finland, France, Germany, Greece, Ireland, Israel, Italy, the Netherlands, Poland, Portugal, Romania, Spain, Switzerland, Turkey, and the UK. The latest survey was conducted in June 2021 by means of computer-assisted web interviewing (CAWI). It included over 20,000 consumers in the same 18 countries.

As in previous years, participants were European food consumers over 18 years old that were evenly split across the 18 countries and nationally representative in terms of age, gender and region. The study was conducted by a consortium of pan-European academic partners led by the University of Reading, with the European Food Information Council (EUFIC), Aarhus University, KU Leuven, and the University of Warsaw. The survey was conducted in June 2021 by Ipsos.

Qualitative research

Qualitative online consumer research

- Target: minimum 10 participants per country
- 18 countries
- Sufficient English proficiency
- Leaders in the area of food
- Sufficiently eloquent and outspoken
- 3 rounds of 6-10 days with assignments

Desk research

- Finding best practises and strategies for building trust in markets other than the food industry
- Understanding the psychological constructs underlying trust
- Learning about current practises in food innovation and communication
- Constructing a theoretical framework

Fieldwork

- Timeline: November 2021
- Online community: Open questions in a forum setting, encouraging participants to elaborate and converse with one another, submission of images
- Quantitative tools: questionnaires and polls
- Focus groups: 5 live sessions, 38 participants in total

Overview of respondents

Qualitative research

COUNTRY	NO. ACTIVE PARTICIPANTS
BELGIUM	14
CZECH REPUBLIC	12
DENMARK	10
FINLAND	14
FRANCE	11
GERMANY	12
GREECE	10
IRELAND	17
ISRAEL	13
ITALY	15
NETHERLANDS	13
POLAND	16
ROMANIA	10
PORTUGAL	11
SPAIN	13
SWITZERLAND	11
TURKEY	13
UNITED KINGDOM	17
TOTAL	232

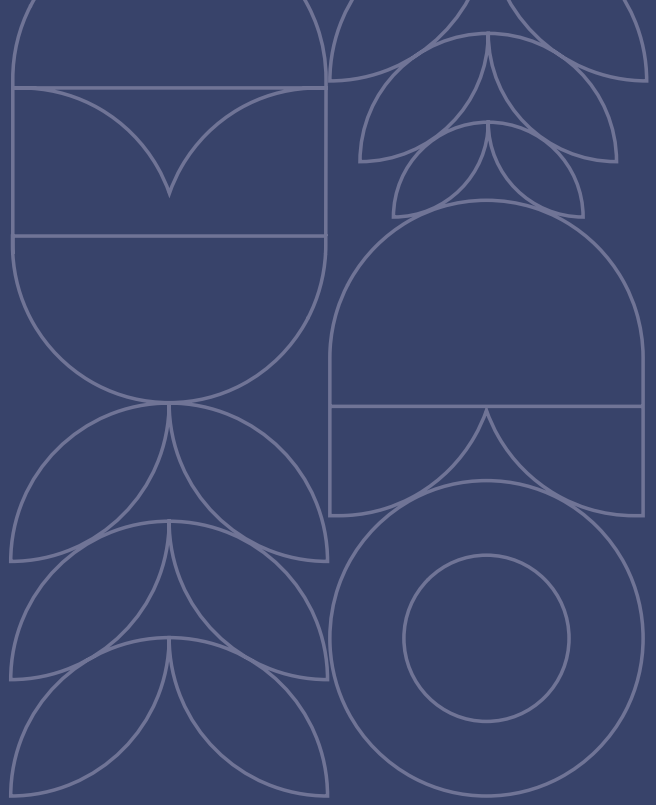
About EIT Food

EIT Food is the world's largest and most dynamic food innovation community. We accelerate innovation to build a future-fit food system that produces healthy and sustainable food for all.

Supported by the EU, we invest in projects, organisations and individuals that share our goals for a healthy and sustainable food system. We unlock innovation potential in businesses and universities, and create and scale agrifood startups to bring new technologies and products to market. We equip entrepreneurs and professionals with the skills needed to transform the food system and put consumers at the heart of our work, helping build trust by reconnecting them to the origins of their food.

We are one of eight innovation communities established by the European Institute for Innovation & Technology (EIT), an independent EU body set up in 2008 to drive innovation and entrepreneurship across Europe.

Find out more at www.eitfood.eu or follow us via social media: Twitter, Facebook, LinkedIn, YouTube and Instagram.




eit
Food

Co-funded by the
European Union