



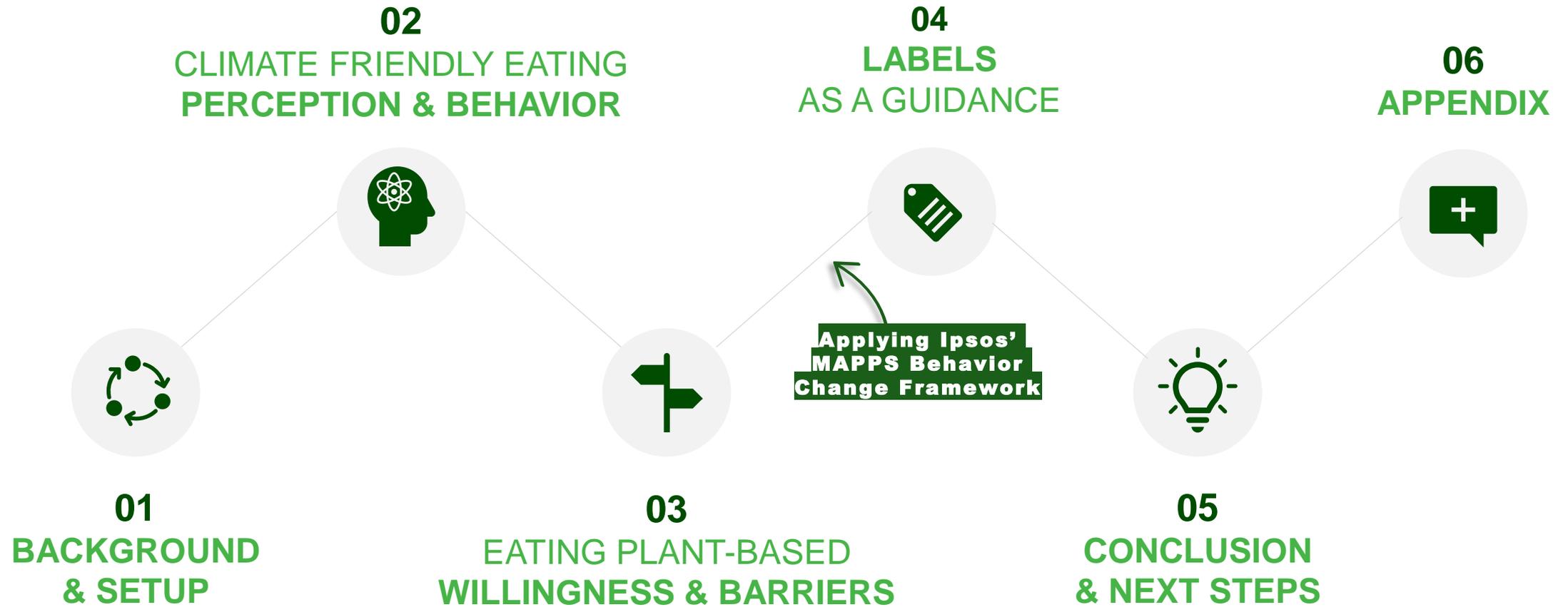
# THE TRUTH ABOUT CLIMATE FRIENDLY EATING



Revealing the Danish eating habits & perceptions  
on climate friendly foods

November 2022

# CONTENT



# BACKGROUND & SETUP

# 1

# BACKGROUND & SETUP | What is this study about?

The focus on climate change and sustainability is not to be avoided. In the past two years, **“Climate change | Environment”** have been rated as a Top 3 factor of worries in Ipsos’ What Worries Denmark study, and politicians, companies, NGOs, etc. are all searching for the solutions that can solve this crisis.

72% agree that if ordinary people do not act now to combat climate change, they will be failing future generations. But how can ‘ordinary people’ influence the climate change process and obtain a more sustainable lifestyle? Ipsos’ Perils of Perception research points towards people in general having a very weak understanding of the impact on climate of different everyday actions.

One way of contributing to the green agenda is by eating more climate friendly, but **do people actually know what foods are better for the environment?** and **what does it take to enhance willingness of people to buy/ choose/ eat more climate friendly foods?**

*Sources: “What Worries the World”, “Perils of Perception” and “Earth Day 2021” (Ipsos Publications)*

## Business Objectives

How can we influence consumers to choose more climate friendly food?

Eventually, we wish to provide insights on consumer behavior for companies to utilize, in order to enhance more climate friendly eating.

## Research Objectives

Explore consumer understanding of climate friendly food

What are the drivers and barriers for eating more climate friendly?

Are consumers willing to change eating habits by swapping current food to more climate friendly food?

# BACKGROUND & SETUP | What did we do?

## Curation

To uncover already existing knowledge on climate friendly food and eating behavior

Based on Ipsos publications, external webpages, etc.

## Quantitative survey

500 respondents  
Males and females between 18-65 years responsible for at least some of the household shopping

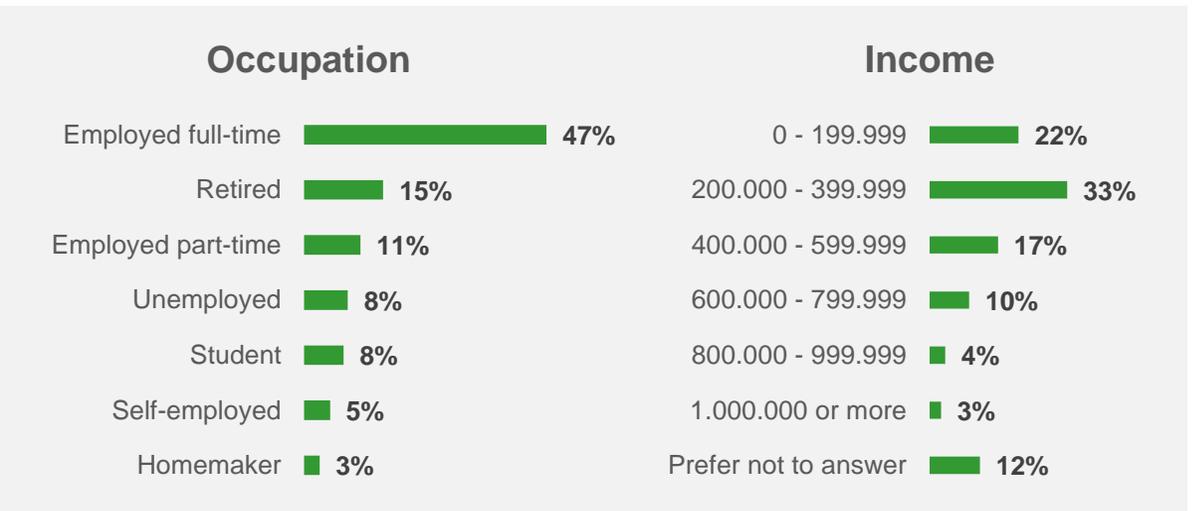
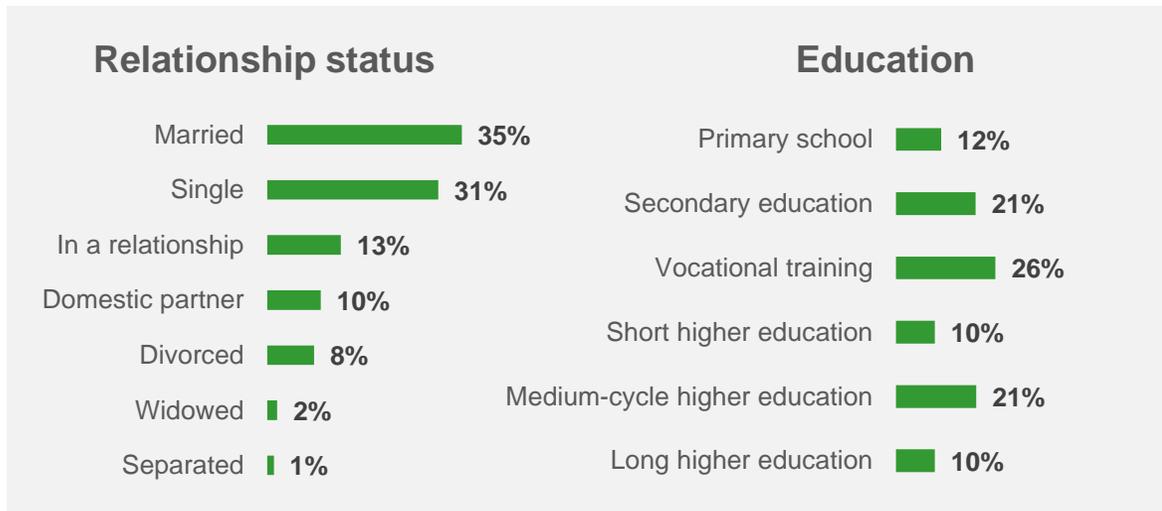
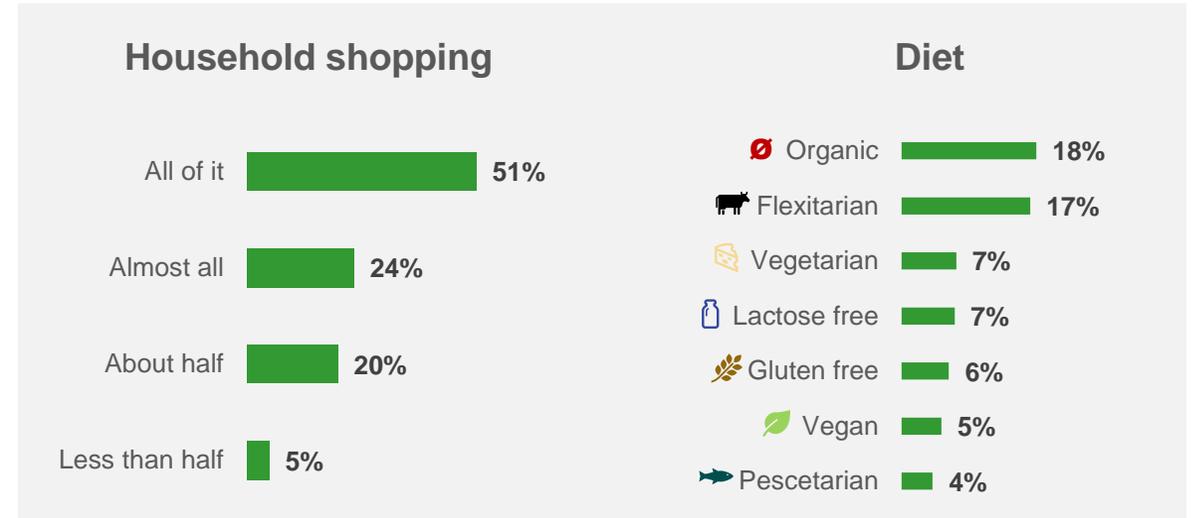
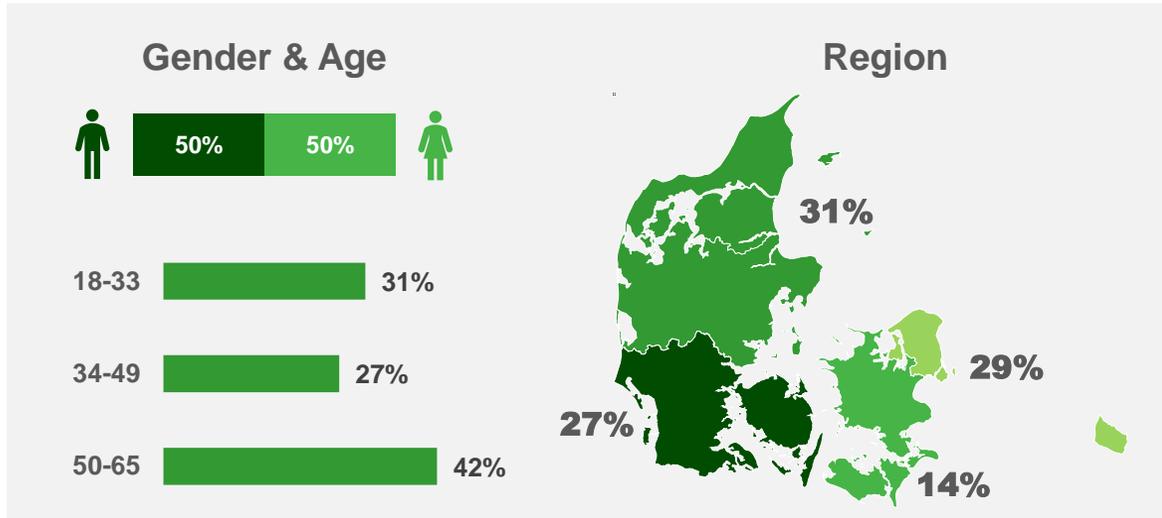
## Qualitative interviews

11 vox-pop semi-structured interviews with grocery shoppers in Copenhagen

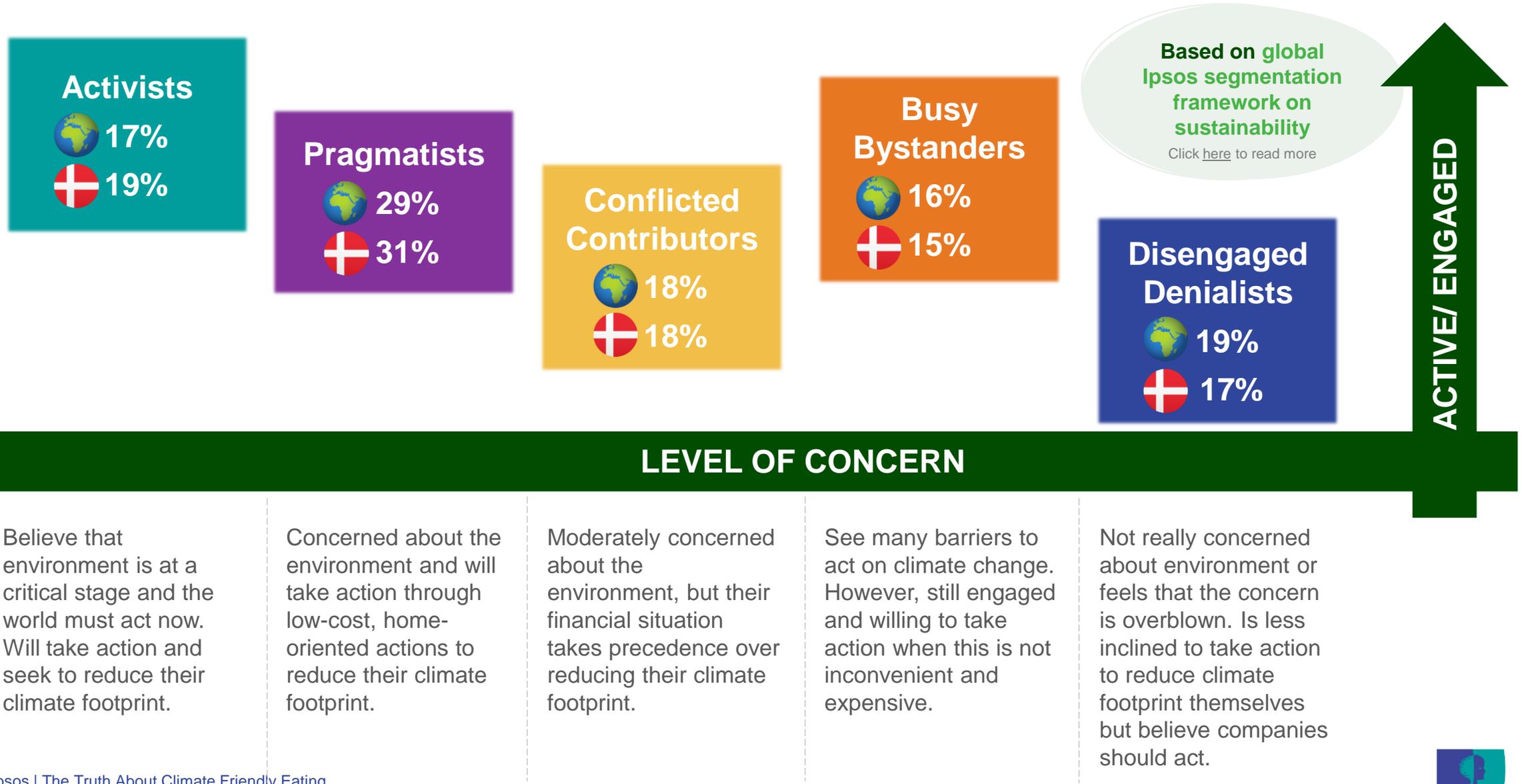
## Data collection

June 2022 on  
[Ipsos Digital - FastFacts](#)

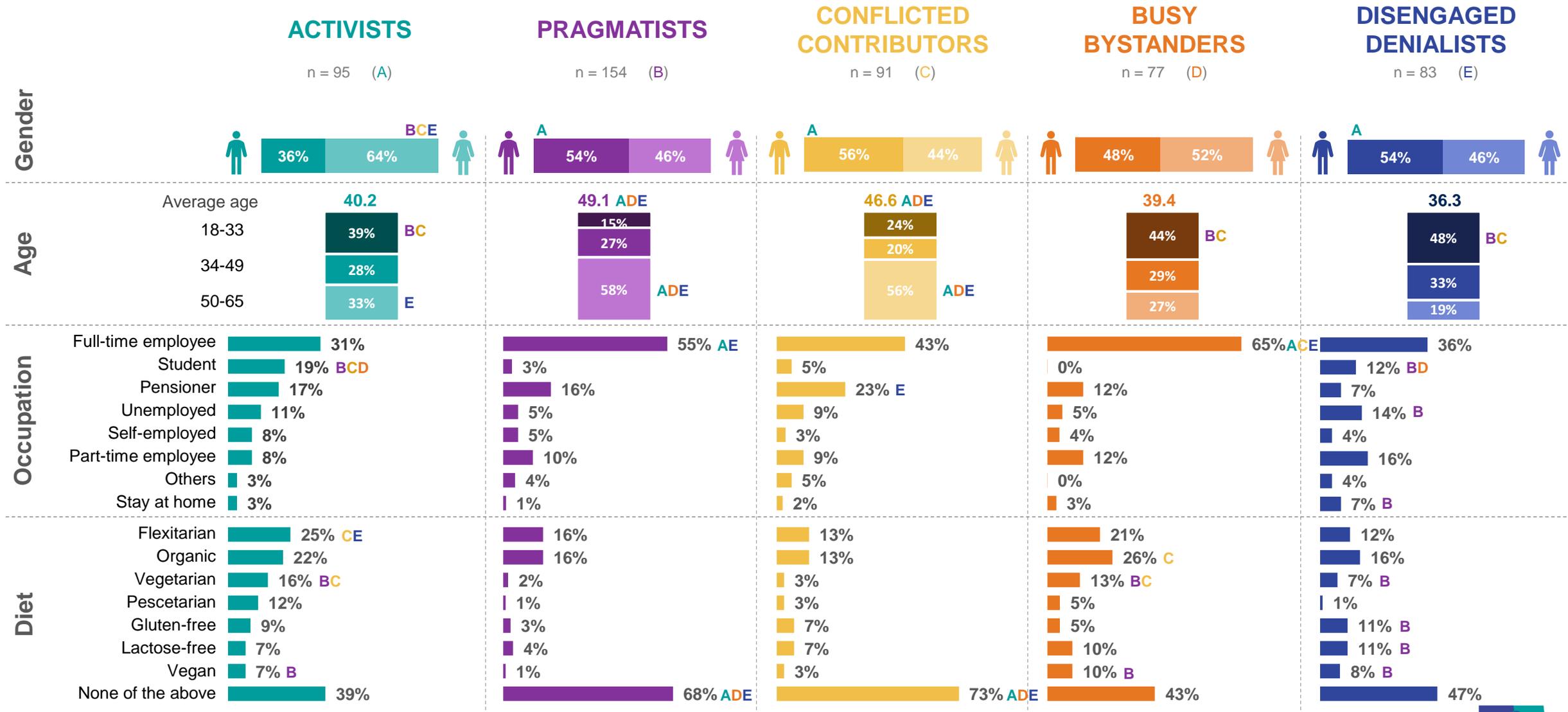
# SAMPLE OVERVIEW | Who did we talk to?



# SUSTAINABILITY SEGMENTS | Sample distribution across segments



# SUSTAINABILITY SEGMENTS | Demographic profile across segments



# PERCEPTION & BEHAVIOR

Exploring consumers' understanding of eating climate friendly as well as their current and future behavior.

# 2

We started by asking consumers about their **spontaneous associations with eating climate friendly...**



Q: What do you associate with eating climate friendly? We want to hear it all. What comes to mind?

Note: Open ends are not coded – please use it as qualitative insights



Unprompted, consumers mainly associate eating climate friendly with **reducing meat consumption, choosing local produced foods, and eating plant-based.**

**19%** *Eating less / no meat*

**13%** *Choosing local produced foods*

**12%** *Eating plant-based / more vegetables*

**8%** *Buying organic products*

**6%** *Avoiding food waste*

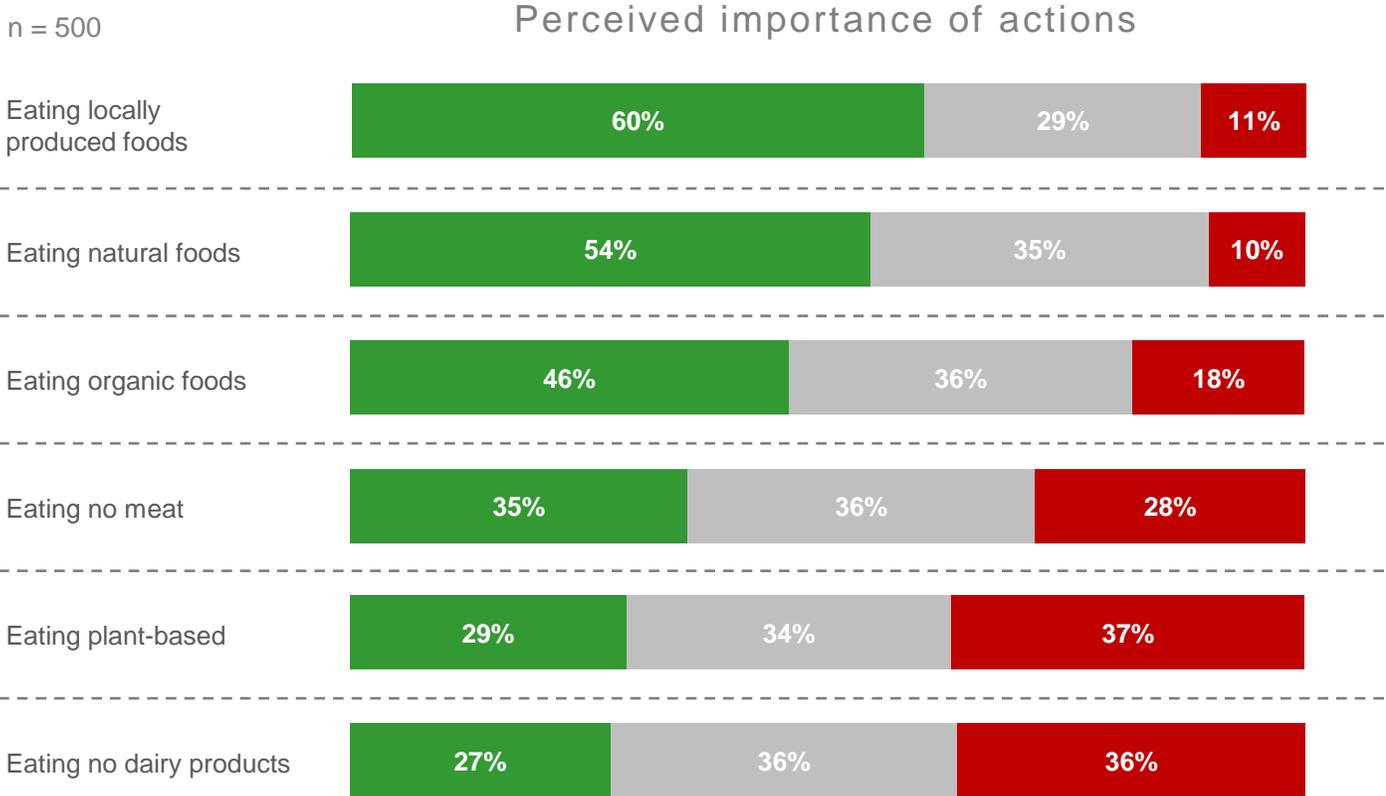


**We are primarily looking for organic foods – that has something do to with climate, right?**  
– Danish shopper

Q: What do you associate with eating climate friendly? We want to hear it all. What comes to mind?

Note: Open ends are not coded – please use it as qualitative insights

When prompted, the **perceived importance of eating local, organic, and natural foods in order to eat climate friendly stands out**. It even shows to be perceived as more important than cutting meat, dairy, or eating plant-based.



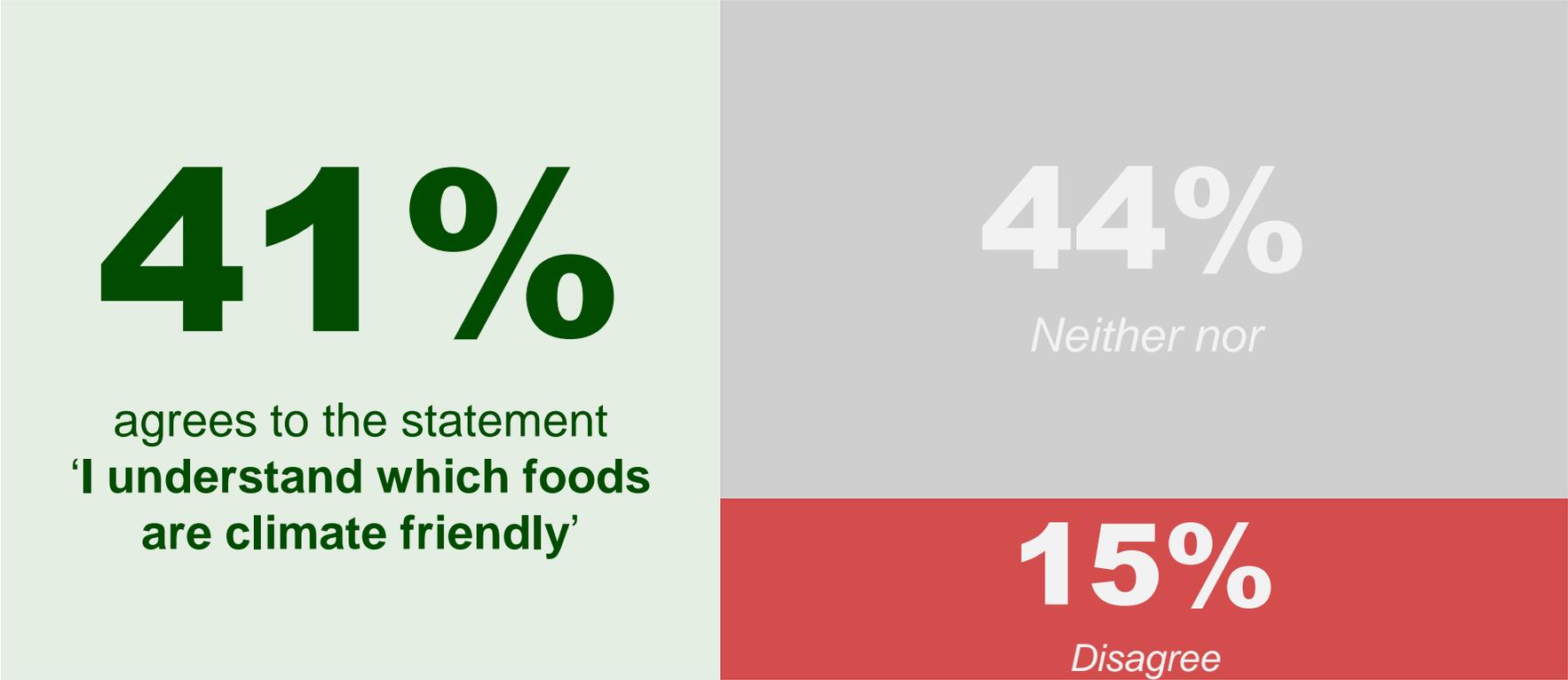
**60%**  
thinks eating locally produced foods is important in order to eat climate friendly

Click [here](#) to see breakdown per segment

Q: To which degree do you think the following are important in order to eat climate friendly?



Many consumers are quite confident that they understand which foods are climate friendly, and only 15% disagree to having an understanding of this.



Q: To what extent do you agree or disagree with the following statement? 'I understand which foods are climate friendly'

# But do they actually know?

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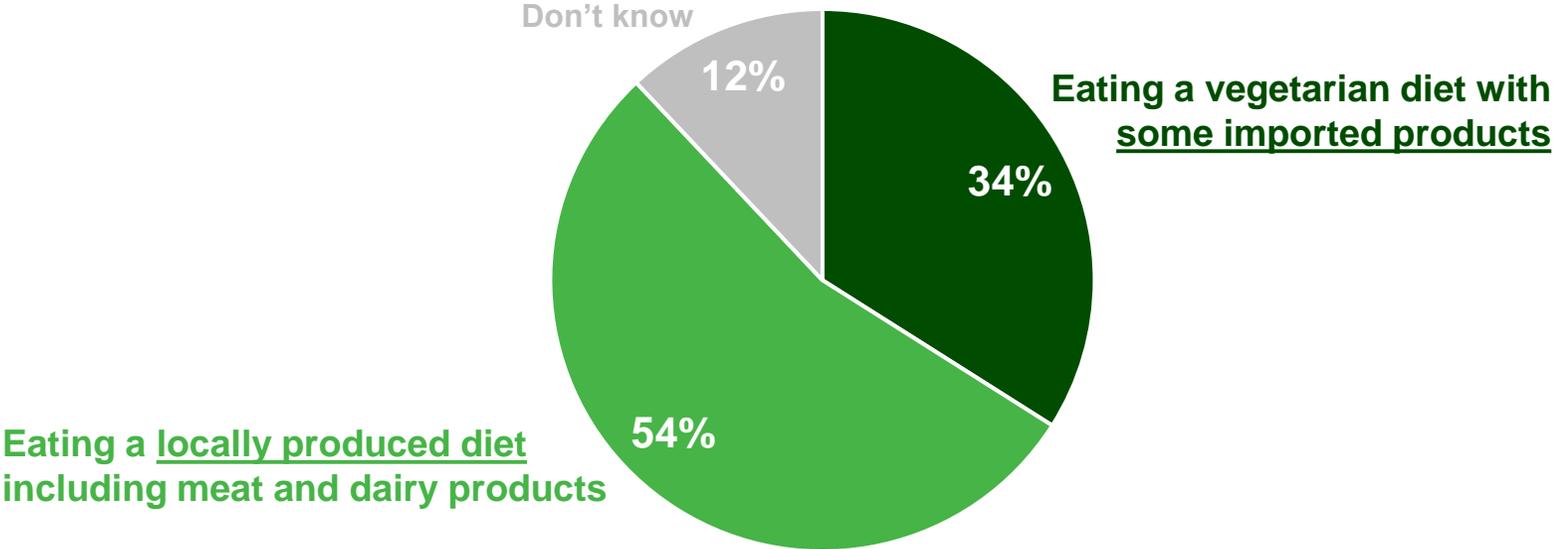
We tested this by taking our respondents through a few tests:

1. Choosing the most climate friendly option between two general types of diets.
2. Choosing the three most climate friendly foods within different categories.



# Eating a locally produced diet including meat and dairy is incorrectly perceived as the option with the lowest green house gas emission: Going plant-based actually makes more of a difference to your carbon footprint than eating local

n = 500



**“Are organic foods necessarily climate friendly? I’m not entirely sure because foods that are organic can easily be imported from far away and then I would assume it is not that climate friendly anymore?”**  
– Danish shopper

### Differences across segments?

A majority of **Activists (52%)** choose the incorrect option, but it is still the segment with the highest % of correct answers (**41%**)

The segment with the highest % of incorrect answers is the **Busy Bystanders (64%)**

Q: Which of these two actions do you think would reduce green house gas emission the most?

Click [here](#) to see full breakdown per segment



# Consumers have a decent recognition of which foods have the lowest impact on the greenhouse gas emissions. However, some foods are still mistakenly perceived “better” or “worse” than they really are

n = 500

Higher climate impact ↓

	Correct ranking	Consumer ranking		Correct ranking	Consumer ranking		Correct ranking	Consumer ranking		Correct ranking	Consumer ranking
Mussel, raw	1	2	Carrot, raw	1	1	Rye-bread	1	5	Tap water	1	1
Vegan bacon	2	4	Spinach, raw	2	3	Eggs	2	2	Energy drink	2	10
Vegan minced	3	1	Pineapple, raw	3	10	Kidney beans	3	1	Beer lager 4,4%	3	8
Chicken	4	3	Tomato, raw	4	5	Skyr 0,2%	4	7	Milk 1,5% fat	4	4
Pork tenderloin	5	8	Broccoli, raw	5	4	Rice, parboiled, raw	5	4	Apple juice	5	2
Tuna in water, can	6	6	Banana, raw	6	8	Pasta, raw	6	6	Red wine	6	5
Fish fillet,	7	7	Green beans, raw	7	2	Quinoa, black, raw	7	3	Vodka	7	6
Salmon, raw	8	5	Avocado, raw	8	9	Granola bar	8	9	Almond milk	8	3
Kebab	9	9	Garlic, raw	9	6	Butter	9	8	Cocoa powder	9	9
T-bone steak	10	10	Blueberries, raw	10	7	Mozzarella	10	10	Instant coffee	10	6

Differences between correct ranking and consumer ranking is highlighted if difference is +/- 3 in ranking

Q: From this list of foods, which three foods do you think would have the least impact on the greenhouse gas emissions? For comparison reasons, please think of the same amount of each food.

The results point to the existence of consumers perceiving more natural and healthy foods to also be more climate friendly. For instance, **beans, quinoa, and almond milk** are perceived to be a lot “**better**” than reality, whereas **beer and energy drink** are perceived “**worse**”

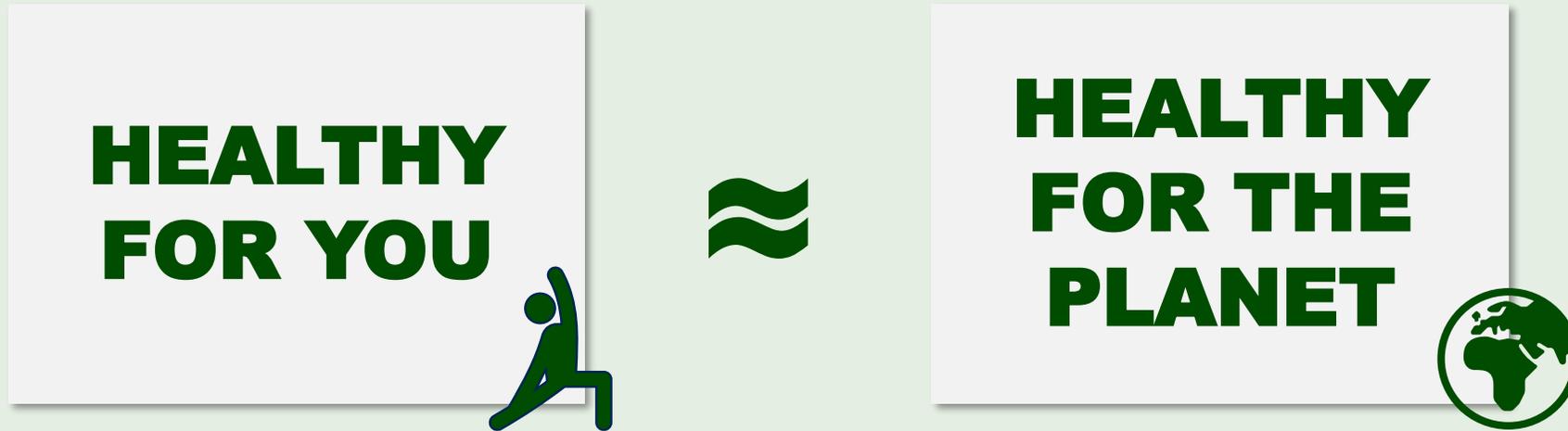
n = 500

Higher climate impact ↓

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Vegan minced	3	1	Pineapple, raw	3	10	<b>Kidney beans</b>	3	1	<b>Beer lager 4,4%</b>	3	8
Chicken	4	3	Tomato, raw	4	5	Skyr 0,2%	4	7	Milk 1,5% fat	4	4
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Fish fillet,	7	7	<b>Green beans, raw</b>	7	2	<b>Quinoa, black, raw</b>	7	3	Vodka	7	6
Salmon, raw	8	5	Avocado, raw	8	9	Granola bar	8	9	<b>Almond milk</b>	8	3
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Q: From this list of foods, which three foods do you think would have the least impact on the greenhouse gas emissions? For comparison reasons, please think of the same amount of each food.

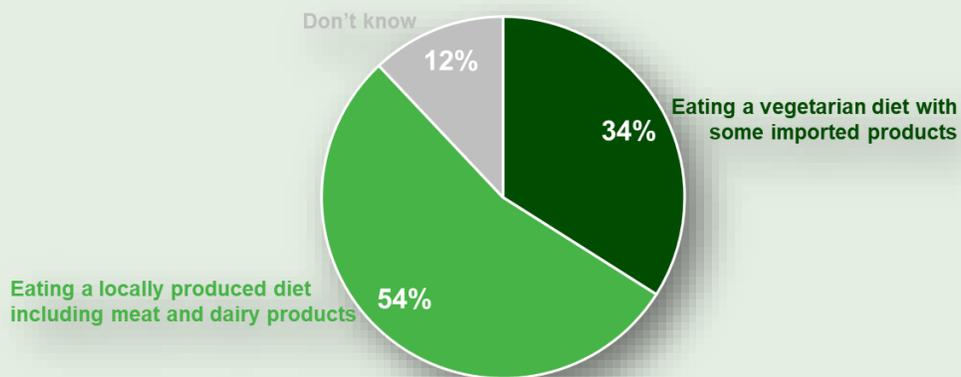
This points us towards the following **hypothesis on consumer perceptions** of eating climate friendly....



**HOWEVER**, this perception is a bit mistaken and is not a good guidance for consumers to eat more climate friendly

## So, what do we know now?

Consumers believe they have a **good understanding of climate friendly foods...**



...but put to the test, **the majority actually has a somewhat incorrect perception**

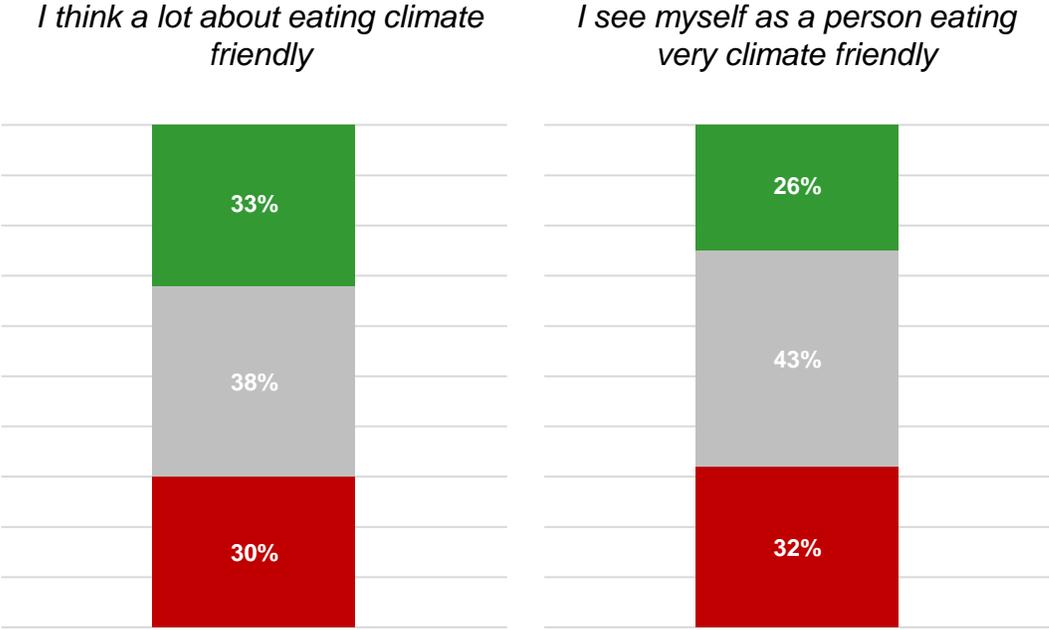
So those are the perceptions, **let's talk about actions**

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**1 out of 3 think a lot about eating climate friendly but only 1/4 see themselves as eating very climate friendly.** Comparing the segments, significantly more **Activists** think about eating climate friendly and perceives themselves as eating more climate friendly as well.

n = 500



**Differences across segments?**

**Activists (51%)** think significantly more about eating climate friendly than other segments.

A significantly higher number of **Activists (46%)** see themselves as a person eating very climate friendly.

Click [here](#) to see full breakdown per segment

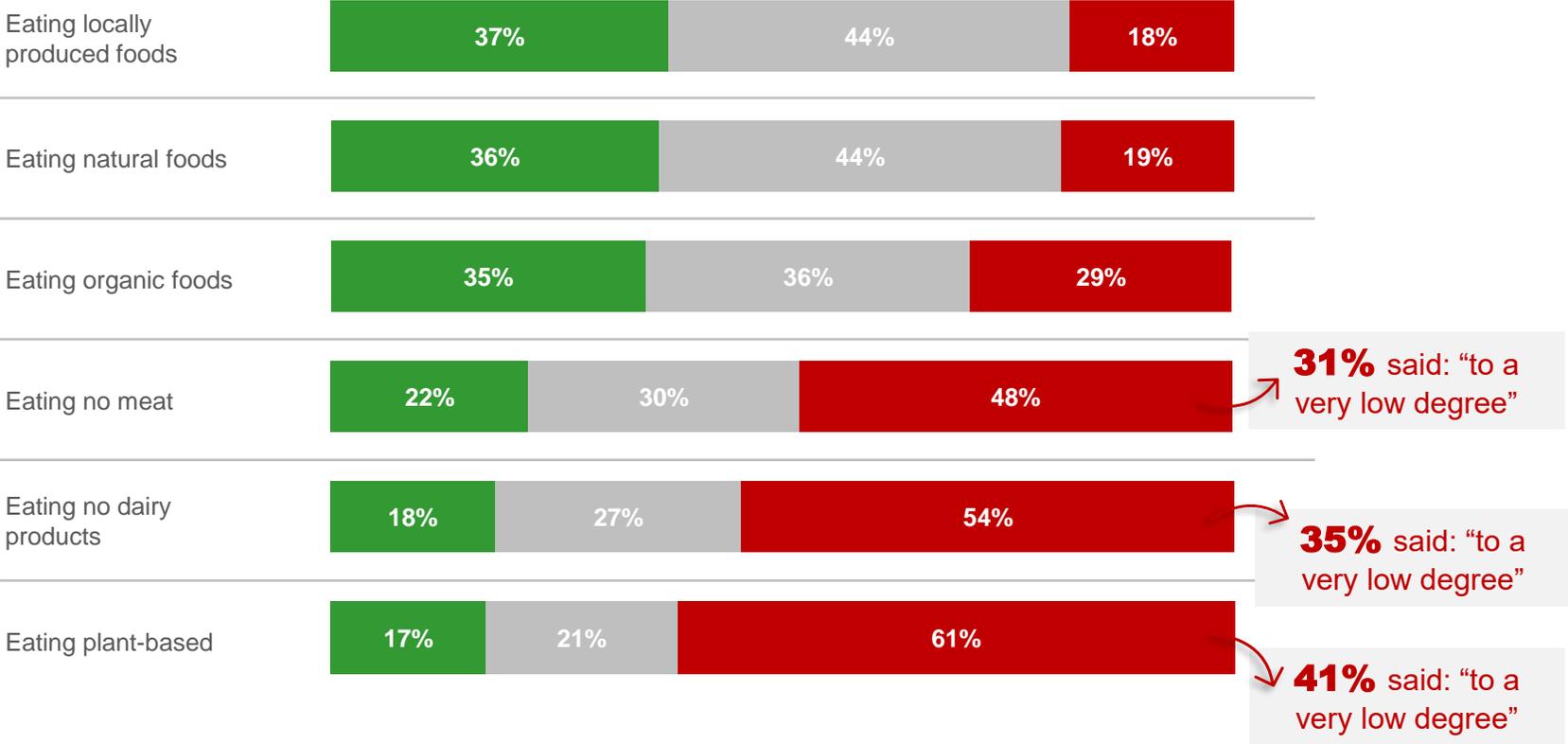
Q: To what extend do you agree or disagree with the following: 1) I think a lot about eating climate friendly, 2) I consider myself to be eating very climate friendly, 3) I would like to eat more climate friendly



Deep diving into current actions, **the main actions of eating climate friendly is eating local, organic and natural foods**, but this is not necessarily the best for the environment. The actions with the largest positive impact on CO2 emissions (e.g., cutting meats) are amongst the least adapted into consumers' diet behavior.

n = 500

Current actions



**Differences across segments?**

31% of the **Activists** are eating plant-based in order to eat more climate friendly.

Whereas this only applies to **4% of the Conflicted Contributors.**

Click [here](#) to see full breakdown per segment

Q: To which degree are you currently doing the following in order to eat climate friendly?

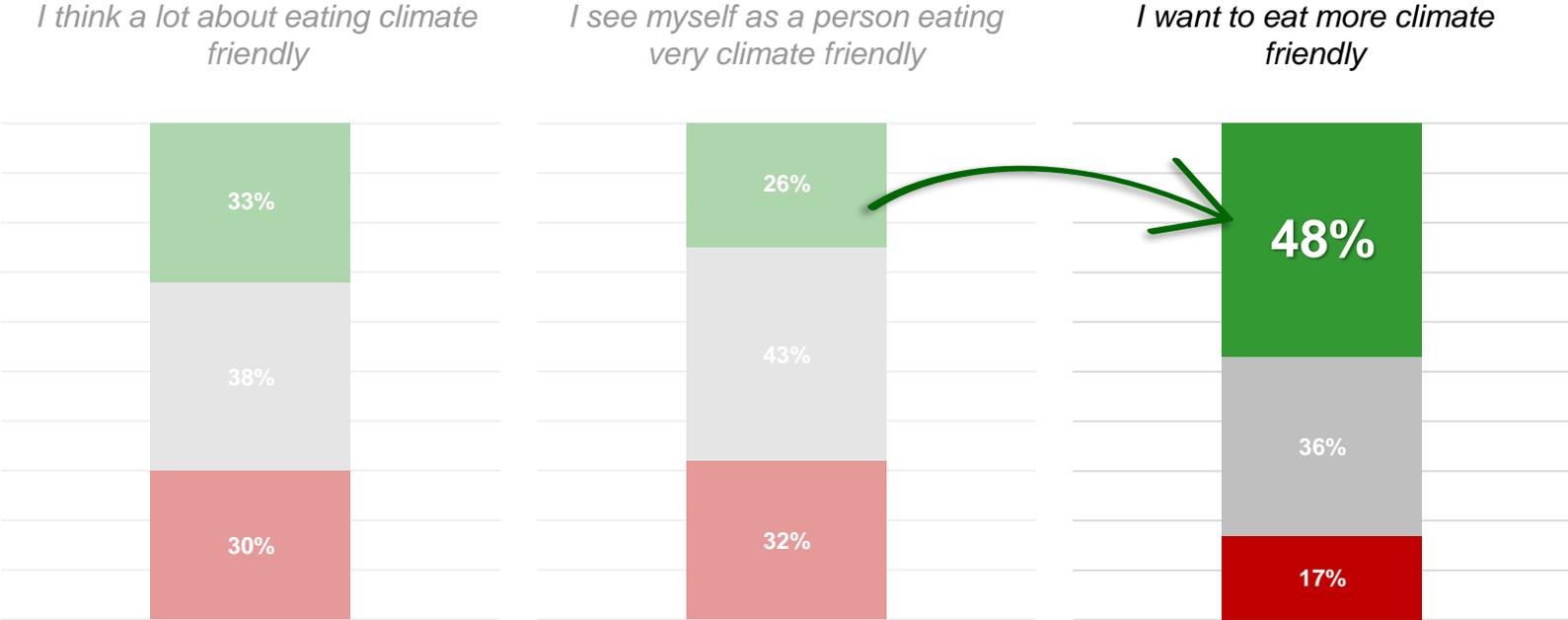


Eating climate friendly  
is not common behavior,  
**is there any hope  
for the future?**

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# YES! Significantly more consumers have intentions to eat more climate friendly going forward

n = 500



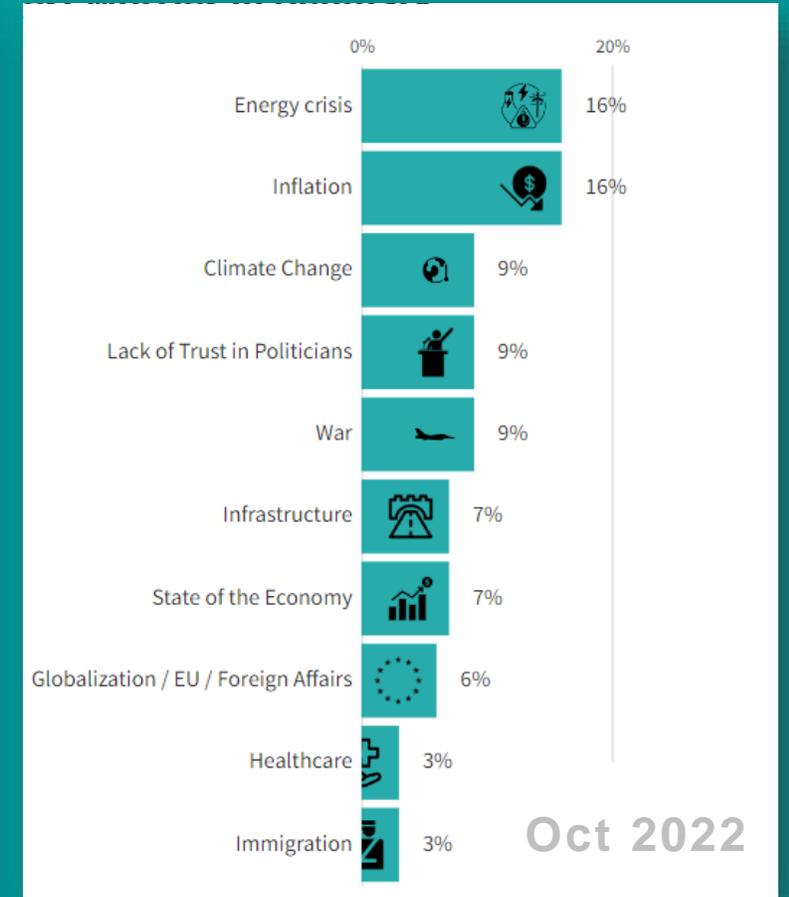
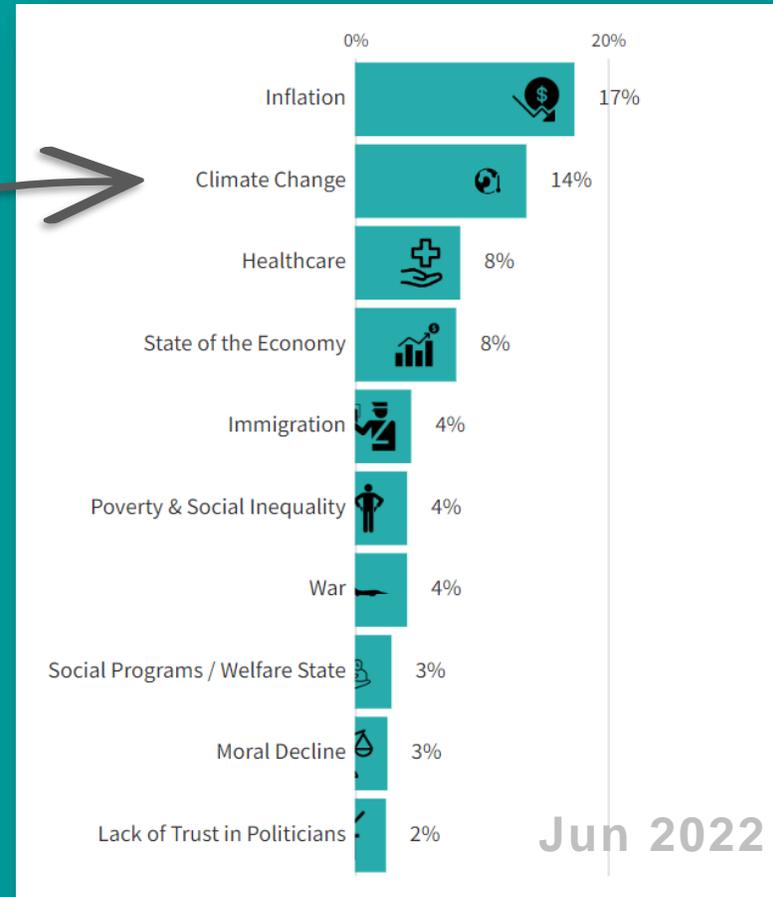
Q: To what extent do you agree or disagree with the following: 1) I think a lot about eating climate friendly, 2) I consider myself to be eating very climate friendly, 3) I would like to eat more climate friendly



... and **climate change** is one of the biggest worries in Denmark



# Biggest Worries in Denmark



Ipsos, What Worries Denmark study (August 2022)  
<https://www.ipsos.com/da-dk/what-worries-denmark-oktober-2022>

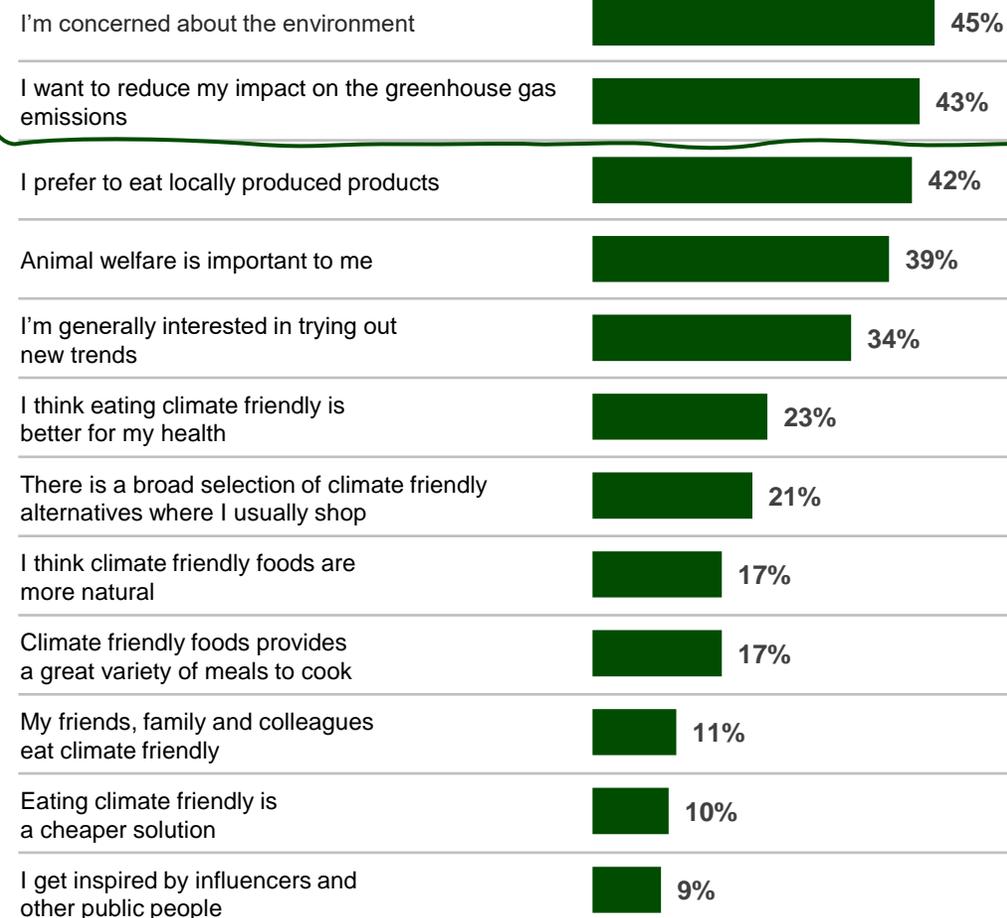


Looking at the underlying motivations, **almost half of the consumers eat climate friendly because they are concerned about the environment and want to reduce their CO2 footprint.**

However, **a lot of consumers choose to eat climate friendly because they prefer to eat locally produced products.**

n = 500

## Motivations to eat climate friendly



Q: Here is a list of statements which could apply or not for choosing to eat climate friendly. Please select all statements that applies.

# Being concerned about the environment and wanting to reduce their footprint are **the strongest motivations for Activists** (typically younger in age), while it is much less of a motivation for **Disengaged Denialists**

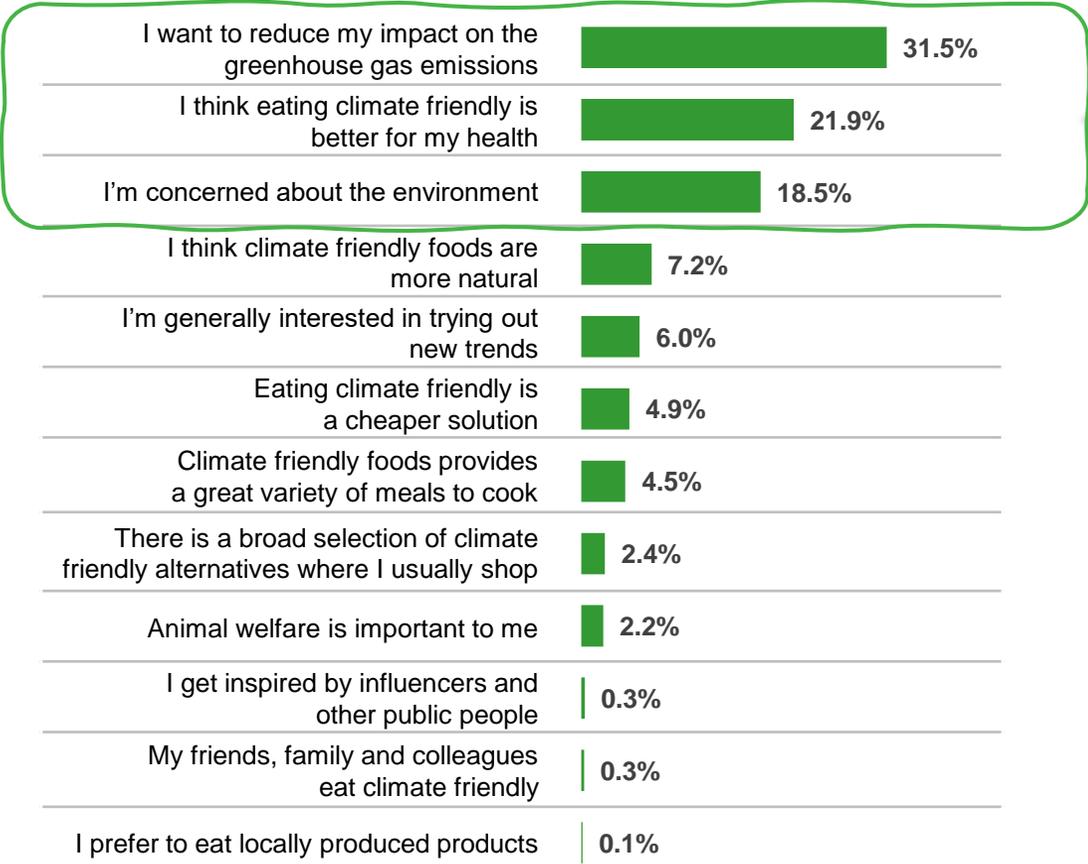
Motivations	TOTAL	ACTIVISTS	PRAGMATISTS	CONFLICTED CONTRIBUTORS	BUSY BYSTANDERS	DISENGAGED DENIALISTS
	n = 500	n = 95 (A)	n = 154 (B)	n = 91 (C)	n = 77 (D)	n = 83 (E)
I'm concerned about the environment	45%	71% B C D E	56% D E	43% E	30% E	14%
I want to reduce my impact on the greenhouse gas emissions	43%	67% B C D E	53% C D E	36% E	27%	20%
I prefer to eat locally produced products	42%	48% E	50% E	42% E	39% E	20%
Animal welfare is important to me	39%	57% B C D E	42% E	35%	31%	27%
I'm generally interested in trying out new trends	34%	45% C D E	40% C E	25%	29%	23%
I think eating climate friendly is better for my health	23%	38% B C E	26% C E	9%	29% C E	10%
There is a broad selection of climate friendly alternatives where I usually shop	21%	31% B C	17%	15%	21%	24%
I think climate friendly foods are more natural	17%	28% B C E	16%	14%	21% E	8%
Climate friendly foods provides a great variety of meals to cook	17%	33% B C D E	16%	9%	18%	12%
My friends, family and colleagues eat climate friendly	11%	16% C	8%	7%	14%	12%
Eating climate friendly is a cheaper solution	10%	13%	8%	7%	17% C	7%
I get inspired by influencers and other public people	9%	17% B C E	7%	4%	9%	6%

Q: Here is a list of statements which could apply or not for choosing to eat climate friendly. Please select all statements that applies.

**BUT!** What is driving consumers to eat more climate friendly is that they want to reduce their impact on the greenhouse gas emission as they are concerned about the environment, but also because they think it is better for their health

**Driver Analysis** on willingness to eat more climate friendly

n = 500



**72% of the willingness to eat more climate friendly is driven by the top 3 reasons**



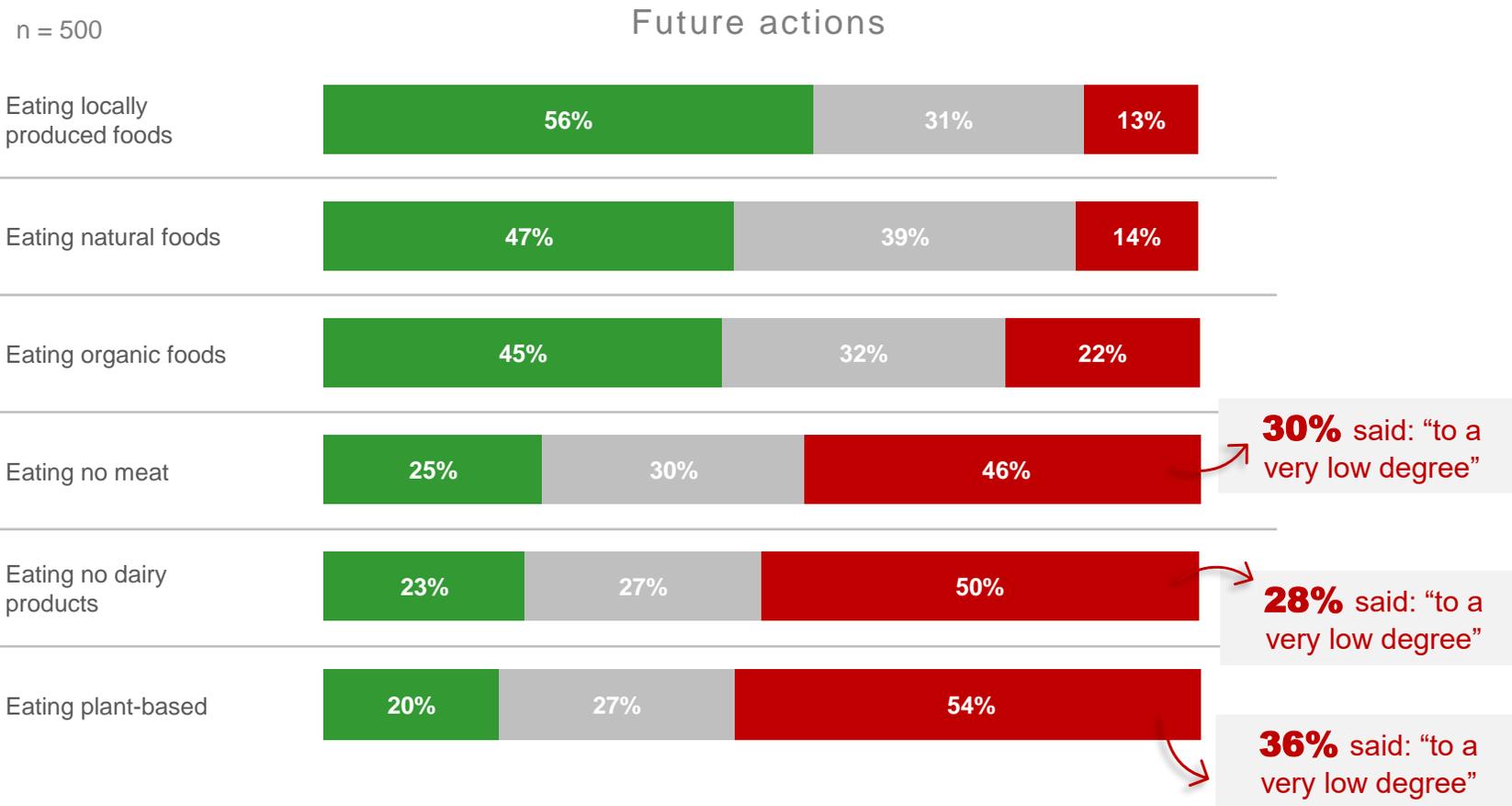
**What is a Driver Analysis?**  
 ...a statistical analysis to identify the ranking of drivers of action and to quantify their relative importance on a desired outcome.

Results are based on a driver analysis with 'I would like to eat more climate friendly' as dependent variable AND 'Here is a list of statements which could apply or not for choosing to eat climate friendly' as independent variable.



# Deep diving into different actions, the main tendencies of future climate friendly eating habits still evolve around local, organic, and natural foods.

Skipping meat is known (also by consumers) to be one of the most impactful actions for climate in terms of eating habits but for most consumers this is not a part of their future diet plans.



## Differences across segments?

More than ¼ of **Disengaged Denialist (26%)** are not willing to eat local produced foods in the future.

The **Conflicted Contributors** are least willing to change their eating habits:  
 eating no meat **11%**  
 eating no dairy **8%**  
 going plant-based **5%**

And the **Activists** as most willing:  
 eating no meat **46%**  
 eating no dairy **36%**  
 going plant-based **41%**

Click [here](#) to see full breakdown per segment

Q: To which degree would you be willing to do the following in order to eat more climate friendly?



**This might explain the lower willingness to cut meat and dairy products**

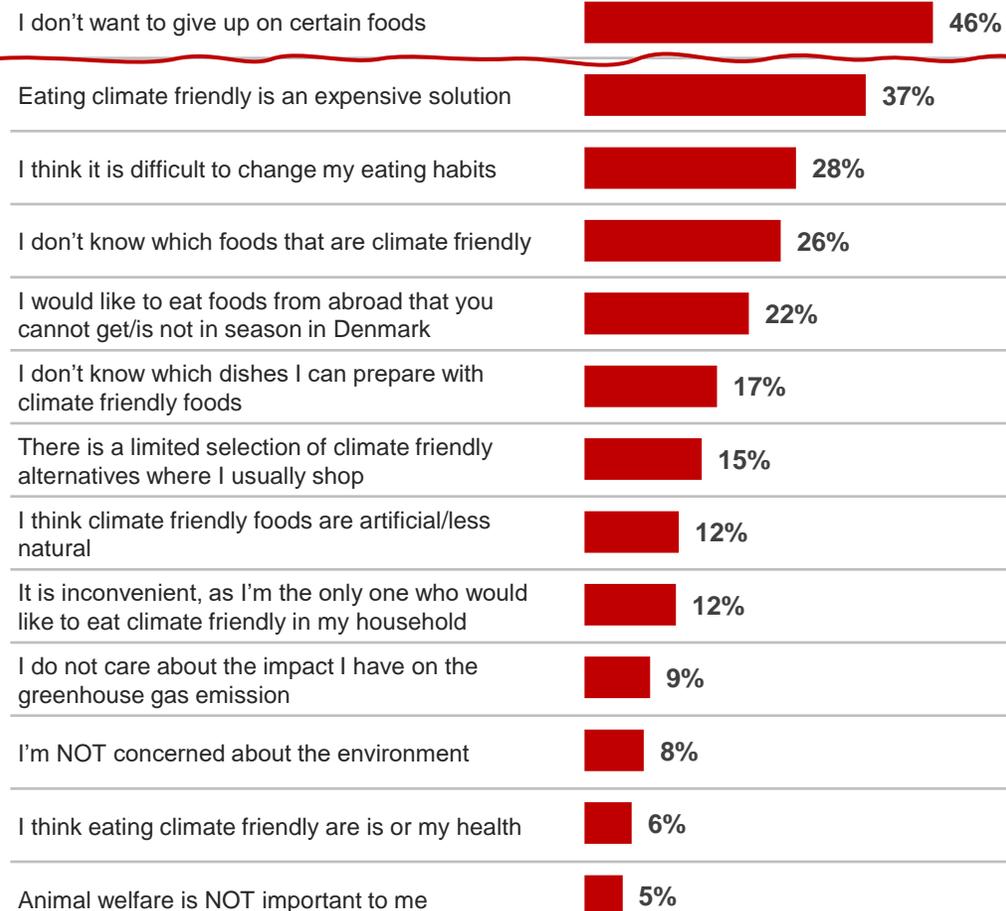
Looking at the barriers for eating climate friendly, **almost half of the consumers simply do not want to give up on certain foods.**

In addition, **more than 1 out of 4 consumers find it difficult to change eating habits.**

Moreover, **a lot of consumers believe that eating climate friendly is expensive.**

n = 500

## Barriers for eating climate friendly



Q: Here is a list of statements which could apply or not for choosing NOT to eat climate friendly. Please select all statements that applies.

Not wanting to give up certain foods is a **significantly higher barrier for Pragmatists and Conflicted Contributors** (typically older in age), while it is much less of a barrier for **Activists**

Barriers	TOTAL	ACTIVISTS	PRAGMATISTS	CONFLICTED CONTRIBUTORS	BUSY BYSTANDERS	DISENGAGED DENIALISTS
	n = 500	n = 95 (A)	n = 154 (B)	n = 91 (C)	n = 77 (D)	n = 83 (E)
I don't want to give up on certain foods	46%	32%	58% A D E	62% A D E	35% A	33% A
Eating climate friendly is an expensive solution	37%	42% E	38% E	45% E	31%	25%
I think it is difficult to change my eating habits	28%	28%	36% D E	24%	22%	20%
I don't know which foods that are climate friendly	26%	22%	31% E	31% E	25%	17%
I would like to eat foods from abroad that you cannot get/is not in season in Denmark	22%	28%	18%	22%	26%	16%
I don't know which dishes I can prepare with climate friendly foods	17%	18%	23% D	15%	10%	16%
There is a limited selection of climate friendly alternatives where I usually shop	15%	24% B E	11%	14%	18%	12%
I think climate friendly foods are artificial/less natural	12%	15%	12%	12%	13%	11%
It is inconvenient, as I'm the only one who would like to eat climate friendly in my household	12%	12%	10%	7%	25% A B C E	10%
I do not care about the impact I have on the greenhouse gas emission	9%	8%	3%	14% B	8%	13% B
I'm NOT concerned about the environment	8%	2%	5%	11% A	4%	19% A B D
I think eating climate friendly is bad for my health	6%	6%	3%	4%	10% B	10% B
Animal welfare is NOT important to me	5%	0%	3%	5% A	8% A	11% A B

Q: Here is a list of statements which could apply or not for choosing NOT to eat climate friendly. Please select all statements that applies.

## So, what do we know now?

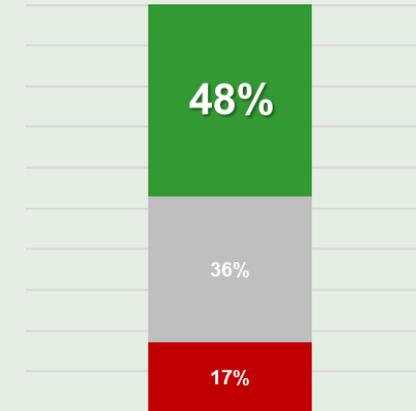
**Consumers want to eat more climate friendly** to reduce their impact on climate.

Yet, despite this motivation...

**46%**

of the consumers say they don't want to give up on certain foods

*I want to eat more climate friendly*



...the majority don't want to give up certain foods or change their habits. **Why is that?**

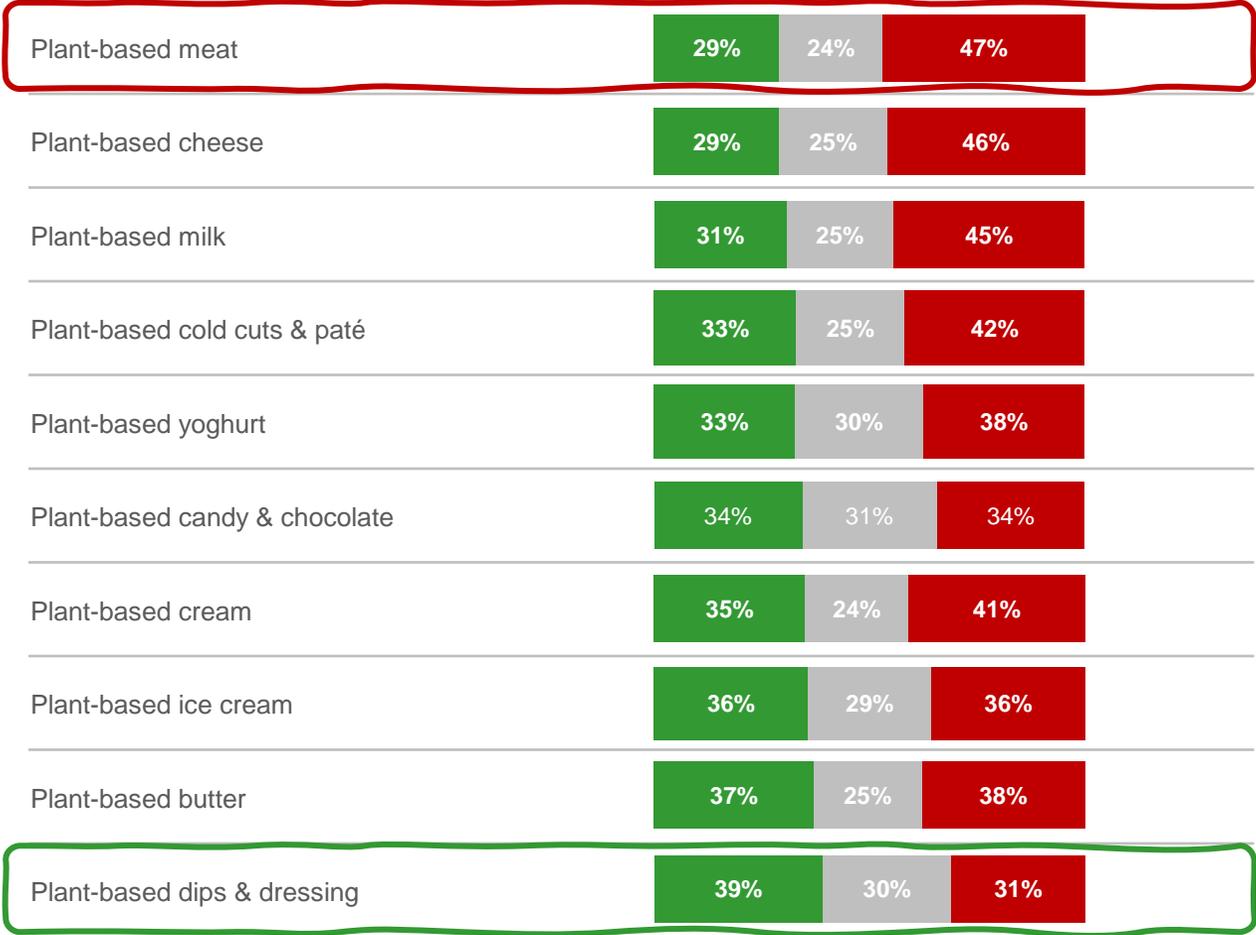
Let's look at the **willingness and barriers** for eating more climate friendly food alternatives

# PLANT-BASED ALTERNATIVES

Uncovering the willingness and barriers  
for eating plant-based as a more climate  
friendly option

# 3

Consumers are **least willing** to use **plant-based meat** and **most willing** to use **plant-based dips & dressing**.



Q: How willing would you be to use the following alternatives?

**Differences across segments?**

**Activists** are most willing to use plant-based alternatives; while **Conflicted Contributors** are least willing to use plant-based alternatives.

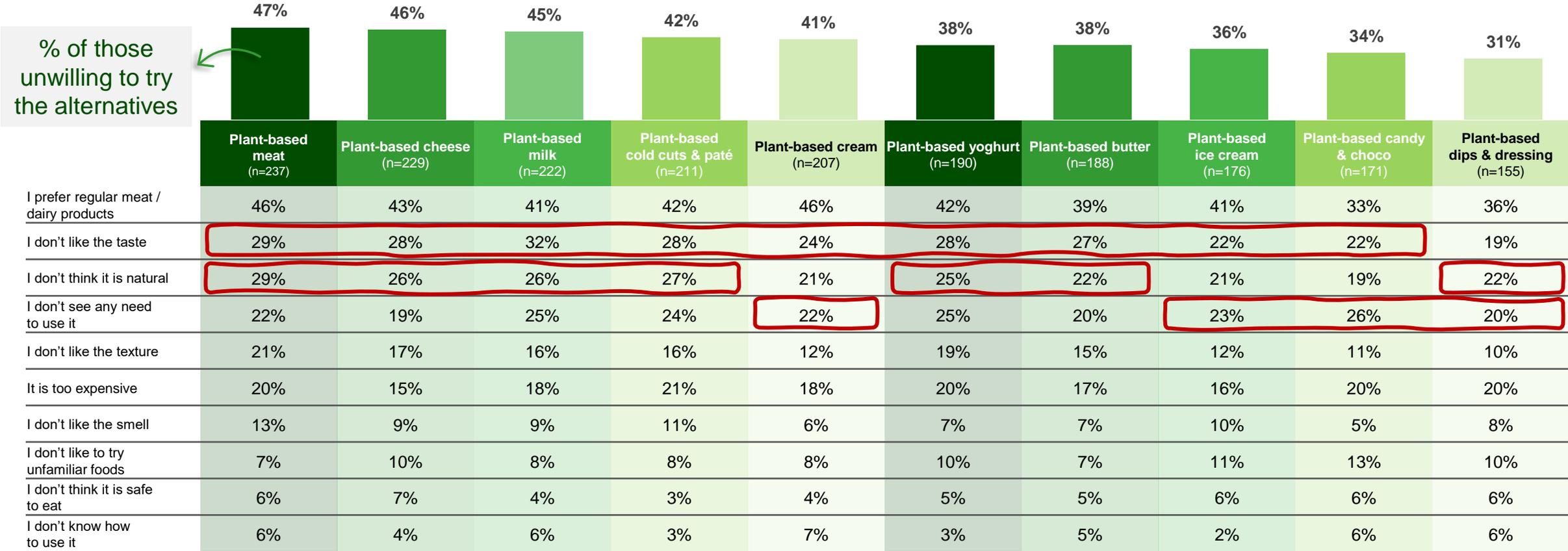
**Activists (55%)** are significantly more willing to eat plant-based meat.

Click [here](#) to see full breakdown per segment

**I would only consider it (eating more plant-based) for certain foods where it makes the most sense for me – and where I don't have to give up too much, e.g., meats**  
 – Danish shopper

# Consumers are not willing to use plant-based alternatives as they prefer the regular food options. This is mainly due to taste and perceived lack of naturalness

**I have considered to add more plant-based alternatives into my diet however, I don't find all these products visually appealing**  
 – Danish shopper



Q: How willing would you be to use the following alternatives? + Why would you not be willing to use the following alternatives?



## So, what do we know now?

**Consumer willingness to use plant-based foods is low.** This especially applies to plant-based meat and dairy alternatives...



	Plant-based meat (n=237)	Plant-based cheese (n=229)	Plant-based milk (n=222)	Plant-based cold cuts & pâté (n=211)
I prefer regular meat / dairy products	46%	43%	41%	42%
I don't like the taste	29%	28%	32%	28%
I don't think it is natural	29%	26%	26%	27%

... mainly because **consumers prefer regular meat and dairy options** (alternatives are perceived less tasty and natural)

Let's look at what we can do to change this

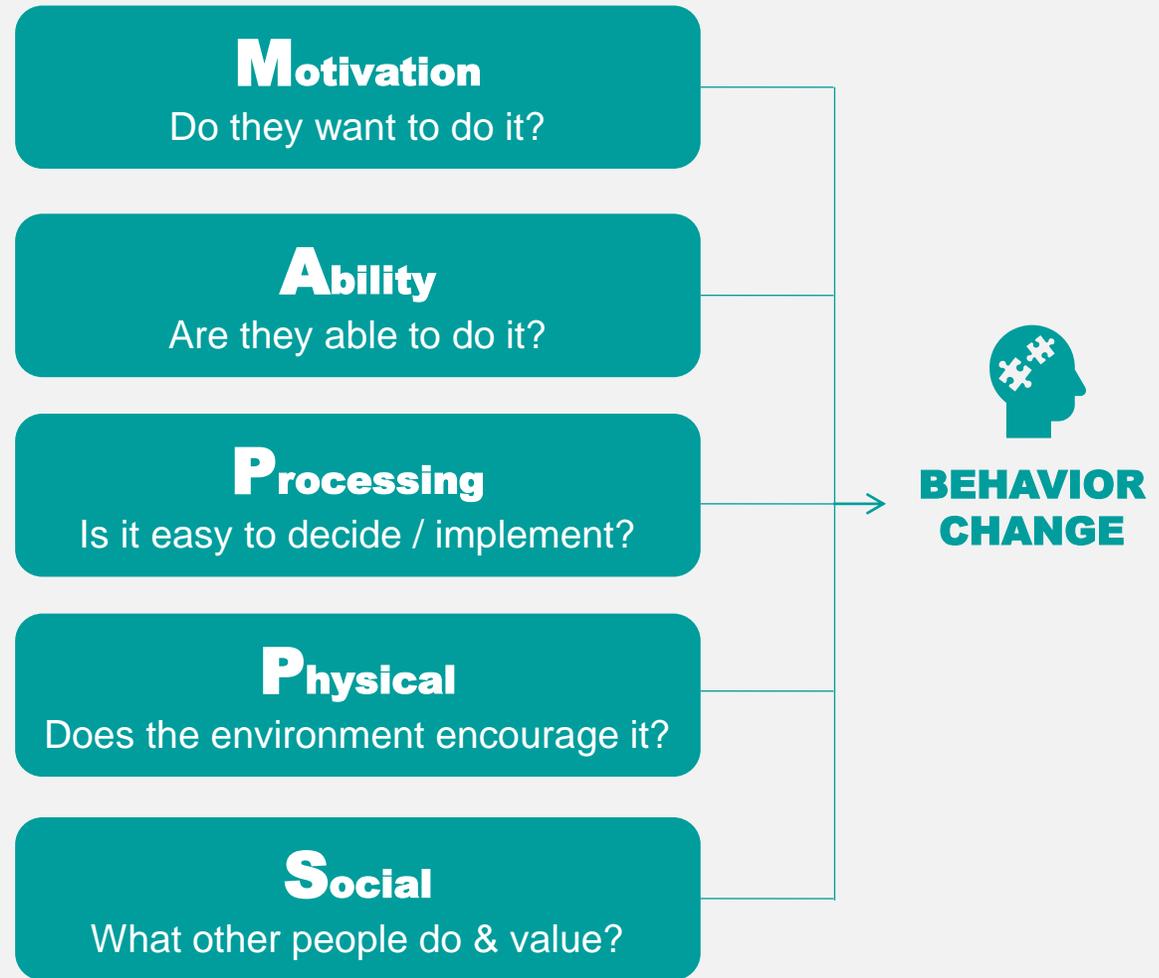


# How can we make consumers change their minds and behavior?



Let's review what we have learned so far by utilizing the **MAPPS** behavior change framework

Ipsos Views: The Science of Behavior Change  
Authors: Colin Strong & Tamara Ansons



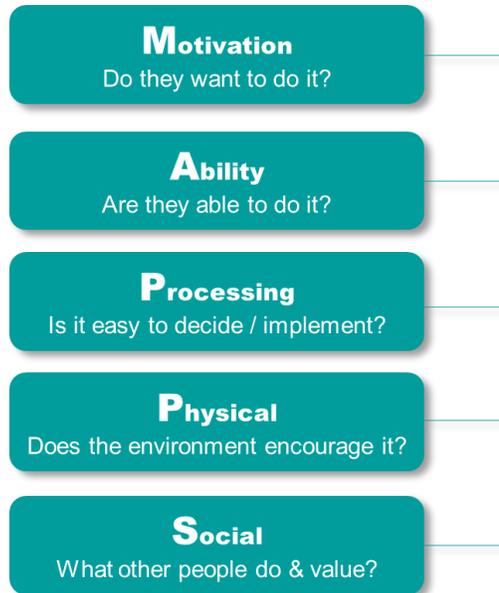


# The MAPPS framework explained

## WHAT?

Ipsos has created a behavior change system called **MAPPS**.

There are a number of stages to MAPPS, but fundamentally it is a model that sets out the key dimensions that are important for behavior change:



## WHY?

*The changing nature of our environment has meant that people are necessarily more proactive as they engage with the world around them. If the fundamentals of the world are stable and predictable, we can act in ways that are routinised and habitual. But once this certainty has eroded, we must more actively engage with our environment.*

If we can first **understand the behavioral dimensions that shape behavior**, then we already have a very effective means for changing behavior as we can **design interventions** (such as marketing communications) with these dimensions in mind.

## HOW?

To get the full benefits and move from problem through to solution, we follow a **“Triple D” process**:

### Diagnose

Use MAPPS to identify and decode the barriers.

### Design

Pivot from understanding the behavior to development of interventions.

### Deliver

A smaller number of interventions are prioritized to for prototype development and testing.

Source: Ipsos View, “The Science of Behavior Change: The principles and practice of tackling behavior change challenges in a word that remains unpredictable and changeable”

# The MAPPS framework applied



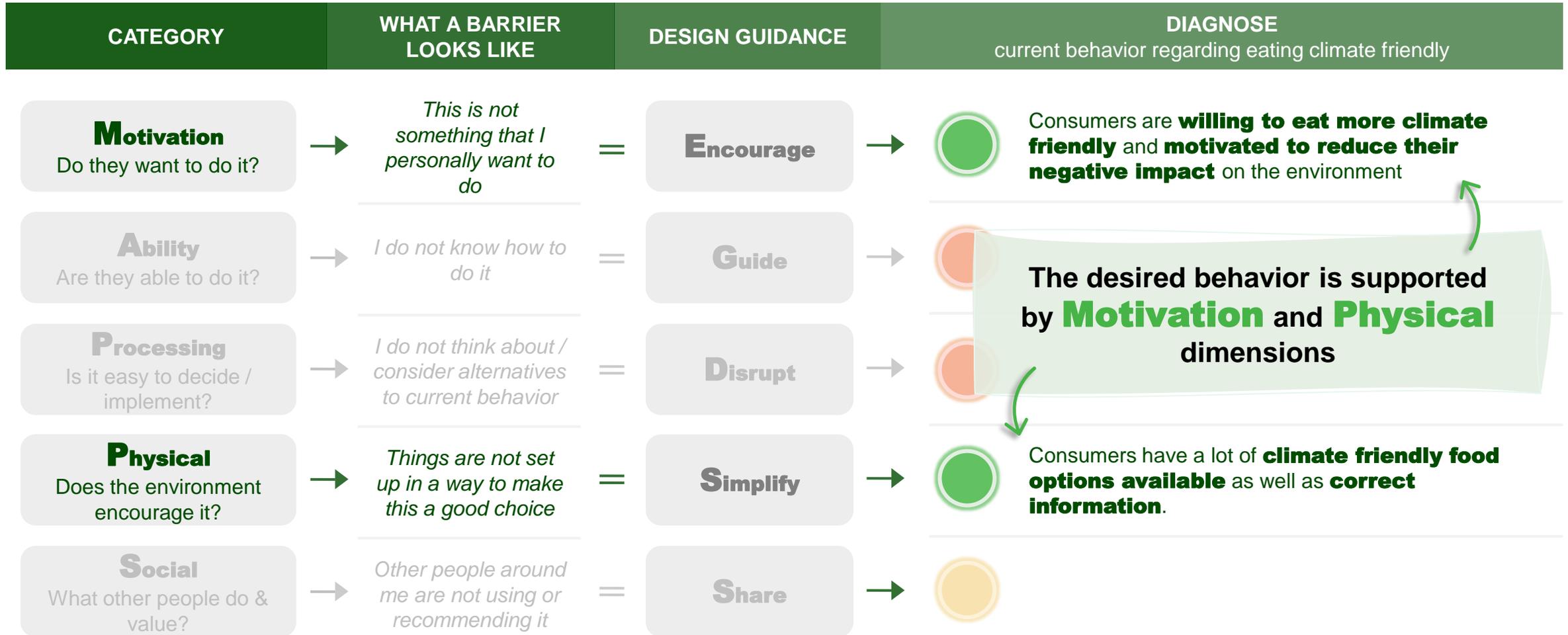
**Diagnose**  
We start by identifying and decoding barriers for each of the MAPPS dimensions based on our knowledge...

DIMENSIONS	WHAT A BARRIER LOOKS LIKE	DESIGN GUIDANCE
<b>Motivation</b> Do they want to do it?	→ <i>This is not something that I personally want to do</i>	= <b>Encourage</b>
<b>Ability</b> Are they able to do it?	→ <i>I do not know how to do it</i>	= <b>Guide</b>
<b>Processing</b> Is it easy to decide / implement?	→ <i>I do not think about / consider alternatives to current behavior</i>	= <b>Disrupt</b>
<b>Physical</b> Does the environment encourage it?	→ <i>Things are not set up in a way to make this a good choice</i>	= <b>Simplify</b>
<b>Social</b> What other people do & value?	→ <i>Other people around me are not using or recommending it</i>	= <b>Share</b>

**Design**  
...then, we assess which kind of interventions to design and develop in order to overcome the barriers

**Deliver**  
We also need to consider what delivery mechanisms and touchpoints are suitable for the interventions

# The MAPPS framework applied



# The MAPPS framework applied

CATEGORY	WHAT A BARRIER LOOKS LIKE	DESIGN GUIDANCE	DIAGNOSE current behavior regarding eating climate friendly
<b>Motivation</b> Do they want to do it?	→ <i>This is not something that I personally want to do</i>	= <b>Encourage</b> →	
<b>Ability</b> Are they able to do it?	→ <i>I do not know how to do it</i>	= <b>Guide</b> →	 <p>Many <b>consumers have incorrect perceptions</b> of which foods are climate friendly. Moreover, most consumers <b>do not want to give up on certain foods</b>, e.g., meat and dairy.</p>
<b>Processing</b> Is it easy to decide / implement?	→ <i>I do not think about / consider alternatives to current behavior</i>	= <b>Disrupt</b> →	 <p>The actions that have the <b>largest positive impact on climate are the least adapted</b> into consumers' diet behavior. Also, the <b>willingness to use plant-based alternatives</b> is generally low.</p>
<b>Physical</b> Does the environment encourage it?	→ <i>Things are not set up in a way to make this a good choice</i>	= <b>Simplify</b> →	
<b>Social</b> What other people do & value?	→ <i>Other people around me are not using or recommending it</i>	= <b>Share</b> →	

**Main barriers can be identified for Ability and Processing**

# The MAPPS framework applied

CATEGORY	WHAT A BARRIER LOOKS LIKE	DESIGN GUIDANCE	DIAGNOSE current behavior regarding eating climate friendly
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**Motivation**  
Do they want to do it?



*This is not something that I personally want to do*



**Encourage**



**Ability**  
Are they able to do it?



*I do not know how to do it*



**Guide**



**Processing**  
Is it easy to decide / implement?



*I do not think about / consider alternatives to current behavior*



**Disrupt**



**Physical**  
Does the environment encourage it?



*Things are not set up in a way to make this a good choice*



**Simplify**



**Social**  
What other people do & value?



*Other people around me are not using or recommending it*



**Share**



For the older age group, we also find an additional barrier related to the **Social** dimension

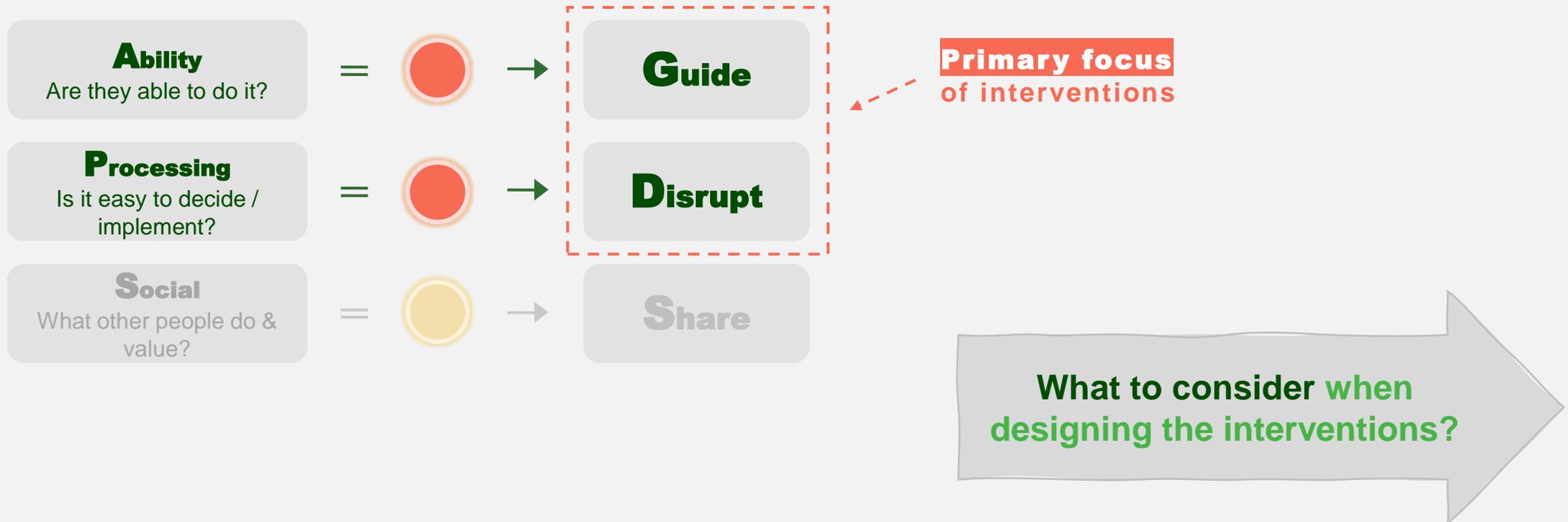


Consumers are aware that eating habits impact the climate, and making **green choices is accepted and recommended** in society. However, **the older age group shows to be particularly reluctant to give up certain foods** – this might be rooted in culture and a preference for traditional Danish food.

Note: Traditional Danish Food often includes regular meat.



We have identified barriers within three of the dimensions. To overcome these, we should **focus on designing and developing interventions that can primarily **GUIDE** and **DISRUPT** consumer behavior.**



# The MAPPS framework: Unlocking **ABILITY / PROCESSING**

## What to consider when designing **GUIDE** interventions?



### Capability

Since many consumers have **incorrect perceptions** on how to eat climate friendly, there is a **need for simple guidelines** that are easily memorable and where information is unfolded gradually. This will **educate consumers and ultimately enable them to navigate** and make more climate friendly choices.



### Routines

Most consumers **don't want to give up on certain foods** and many **find it difficult to change routines**. Thus, educating consumers might not be enough to make them choose more climate friendly foods - this can be explained by **preference** but might also relate to **routines**. Educating consumers is only part of the solution, and there is a **need for changing routines**, which must be done step wise.



### Challenge Current Mindset

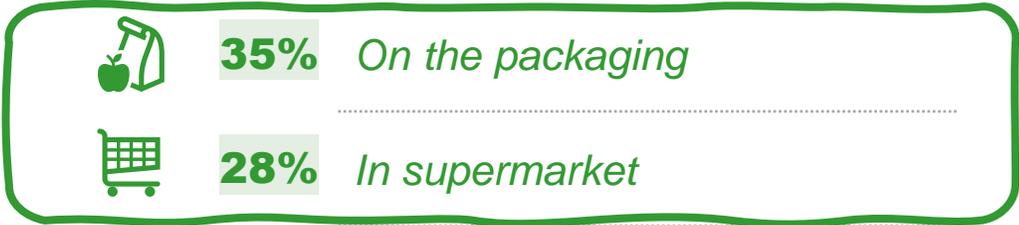
We should seek to **disrupt the way consumers think** about the plant-based options as alternatives to less climate friendly foods, such as regular meat and dairy products. To do this, there is a **need to boost curiosity** in new behavior and to show the reluctant consumers that **they too can change their behavior** to eat more climate friendly.

# LABELS AS A GUIDANCE

Discovering how to **GUIDE** consumers  
to eat more climate friendly

# 4

# Consumers most often **get / search for information** on the **packaging** and in the **supermarket**



 **26%** *News*

 **20%** *Newspapers/articles*

 **16%** *Family & friends*

 **28%** *Don't seek for info*

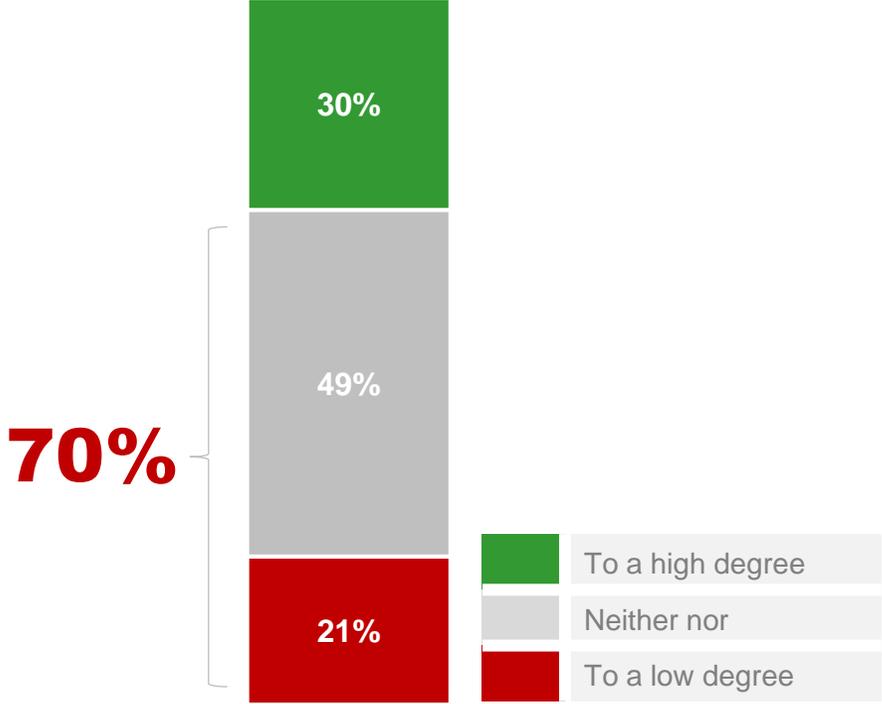


**“When I go shopping, I’m looking specifically for the labels e.g., climate labels, such as Svanemærket and the EU label”**  
– Danish shopper



Q: Where do you get/seek information about climate friendly foods?

Though, the information consumers get / search for is **not helpful** enough in navigating climate-friendly foods



**It's easy to tell whether it's organic or not but it is very difficult to see whether it is climate friendly with so many different labels**

– Danish shopper

**It is a jungle to find out what's climate friendly and what's not**

– Danish shopper

**So how can we improve the knowledge of consumers in relation to climate friendly foods?**

Q: To which degree do you feel the information you get/seek is helping you navigate in which foods are climate friendly or not



# Can a sustainability label help consumers choose more climate friendly options when grocery shopping?

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We asked consumers to evaluate two different labels in terms of:

1. The perceived ability of the label to help them navigate when grocery shopping
2. Direct preference



# TESTING SUSTAINABILITY LABELS

**1** First, the consumers were told that they were to evaluate **two different labels** that might or might not help them in order to choose more climate friendly foods.

**2** Then, we showed them the labels and related descriptions, one-by-one in a randomized order. 



**The Klimasky** is a labelling invented by Netto (supported by Salling Fondene) and has been tested in selected Netto stores.

The label indicate which foods have a low climate footprint and comes in two version: 1) comparing across all categories in stores, or 2) comparing within the category of the specific product

Hence, the label will only appear on foods that meet two of the above criteria.

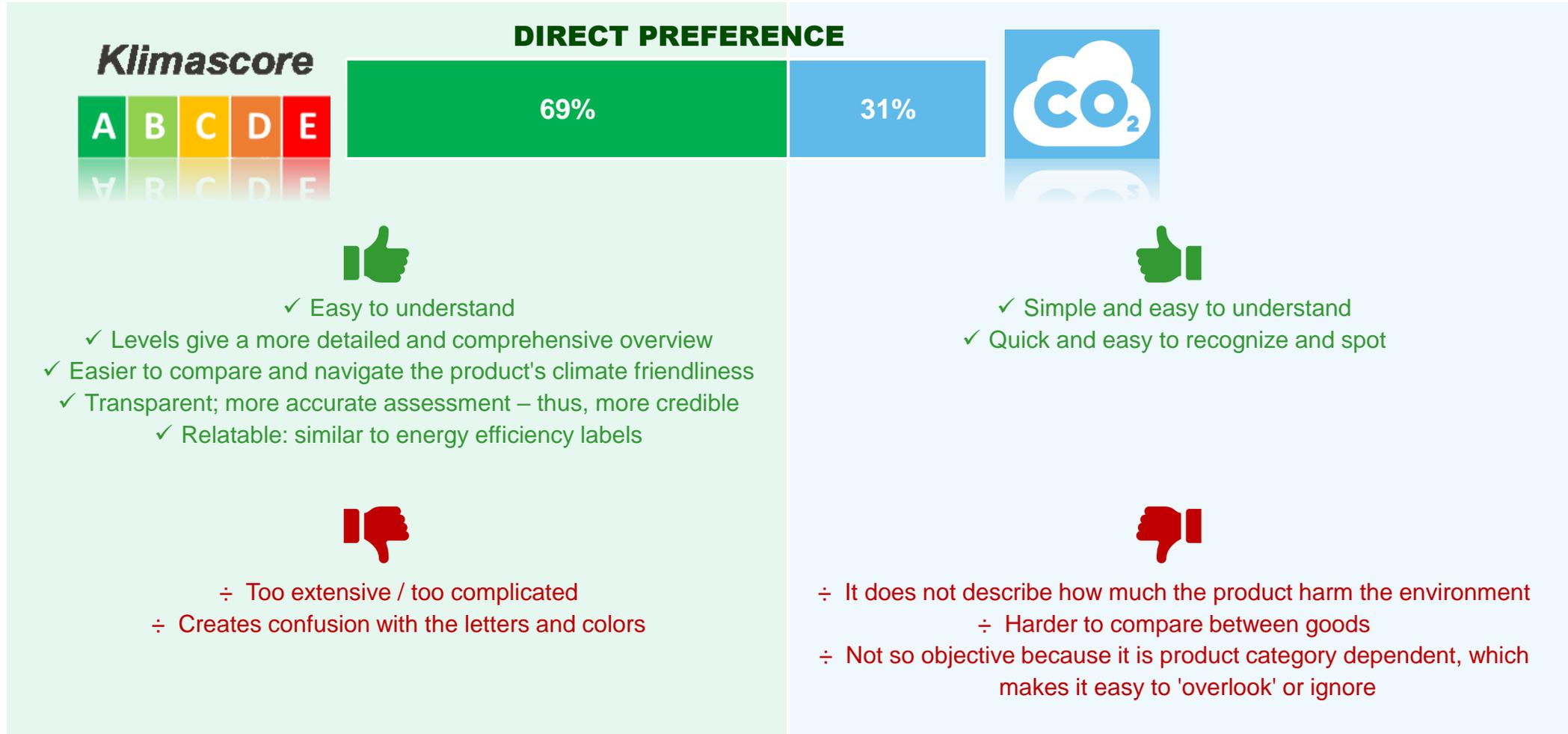


**The Klimascore** shows customers how climate friendly a given food is from a scale from A to E, where A is the most climate friendly and E is the least climate friendly.

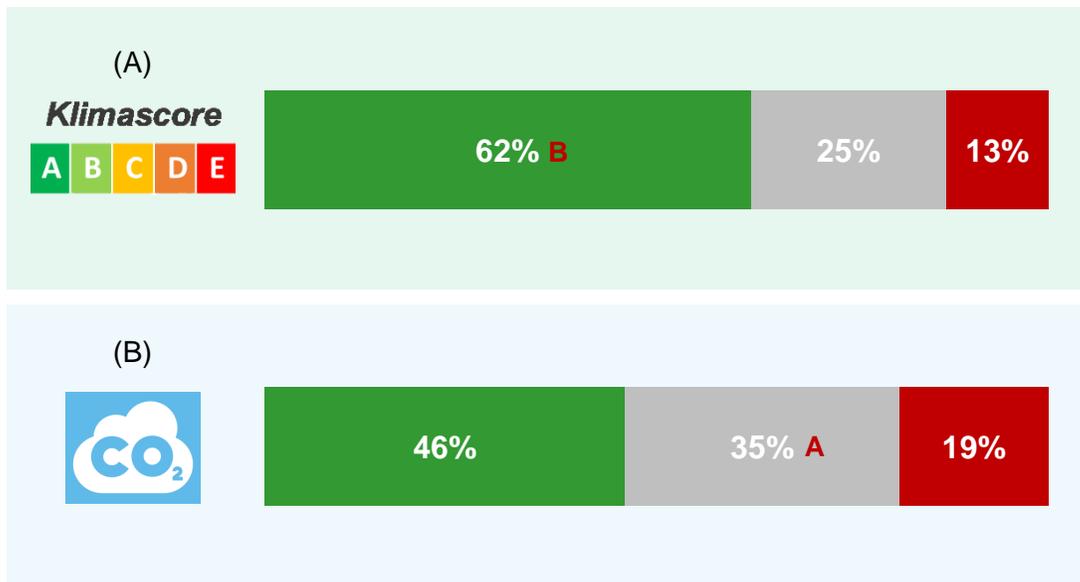
Hence, the label should appear on all foods in the store.

The label has not yet been developed, but it is based on current discussion between various players (government, industrial unions and private companies)

# More than 2/3 of consumers prefer the Klimascoré, mainly because it is more extensive with different levels making it easier to compare between products



# The Klimascore is more helpful in supporting consumers navigate for climate friendly foods compared to the Klimasky



■ Would help me   
 ■ Neither nor   
 ■ Would not help me

Q: How well do you feel the following labels would help you navigate in which foods are climate friendly or not when grocery shopping?



**AB** Letters indicate that segment % is significantly higher (95% CI) than the segment % of the referred letter.



# But a label will not fix it all ...

**Klimascore**



The Klimascore shows relatively good results in the test, but for the label to have an effect, consumers need to i) notice it, and ii) know what it means.

**A label is a cue to guide an already informed consumer**

**There is a need for additional initiatives to ensure proper guidance**

**1**

**Educate consumers on eating climate friendly**, starting with the introduction of basic guidelines and then gradually unfolding more complex information – **it should be easy for consumers to follow, and act based on the guidance.**

*This might require a combination of delivery metrics, for instance:*

- TV commercials with an informative point of view
- Easy-to-remember phrasings / rules of thumb

**2**

**Introduce cues and other in-store information** for consumers to identify and decode in the buying situation – **it should be easy for consumers to navigate when grocery shopping.**

*In-store information could for instance include:*

- Labels on foods
- Stickers or labels to promote the replacement of less climate friendly foods, e.g., meats, with the more climate friendly options, e.g., plant-based alternatives

**3**

**Inspire consumers** to choose the climate friendly options – **the green choice should be appealing.**

*For instance, it could be considered to introduce:*

- Recipe cards next to the climate friendly alternatives to inspire consumers and show them how easy and delicious a more climate friendly meal can be
- TV campaigns with a well-know influencer who most Danes can identify with and can persuade consumers to eat more climate friendly, e.g., Mads Mikkelsen cooking Spaghetti Bolognese with plant-based meat

# And remember! This is a journey, not a simple task...

Getting consumers to eat more climate friendly will take time and requires a step-by-step process using multiple delivery metrics



# CONCLUSIONS & NEXT STEPS

# 5

# CONCLUSIONS | What are the key learnings?

1

## **Incorrect consumer perceptions on how to eat climate friendly**

Consumers think they know how to eat climate friendly. However, by means of an association exercise and two knowledge tests conducted in this research, it is apparent that consumers do not have perfect knowledge of which foods are climate friendly.

One common misunderstanding is that 'eating locally produced food incl. meat & dairy' has less environmental impact than 'eating imported vegetarian food'

2

## **Current food choices are not the most climate friendly, but there is an indication that the future looks greener**

Only about 1 out of 3 Danish consumers perceive themselves as having climate friendly eating habits. Yet, about half of the consumers indicate that they want to eat more climate friendly in the future.

So how can we support this motivation and turn it into action?

3

## **Consumers don't feel they have access to helpful information**

The majority of Danish consumers don't know or don't feel that the information they are exposed to in their daily life help them make climate friendly decisions when grocery shopping.

Most consumers get information on packaging or in the supermarket.

A label could be a way to support Danish consumers in eating more climate friendly. However, this solution cannot stand alone.

# RECOMMENDATION I What are the next steps to be taken?



## **EDUCATE & GUIDE** **consumers through communication**

Consumers want to eat more climate friendly but shows a lack of knowledge in how-to. By informing and educating consumers about the CO2 emission on each individual food in the supermarket through a label, consumers can more easily evaluate their options and make a climate friendly choice.

Nevertheless, a label won't fix it all. Change in behavior needs to be build through the creation of new routines and breaking the old ones. This is not a one-off but rather a step-wise process to become better informed consumers.



## **INSPIRE & DISRUPT** **consumers to use alternatives**

The top barrier for Danish consumers to eat climate friendly is giving up on certain foods. In addition, plant-based alternatives to the least climate friendly food categories are not that popular. Thus, convincing consumers to change behavior will not happen overnight.

This research shows that one method to impose change in behaviors is by disrupting the consumers' mindset by inspiring them on how to eat more climate friendly, e.g., by using more climate friendly foods when cooking.

# THANK YOU!

FOR ANY QUESTIONS, PLEASE REACH OUT TO YOUR IPSOS TEAM



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**GAME CHANGERS**



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**GAME CHANGERS**



# APPENDIX

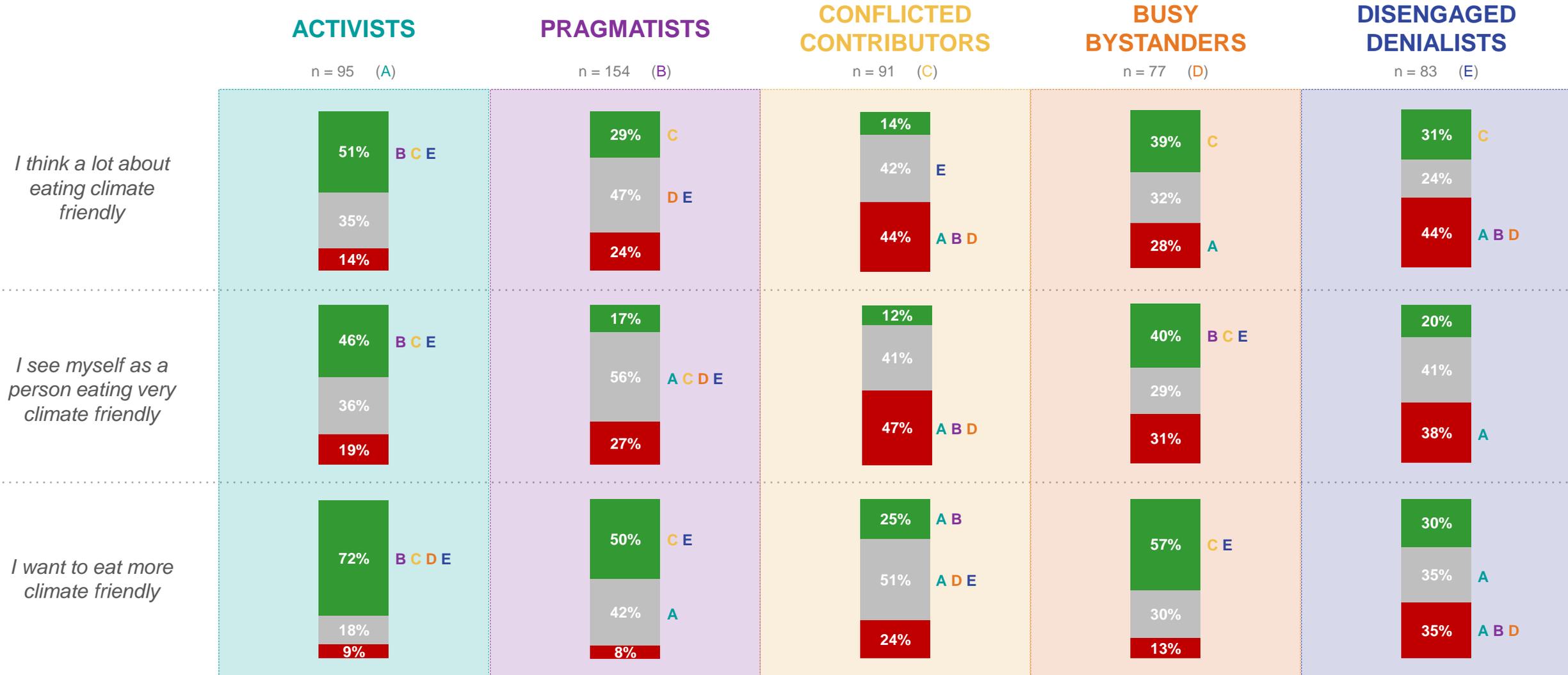
# 6

# SUSTAINABILITY SEGMENTS | Consumers' knowledge

	<b>ACTIVISTS</b> n = 95 (A)	<b>PRAGMATISTS</b> n = 154 (B)	<b>CONFLICTED CONTRIBUTORS</b> n = 91 (C)	<b>BUSY BYSTANDERS</b> n = 77 (D)	<b>DISENGAGED DENIALISTS</b> n = 83 (E)
Eating a vegetarian diet with some imported products	41% <b>C</b>	37%	26%	29%	33%
Eating a locally produced diet including meat and dairy products	52%	56% <b>E</b>	56% <b>E</b>	64% <b>E</b>	41%
Don't know	7%	6%	18% <b>A B</b>	8%	27% <b>A B D</b>

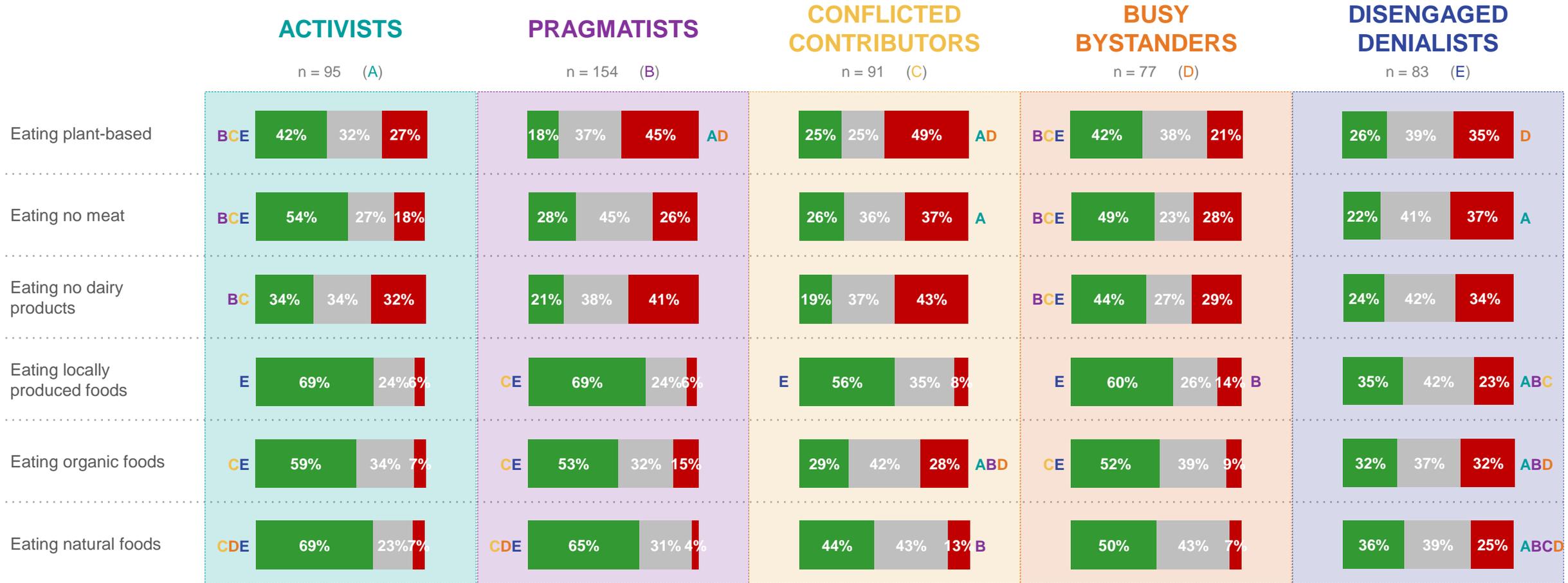
Q: Which of these two actions do you think would reduce green house gas emission the most?

# SUSTAINABILITY SEGMENTS | Consumer behavior



Q: To what extent do you agree or disagree with the following: 1) I think a lot about eating climate friendly, 2) I consider myself to be eating very climate friendly, 3) I would like to eat more climate friendly

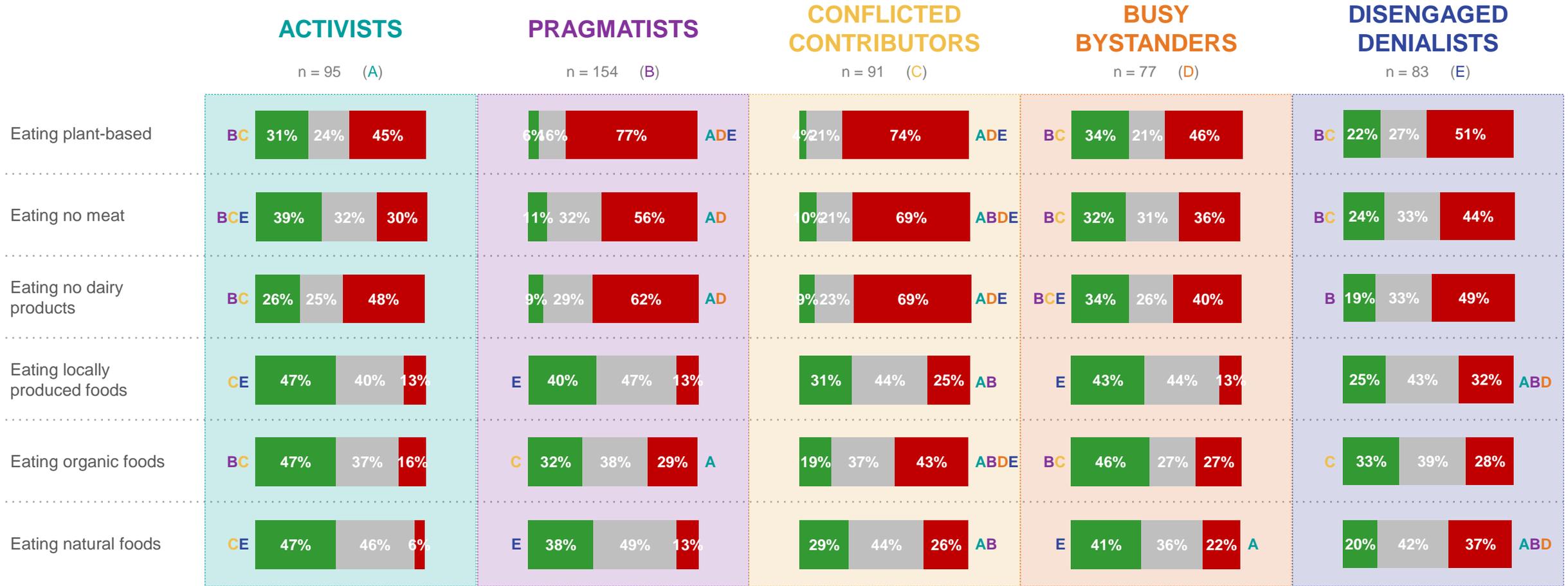
# SUSTAINABILITY SEGMENTS | Important actions on eating climate friendly



■ To a very high/high degree    
 ■ To some degree    
 ■ To a very low/low degree

Q: To which degree do you think the following are important in order to eat climate friendly?

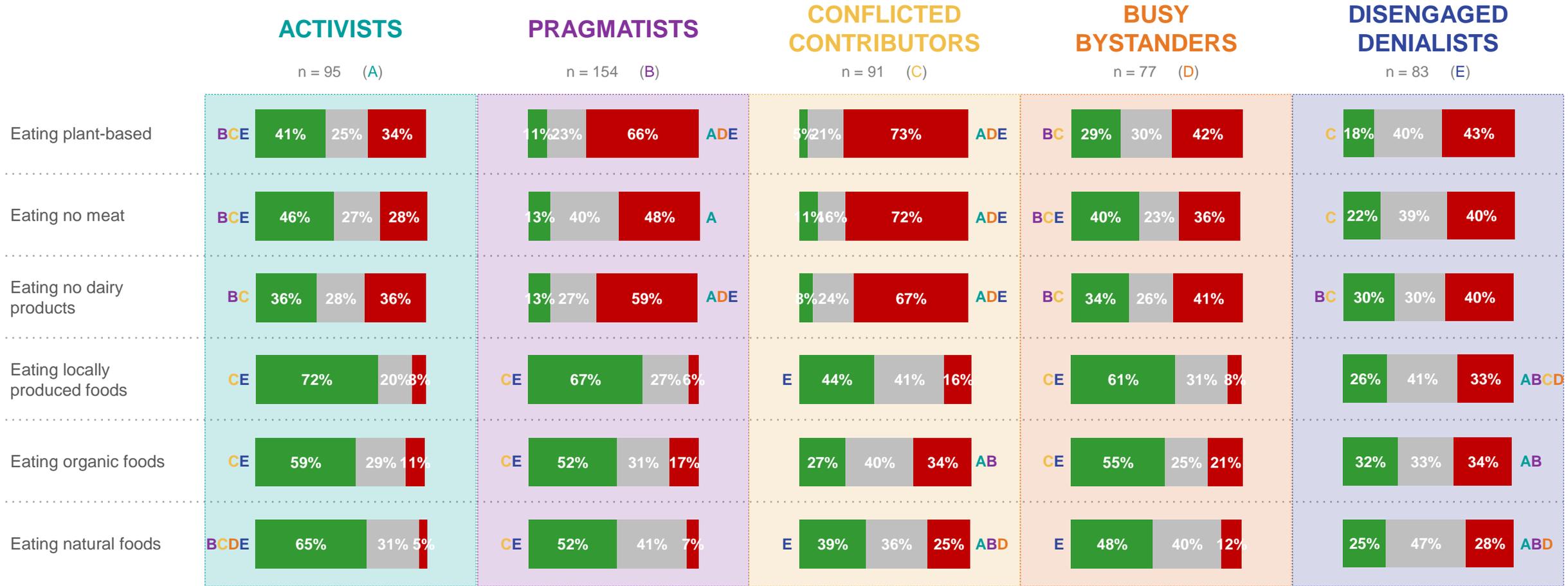
# SUSTAINABILITY SEGMENTS | Current actions on eating climate friendly



■ To a very high/ high degree    
 ■ To some degree    
 ■ To a very low/ low degree

Q: To which degree are you currently doing the following in order to eat climate friendly?

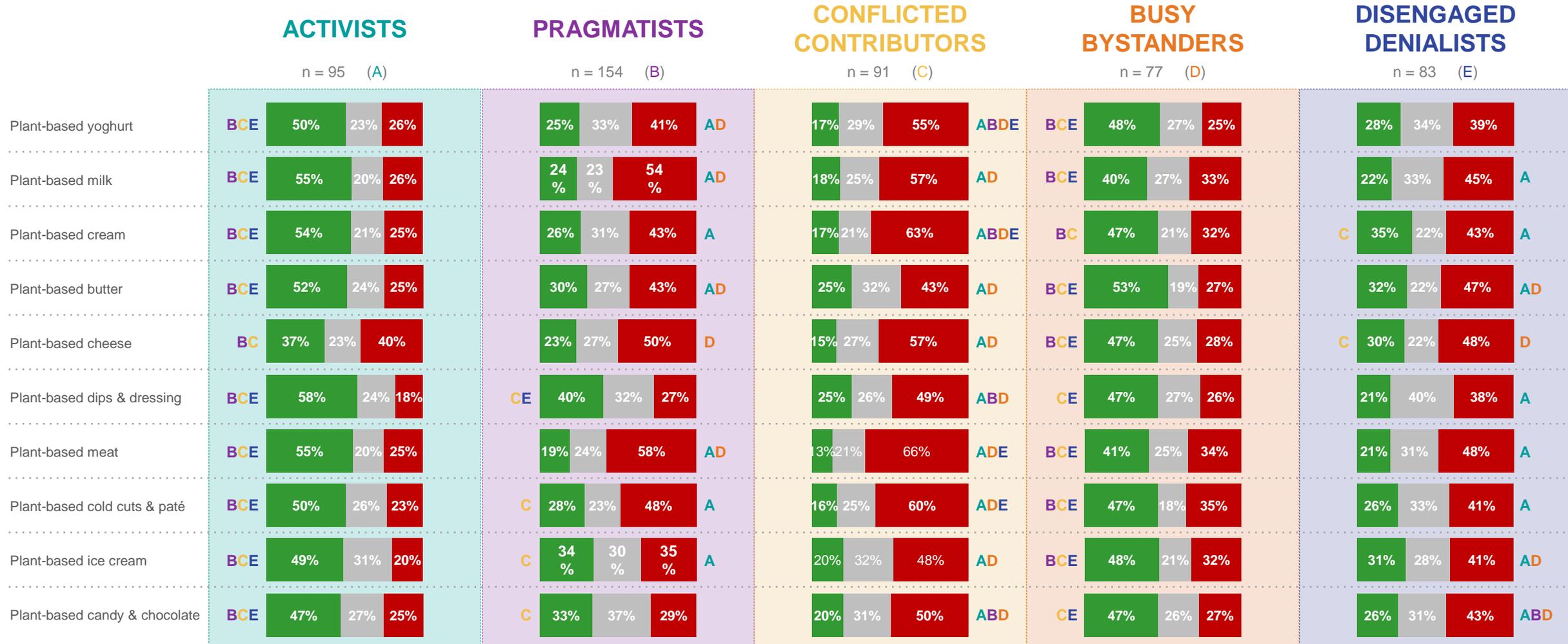
# SUSTAINABILITY SEGMENTS | Future actions on eating climate friendly



■ To a very high/high degree    
 ■ To some degree    
 ■ To a very low/low degree

Q: To which degree would you be willing to do the following in order to eat more climate friendly?

# SUSTAINABILITY SEGMENTS | Willingness to use alternatives



Q: How willing would you be to use the following alternatives?

■ Very willing
 ■ Neither nor
 ■ Not at all willing

A B C Letters indicate that segment % is significantly higher (95% CI) than the segment % of the referred letter.  
D E



# ABOUT IPSOS

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# GAME CHANGERS

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