CHAFEA Online Info Day on the Call for Proposals 2021

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Developing communication campaigns on EU sustainable production and consumption

Challenges and society's expectations

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Context

- Growing expectations from food production and food products
- A multitude of factors shape consumer interest in healthy sustainable eating
- A citizen attitude – consumer behaviour gap

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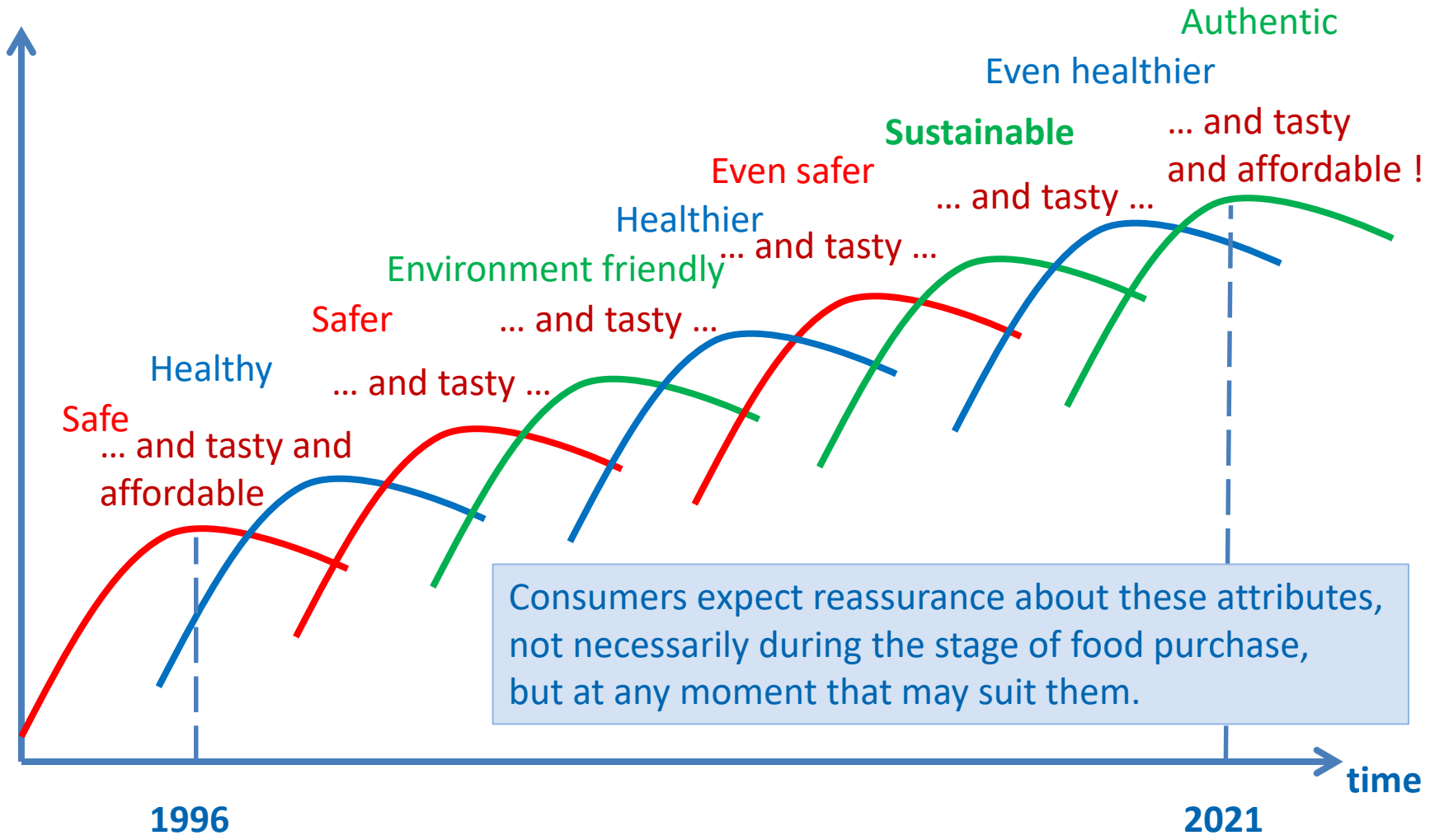
Expectations from
food production and food products



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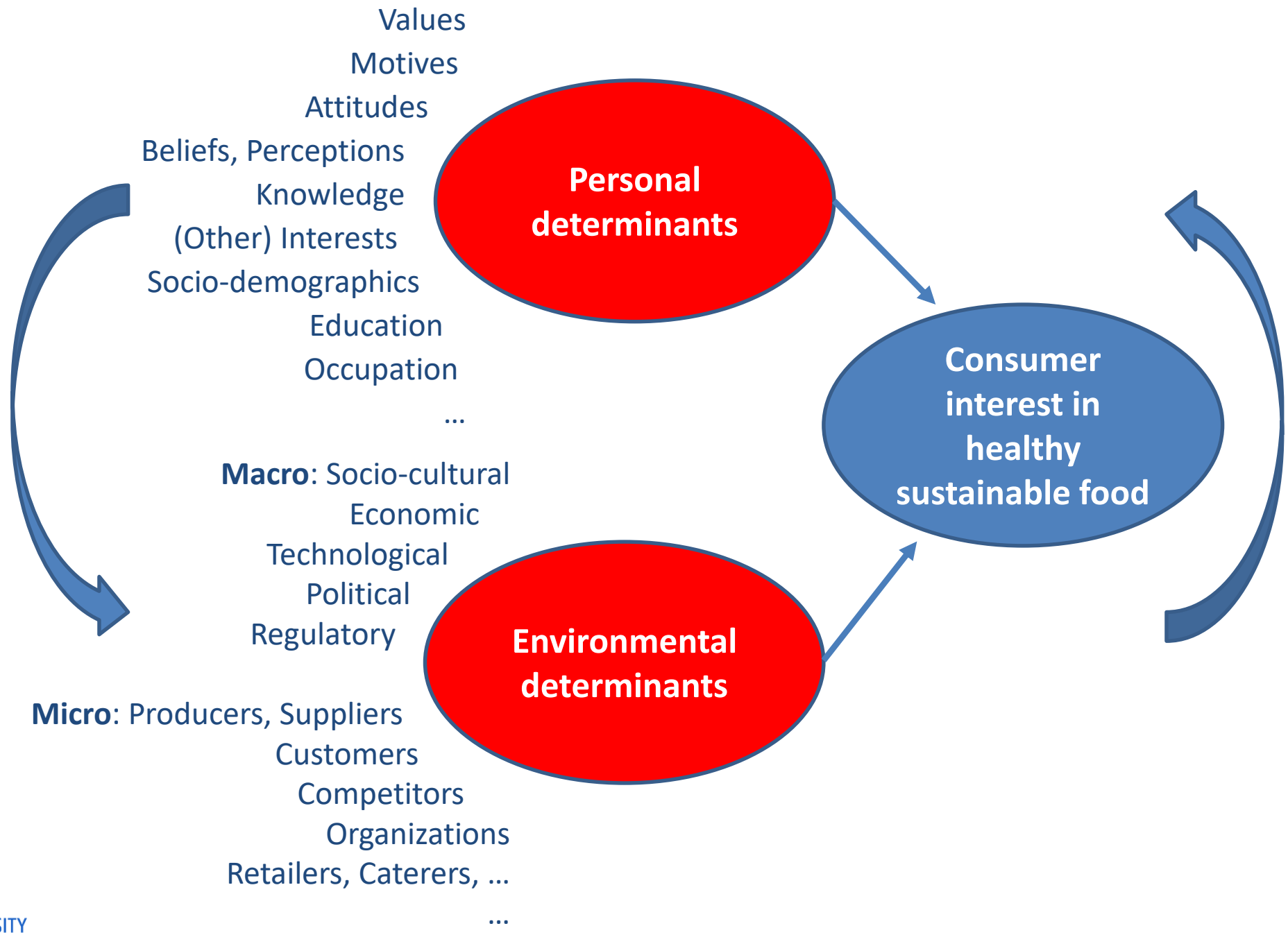

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Citizen attitude – consumer behavioural intention – actual behaviour gap for the case of "sustainable dairy"

- Product concept: branded organic dairy products
- Age 19-22 years
- Groups exposed to different information messages
- 27% inconsistent attitude-intention profile

Table 3. Size and demographic characteristics of consumer segments ($n = 456$).

	Attitude towards buying	
	Weak	Strong
Intention to buy		High involvement
Weak	Low certainty $n = 169$ 49.7% women 33.9% urban	Low perceived availability
Strong	High social norm	$n = 164$ High 71.8% women certainty 38.3% urban
High perceived consumer effectiveness		

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Source: Vermeir & Verbeke (2006) J Agricultural & Environmental Ethics

Sustainability is a broad and multi-faceted concept,
which can mean many different things to different people.

- Planetary health → Planet, ecology
- Economic viability → Profit, economy
- Social welfare, including human health → People, society

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Meaning of 'sustainability' to citizens / consumers

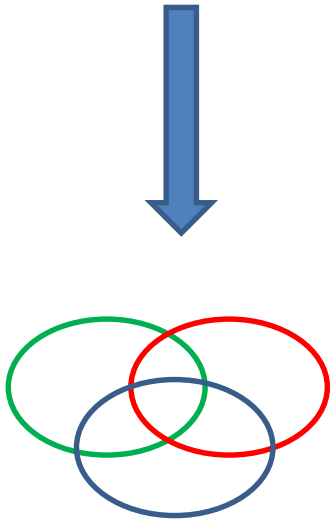
To what extent do you think the following issues have something to do with sustainability?
(n=2783, UK, DE, BE, NL)

Scale: 1='Not at all' – 5='Definitely'	Mean	St.Dev.
Deforestation	**3.89**	1.07
The environmental impact of human use of land and water	**3.89**	1.00
Recyclable packaging	**3.83**	1.00
The environmental impact of food production	**3.78**	1.01
The amount of packaging used on products	**3.76**	1.01
Food waste	**3.74**	1.06
Carbon emissions caused by food production	**3.69**	1.04
Energy use when transporting food products	**3.68**	1.02
The use of pesticides in food production	**3.66**	1.08
World food supply	**3.63**	1.04
The treatment of animals in food production	**3.51**	1.08
The amount of energy used when cooking food products	**3.45**	1.01
Prices paid by consumers for food products	**3.35**	1.02
The healthiness of food and drinks	**3.35**	1.07
Food and drink safety	**3.33**	1.05
Working conditions and wages for food producers	**3.28**	1.03
The quality of public health services	**3.21**	1.05
Absence of child labour in food production	**3.16**	1.18
Local employment	**2.94**	1.10

→ Planet

→ Profit

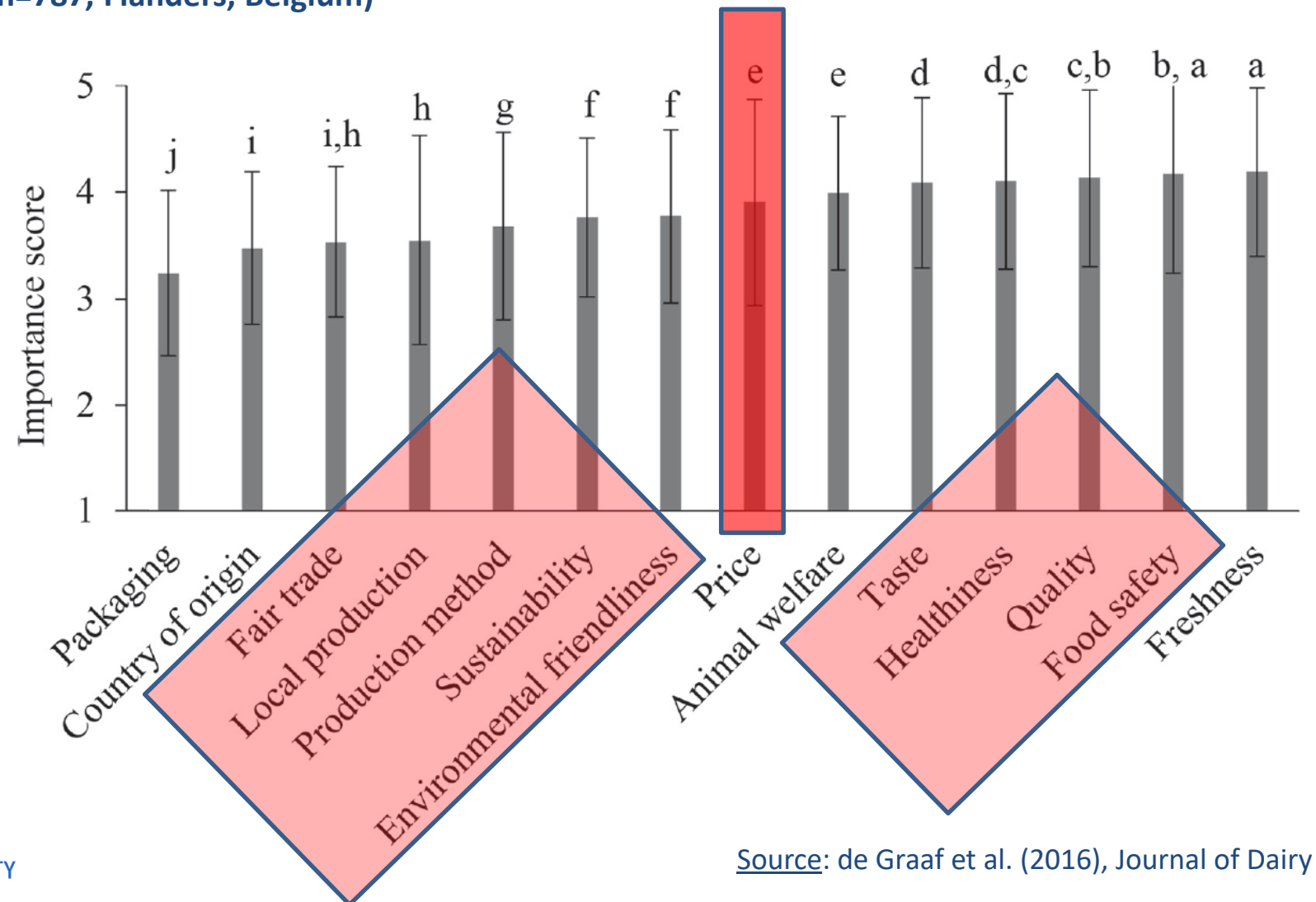
→ People



Source: Van Loo et al. (2017), Food Policy **69**

Milk attribute importance

When purchasing cow's milk, how important are the following attributes to you?
(n=787, Flanders, Belgium)



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Source: de Graaf et al. (2016), Journal of Dairy Science **99**

Consumers associate many product attributes with each other, while being aware of some inevitable trade-offs

"More attention to animal welfare will yield products that are more/have better …"

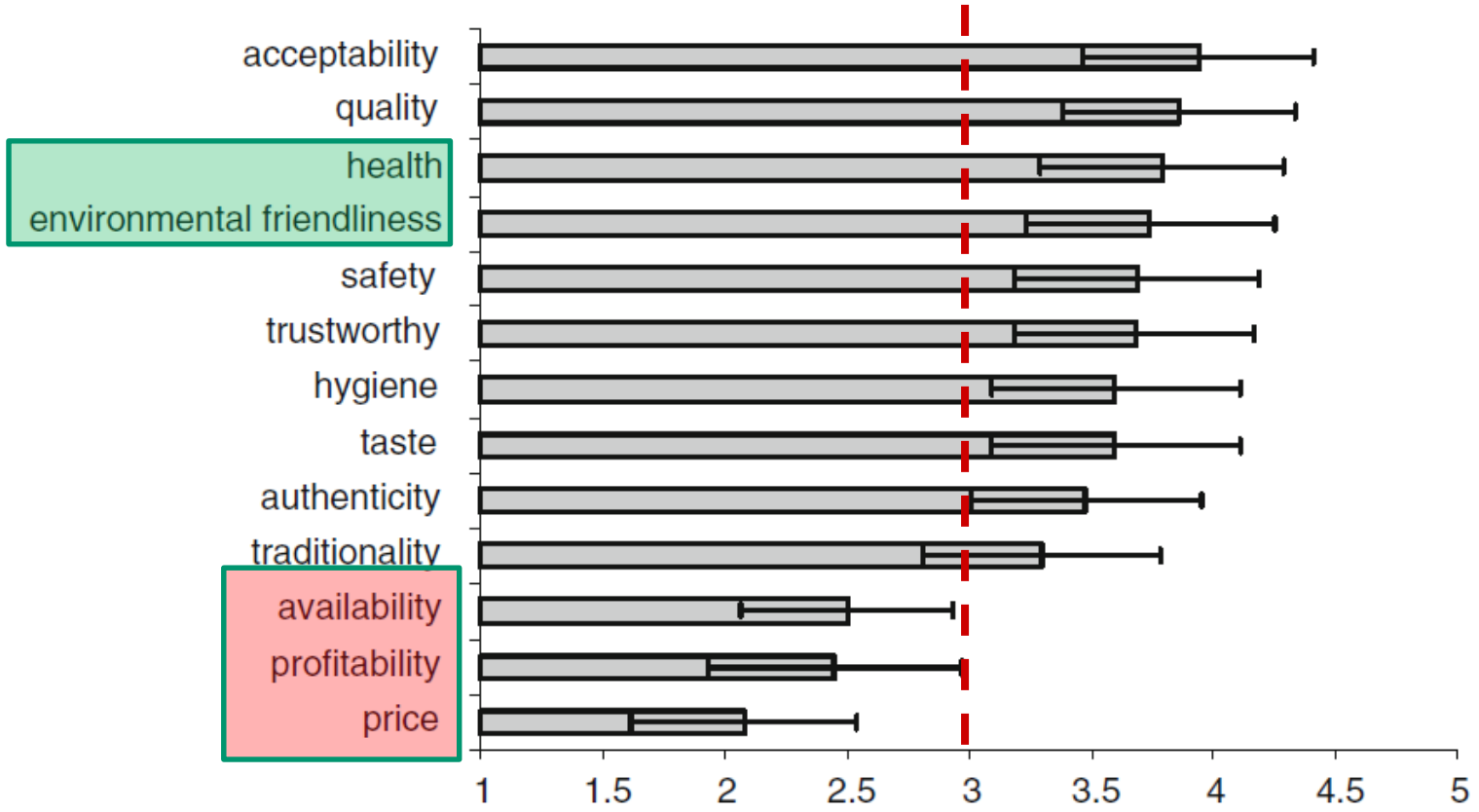

Fig. 1 Association of higher welfare with other product attributes. Mean scores above 3 correspond with positive associations, mean scores below 3 with negative associations

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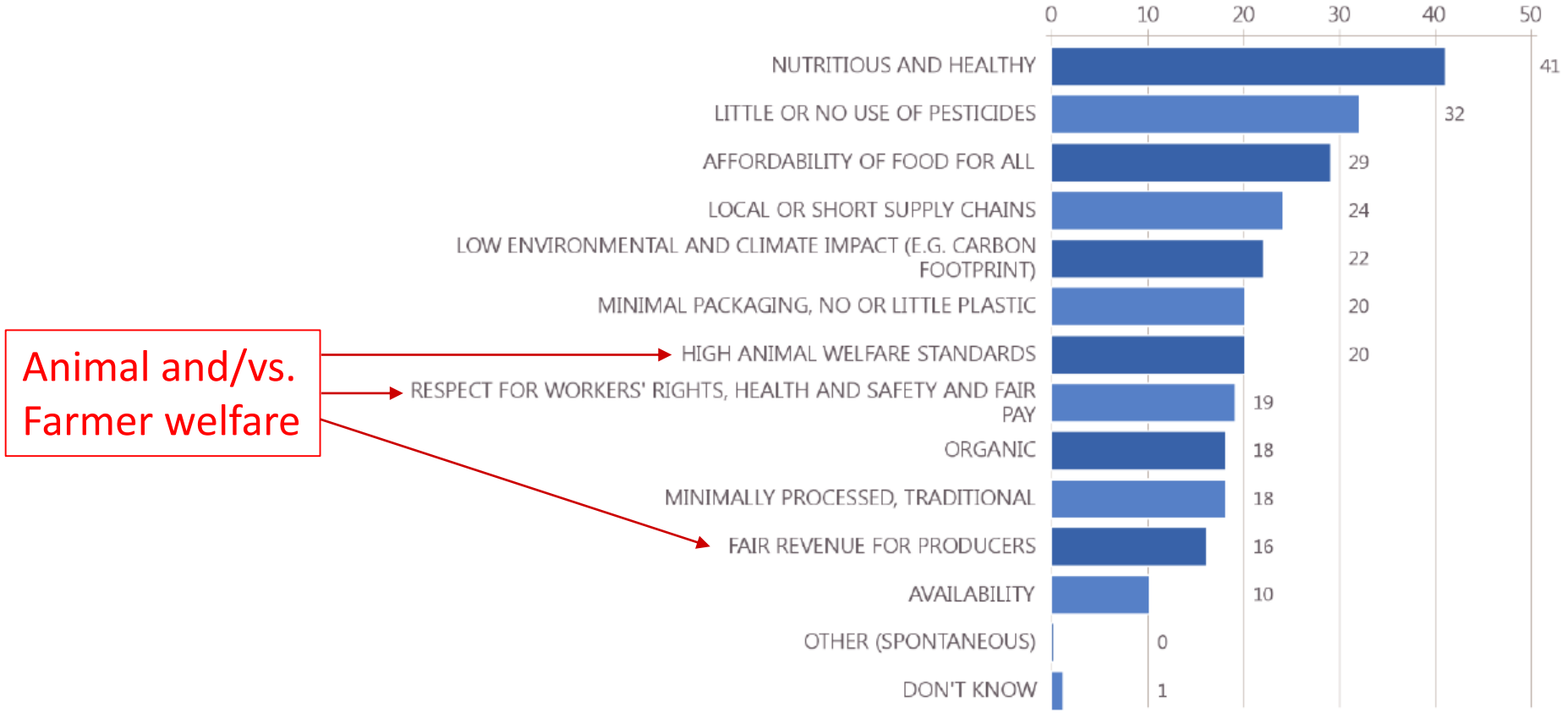
Source: Vanhonacker et al. (2010) J Agricultural & Environmental Ethics **23**

Consumers associate multiple attributes with 'sustainability' …

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



Animal and/vs. Farmer welfare

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

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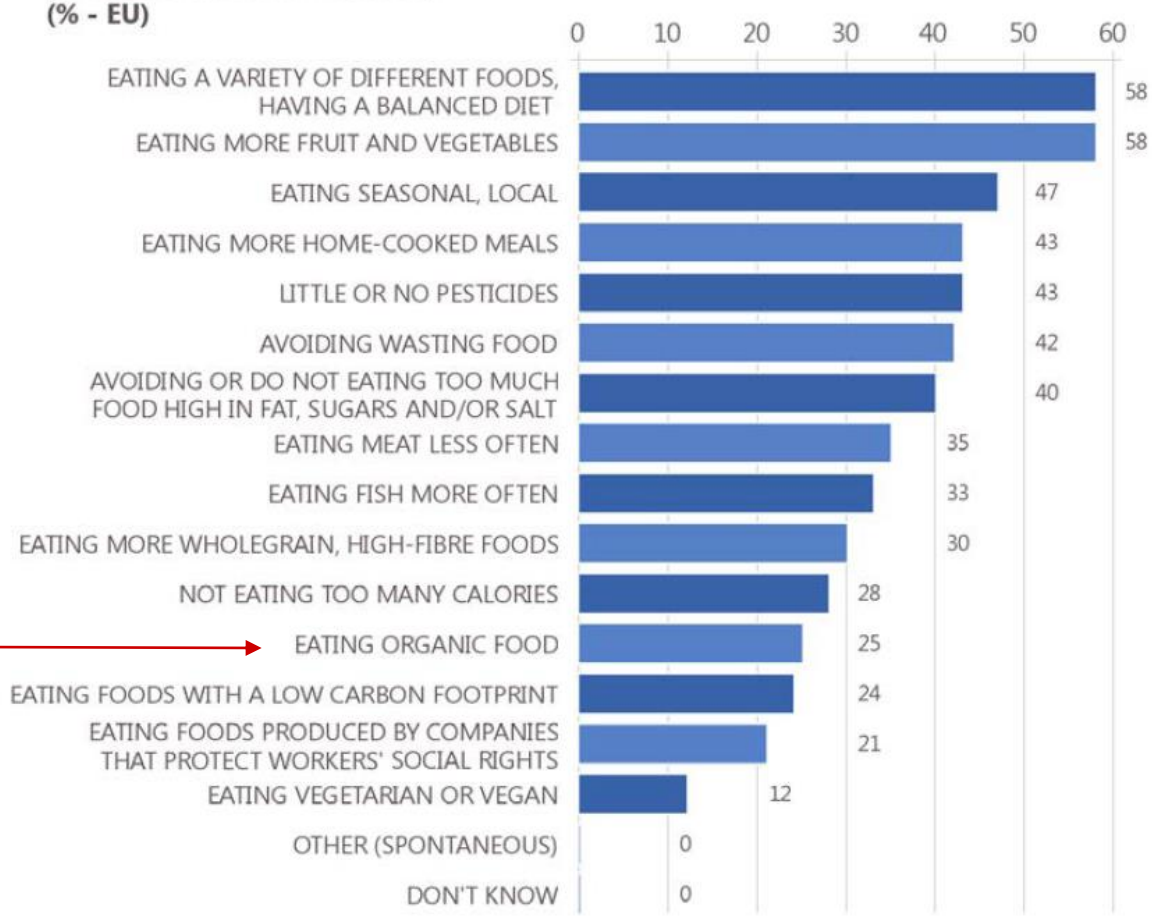
Source: EUROBAROMETER 505 (2020)

In a similar vein, a healthy and sustainable diet means different things to different people …

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



Many more things than just organic

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

Source: EUROBAROMETER 505 (2020)

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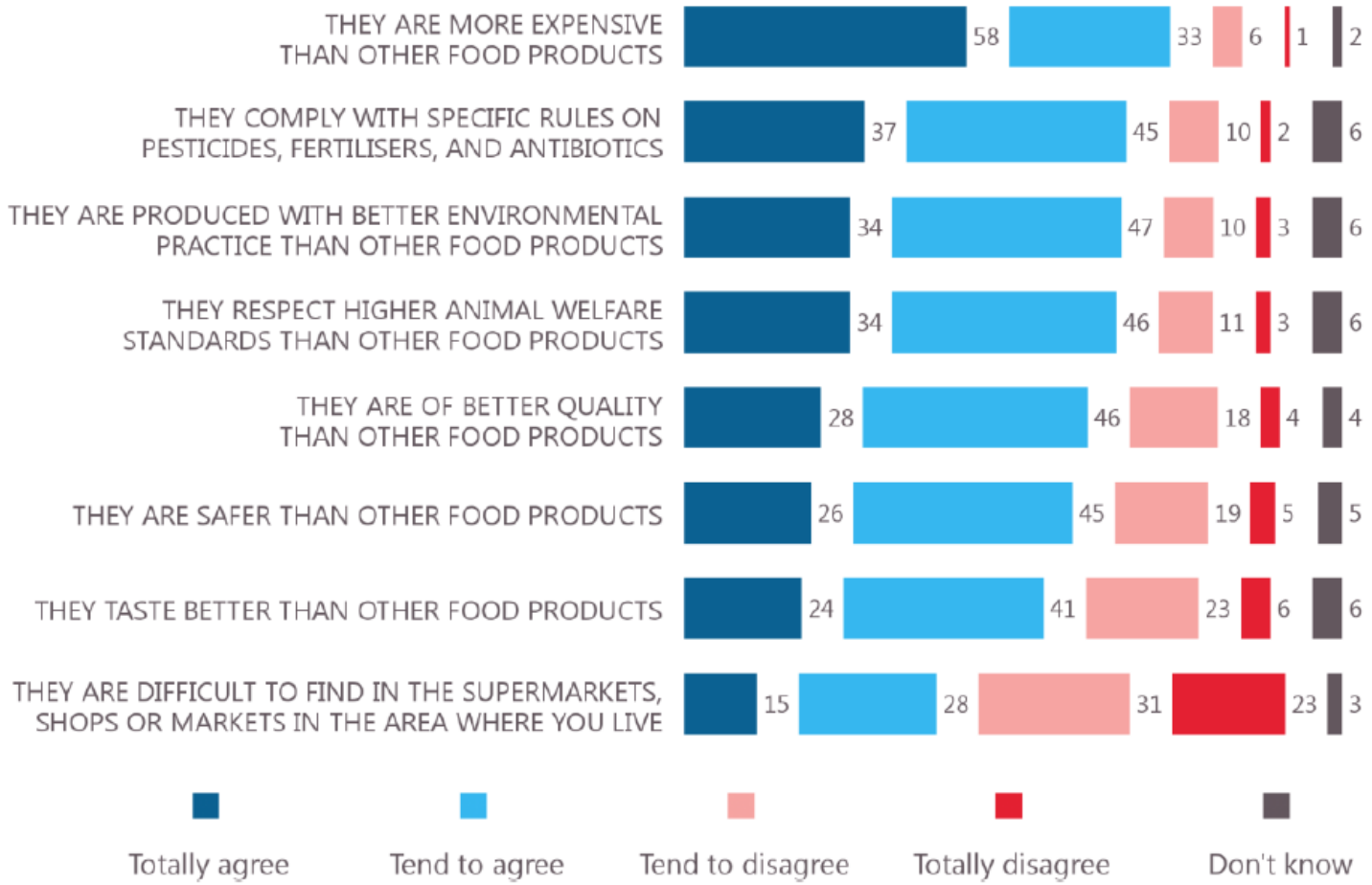
Despite organic food's overall favourable image, it is still (perceived as) more expensive

QA14 Do you agree or not with the following statements related to food products coming from « organic » agriculture ...?
(% - EU27)



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

Source: EUROBAROMETER 504 (2020)

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Consumer valuation of organic yoghurt

Table 5. Willingness to pay a price premium for 3 different types of buyers (%; n = 687)

Item	Total sample	Non buyer	Occasional buyer	Habitual buyer	*P*-value (*F*-test)
Mean (% extra)	21.9	15.2[a]	23.1[b]	39.9[c]	<0.001
SD (% extra)	22.4	19.1	19.7	25.0	
SE (% extra)	0.9	1.0	1.4	2.3	

[a–c]Indicate significantly different means using Dunnett T3 post hoc.

- Consumers who regularly buy organic yoghurt are willing to pay a 40% premium.
- The actual price premium for bio yoghurt in the market is indeed 35-40%.

- Consumers who never buy organic yoghurt are willing to pay a 15% premium.
- The actual price premium is more than twice the amount non-buyers are willing to pay.

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Source: Van Loo et al. (2013), Journal of Dairy Science **96**

Interest in sustainability by all cannot be taken for granted.
Consumers are not all alike. Markets are heterogenous.

- Segmentation
- Targeting
- Positioning

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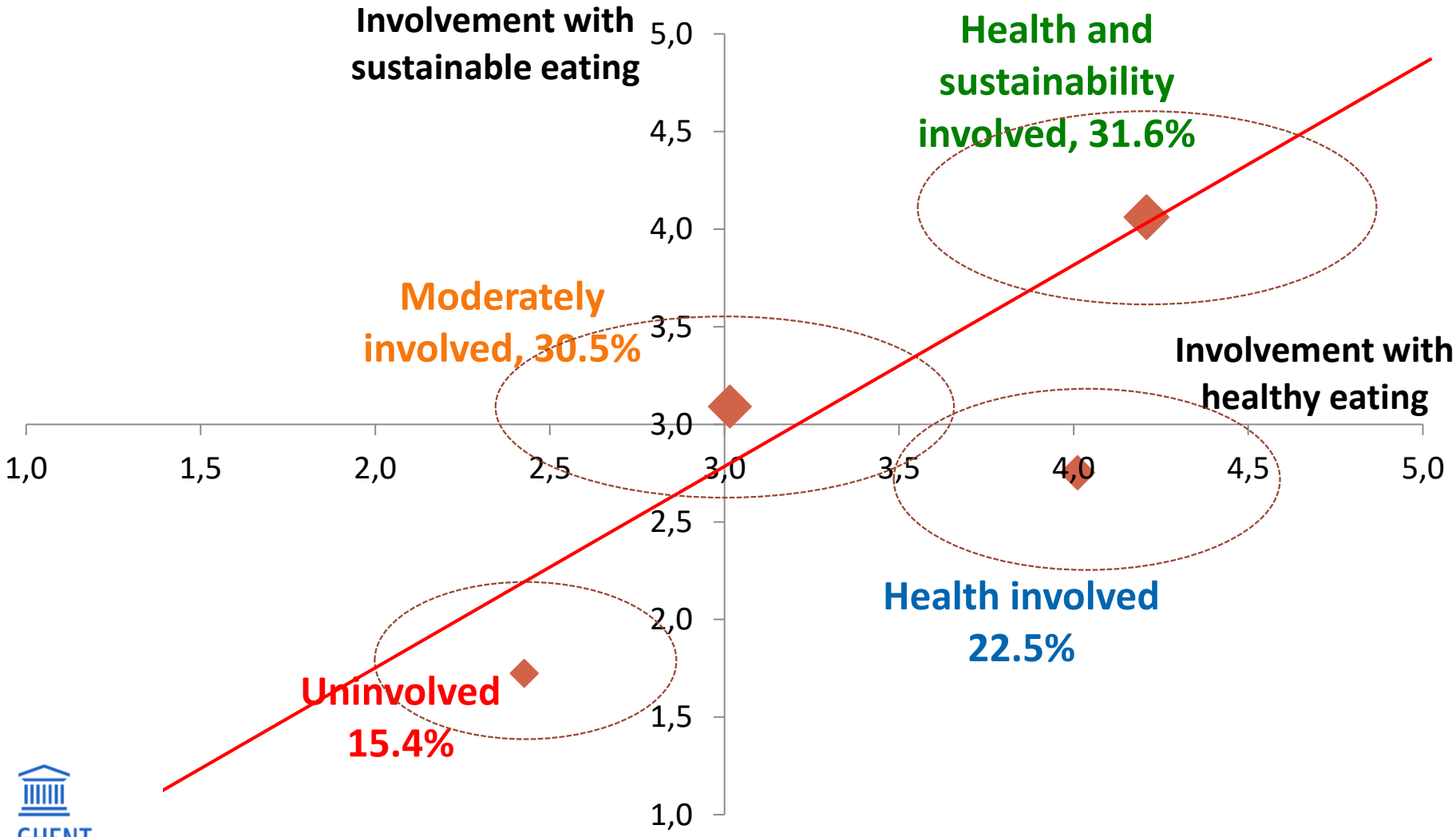
Consumer segments based on involvement with healthy and sustainable eating

(n=2,720; 2014; BE, NL, UK, DE)



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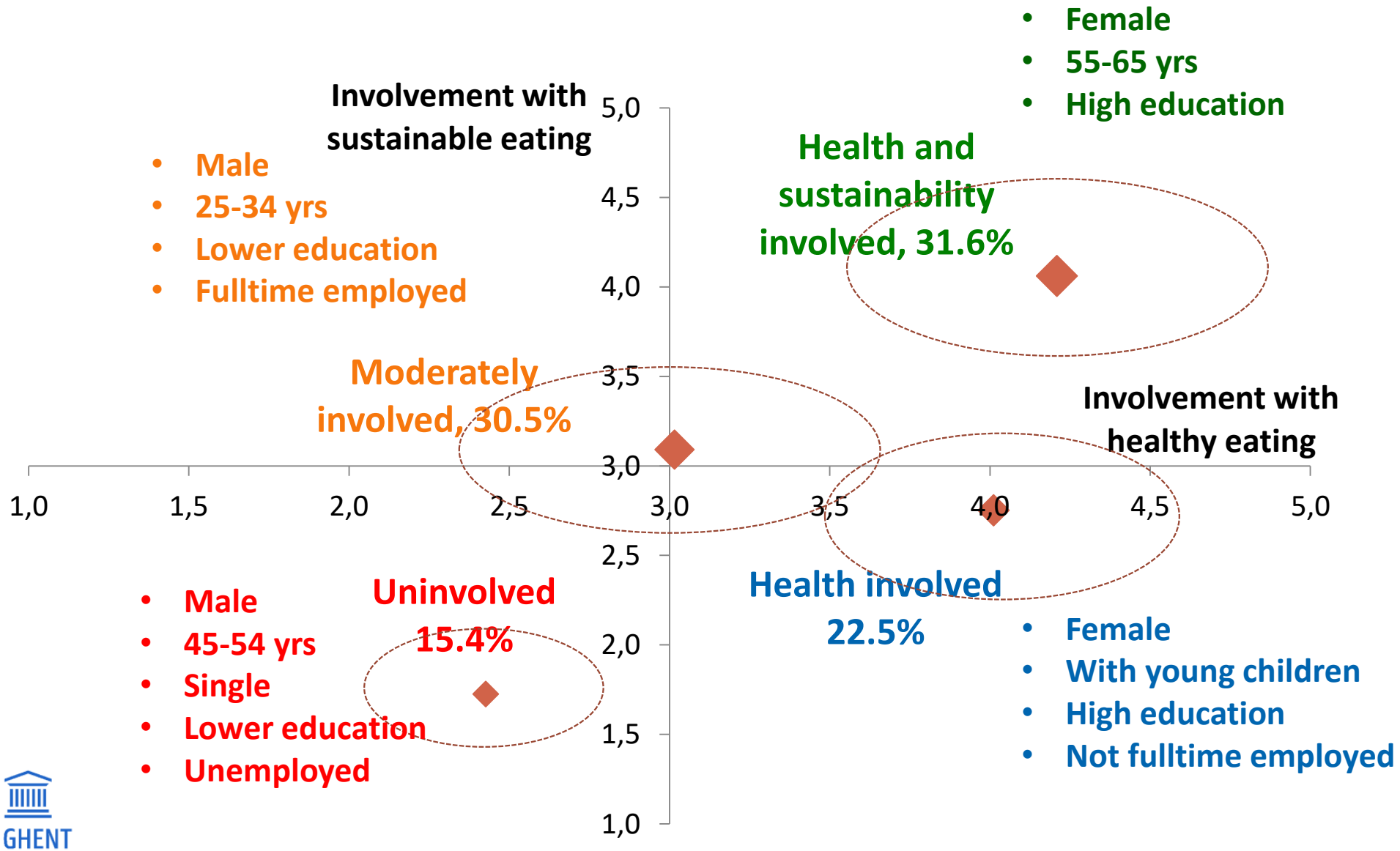
Source: Van Loo, Hoefkens, Verbeke (2017) Food Policy **69**

Segment profiles

(n=2,720; 2014; BE, NL, UK, DE)



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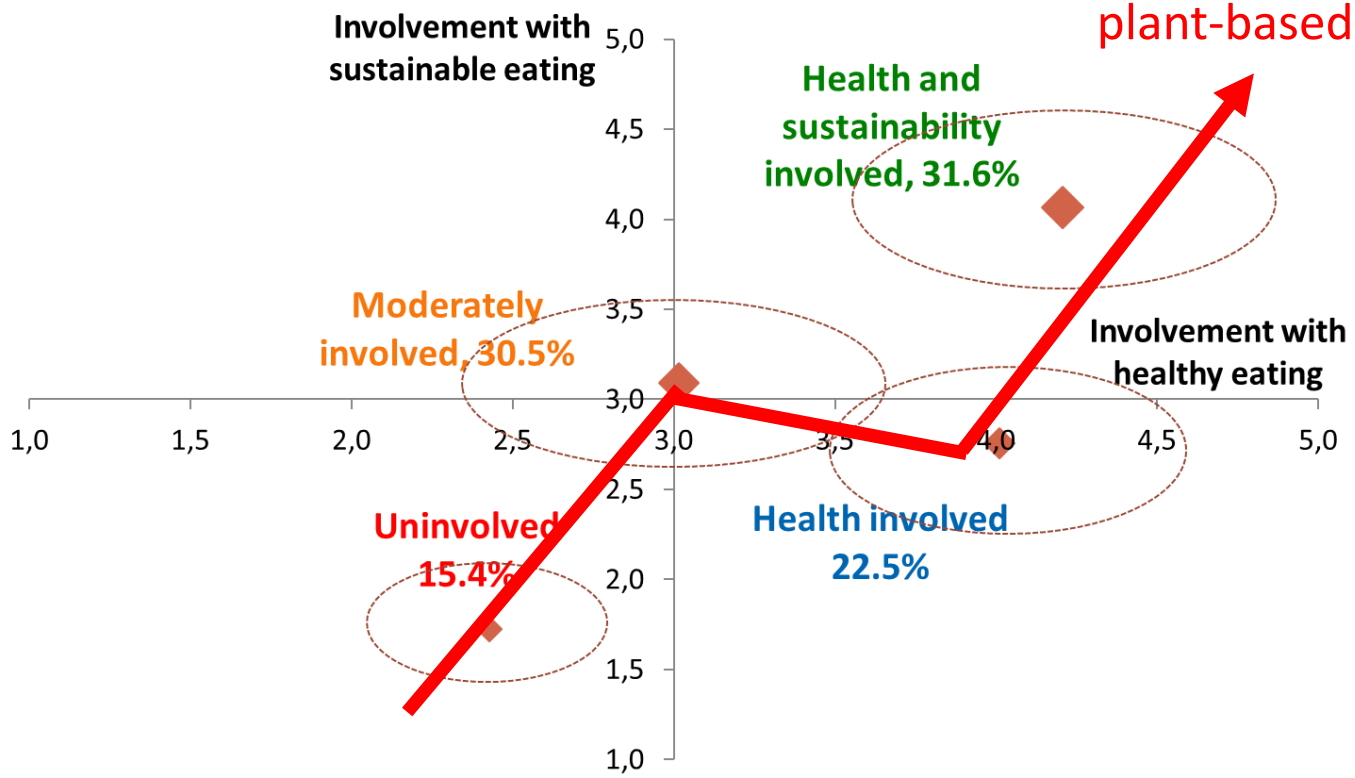
Source: Van Loo, Hoefkens, Verbeke (2017) Food Policy **69**

Segment profiles

(n=2,720; 2014; BE, NL, UK, DE)

Increasing levels of:

- Food-related health concerns
- Self-reported healthy eating
- Subjective healthiness of own diet
- Attitude towards and consumption of plant-based diets



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Source: Van Loo, Hoefkens, Verbeke (2017) Food Policy **69**

Strong perceived match between a healthy and a sustainable diet

but also …
a stronger association of both concepts with a plant-based rather than an animal-based diet

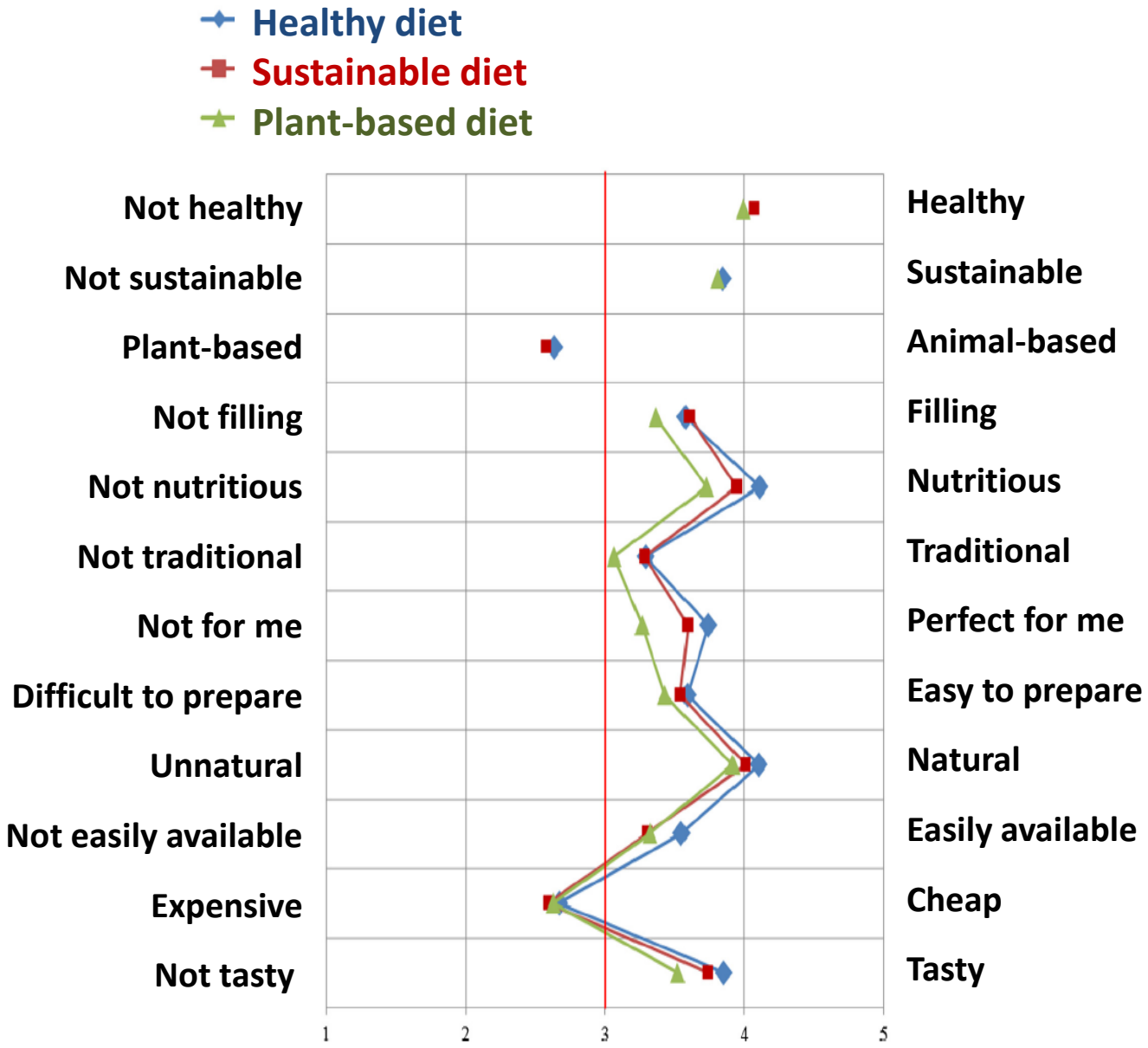

Fig. 1. Perception of a healthy, sustainable and plant-based diet (5-point semantic differential scale)[1] (n = 2783). ([1]For each of the items, Wilcoxon matched-pair signed-ranks tests were performed to test for differences between healthy, sustainable and plant-based diets ($p < 0.05$). Only five pairs were not statically different as indicated by the following superscripts: [a] No significant differences between healthy and sustainable diet; [b] No significant differences between healthy and plant-based diet; [c] No significant differences between sustainable and plant-based diet.)

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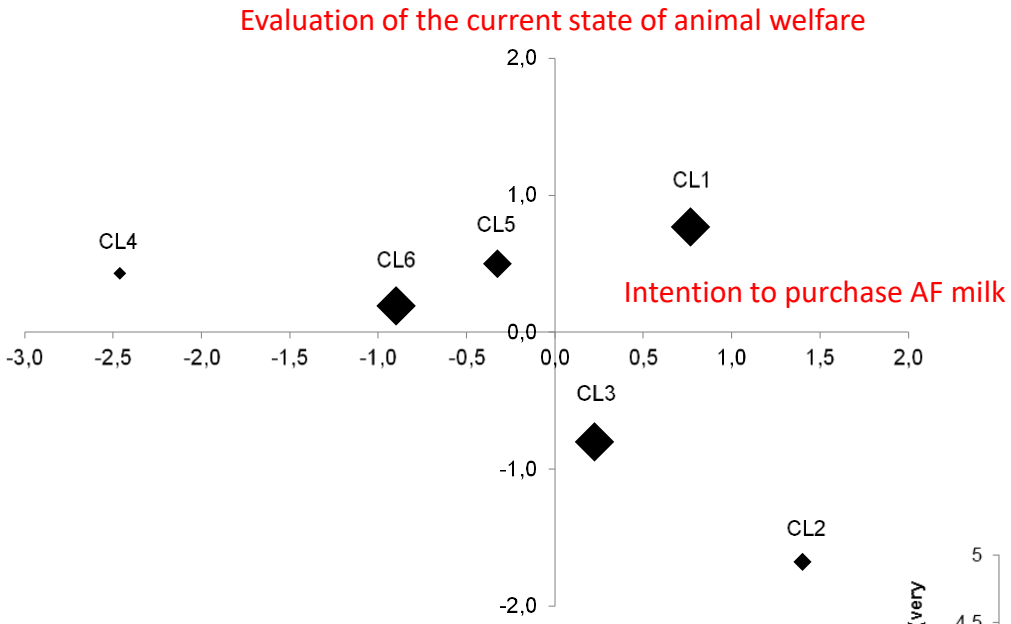
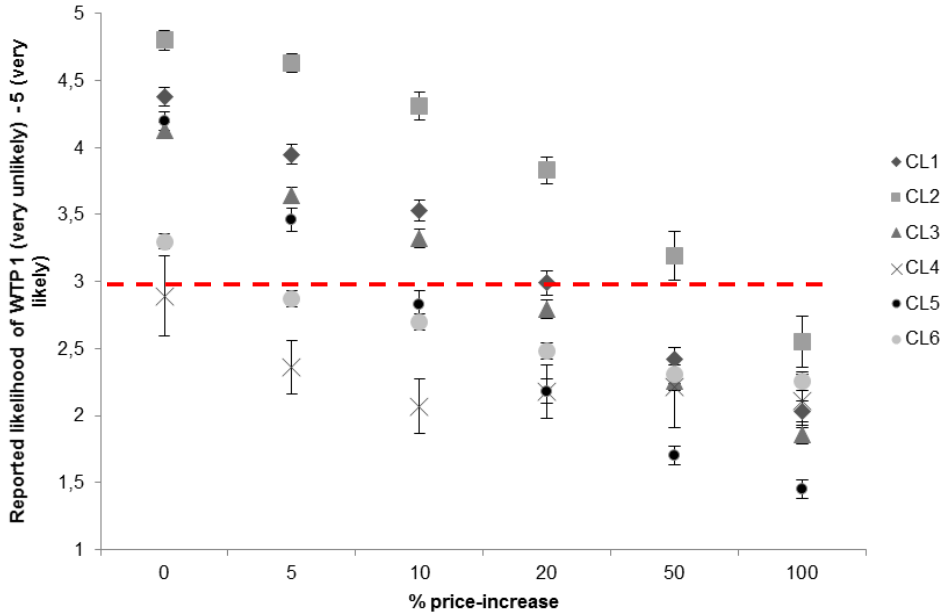
Source: Van Loo, Hoefkens, Verbeke (2017) Food Policy

Market segments and willingness-to-pay (WTP) for AF milk



- 6 distinct market were segments identified
- High potential CL2 (8%)
- Moderate potential CL1 (24%) & CL3 (24%)
- Low potential CL4, CL5, CL6

- WTP up to 10% CL2, CL1, CL3
- WTP up to 20% only CL2
- WTP up to 50% CL2 to some extent
- WTP double: none



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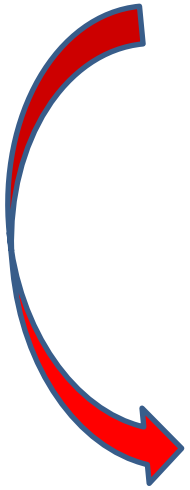
Source: de Graaf et al. (2016) Sustainability **8**: 1302

Implications for proposal drafting

Sustainability is a broad and multi-faceted concept,
which can mean many different things to different people.



1. What exactly makes your product ‘sustainable’ ? Our USP !
2. To what extent does this distinguish your product from competitors ?
3. Is this USP also appealing to consumers and for what reason ? Motives !
4. How can the related sustainability claim be substantiated ? Trust !
5. How will you translate this into your message(s) ? Messages !
6. How will you transfer this message to your target market ? Activities !

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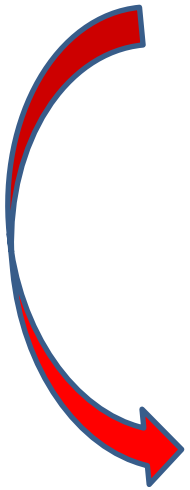

1. How is your target market structured ? Segments!
2. Think of primary and secondary targets; decision-makers and influencers.
3. What are the characteristics and preferences of your target segment(s)?
4. How does your product appeal to those preferences ?
5. To what extent can interest and preferences eventually be altered ?
6. What is the potential of new markets and/or segments ?

Implications for proposal drafting

Award criteria:

- Relevance (b), contribution to sustainability of production and consumption
- Relevance (c), market analysis
- Technical quality, activities and deliverables

SWOT:

- Markets, Segments, and their Preferences = Opportunities / Threats
- Sustainability-related USPs = Strengths / Weaknesses

Information sources:

- Eurobarometer surveys and reports
- Scientific publications

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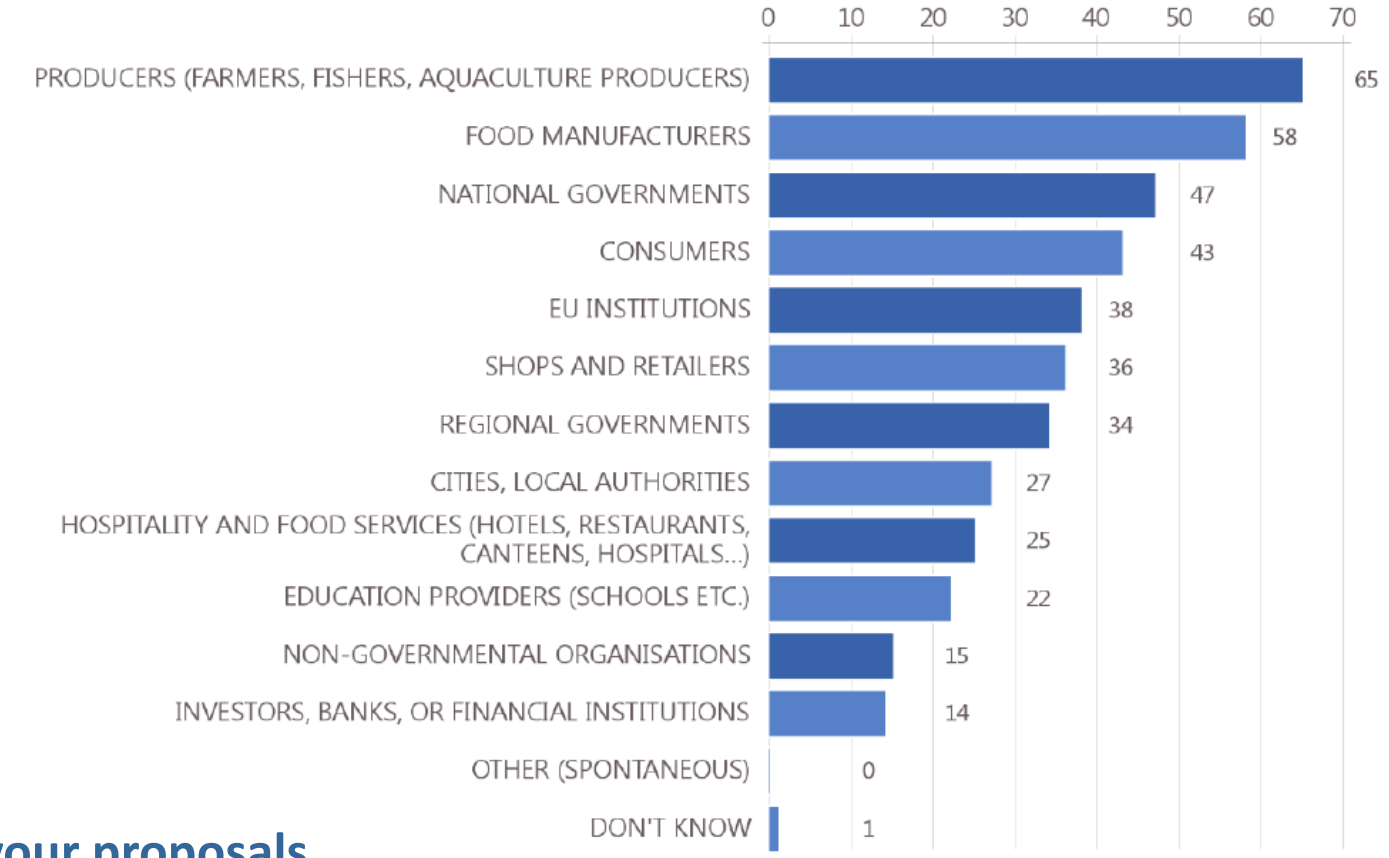
Consumers see a primary role for producers and food manufacturers in making our food systems sustainable.

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



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

Go for it,
Good luck with your proposals,
See the following testimonials !

Source: EUROBAROMETER 505 (2020)

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THANKS FOR YOUR ATTENTION

LOOKING FORWARD TO YOUR TESTIMONIALS AND QUESTIONS

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