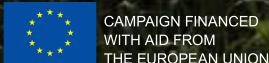


Survey 2022

Key insights and results

April 2022

European Milk Forum



userneeds



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Methodology of the survey /1

- The survey was carried out in five European countries; **Belgium, Denmark, France, Ireland, and Northern Ireland.**
- **The survey consists of a sample with 1.500+ representative respondents** between the age of 18-99 years in each country.
- **Except** for and Northern Ireland, where the sample size is 950+ and in Denmark, where the respondents are between 18-65 of age.



Methodology of the survey /2

- The data was collected in **February** through **March 2022** by Norstat.
- The questionnaires consisted of a central part with common questions and a specific part with individual local questions for each market. **This presentation covers the central part.**
- Some questions have been repeated throughout the last five years of research making the results for 2022 comparable. If there is no yearly comparison, the question has not been asked in the previous years.
- When the following refers to ‘the Europeans’ it is equivalent to the citizens of the five countries.





Cross-cutting insights from 2022

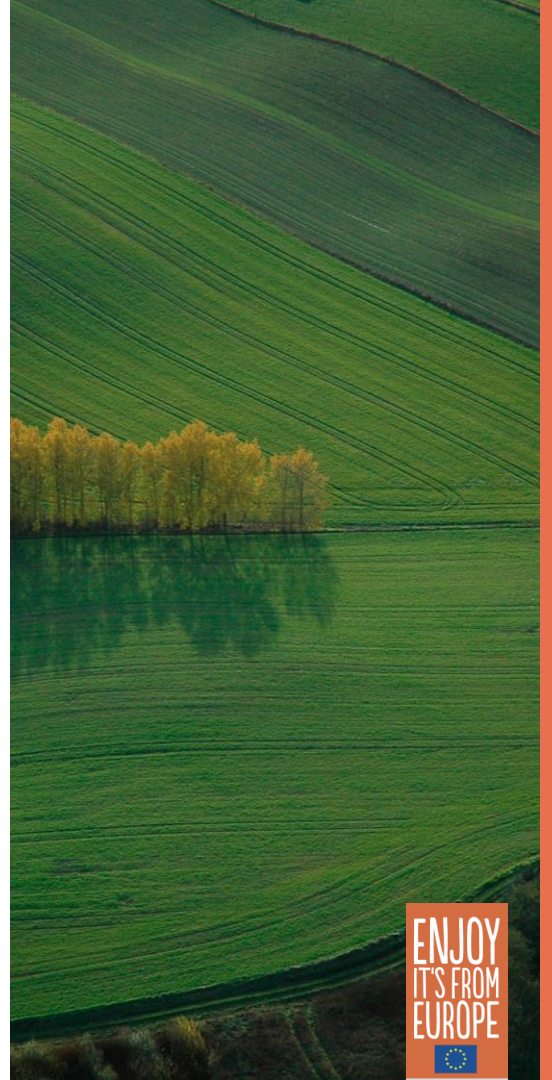
- 1) In 4 out of 5 countries, at least 49% of consumers are willing to pay more for dairy products if the cost increase is due to climate and or sustainability initiatives
- 2) Dairy products are key to enjoyable meals for between 59% and 67% of Europeans
- 3) Nutritional value (64%-77%) is the most common reason why dairy is part of consumers' diets
- 4) A majority of consumers (between 56%-75%) believe it is more sustainable for the planet to keep dairy production in Europe
- 5) Half of consumers (46%-60%) think the dairy sector is serious about becoming more sustainable
- 6) A majority of consumers (59%-74%) perceive the dairy sector as vital to rural communities and regional economies



Cross-cutting insights 2018-2022

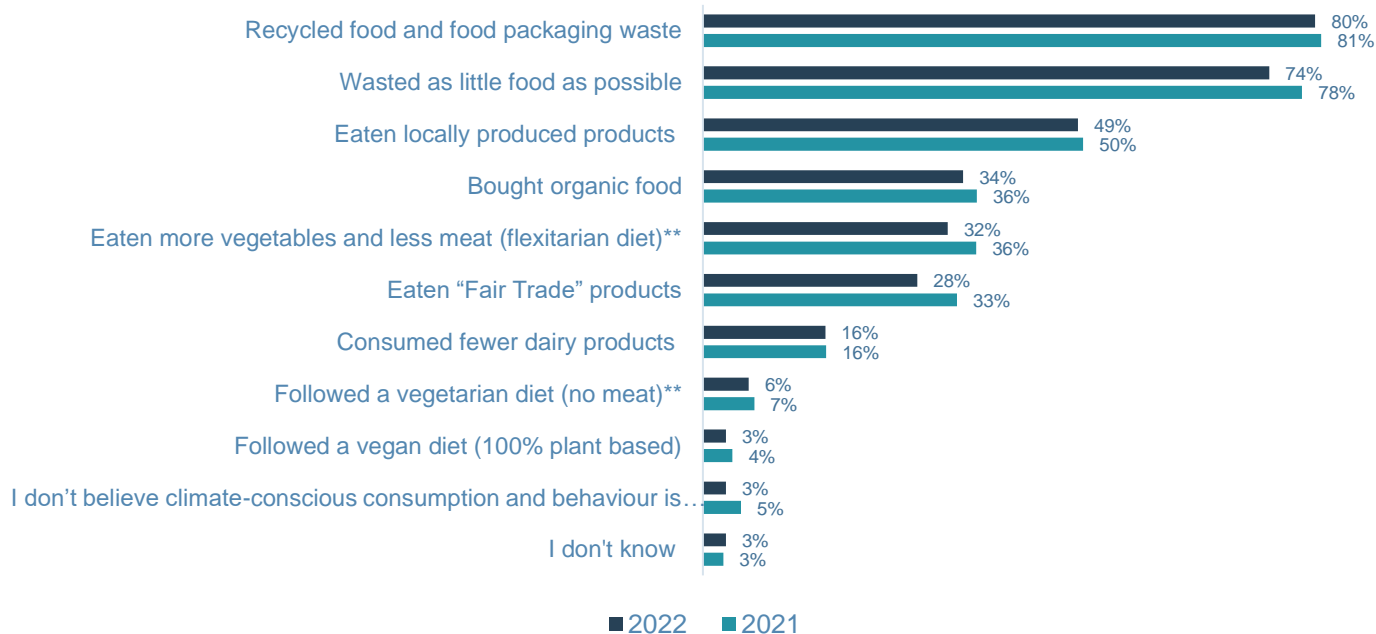
- 1) Dairy products are increasingly considered as part of a sustainable diet when asked directly. There is a 10% increase from 31% in 2021 to 41% in 2022.
- 2) Both taste and price are more important to consumers when purchasing food in 2022. In 2021 Price was considered important for 51% and taste was at 61%. In 2022 the number for price is 73% and taste is 70%
- 3) The Dairy sector is considered among the most responsible of the presented sectors in the survey. That is an increase from 20% in 2017 to 27% in 2022.
- 4) The dairy sector is considered “pollutive” by the lowest share of consumers throughout 2018-2022. In 2018 it was 21% and in 2022 17% of consumers associated the dairy sector with "pollutive".
- 5) In 4 out of 5 countries there is a significant decrease in the share of consumers who think the dairy sector has a negative impact on climate change. In the four countries it was between 44% and 67% in 2018. That has dropped to between 27% and 33% in 2022.
- 6) A higher share of consumers believe the dairy sector focuses on reducing its impact on climate change. In 2018 it was between 27% and 36% that has increased to between 40% and 48% in 2022.

Consumers: Dairy, diet and sustainability



1 in 6 still consume fewer dairy products as a climate conscious action. Recycling and food waste tops the list again in 2022.

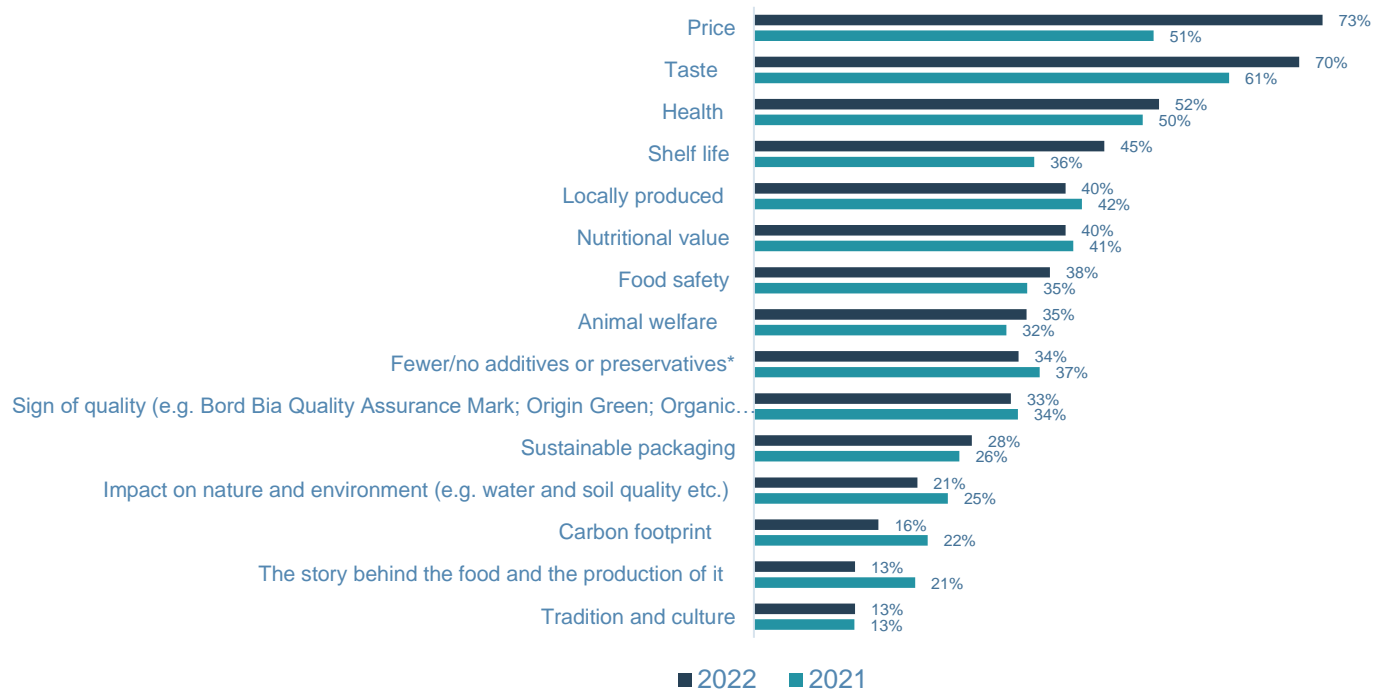
What climate conscious actions have you taken in the past year? (Choose all that apply)



**Wording changed in 2021

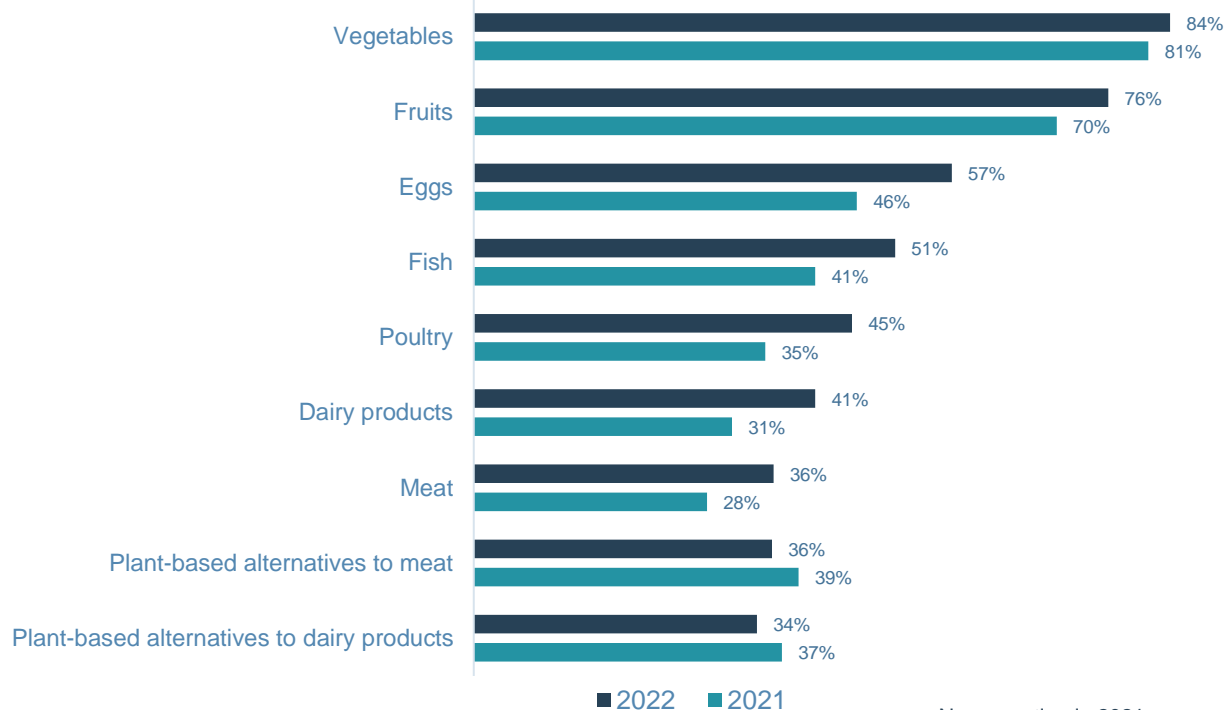
Price is the most important factor when buying food in 2022

When purchasing food, which of the following factors do you consider important?



Large increase in the share of consumers who consider dairy products as part of a sustainable diet

Which of the following do you consider being a part of a sustainable diet?
(Choose all that apply)



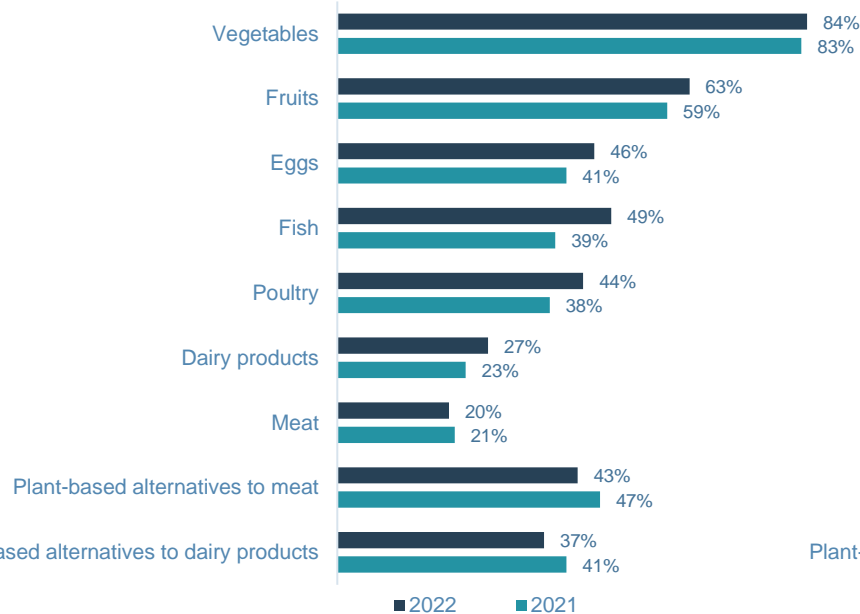
New question in 2021

Which of the following do you consider being a part of a sustainable diet?
(Choose all that apply)

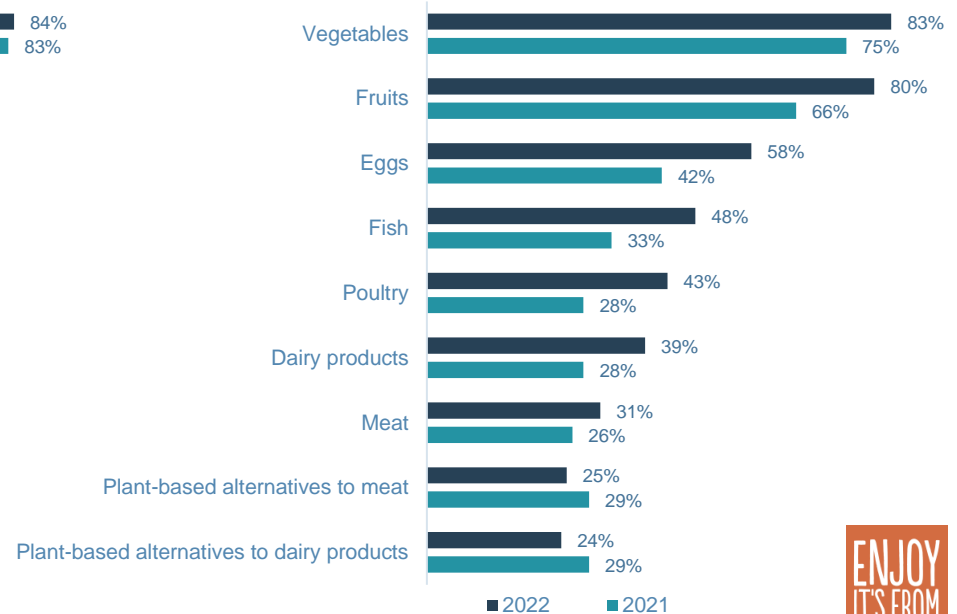
11

Increased share of consumers who consider dairy products as part of a sustainable diet both in Denmark and France

Denmark



France

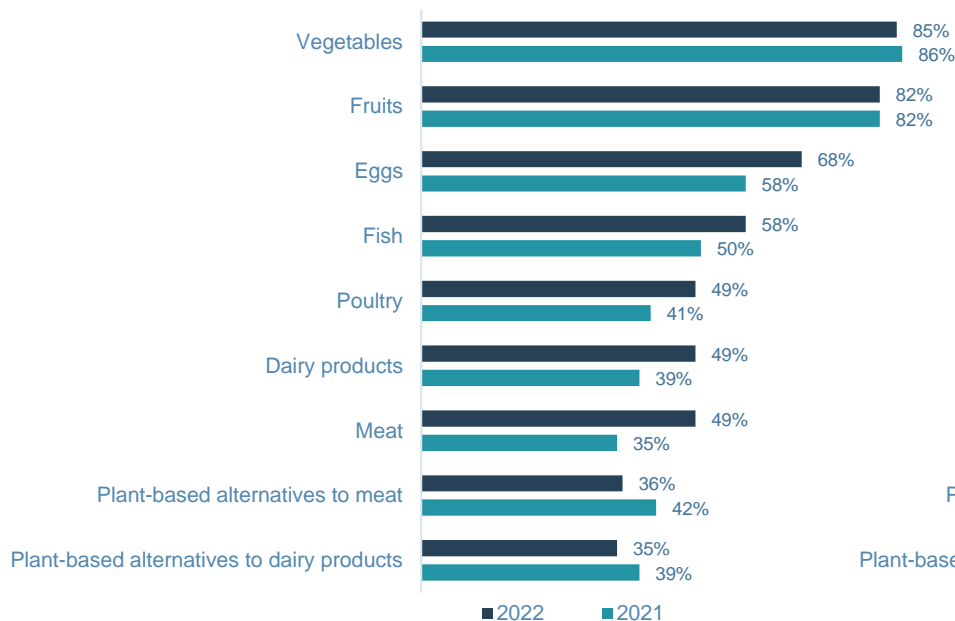


New question in 2021

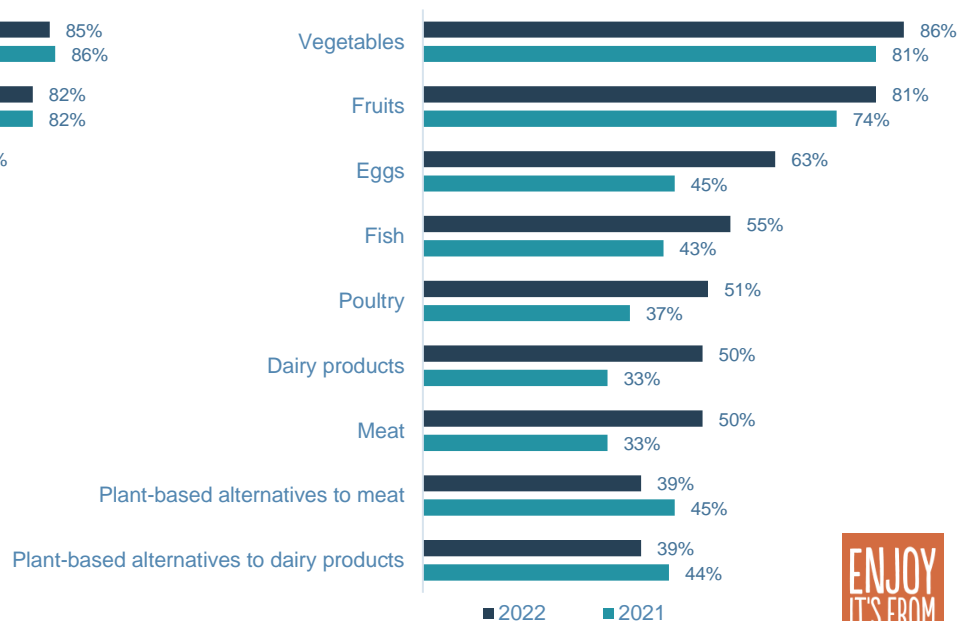
Half of consumers in both Ireland and Northern Ireland now consider dairy products as part of a sustainable diet

Which of the following do you consider being a part of a sustainable diet?
(Choose all that apply)

Ireland



Northern Ireland

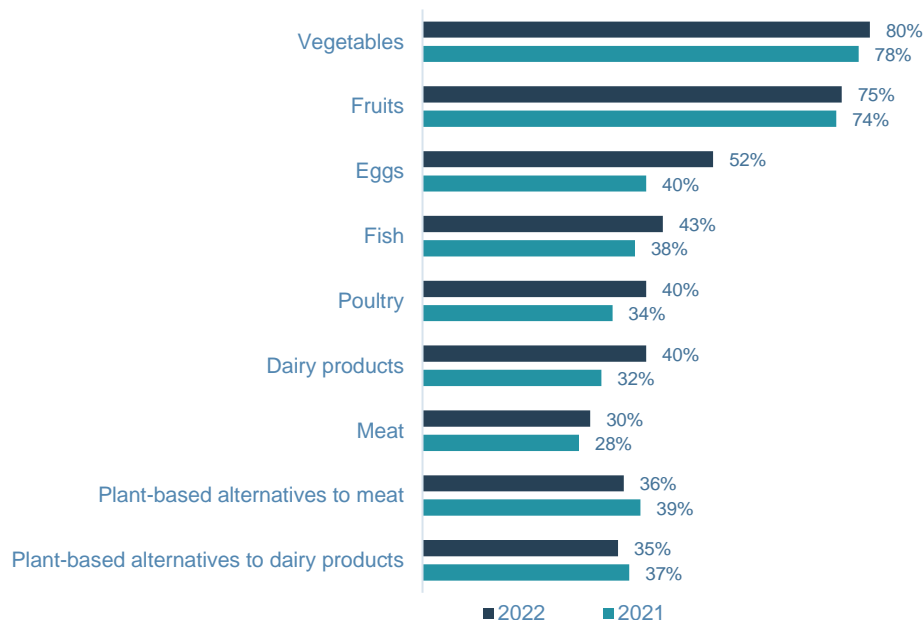


New question in 2021

Large increase in the share of consumers who consider dairy as part of a sustainable diet in Belgium

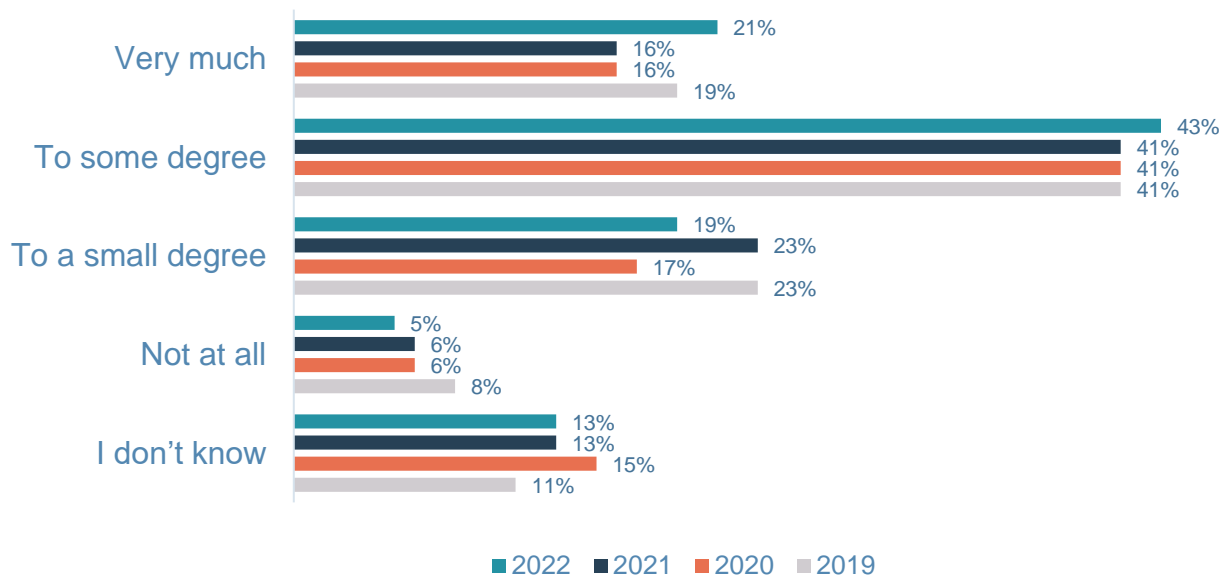
Which of the following do you consider being a part of a sustainable diet?
(Choose all that apply)

Belgium



Increase in perception of dairy products as part of a sustainable diet

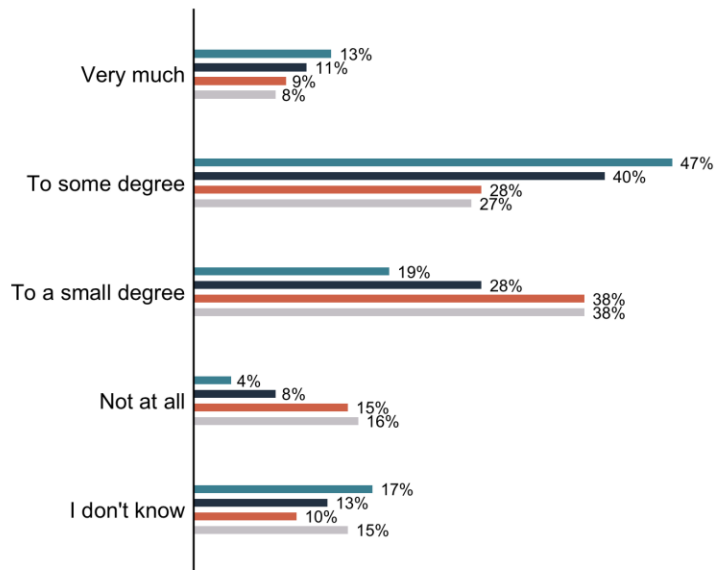
To what degree do you perceive dairy products as being a part of a sustainable diet?



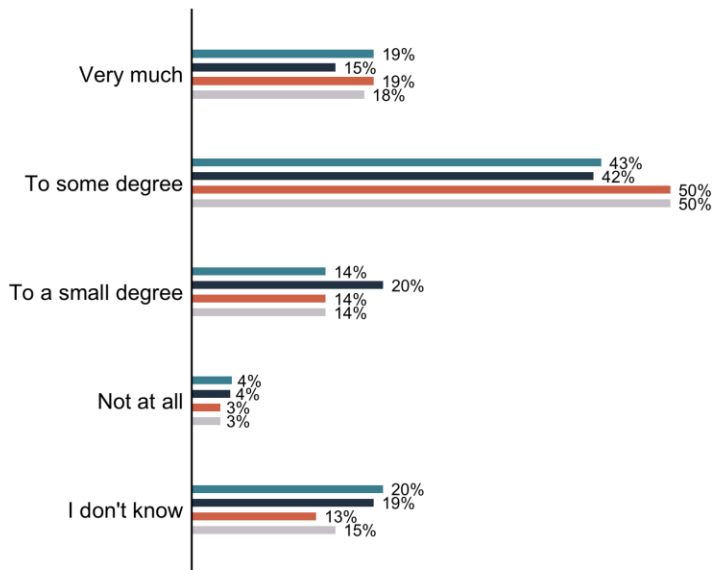
Dairy products is considered as part of a sustainable diet by over 60% of the consumers in both Denmark and France

To what degree do you perceive dairy products as being a part of a sustainable diet?

Denmark



France

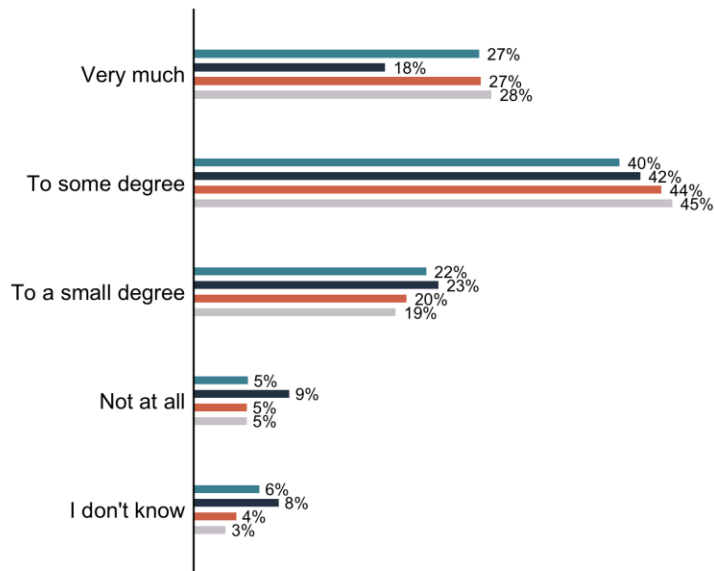


2022 2021 2020 2019

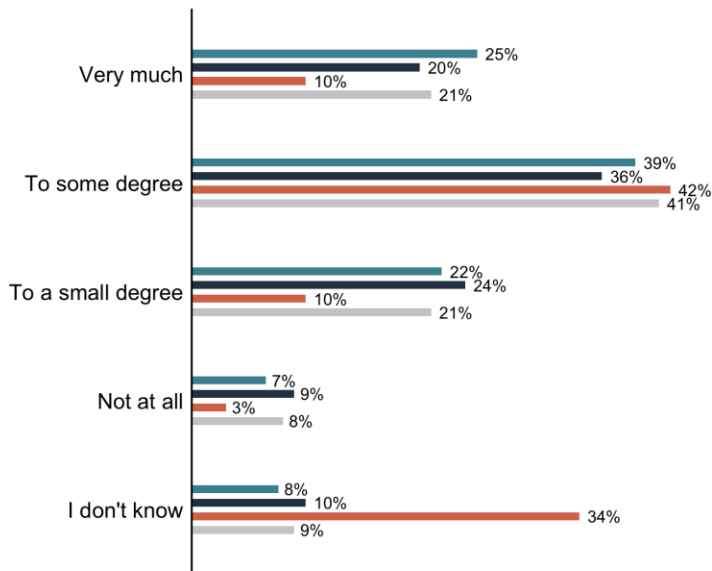
Dairy is considered as part of a sustainable diet by over 60% of consumers in both Ireland and Northern Ireland

To what degree do you perceive dairy products as being a part of a sustainable diet?

Ireland



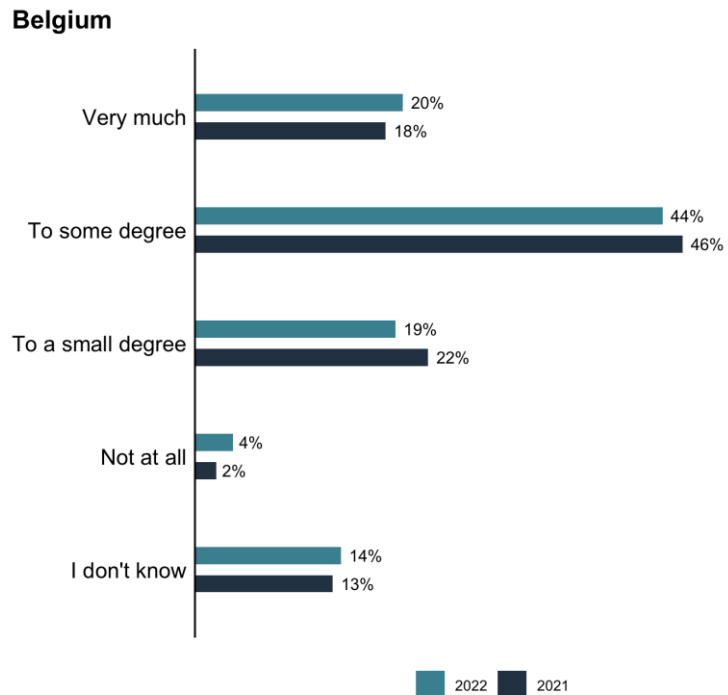
Northern Ireland



2022 2021 2020 2019

The high amount of people who consider dairy as part of a sustainable diet is maintained in Belgium

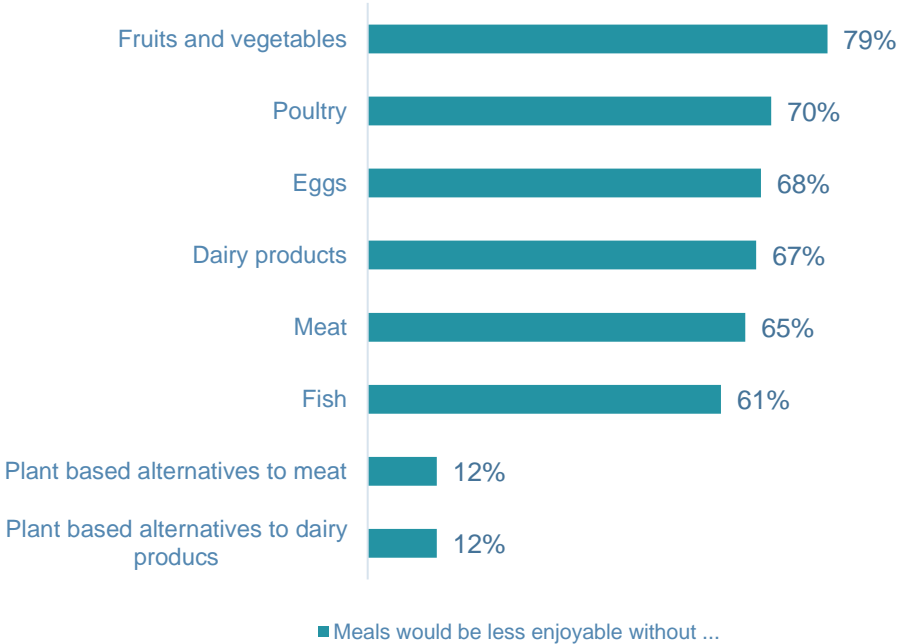
To what degree do you perceive dairy products as being a part of a sustainable diet?



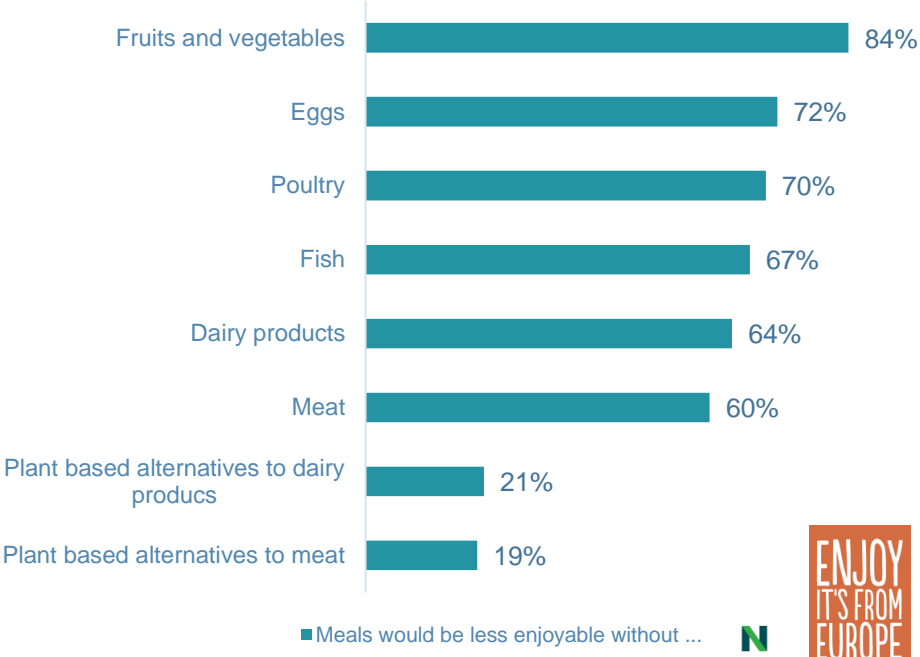
More than 2/3 would enjoy their meals less without dairy products

If the following products were no longer available, how would it impact your experience of what you eat on a daily basis?

Denmark



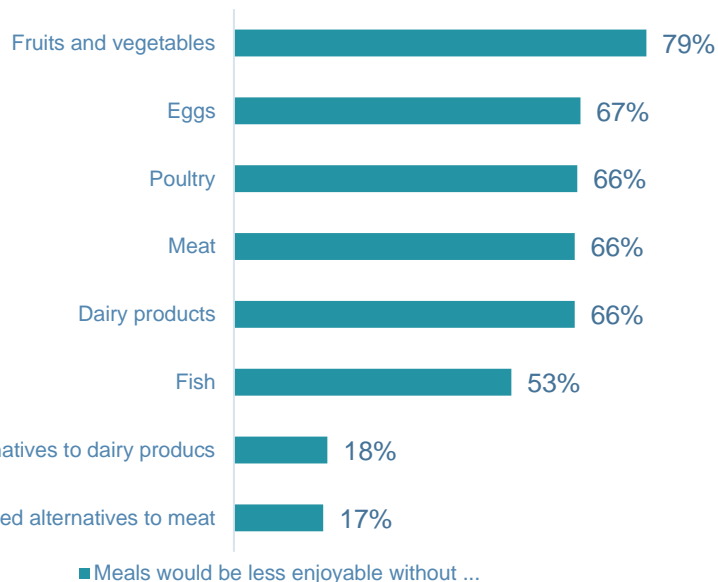
France



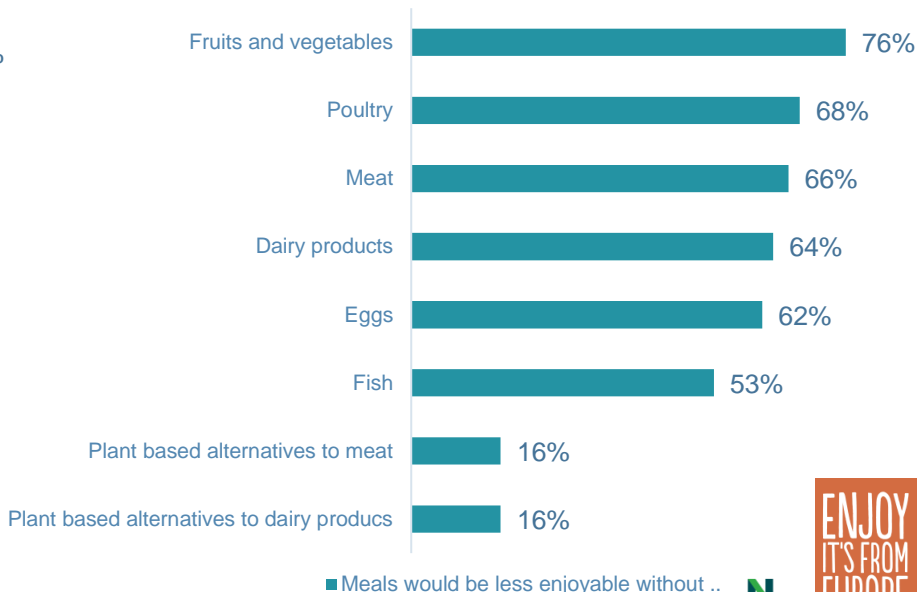
2/3 would enjoy their meals less without dairy in both Ireland and Northern Ireland

If the following products were no longer available, how would it impact your experience of what you eat on a daily basis?

Ireland



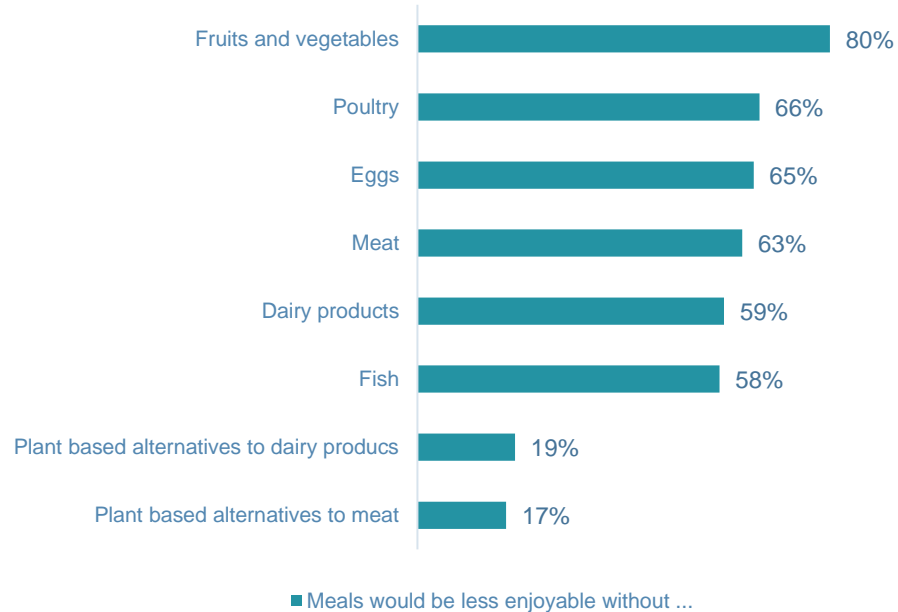
Northern Ireland



More than half would enjoy their meal less without dairy in Belgium

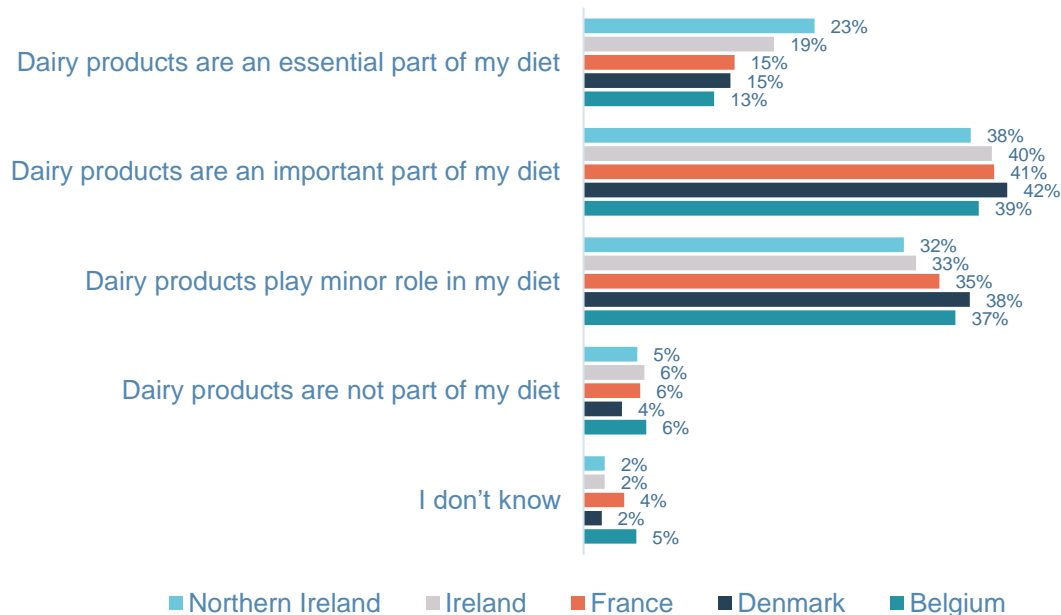
If the following products were no longer available, how would it impact your experience of what you eat on a daily basis?

Belgium



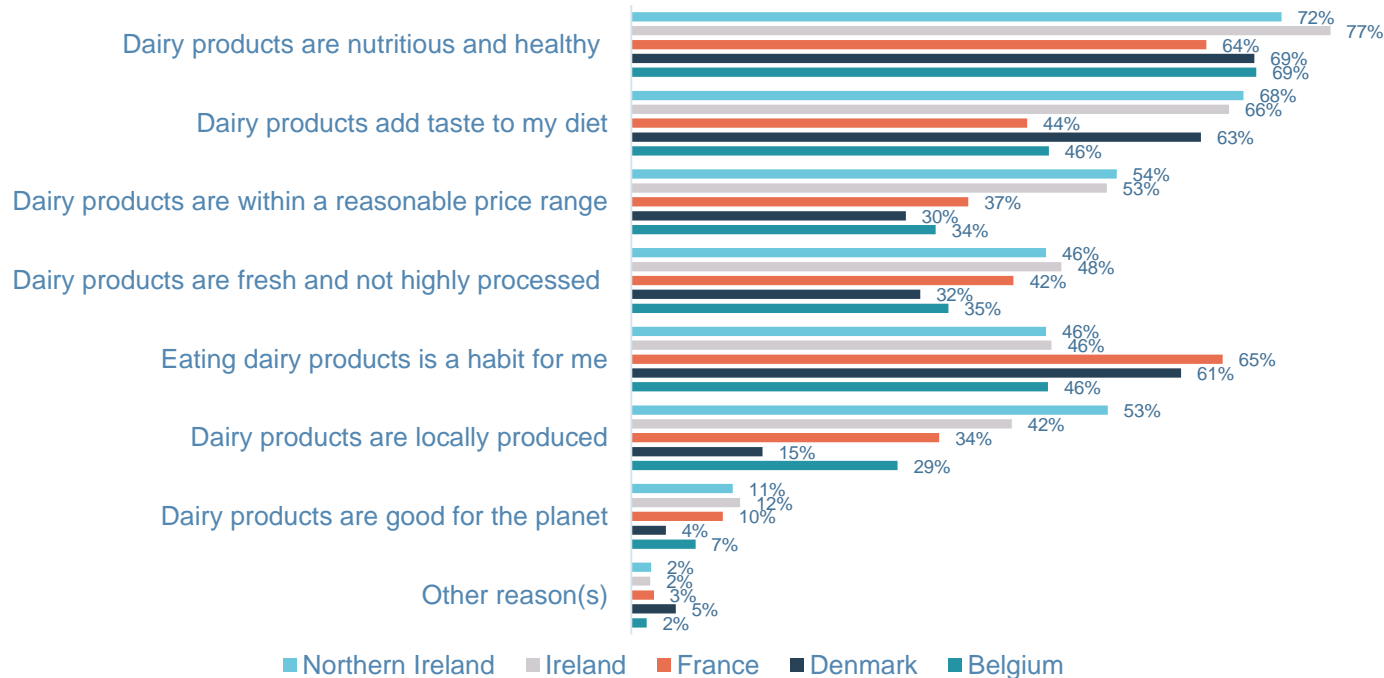
For half, dairy is an important or essential part of the diet across countries

What role do dairy products play in your diet?



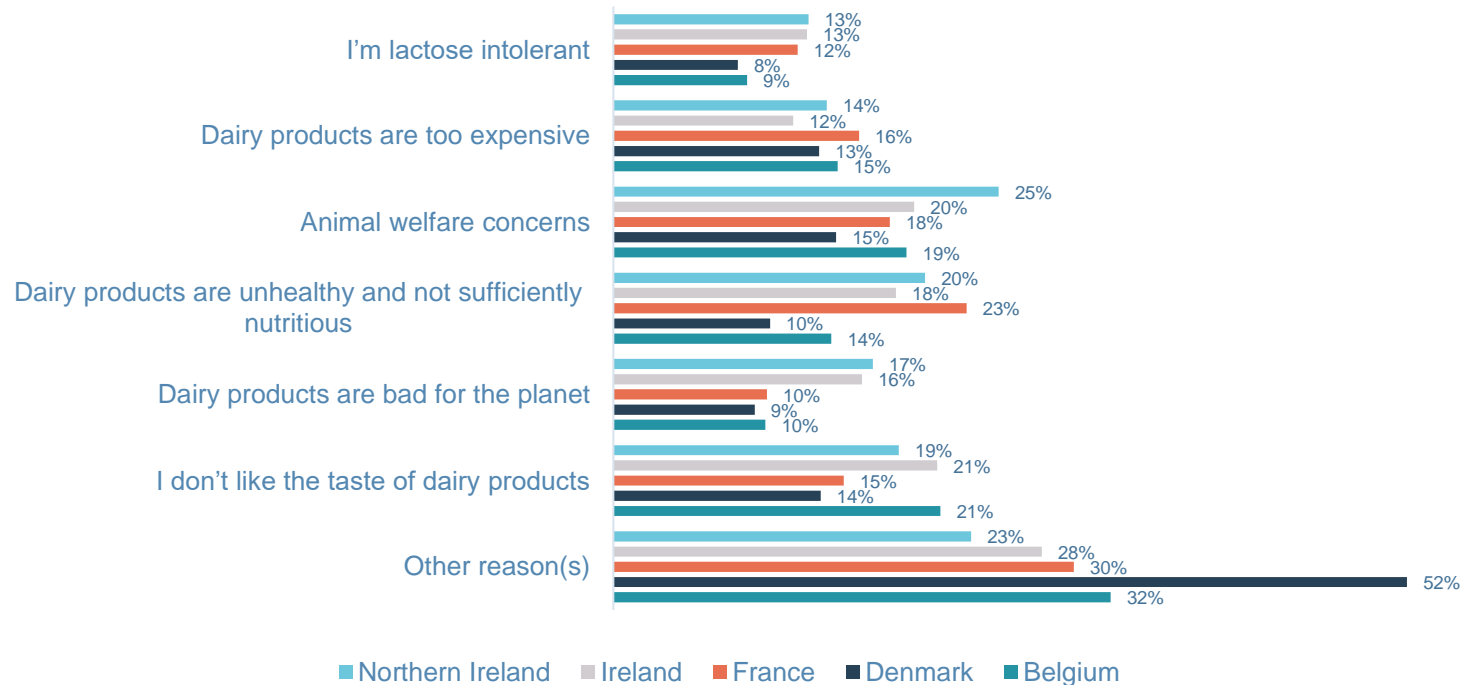
'Nutritious and healthy' and taste are the most important factors for those who consider dairy products an important or essential part of their diet. Only few consume dairy products because they are good for the planet.

Why is dairy products an important or essential part of diet?



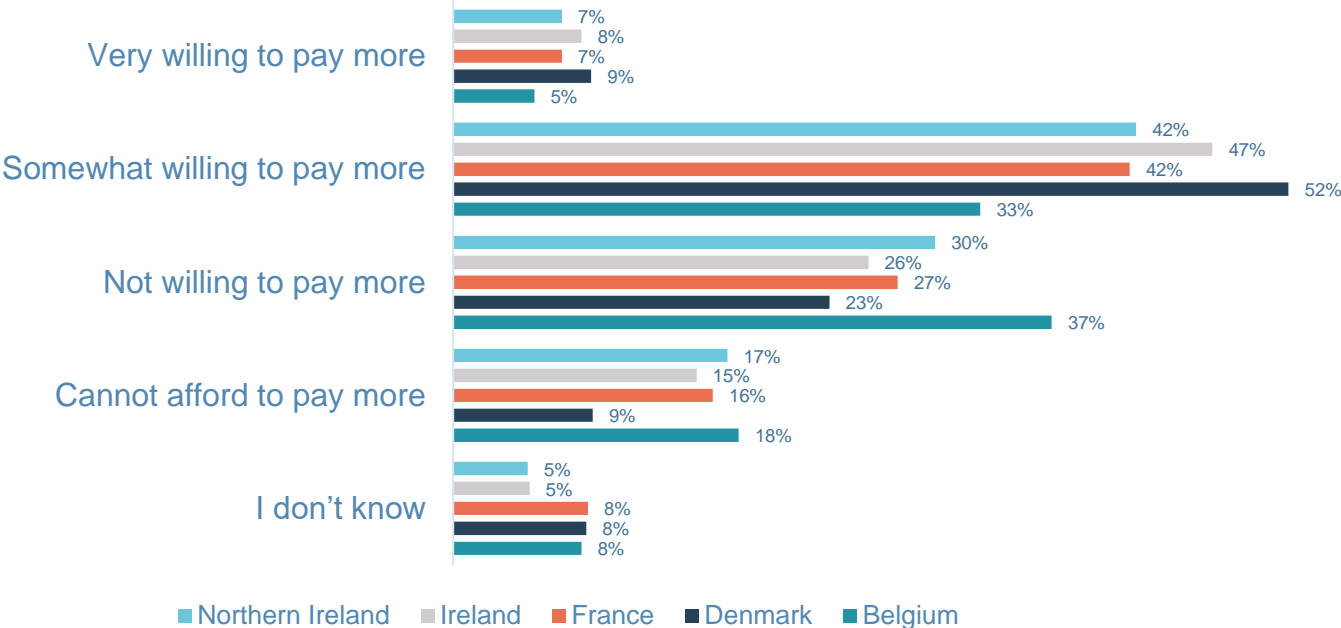
The consumers who do not eat dairy products has various different reasons to why they do not eat dairy products

Dairy products is a minor role/not part of my diet



Around half are willing to pay more if increased sustainability targets and initiatives for European dairy farmers could result in more expensive dairy products

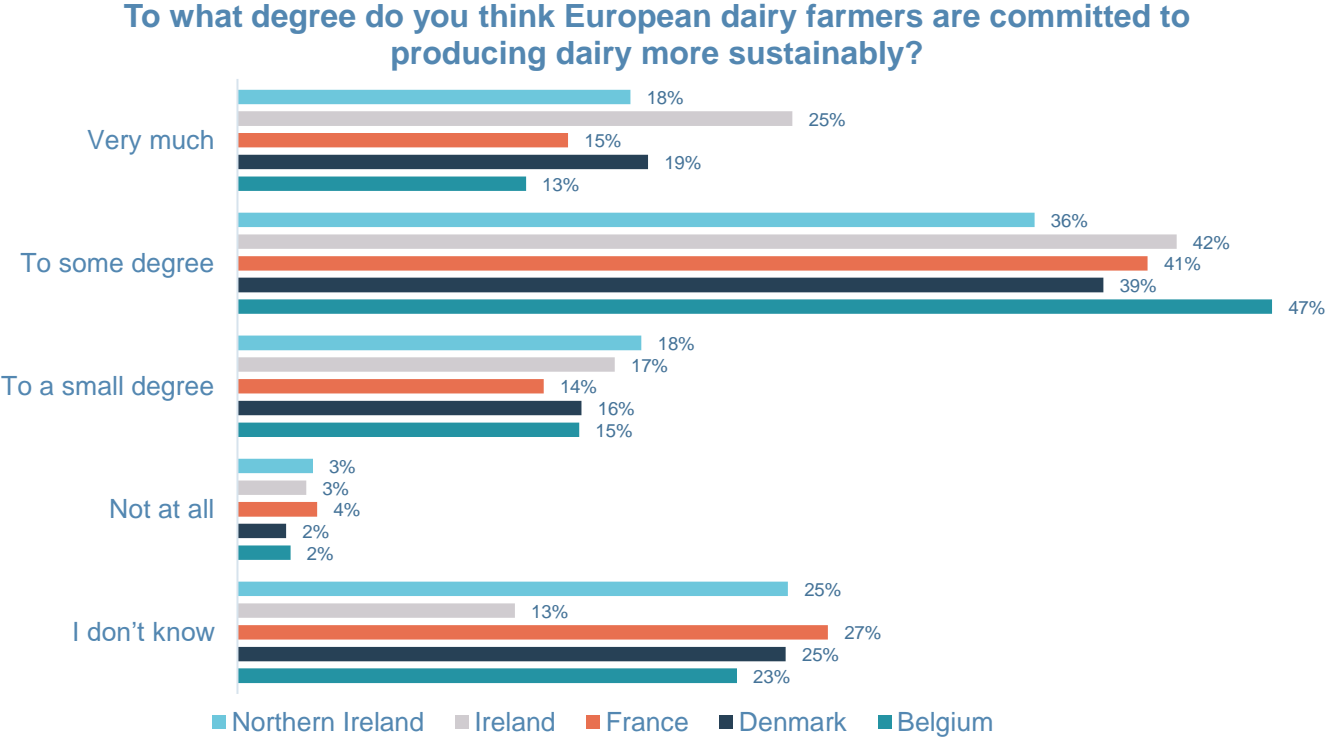
Increased sustainability targets and initiatives for European dairy farmers could result in more expensive dairy products for consumers. How willing would you be to pay for more sustainable dairy products?



The dairy sector: Consumer associations, climate commitments and more



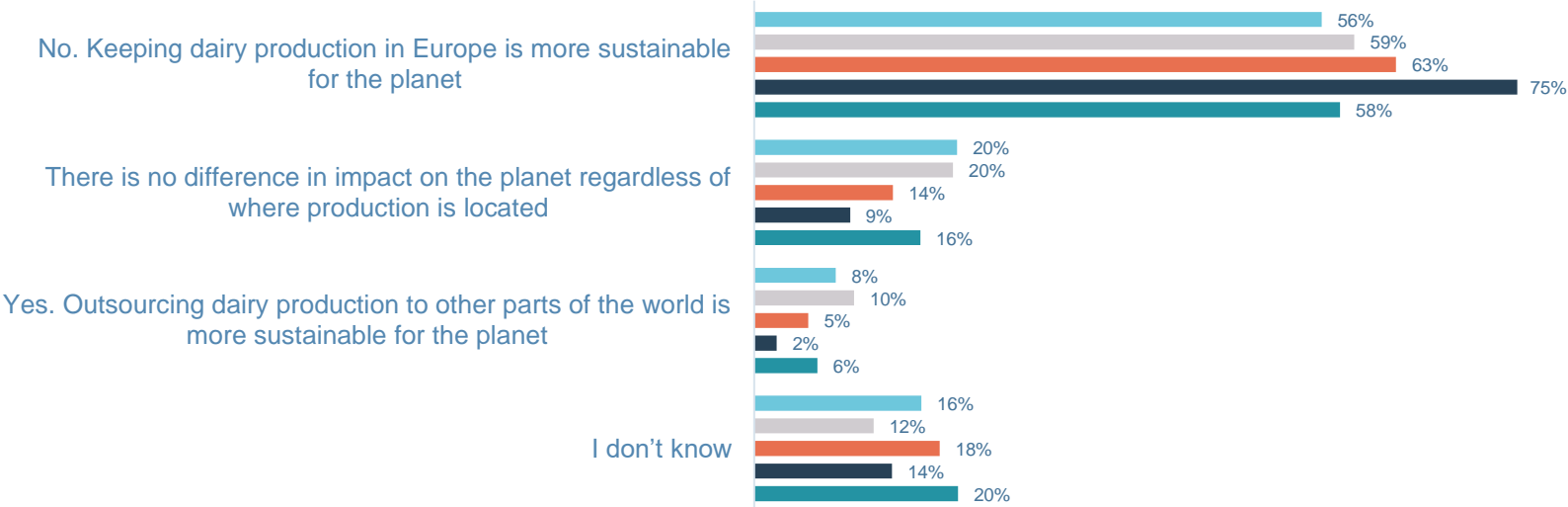
More than half think European dairy farmers are committed to producing dairy more sustainably



New question in 2022

Agreement on the fact that the dairy production should be kept in Europe across countries

Imagine that all dairy products for European consumers were produced and imported to Europe from other parts of the world.



■ Northern Ireland ■ Ireland ■ France ■ Denmark ■ Belgium

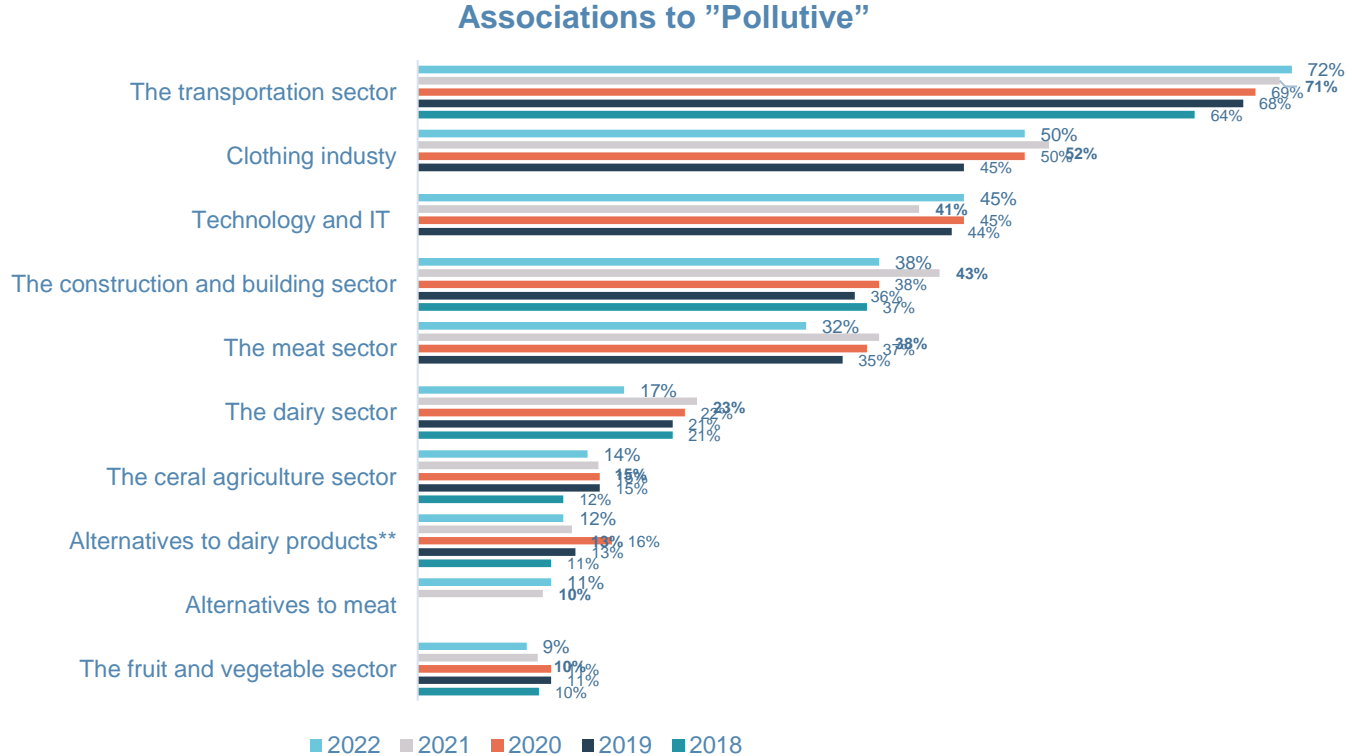
New question in 2022



Norstat for EMF



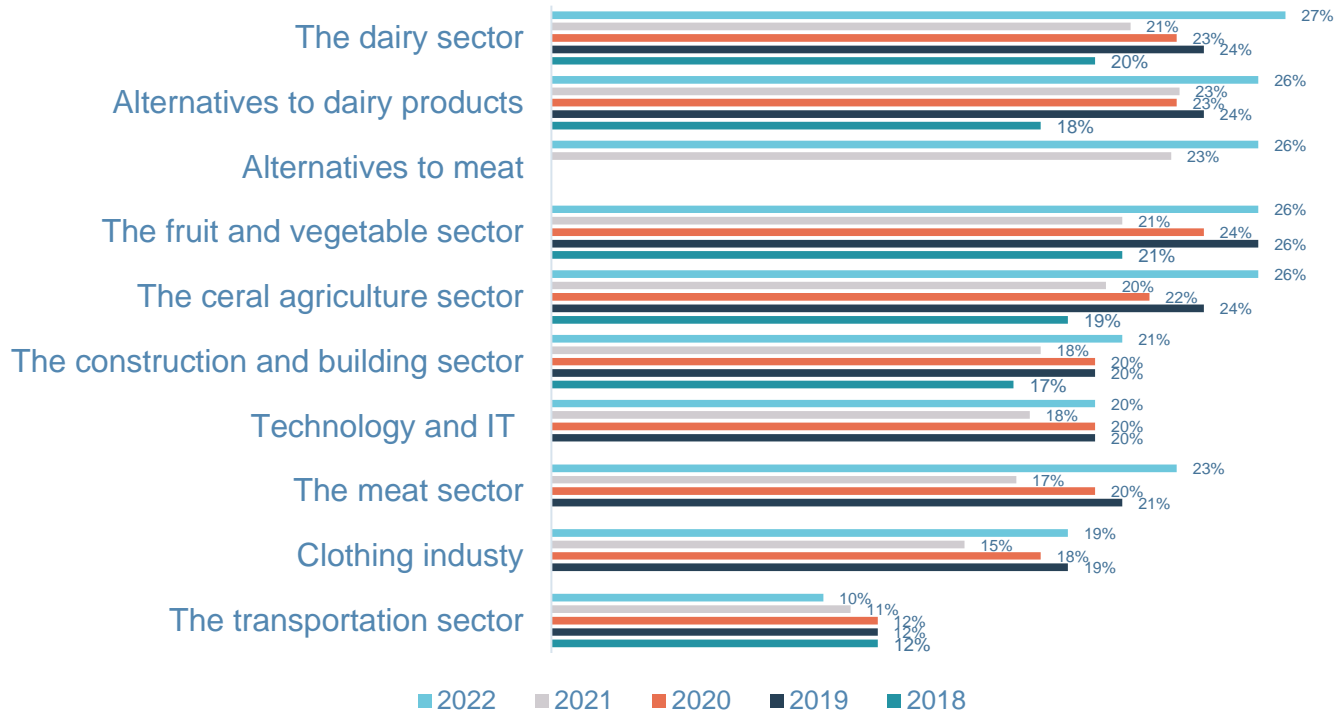
Dairy is still ranking low in association to the word 'pollutive' compared to other sectors.



**From 2018-2020 the category was "Plant-based milk"

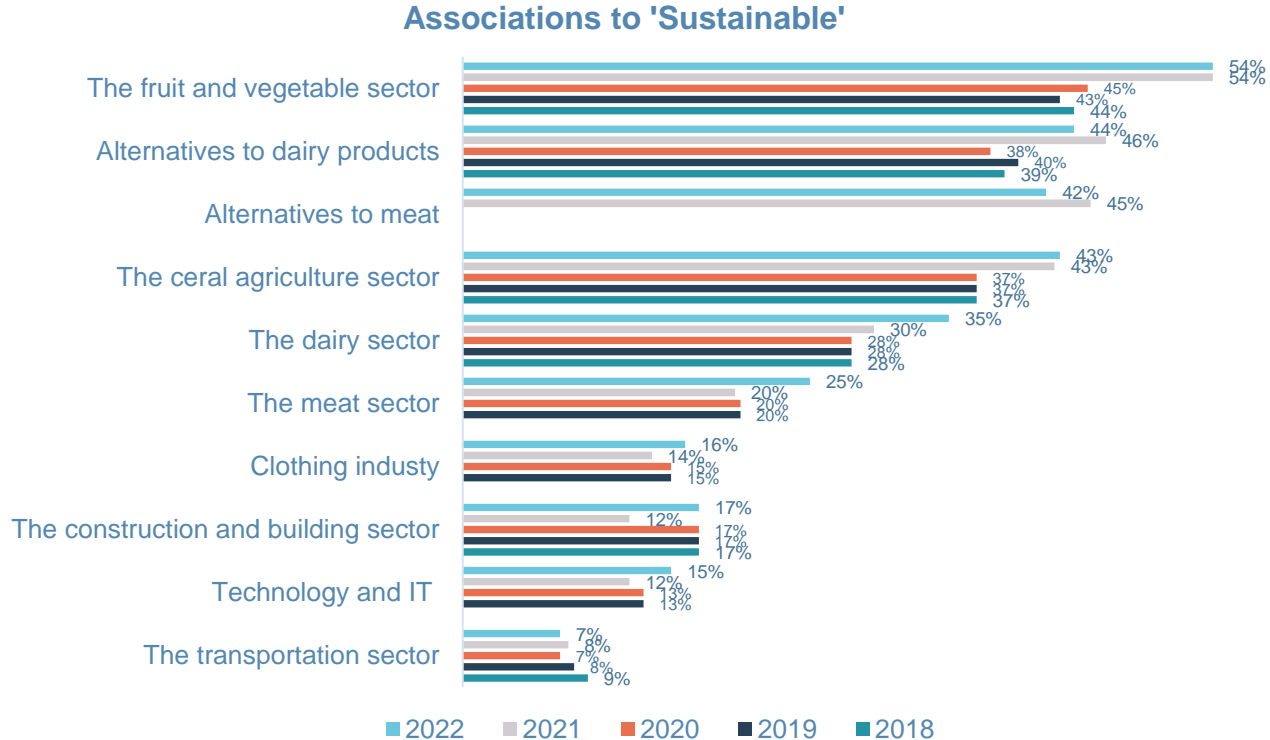
The dairy sector is seen as responsible as the other food sectors

Associations to “Responsible”



**From 2018-2022 the category was "Plant-based milk"

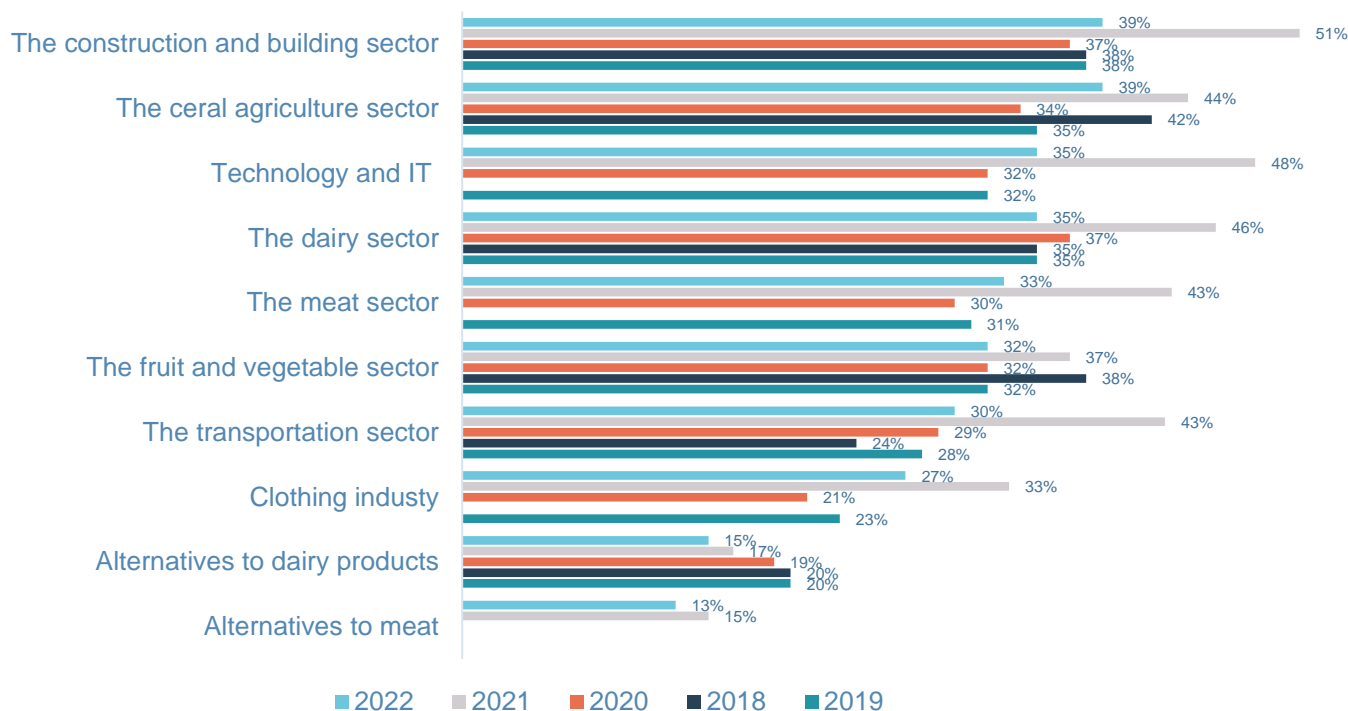
More consumers in 2022 associate the dairy sector with 'sustainable'



**From 2018-2020 the category was "Plant-based milk"

The dairy sector is seen as less economically important in 2022 but is still in top three of the sectors

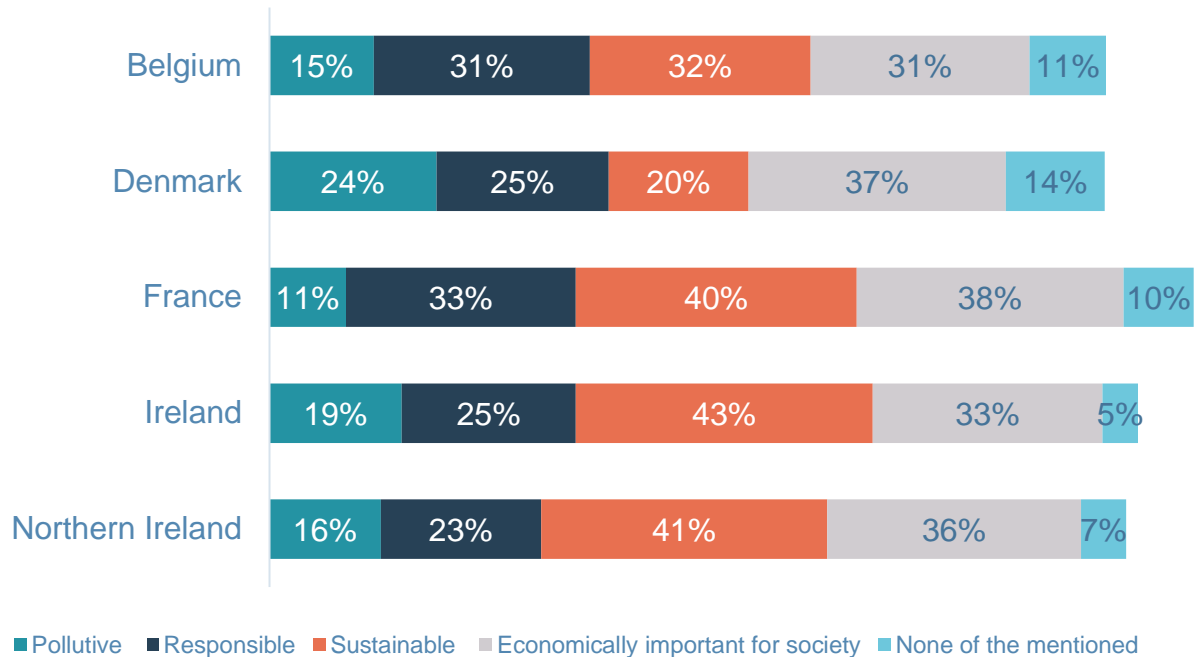
Associations to 'Economically important to society'



**From 2018-2020 the category was "Plant-based milk"

In four of the five countries the most frequent word associated with the dairy sector is sustainable. In Denmark the most frequent word associated with the dairy sector is economically important for society

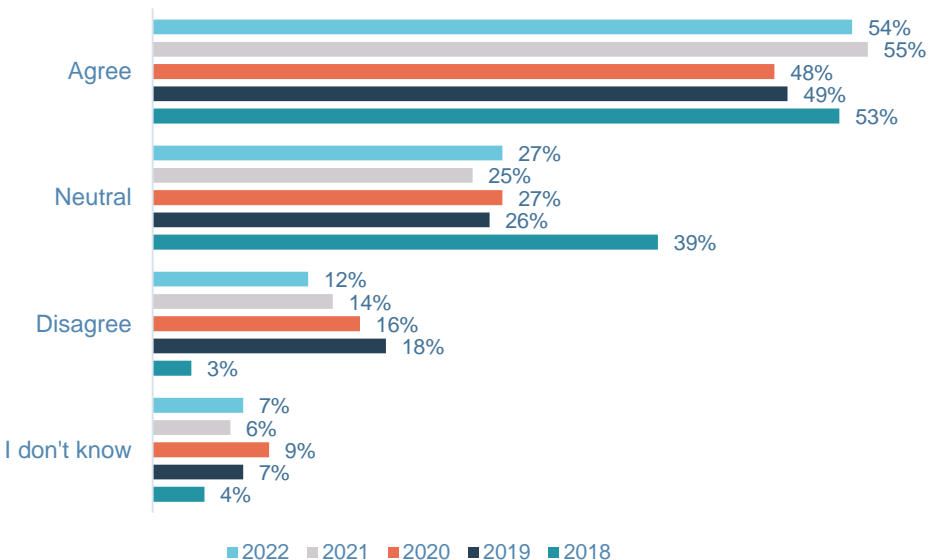
Please mark which of the following words you associate the dairy sector



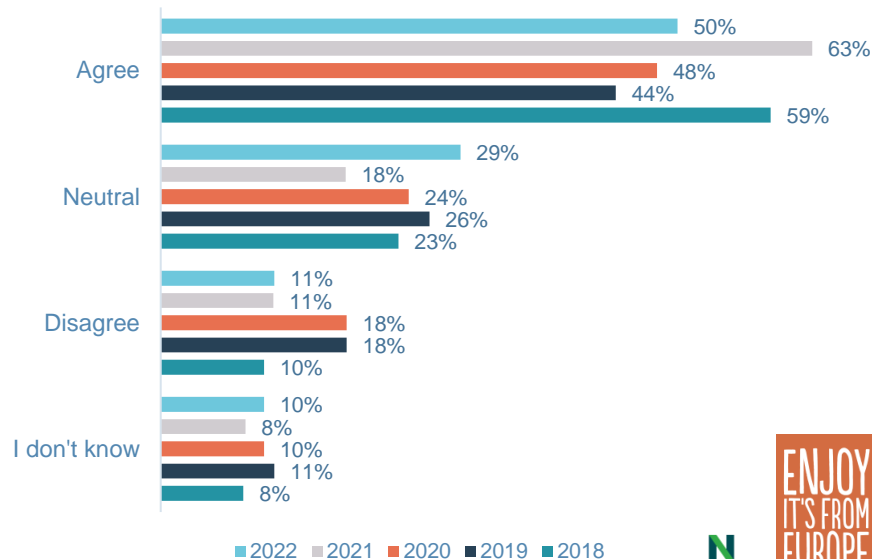
Half of consumers in Ireland and Northern Ireland believe the dairy sector plays an important part in creating a more sustainable future

The dairy sector plays an important part in creating a more sustainable future

Ireland



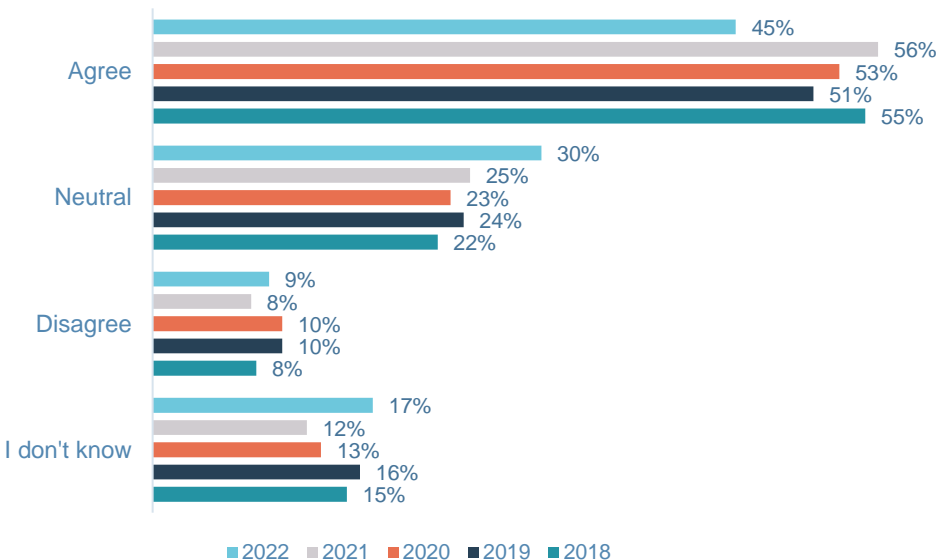
Northern Ireland



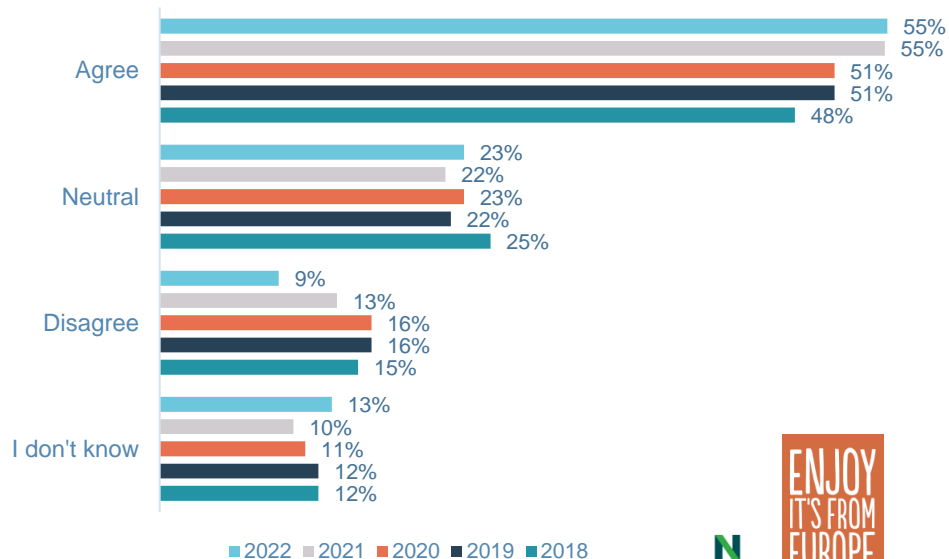
Fewer Danish consumers believe the dairy sector to play an important part in creating a more sustainable future, while the level is stable in France

The dairy sector plays an important part in creating a more sustainable future

Denmark



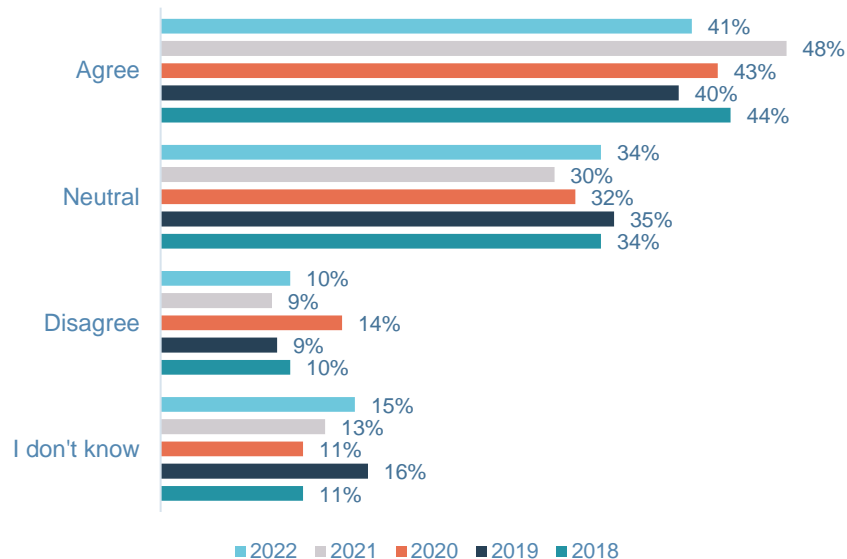
France



Decrease in Belgian consumers considering the dairy sector playing an important part in creating a more sustainable future

The dairy sector plays an important part in creating a more sustainable future

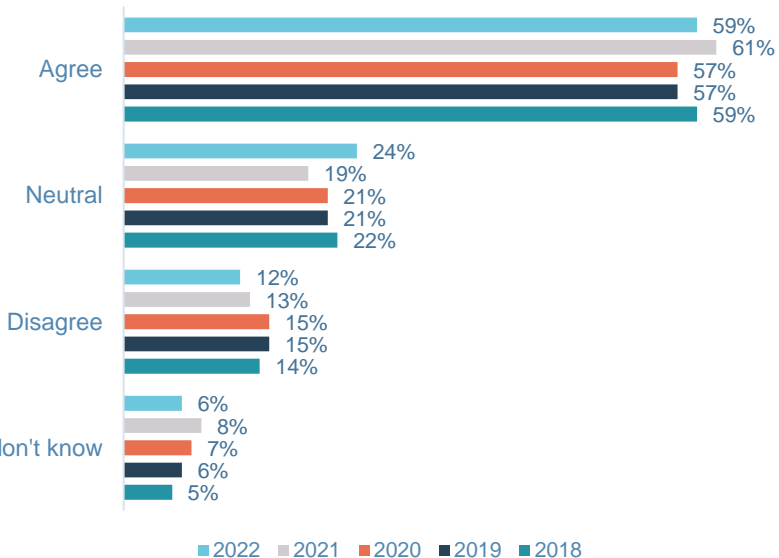
Belgium



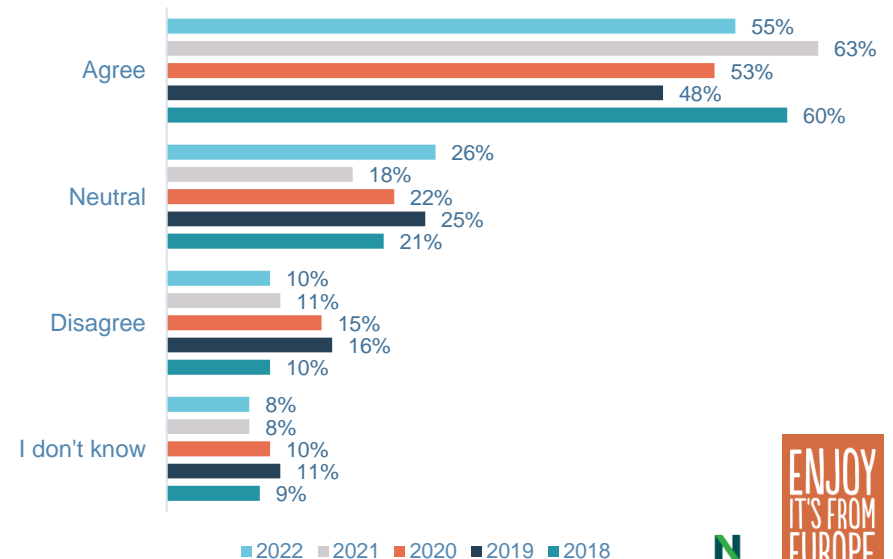
Stable level Irish consumers thinking the dairy sector can help feed the world in a sustainable way, while there has been a decrease in Northern Ireland

The dairy sector can help feed the world in a sustainable way

Ireland



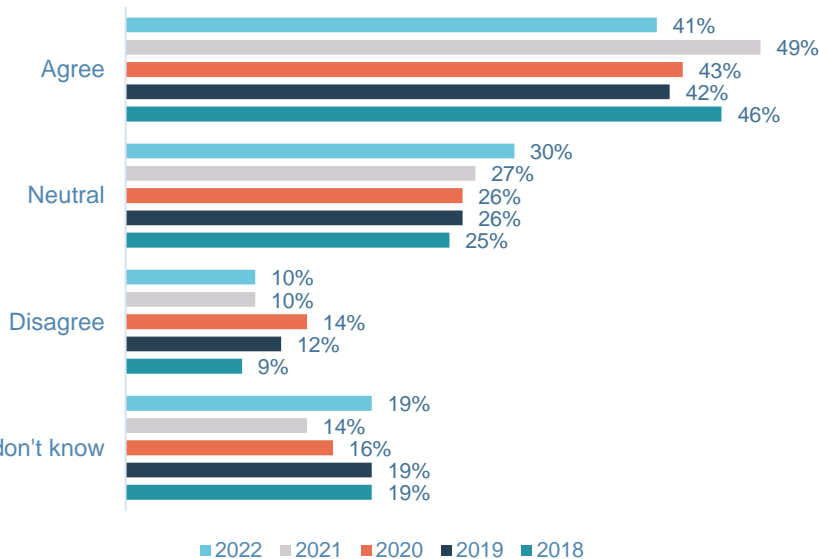
Northern Ireland



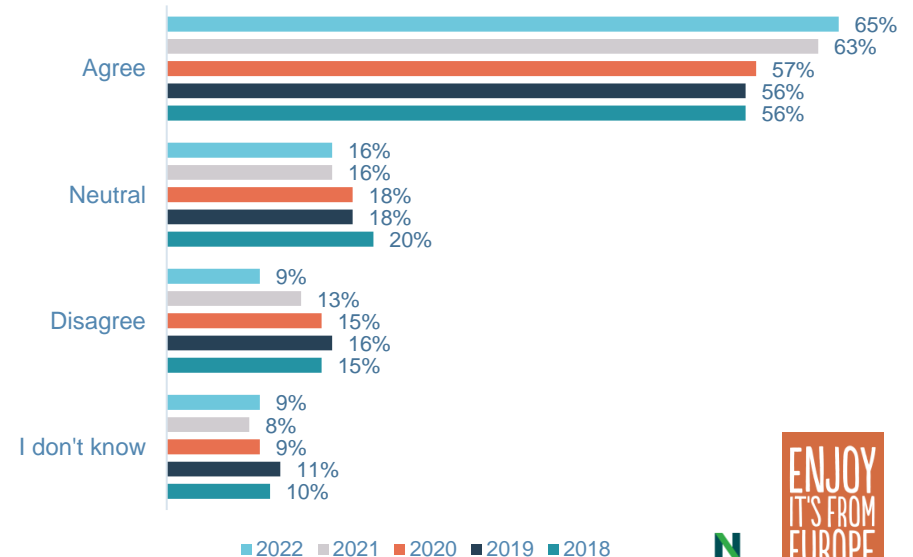
4 in 10 Danish and 2/3 French consumers believe the dairy sector can help feed the world in a sustainable way

The dairy sector can help feed the world in a sustainable way

Denmark



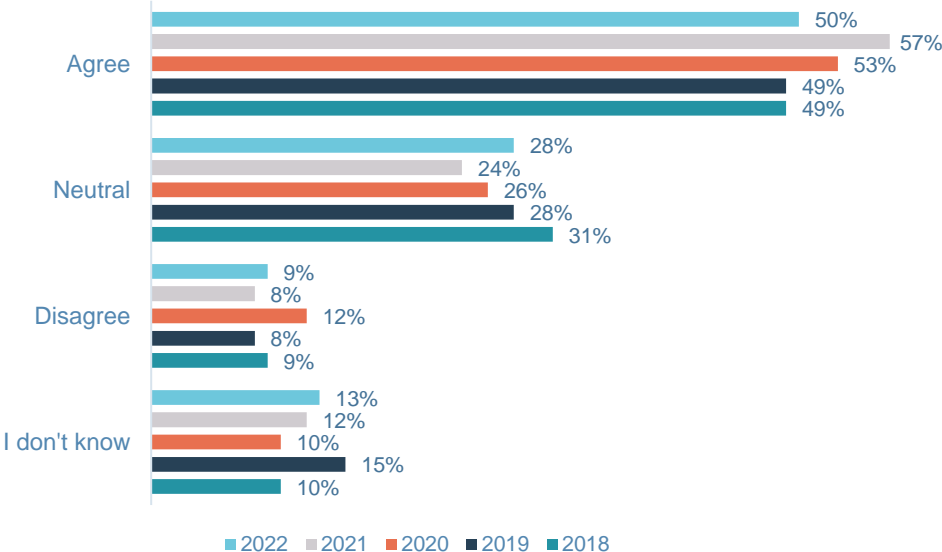
France



Half of Belgian consumers think the dairy sector can help feed the world in a sustainable way

The dairy sector can help feed the world in a sustainable way

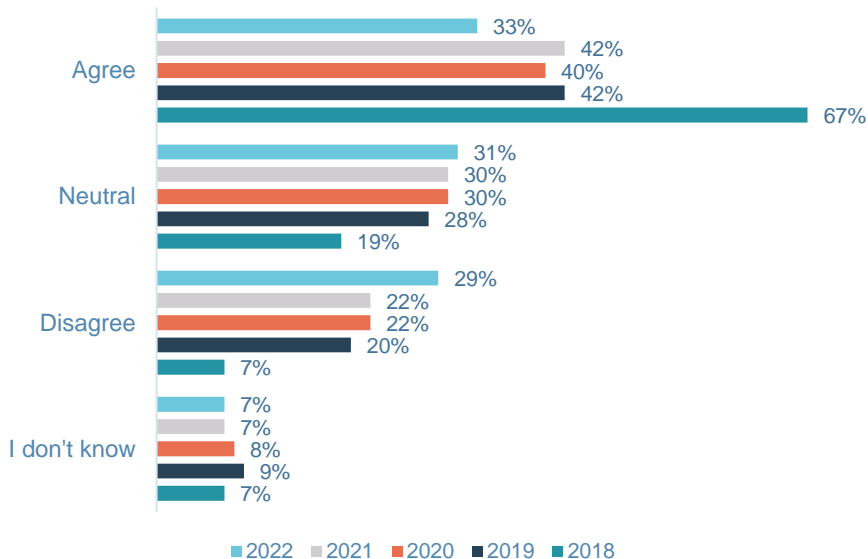
Belgium



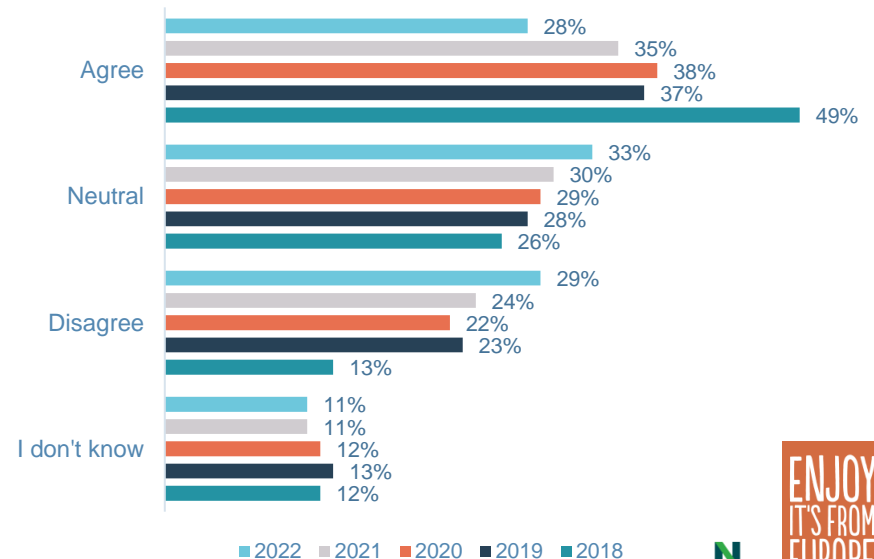
Significant drop in share of consumers believing the dairy sector has a negative impact on climate change

The dairy sector has a negative impact on climate change

Ireland



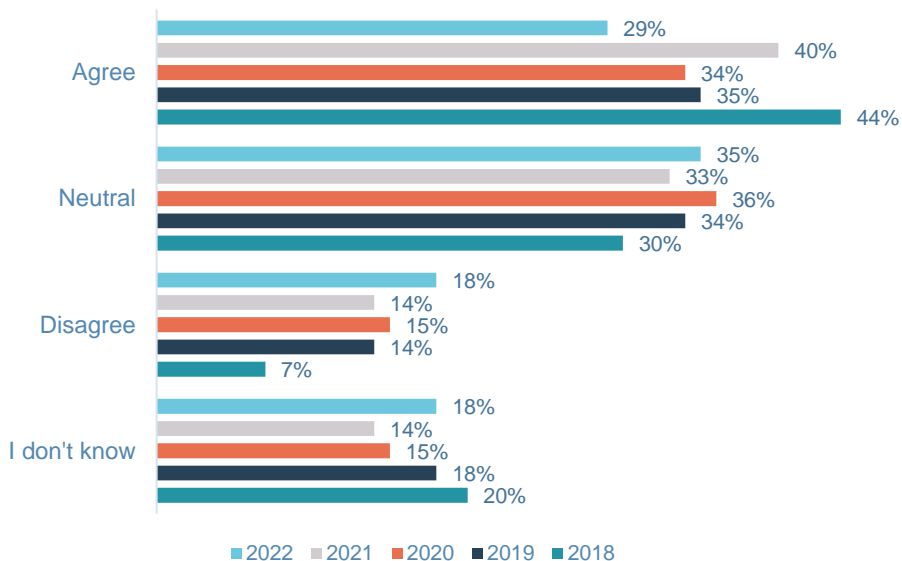
Northern Ireland



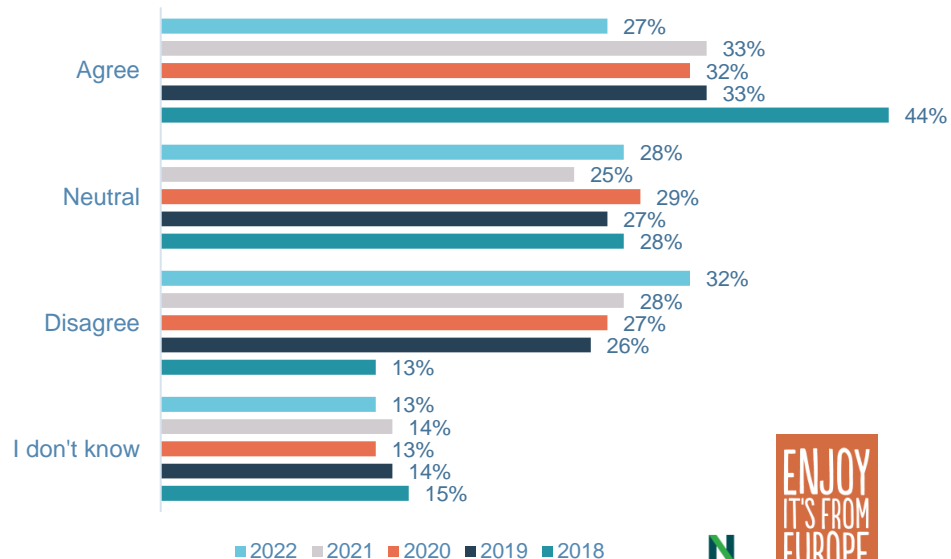
Sharp decrease in share of consumers believing the dairy has a negative impact on climate change

The dairy sector has a negative impact on climate change

Denmark

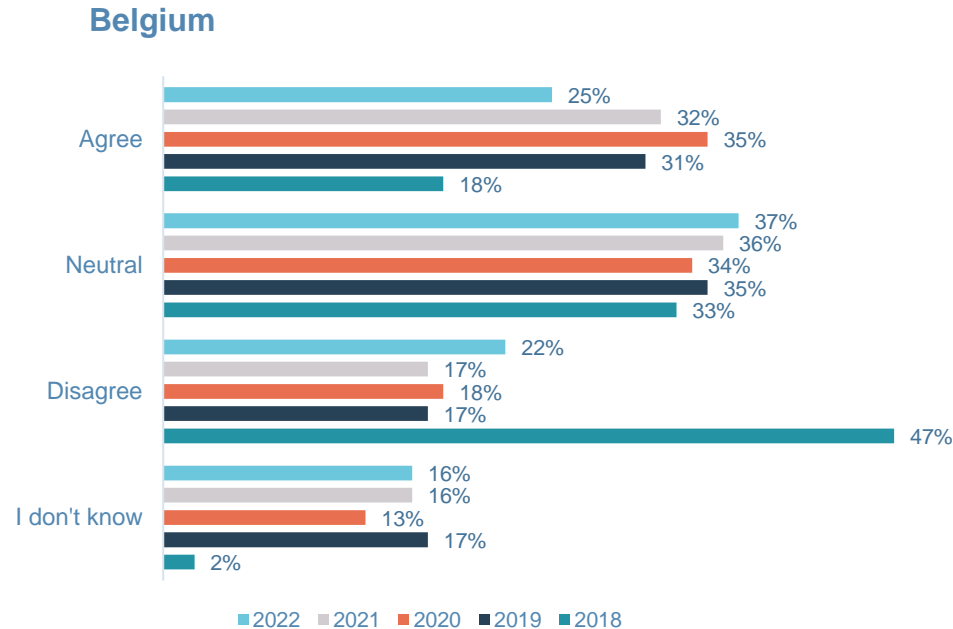


France



Fewer Belgian consumers believe the dairy sector is having a negative impact on climate change

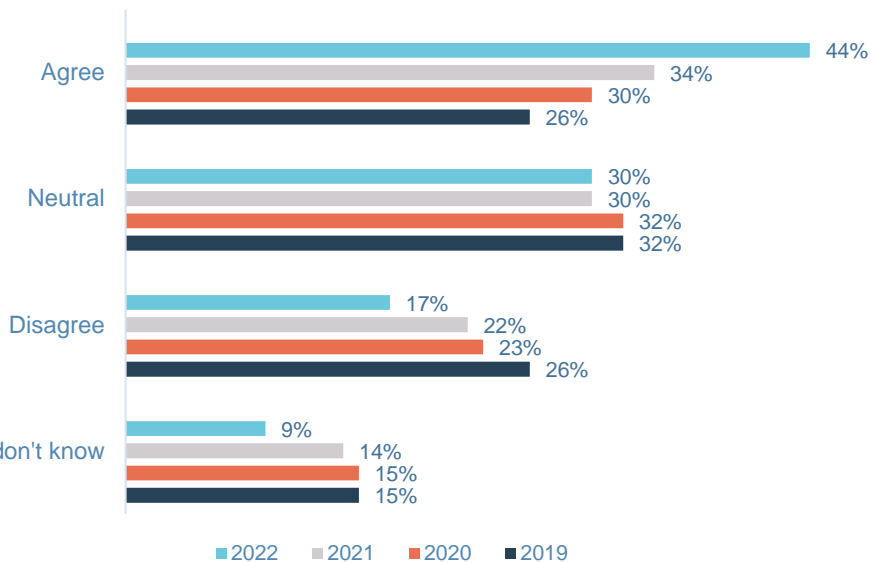
The dairy sector has a negative impact on climate change



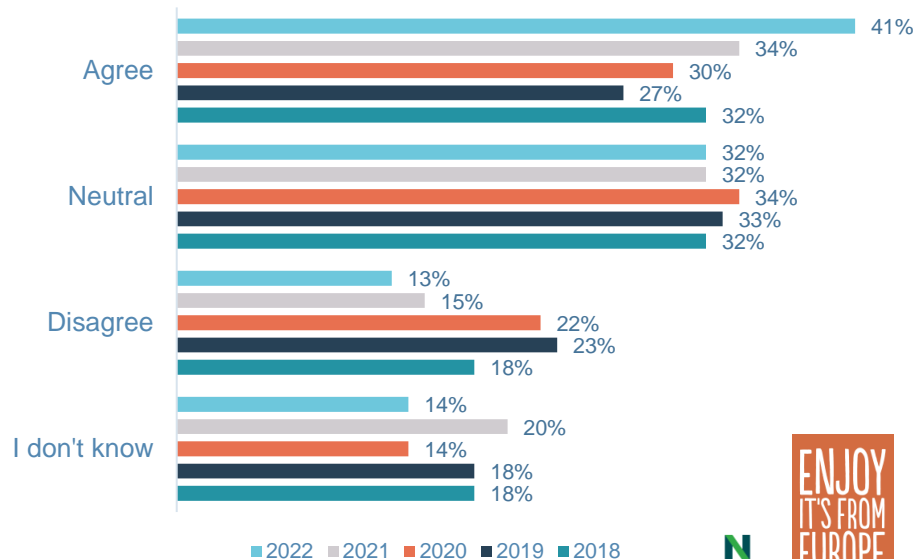
Sharp increase in share of consumers believing the dairy sector focuses on reducing its impact on climate change

The dairy sector focuses on reducing its impact on climate change

Ireland



Northern Ireland

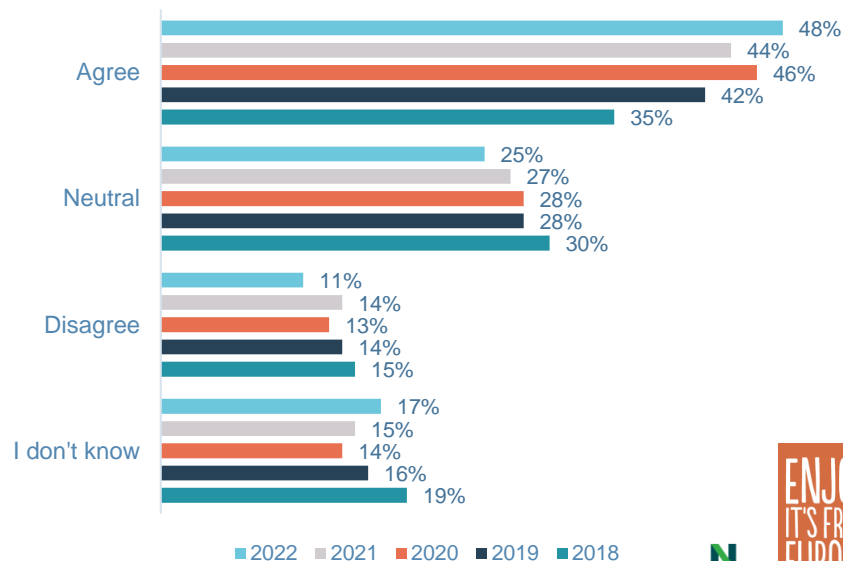
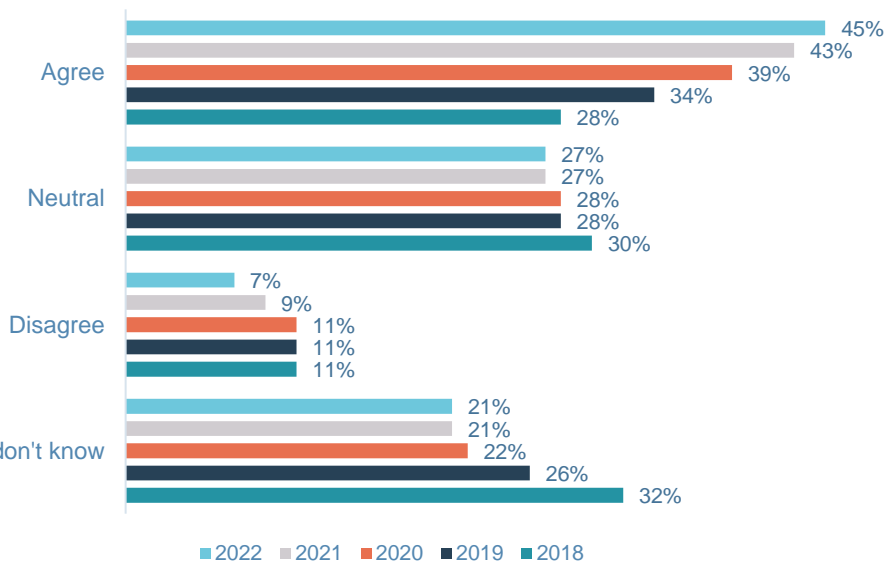


Higher share of Danish and French consumers think the dairy sector focuses on reducing its impact on climate change

The dairy sector focuses on reducing its impact on climate change

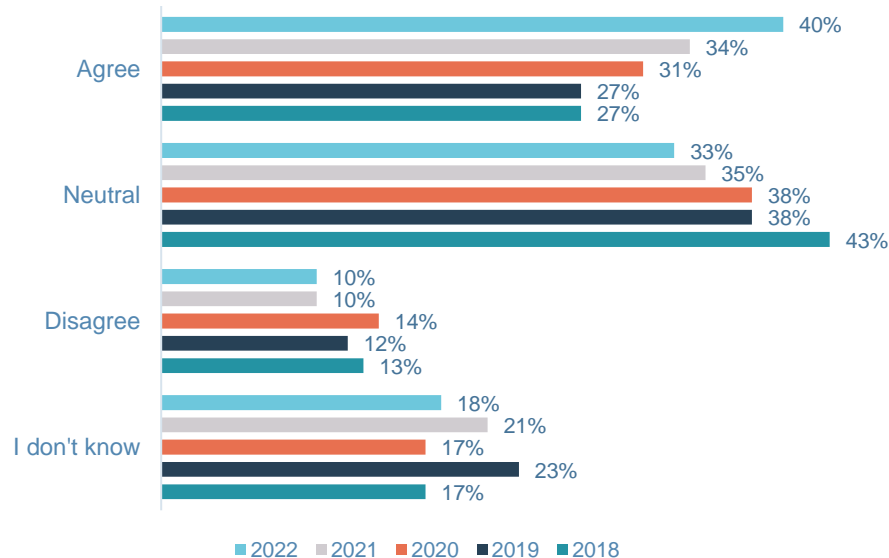
Denmark

France



4 in 10 Belgians agree that the dairy sector focuses in reducing its impact in climate change. That is the highest in the period from 2018-2022

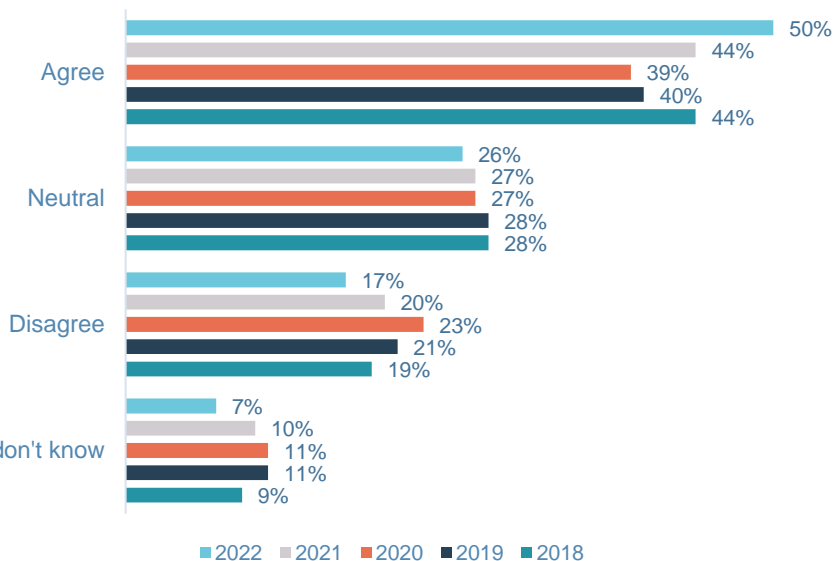
The dairy sector focuses on reducing its impact on climate change
Belgium



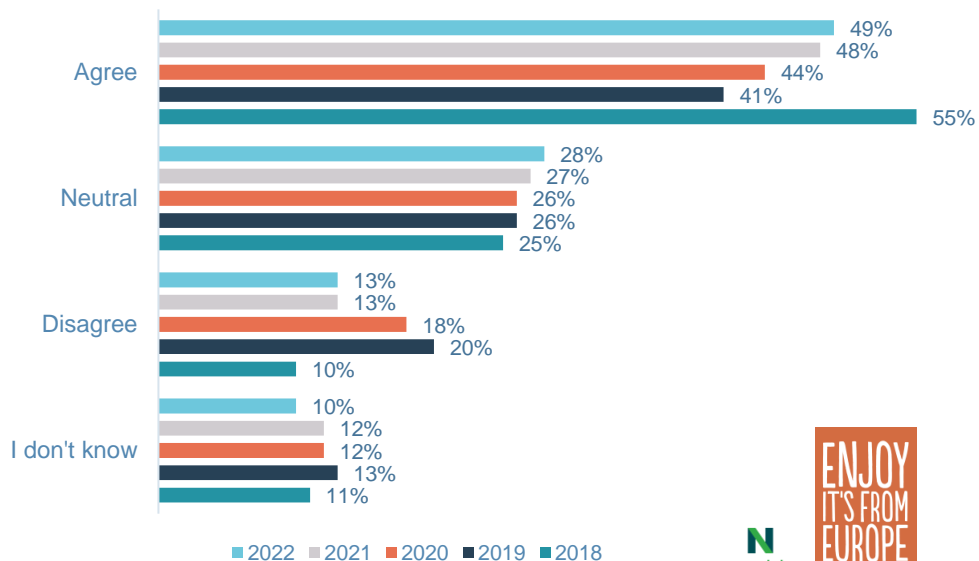
Half of consumers in Ireland and Northern Ireland believe the dairy sector contributes to the preservation of landscape and biodiversity

The dairy sector contributes to the preservation of the landscape and the plant and animal species living there

Ireland



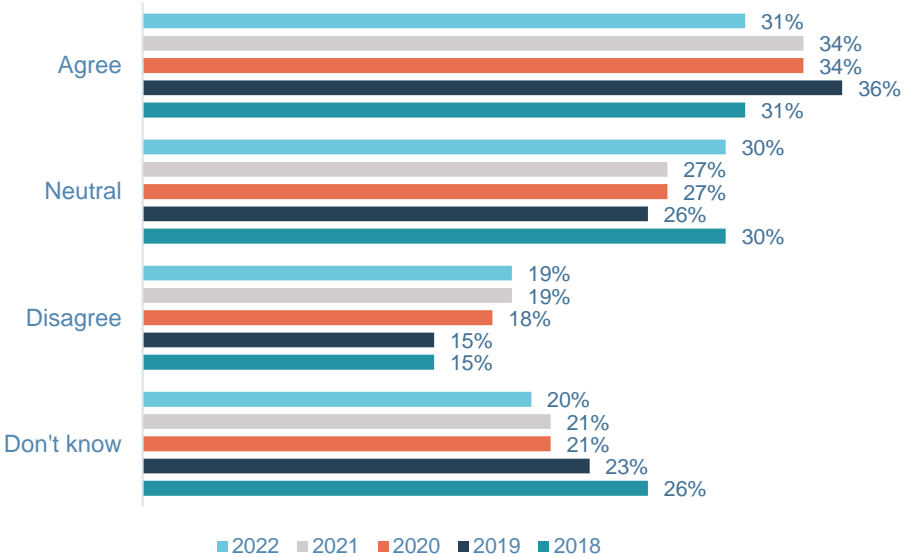
Northern Ireland



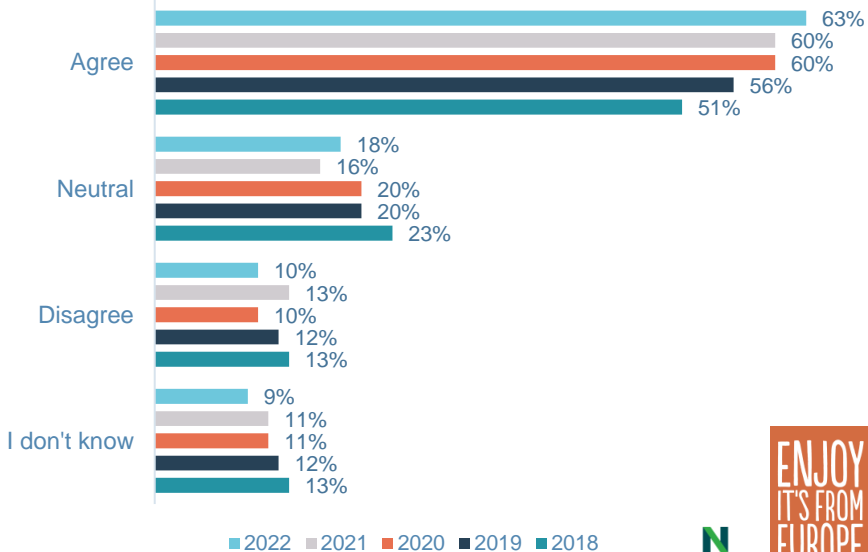
3 in 10 Danish and 6 in 10 French consumers believe the dairy sector contributes to the preservation of the landscape and the plant and animal species living there

The dairy sector contributes to the preservation of the landscape and the plant and animal species living there

Denmark



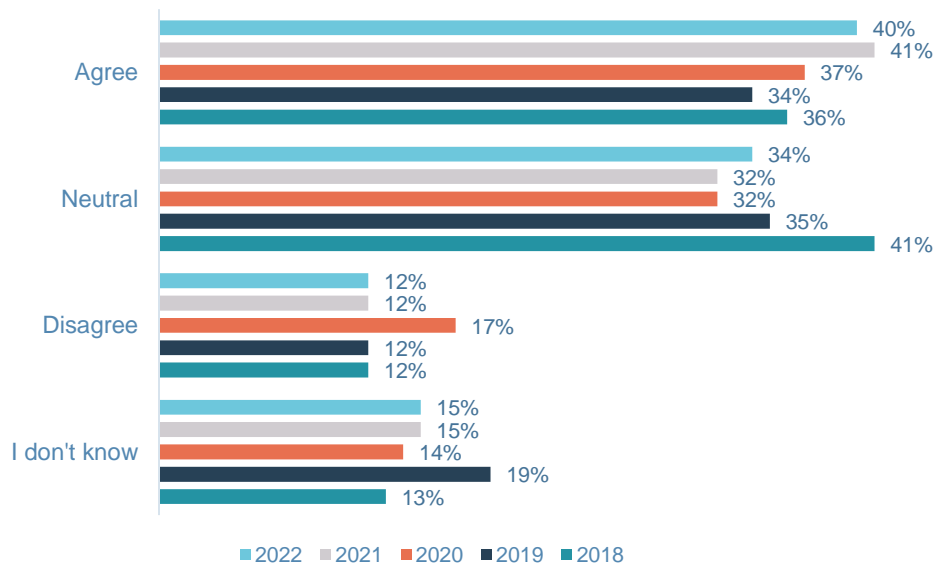
France



More Belgians believe the dairy sector contributes to the preservation of the landscape and the plant and animal species living there since to 2018

The dairy sector contributes to the preservation of the landscape and the plant and animal species living there

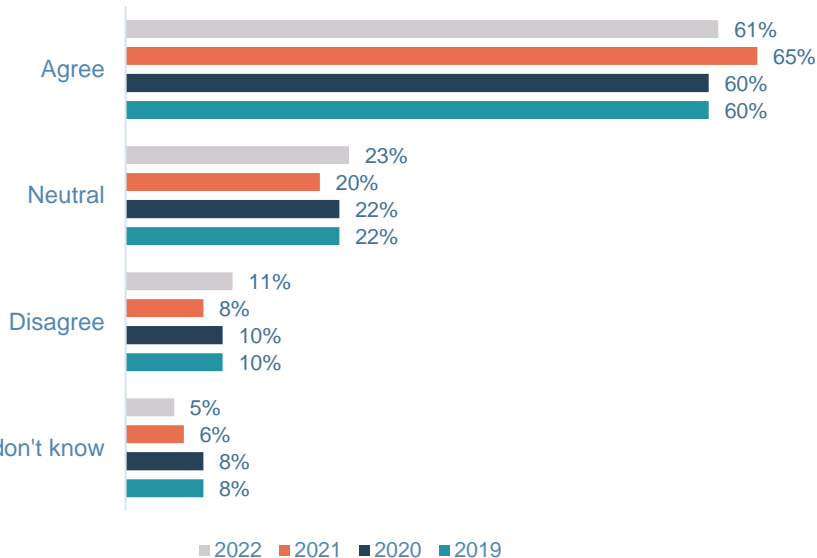
Belgium



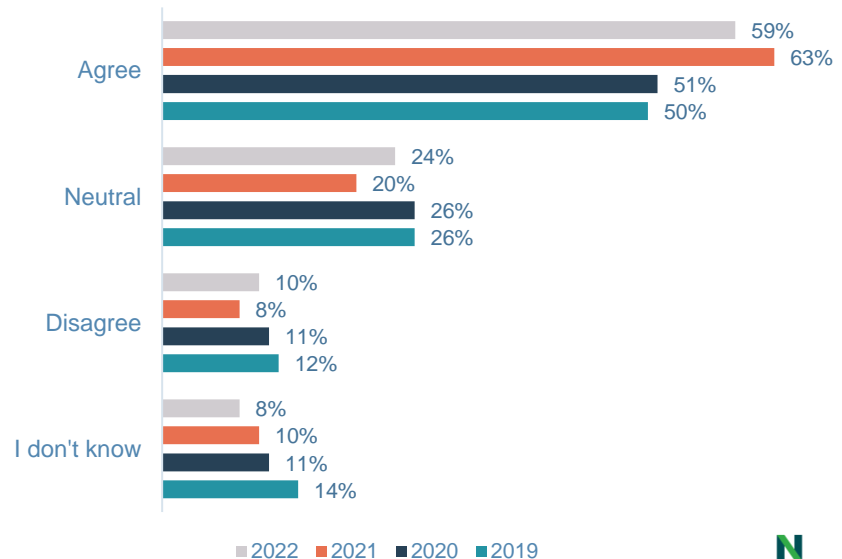
6 in 10 consumers from Ireland and Northern Ireland believe the dairy sector can help consumers eating more sustainable

The dairy sector can help consumers eating more sustainable by communicating knowledge and advice.

Ireland



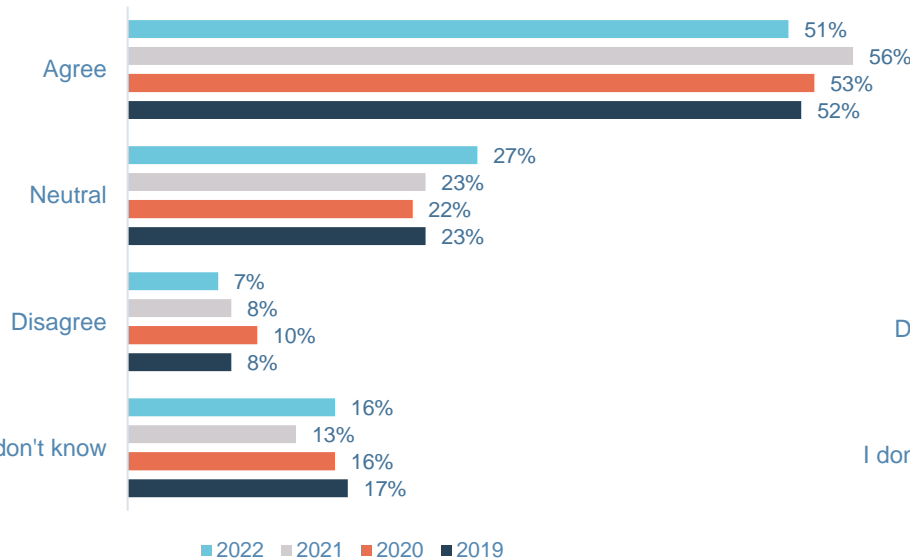
Northern Ireland



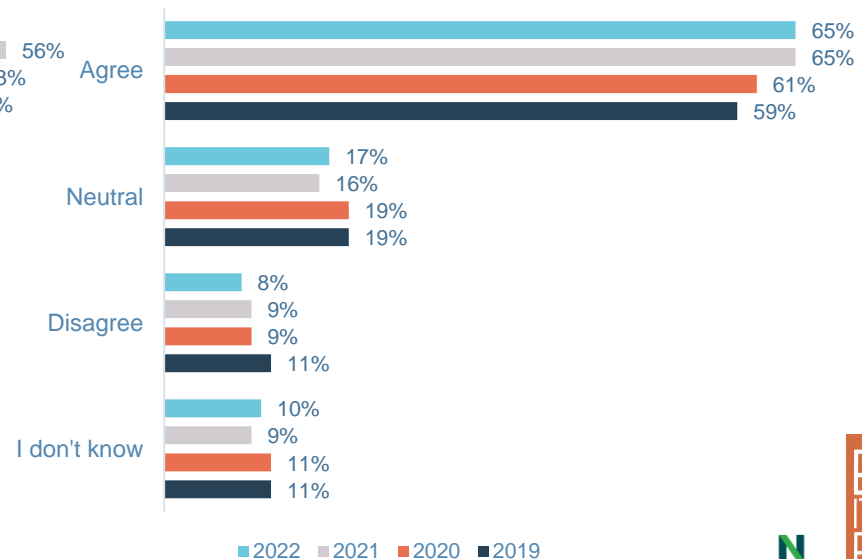
Half of Danish consumers and 2/3 French consumers think the dairy sector can help consumers eating more sustainable by communication knowledge and advice

The dairy sector can help consumers eating more sustainable by communicating knowledge and advice.

Denmark



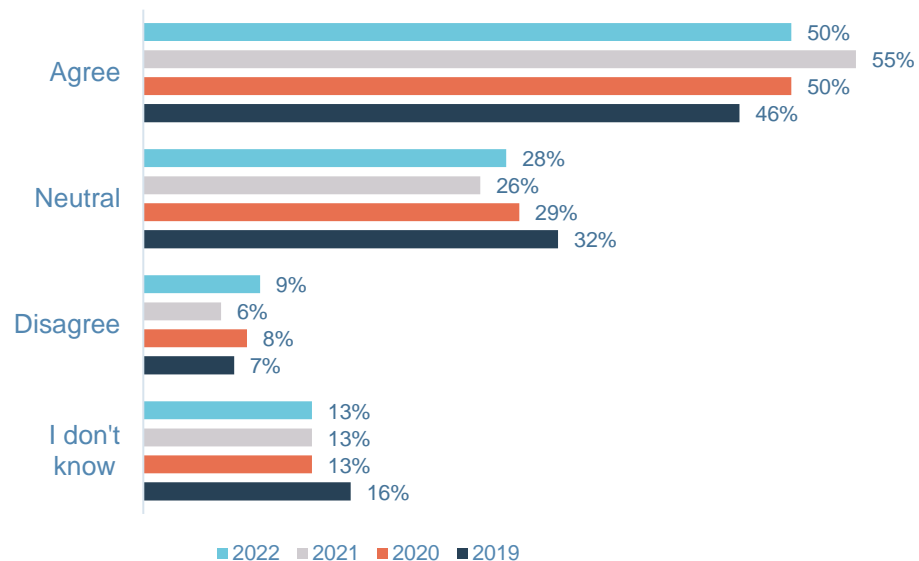
France



Half of the Belgian consumers agree that the dairy sector can help consumers eating more sustainable through communication

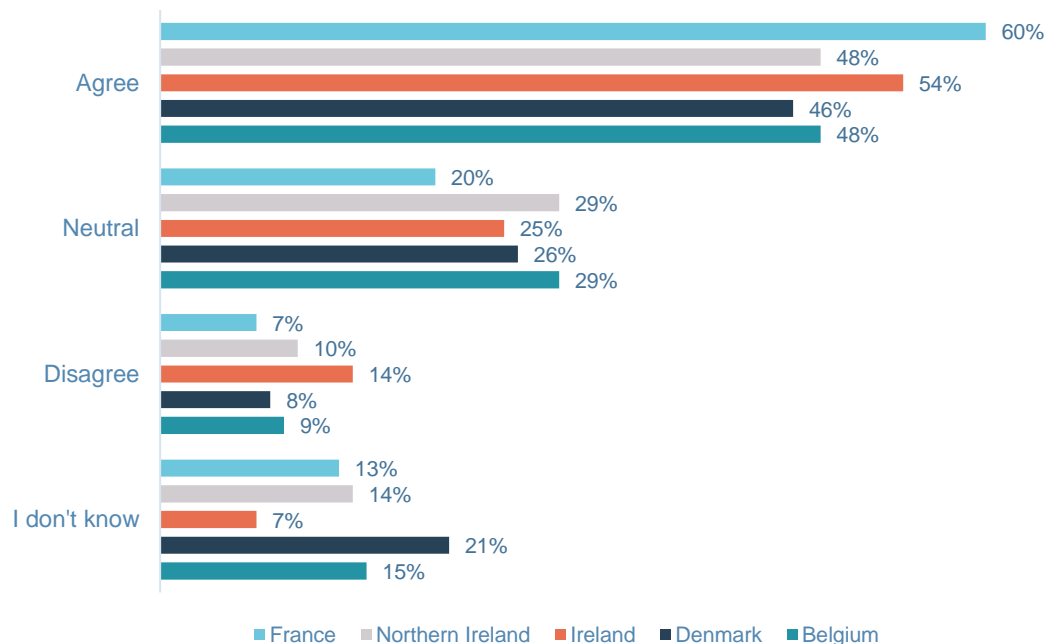
The dairy sector can help consumers eating more sustainable by communicating knowledge and advice.

Belgium



Fewest Danes and most French consumers believe the dairy sector is serious about becoming more sustainable

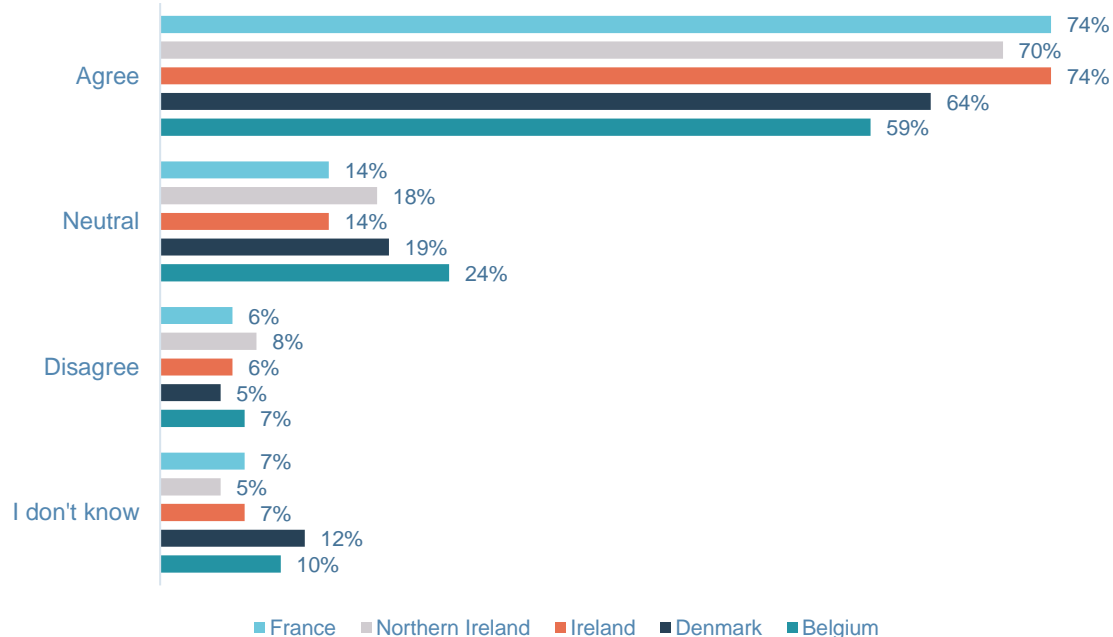
The dairy sector is serious about becoming more sustainable



New question in 2022

A majority of consumers see the dairy sector as vital to their rural communities and regional economies across countries

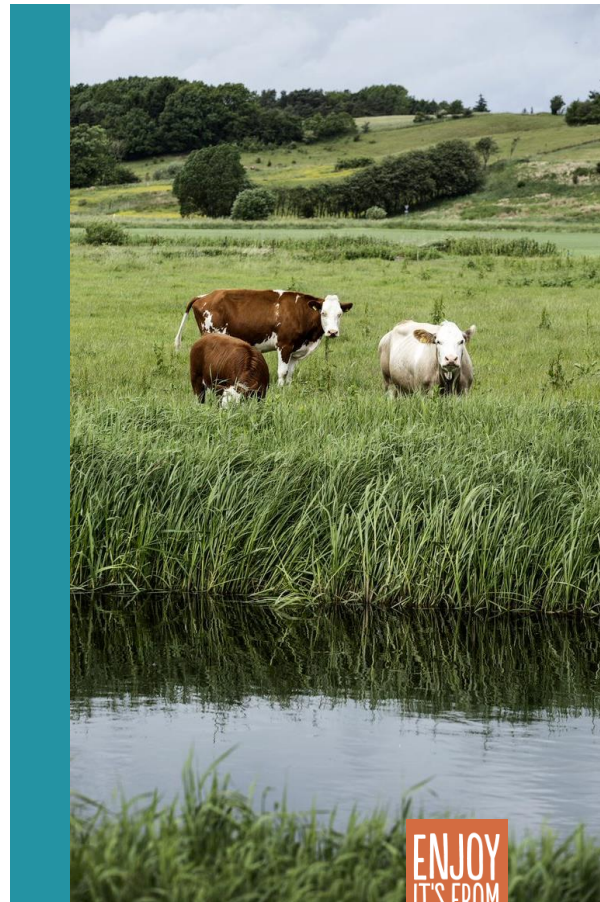
The dairy sector is vital to their rural communities and regional economies



New question in 2022

Key findings and take ways: *Consumers*

- More Europeans see dairy products as part of a sustainable diet
- Price is now the most important factor when purchasing food
- Europeans would find meals less enjoyable without dairy products
- Over 50% say dairy products are an important or essential part of their diet
- Consumers are split when it comes to willingness to pay more for sustainable products



Key findings and take ways: *The dairy sector*

- A majority of Europeans think dairy farmers are committed to producing more sustainably
- More than half of consumers believe it is better for the planet to keep dairy production in Europe
- The dairy sector is associated less with "pollutive" and is regarded as the most "responsible" sector
- A growing share of consumers see the dairy sector as focusing on reducing its impact on the climate
- 4 out of 5 countries are returning to pre-COVID levels in their opinion regarding the dairy sectors ability to feed the world in a sustainable way
- A falling share of consumers think the dairy sector has a negative impact on climate change

