



THE STUDY

Europeans like sustainable shopping

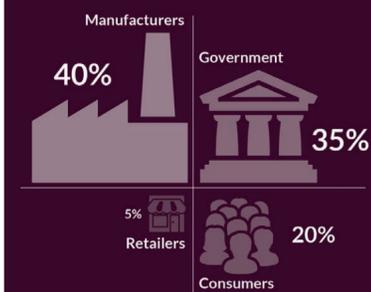
Did Coronavirus make consumers forget about environmental issues? Are they still interested in choosing eco-friendly packaging? The GfK report #WhoCaresWhoDoes investigates the relation between companies' CSR and purchasing habits across Europe.

La spesa sostenibile piace agli europei

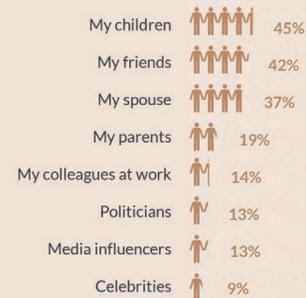
GfK presenta il report #WhoCaresWhoDoes, nato nel 2019 per indagare quanto influisce la Csr dei brand alimentari nelle scelte dei consumer. Emergono shopper sempre più consapevoli, attenti alle iniziative a sfondo sostenibile proposte dai brand. Un ruolo essenziale lo giocano le generazioni più giovani che, sulla scia delle proteste pacifiche dei Fridays for Future, influenzano gli acquisti delle persone che li circondano. Il riciclo della plastica e la salvaguardia ambientale non sono trend passeggeri, ma preoccupazioni consolidate che incidono sulla scelta dei marchi da acquistare.



Who can make the biggest difference to control and limit environmental damage (EU 10, 2020)

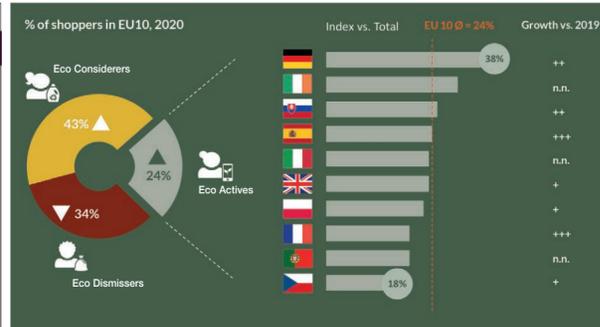


Most likely to impact shopper's behaviors regarding the environment? (% yes, EU 10)



Categories in which shopper think their purchase decision can make an impact to protect the environment

| EU 10 | Category |
|-------|--|
| 1 | Fresh foods such as fruit and vegetables |
| 2 | Household care products such as laundry detergents, cleaners |
| 3 | Paper products such as toilet tissues, paper towels, other tissues |
| 4 | Personal care products such as shampoo, deodorants, toothpaste |
| 5 | Meat |
| ... | ... |
| 10 | Frozen foods |
| 11 | Hot drinks such as tea, coffee |



Climate change and environmental damage have been the hottest topics of 2019. A special mention goes to Greta Thunberg and the 'Fridays for future' demonstrations. But 2020 has introduced a new burning subject, which is the spread of Coronavirus and its consequent global health emergency. GfK, global expert in data and analytics, conducted the research #WhoCaresWhoDoes in more than 20 countries worldwide to find out what consumers think when they do their shopping. Moreover, it explores how the CSR of food brands affects the purchasing process of consumers. 10 European countries were involved: Italy, the UK, Ireland, Germany, France, Slovakia, the Czech Republic, Poland, Portugal and Spain. The survey required the cooperation of the research institutes Kantar and Europanel, and it displays a general overview of the role of sustainability in Europe.

Eco-aware decision making

Greta Thunberg drew the attention of an array of relevant topics, such as plastic recycle and the effects of the manufacturing process on the environment. Fires in the Amazon rainforest and in Australia during the summer of 2019 highlighted the need to act immediately. Did something change in 2020? It is obvious that Coronavirus turned consumers' lives upside-down. Staying at home for a long period of time changed their habits and even created new ones. Although 2020 completely reshaped the world, the survey conducted by GfK shows that plastic waste remains the most important challenge for European citizens. In particular, Northern European countries seem to be more sensitive towards the recycle theme.

Consumers are increasingly aware of their role. They know that their purchases can somehow affect the world. Consequently, 3 out of 10 European households stopped purchasing those items that can be harmful to the community and the environment. Consumers shape their decisions according to different standards, such as plastic waste and the existence of a plastic-free option.

On the contrary, in Southern Europe citizens are more interested in environmental issues. Climate change is perceived as a concrete problem which has to be solved. Global warming and forest fires are so important that 4 out of 10 Europeans claimed that they feel personally affected by environmental issues. Moreover, consumers are not alone when it comes to select the right brand to buy. Their behavior is influenced by their surroundings.

Children in the first place (45%), followed by their friends (42%), their spouse (37%), their parents (37%) and their colleagues at work (14%). At the bottom of the chart are politicians (13%), followed by media influencers (13%) and celebrities (9%), which do not seem to be much influential.

Three different types of consumer

Based on the purchasing behavior of consumers, GfK managed to identify three different types of shopper. Eco Active shoppers feel responsible for environmental issues, so they try to make significant steps to stop climate change. In 2020, 34% of Europeans avoided packaging waste through their shopping behaviors. Within this category, Germany displays the higher number of people involved (38%). Other countries follow: Ireland, Slovakia (25%), Spain (24%), Italy and the UK (both 23%). On this point, France and Spain record the highest increase in terms of Eco Active shoppers.

Eco Considerers – the second consumer category - account for 43% of Europeans. They are concerned about plastic and they occasionally make steps to reduce their waste. However, they think that the emphasis for ac-

tion should be placed on companies and governments. The remaining 24% belongs to the Eco Dismissers category, which has no interest in plastic waste challenges and, consequently, lacks awareness on environmental concerns. Although there are many consumers who are completely indifferent to this type of issues, the GfK survey illustrates that the concern towards plastic reduction is not temporary. As a matter of fact, purchasing behaviors remained unaltered even when the public opinion focused on more recent news.

The Italian scenario

Within this complex landscape, Italy emerges as a very careful country towards the theme of sustainability. 65% of interviewees claimed that they belong to the Eco Active category and that they really care about plastic waste. 30% claimed that they avoid plastic packaging and they would rather buy plastic-free options. Moreover, 36% of consumers definitively stopped buying plastic items because of their negative effects on the environment. Italian consumers have higher expectations than the European average: half of the Italian households believe that companies should provide customers with recyclable and biodegrad-

ble options. As a demonstration of this trend, 62% of Italians choose those companies that publicly declare their interest in environmental issues and undertake ad-hoc ventures. Ironically, 58% of families are not aware of the final destination of recycled items. Lastly, Italians think that their choices can be more effective on protecting the environment when it comes to home care products such as laundry detergents and cleaners. As a matter of fact, this category requires a massive amount of plastic.

A never-ending responsibility

The GfK survey portrays a clear overview of what European citizens think about sustainability. Even though the topic of hygiene held the stage worldwide, other burning issues were highlighted during the pandemic. The 'Fridays for future' demonstrations made the youngster realize that they can have a huge influence on the purchasing habits of their parents. On one hand, single consumers prefer sustainability also when they do the shopping. On the other hand, companies and retailers should take into consideration that sustainability is a key factor within the manufacturing process. Therefore, it cannot be excluded from the whole shopping experience.



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