



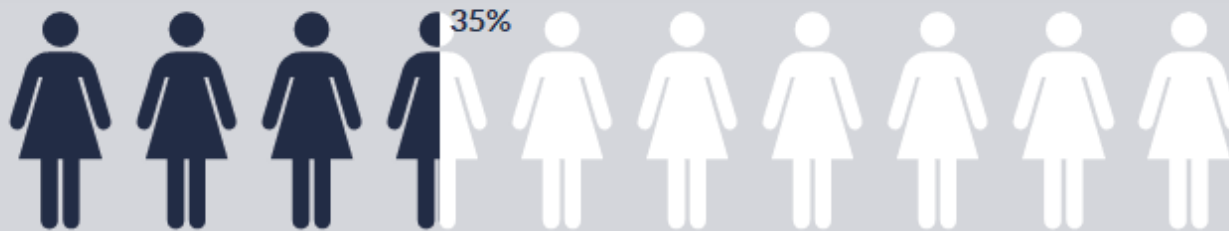
Europe's Green Shoppers are increasing, despite lockdowns

Latest findings from GfK



How big is the
Green trend in
Europe?

"I have stopped buying some products/services because of their impact on the environment or society" (EU10)



"One third of households in Europe have stopped purchasing certain products or services because of their impact on the environment or society."

GfK Sustainability and Concern Report 2020
#WhoCaresWhoDoes



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What are the specific criteria that are tipping these purchase decisions? If you know what factors your shoppers care most about, you can focus your environmental investment on areas that not only benefit our planet, but also attract maximum approval, loyalty and spend from your buying audience.

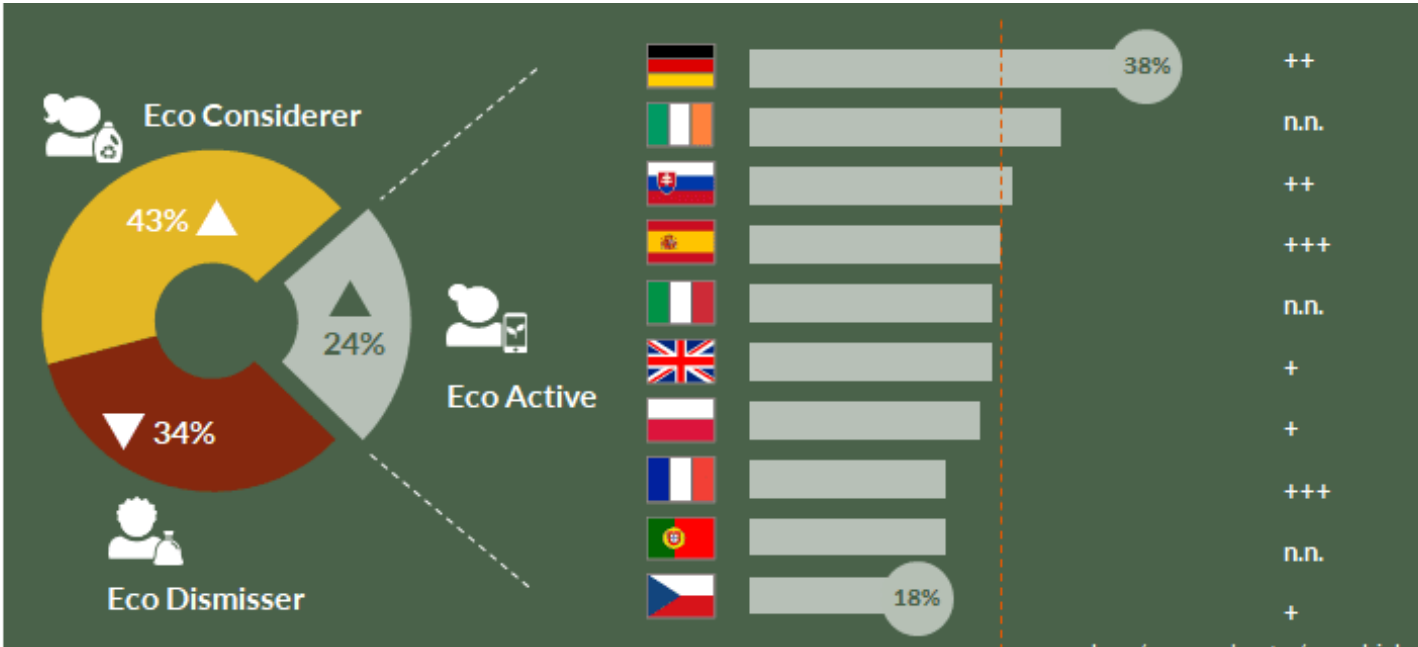


Growth of "Eco
Actives" across
each of the 10
countries
studied

The disruption and uncertainty of the pandemic has made people think hard about what really matters to them, and the need to take responsibility and action as individuals.

Rather than being side-lined by the issues of lockdown and social distancing, environmental awareness and activity is appearing across a broader audience than ever.

Eco Actives (shoppers who feel responsible and are making significant steps to reduce their plastic waste and know which companies have a genuine environmental concern) now form a significant proportion across all ten countries we studied – ranging from 38% in Germany to 18% in Czech.



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For some of these countries, Eco Actives have shown double-digit growth in numbers since last year. And 30% of European households now actively avoid buying products that are wrapped in plastic if there is an alternative.

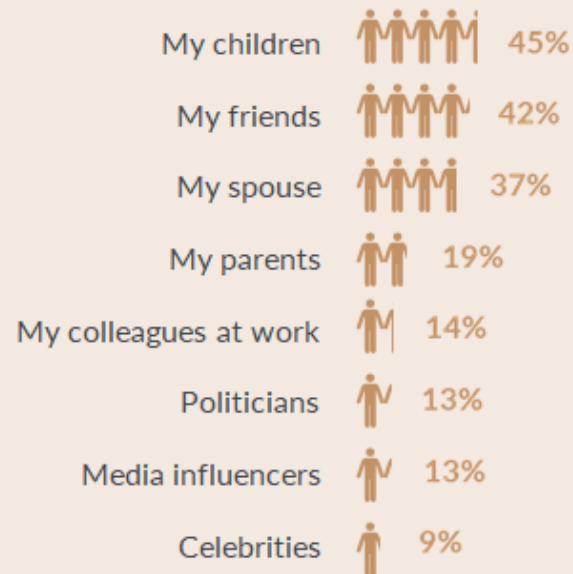


Children are
the leading
influence on
household eco
behavior

Even more importantly, young age groups in Europe have become a leading driving force behind green shopping decisions – empowered by activists including Greta Thunberg and Sir David Attenborough, and spurred on by world headlines of fresh catastrophic wildfires, floods and growing plastic pollution.

Across ten EU countries, 45% of household main shoppers say their children are the leading influence on their green purchase behavior. Only 9% say the same about celebrities and 13% for politicians or media influencers.

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



Which country do you think has the highest % saying brands must be environmentally responsible?

[Read on to get the answer]

☐ Germany

☐ France

☐ Spain

[See results](#)

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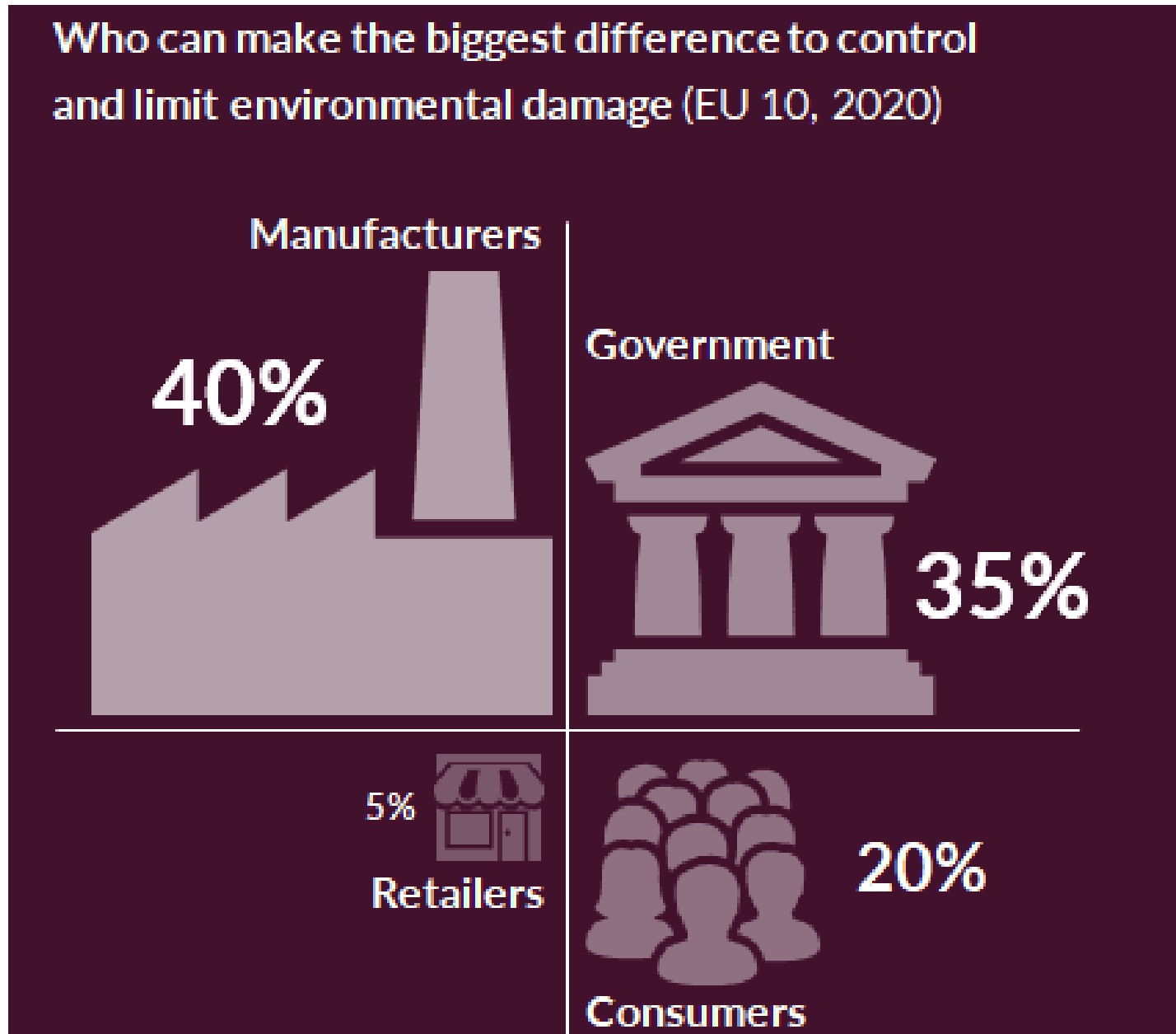
Consumers
have specific
green
expectations
for brands

Across the EU10 countries, 40% of people believe manufacturers can make the biggest difference in controlling and limiting the damage humans are doing to the environment. Governments come second, at 35%.

Interestingly, 20% say consumers themselves can make the biggest difference – particularly in their purchase choices around:

1. Fresh foods (eg fruit and vegetables)
2. Household care products (eg laundry detergents, cleaners)
3. Paper products (eg loo roll, paper towels, tissues)

Get the top five and bottom two of this list in our sample report: [GfK Sustainability and Concern Report 2020](#)
[#WhoCaresWhoDoes](#)





Country
differences and
similarities:
France,
Germany, Italy,
Spain & UK

In **France**, close to two thirds of people say that brands and companies must be environmentally responsible, while almost four in ten feel guilty when they do something that is not environmentally friendly. Possibly more critically for manufacturers and retailers is that three in ten will select one brand over another if it supports a cause they believe in.

Italy is a similar picture to France, with nearly two thirds saying brands and companies must be environmentally responsible and nearly three in ten selecting one brand over another if it supports a cause they believe in. However, for Italians, over half feel guilty when they do something that is not environmentally friendly.

	France	Germany	Italy	Spain	UK
"Brands and companies have to be environmentally responsible these days"	64%	55%	62%	70%	53%
"I feel guilty when I do something that is not environmentally friendly"	37%	27%	53%	47%	31%
"I will select one brand over another specifically because it supports a cause I believe in"	29%	23%	29%	28%	20%

GfK Consumer Life 2020, top 2 boxes agreeing

Spain has by far the most shoppers (well over two thirds) who expect brands to be environmentally responsible, while just under half feel guilty when they do something non-green. As with Italy, nearly three in ten Spaniards will give preference to a brand that shares their values.

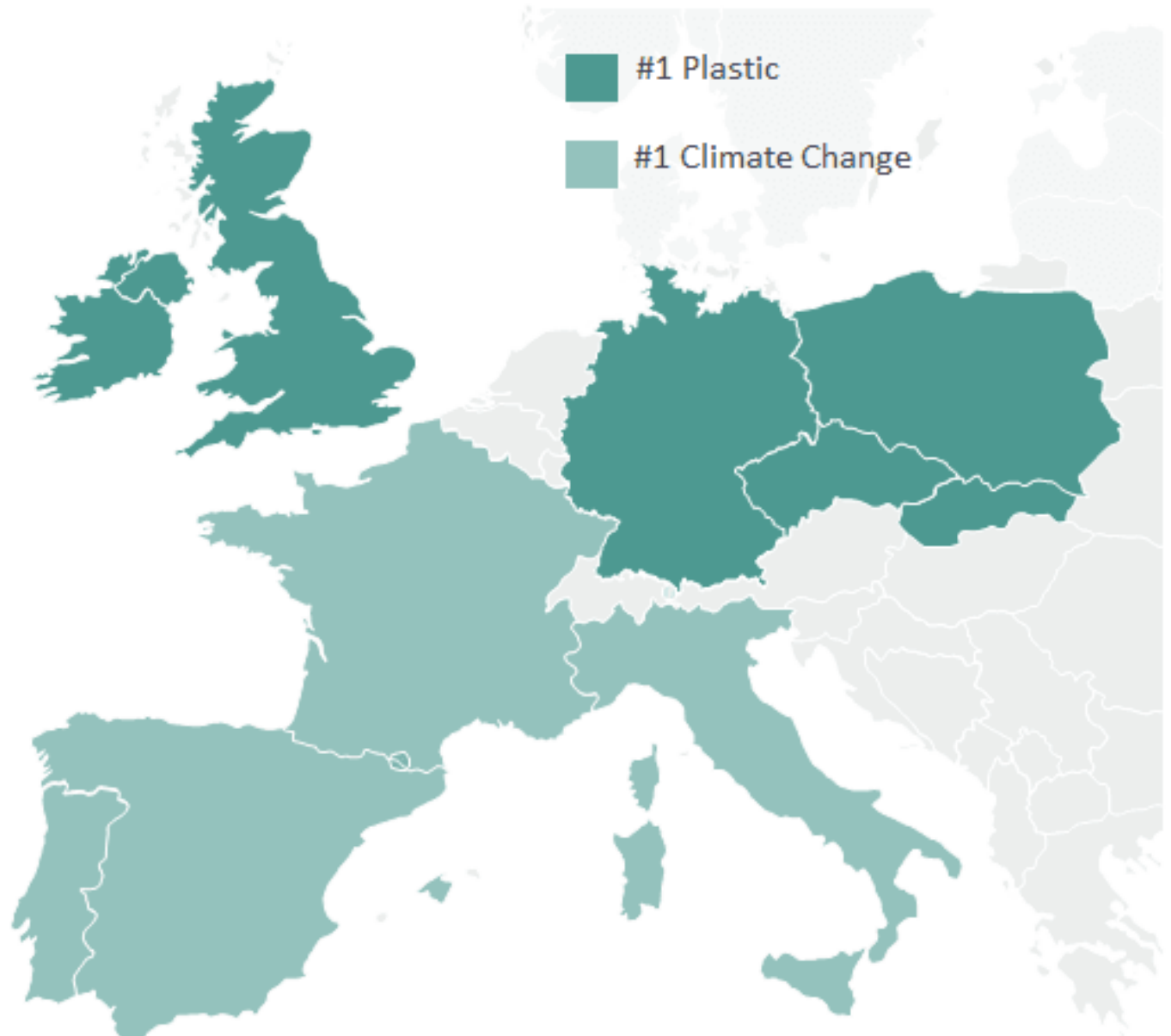
In **Germany** and **UK**, the markets are fairly close with just over half expecting brands to be environmentally responsible, around three in ten feeling guilty if they do something un-environmental, and two in ten selecting one brand over another because it supports a cause they believe in.



Plastic waste
remains #1
concern across
Europe, but
anxiety around
climate change
is rising

Plastic waste remains the leading concern across northern Europe, but anxiety around climate change has overtaken this in southern Europe.

However, there are key differences at country level (click right for the next page...)



▲ = change vs. 2019 (*No data for 2019)

EU 10		GER 	ITA* 	SK 	CZ 	PL 
1	Plastic Waste	▶ Plastic Waste	Climate Change	▶ Plastic Waste	▶ Plastic Waste	▲ Plastic Waste
2	Climate Change	▲ Climate Change	Air Pollution	▲ Climate Change	▲ Water Shortage	▲ Climate Change
3	Air Pollution	▲ Deforestation	Plastic Waste	▼ Water Pollution	▲ Climate Change	▲ Air Pollution

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The number of people citing plastic waste as a major concern has increased in Poland compared to last year, and held constant in Germany, Slovakia and Czech Republic.

In the Czech Republic, we're seeing increased numbers of people saying they are concerned about nearly all of the environmental concerns listed, with water shortage coming second, ahead of climate change.

A person with short dark hair, wearing a grey and black striped sweater, is seen from behind, looking at a wall covered in various design sketches, wireframes, and photographs. The sketches include user interface elements, flowcharts, and human figures. A dark grey semi-transparent box is overlaid on the right side of the image.

3 key take-
aways

Key take-aways

A year of mass disruption and the huge focus on health has not changed the subject of sustainability.

The temptation for manufacturers and retailers is to switch to survival mode during the pandemic and target just that one major message. But consumers' response to this upheaval and the heightened importance of 'home' has been to cherish their personal values even more and think hard about what is important.

No company can afford to ignore the fact that sustainability is now a leading concern for an increasingly broad - and young - audience.

Manufacturers must align their product and marketing strategy – but not just against the background of sustainability in general. Real success in this area lies in clearly differentiating which measures have priority depending on the category and consumer audiences. For retailers, the priority is to clearly communicate their sustainability contribution to the customer.

Creating trust is the top priority in all areas.

Increasing numbers of shoppers are actively looking for solutions to allow them to make a difference in their drive for a greener lifestyle. Not offering them the solutions they crave would be fatal in the medium and long term, as you watch your consumers switch their spending to competitors eager to innovate and target sustainable shopping solutions.

Download our free sample report

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insights.gfk.com/sustainability-concern-action

