European Commission

Flash Eurobarometer 367

ATTITUDES OF EUROPEANS TOWARDS BUILDING THE SINGLE MARKET FOR GREEN PRODUCTS

SUMMARY

Fieldwork: December 2012

Publication: July 2013

This survey has been requested by the European Commission, Directorate-General for Environment and co-ordinated by Directorate-General for Communication.

Flash Eurobarometer 367 - TNS Political & Social

Eurobarometer

Flash Eurobarometer 367

Attitudes of Europeans towards building the single market for green products

Conducted by TNS Political & Social at the request of the European Commission, Directorate-General for Environment

Survey co-ordinated by the European Commission, Directorate-General for Communication (DG COMM "Research and Speechwriting" Unit)

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INTRODUCTION

The European Commission has adopted in April 2013 the Single Market for Green Products initiative, which introduces two methods for measurement and a set of principles for communicating the environmental performance of products and organisations. It is accompanied by a Commission Recommendation that encourages Member States and the private sector to use these methods. Better understanding consumer behaviour and attitudes is a key component to properly implement this new policy initiative.

This summary presents the results of the Flash Eurobarometer *"Attitudes of Europeans towards building the single market for green products"* (Flash N° 367). This survey was conducted to examine EU citizens' knowledge of green products and their reasons for buying, or not buying, environmentally-friendly products.

This report focuses on EU citizens' attitudes to sustainable development in six parts:

- The first section examines EU citizens' behaviours and attitudes towards environmentally-friendly products;
- The second section looks at the influence of environmental considerations on EU citizens' consumption habits;
- The third section deals with respondents' views on actions to solve environmental problems;
- The fourth section concentrates on consumers' confidence about environmental claims made about products;
- The fifth section deals with sustainable consumption issues related to food, including food expiry dates and meat consumption;
- The sixth section focuses on product lifespan issues, looking at consumer knowledge, product reliability and the willingness to repair products.

This survey was carried out by TNS Political & Social network in the 27 Member States of the European Union and in Croatia between 4th December and 10th December 2012. Over 25,568 respondents from different social and demographic groups were interviewed via telephone (landline and mobile phone) in their mother tongue on behalf of Directorate-General for Environment. The methodology used is that of Eurobarometer surveys as carried out by the Directorate-General for Communication ("Research and Speechwriting" Unit).[1] A technical note on the manner in which interviews were conducted by the Institutes within the TNS Political & Social network is appended as an annex to this report. Also included are the interview methods and confidence intervals.[2]

[1] http://ec.europa.eu/public_opinion/index_en.htm

[2] The results tables are included in the annex. It should be noted that the total of the percentages in the tables of this report may exceed 100% when the respondent has the possibility of giving several answers to the question.

Note: In this report, countries are referred to by their official abbreviation. The abbreviations used in this report correspond to:

ABBREVIATIONS			
BE	Belgium	LV	Latvia
CZ	Czech Republic	LU	Luxembourg
BG	Bulgaria	HU	Hungary
DK	Denmark	MT	Malta
DE	Germany	NL	The Netherlands
EE	Estonia	AT	Austria
EL	Greece	PL	Poland
ES	Spain	PT	Portugal
FR	France	RO	Romania
IE	Ireland	SI	Slovenia
IT	Italy	SK	Slovakia
CY	Republic of Cyprus*	FI	Finland
LT	Lithuania	SE	Sweden
		UK	The United Kingdom
HR	Croatia	EU27	European Union – 27 Member States
		EU15	BE, IT, FR, DE, LU, NL, DK, UK, IE, PT, ES, EL, AT, SE, FI**
		NMS12	BG, CZ, EE, CY, LT, LV, MT, HU, PL, RO, SL, SK***
		EURO AREA	BE, FR, IT, LU, DE, AT, ES, PT, IE, NL, FI, EL, EE, SI, CY, MT, SK

* Cyprus as a whole is one of the 27 European Union Member States. However, the 'acquis communautaire' has been suspended in the part of the country which is not controlled by the government of the Republic of Cyprus. For practical reasons, only the interviews carried out in the part of the country controlled by the government of the Republic of Cyprus are included in the 'CY' category and in the EU27 average.

** EU15 refers to the 15 countries forming the European Union before the enlargements of 2004 and 2007

*** The NMS12 are the 12 'new Member States' which joined the European Union during the 2004 and 2007 enlargements

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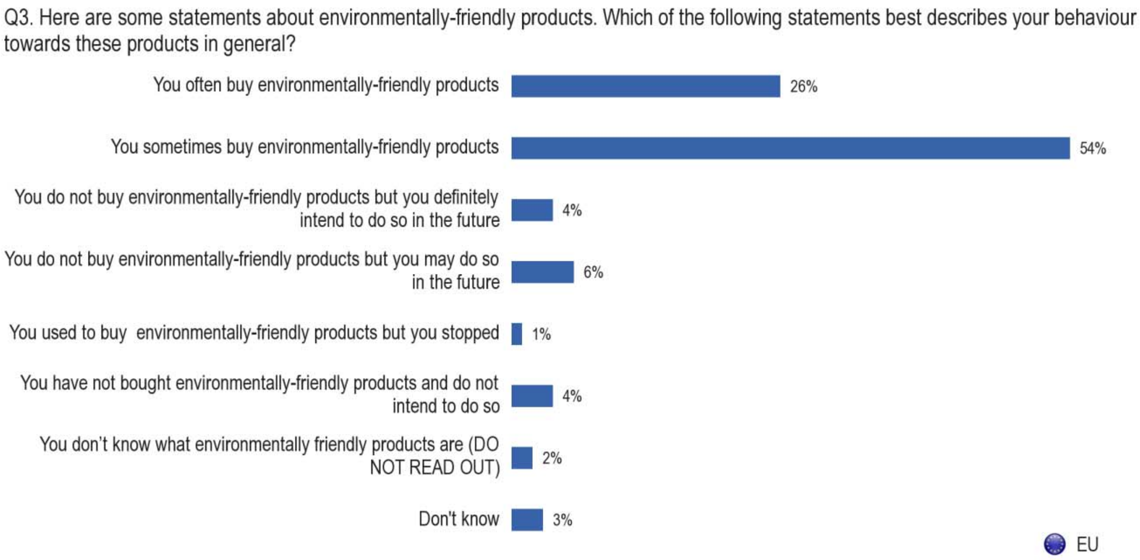
The Eurobarometer web site can be consulted at the following address:
http://ec.europa.eu/public_opinion/index_en.htm

We would like to take the opportunity to thank all the respondents across the continent who gave their time to take part in this survey.
Without their active participation, this study would not have been possible.

1. BEHAVIOURS AND ATTITUDES TOWARDS ENVIRONMENTALLY-FRIENDLY PRODUCTS

Across the EU, a very high proportion of citizens buy environmentally-friendly products so are classified into the two *maintenance* categories (80%). More than half of respondents are classified as *occasional maintenance* (54%) and another quarter as *regular maintenance* (26%).

In total, 15% of EU citizens do not buy environmentally-friendly products.



Base: All respondents = 25568

The *maintenance* behaviour stages are by far the most common in every EU Member State and Croatia with more than 60% of citizens are at this stage in every country.

Citizens are most likely to be at a *maintenance* behaviour stage in Austria (93%), Germany (90%) and Sweden (89%). The lowest proportion of *maintenance* stage citizens are in Bulgaria (61%), Malta (68%) and Lithuania (70%). Croatia almost exactly replicates the EU average with 55% at *occasional maintenance* and 24% at *regular maintenance*.

Costs and benefits

A majority of citizens in the EU27 agree that environmentally-friendly products are good value for money (55%). Respondents who often buy environmentally-friendly products are much more likely to agree that environmentally-friendly products are good value for money compared to those who only sometimes buy these products (68% and 53%, respectively). This is the only aspect where these two categories really differ, which suggests that lowering the price gap between green and non-green alternatives would enlarge the number of regular consumers.

Efficacy

Large majorities of EU citizens believe both that buying environmentally-friendly products can make a difference to the environment (89%) and that environmentally-friendly products are as effective as regular products (74%).

Social norms

There is strong agreement across the EU about the ethics of environmentally-friendly products: 95% of respondents agreed that using environmentally products is 'the right thing to do', 91% agreed that buying environmentally-friendly products sets a good example and 80% agreed that their family and friends would think it was a good thing if they used environmentally-friendly products.

Design

Just over than half of EU citizens think that environmentally-friendly products are easily available in shops (54%) and a similar proportion believe that it is easy to differentiate environmentally-friendly products from other products (51%). Environmentally-friendly products were most likely to be seen as easily available in Sweden (81%) and least in Estonia (40%).

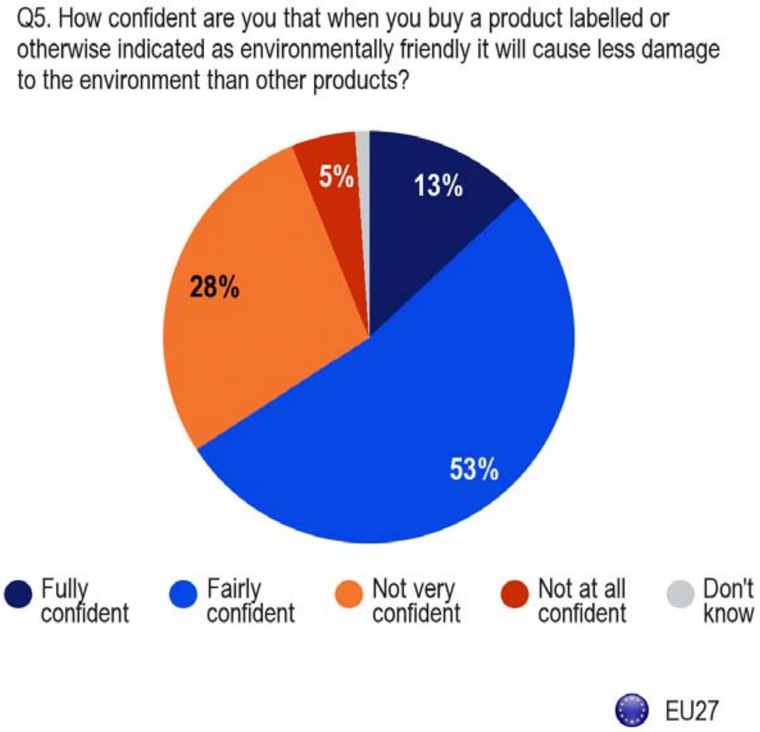
Respondents who do not buy environmentally-friendly products but intend to, are significantly less likely to believe that environmentally-friendly products are easily available compared with those who sometimes buy them (42% versus 54%). This suggests that environmentally friendly products should be more carefully presented so that they could be more easily differentiated from other products.

Statements about the environment

Around a third of EU citizens believe that concerns about the environment are exaggerated (37%). Bulgarian respondents are most likely to share this view (48%), with Slovenians least likely to believe this (16%).

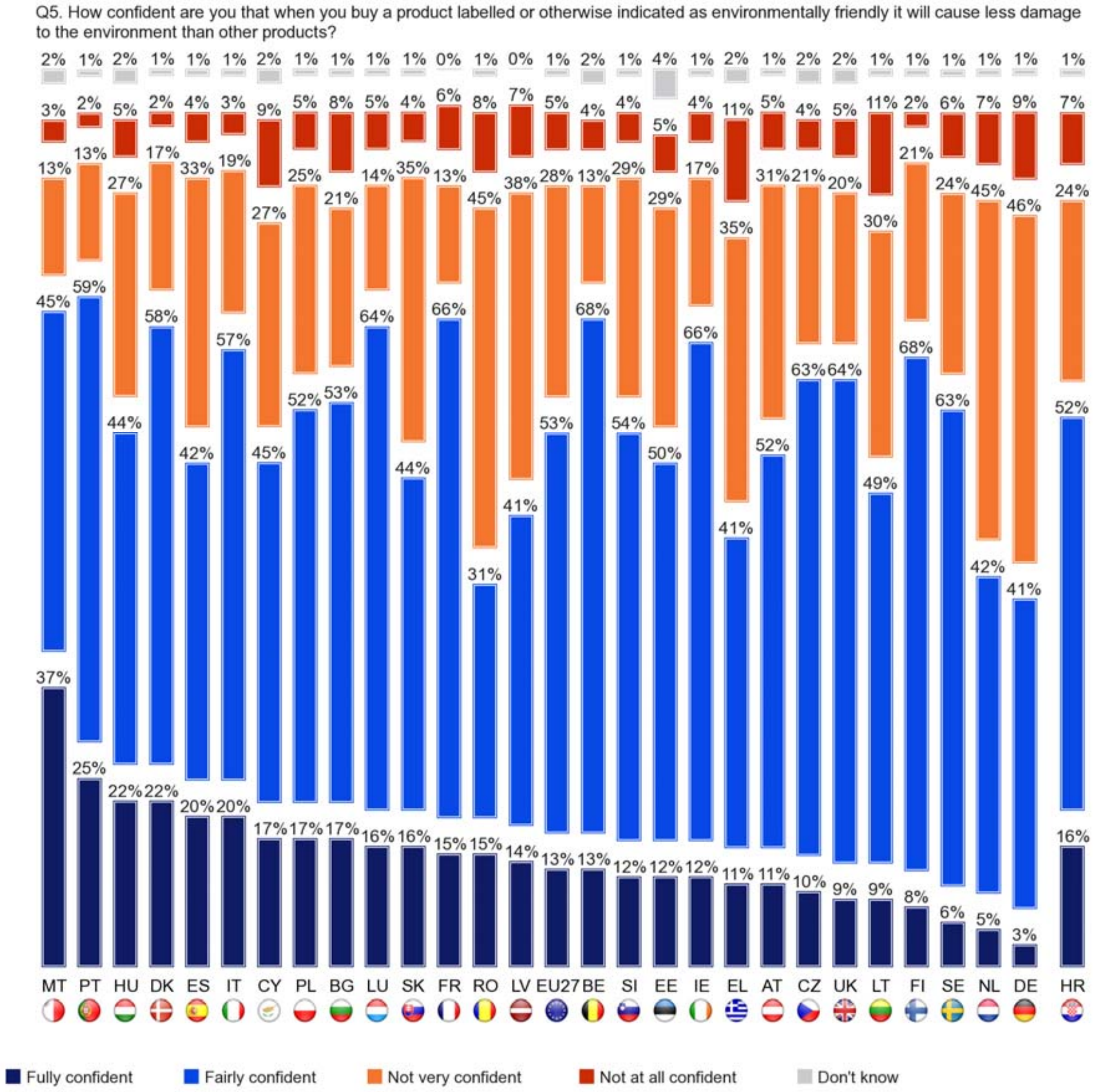
Level of confidence regarding whether environmentally-friendly products cause less damage to the environment than other products

Around two-thirds of EU citizens (66%) are fully or fairly confident that products indicated as environmentally-friendly will cause less damage to the environment than other products.



Base: Those who know what environmentally-friendly products are = 24458

Confidence that products labelled environmentally-friendly are less harmful to the environment is highest in Portugal (84%), Malta (82%), France (81%) and Belgium (81%). However, confidence is significantly lower in Germany (44%), Romania (46%) and the Netherlands (47%). Confidence is close to the EU average in Croatia (68%).

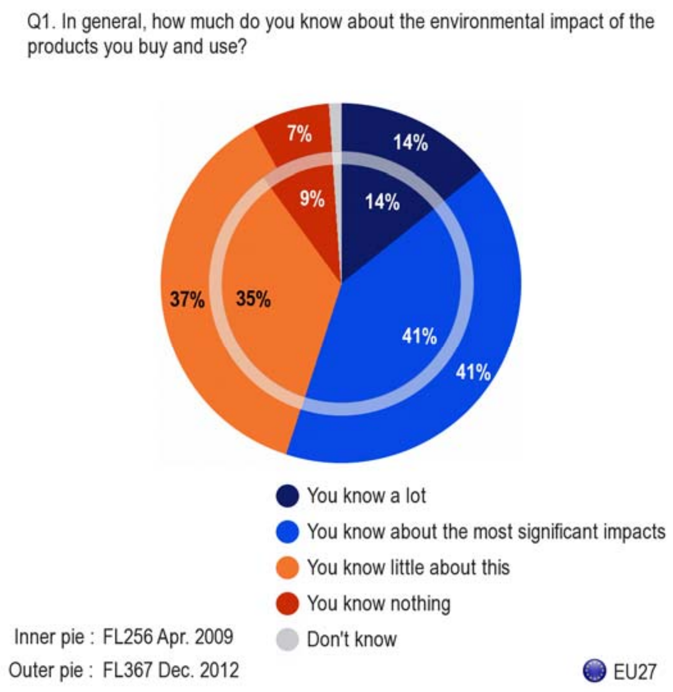


Base: Those who know what environmentally-friendly products are = 24458

2. INFLUENCE OF ENVIRONMENTAL CONSIDERATIONS ON CONSUMPTION HABITS

Most people are willing to consider environmental factors when making purchases, but fewer feel fully informed about these issues.

More than three-quarters of respondents are willing to pay more for environmentally-friendly products if they were confident that the products are truly environmentally-friendly (77%).

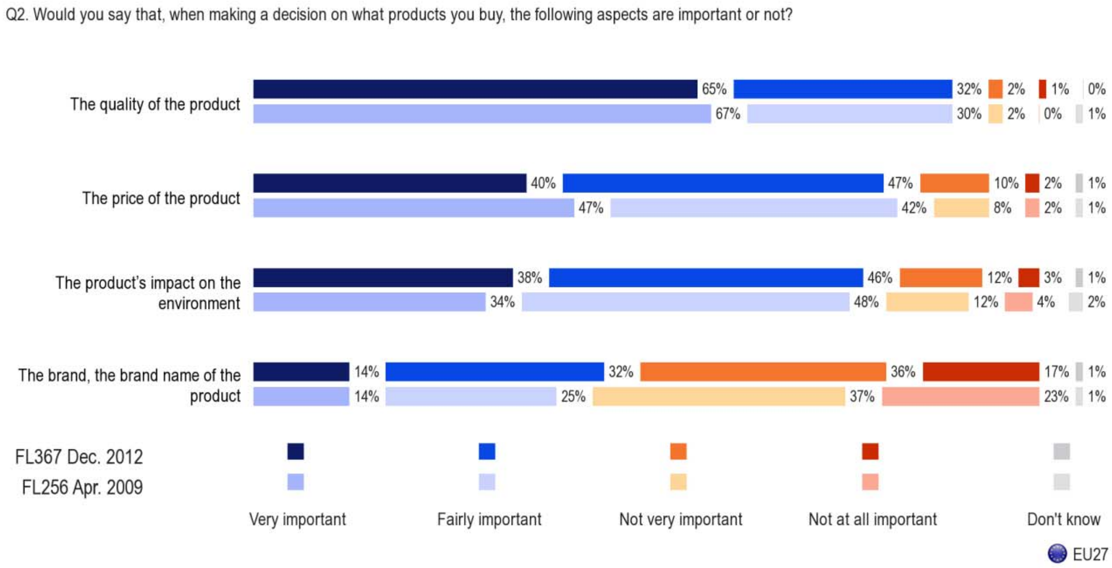


Base: All respondents = 25568

Four out of five think that lower taxes on environmentally-friendly materials and products can play a role in reducing people's impact on the environment (83%).

Slightly more than half of EU citizens feel that they know (55%) about the environmental impact of the products they buy and use, with 14% saying they 'know a lot' and 41% saying they know about the most significant impacts. These knowledge levels are similar to those found in 2009.

Environmental impact is an increasing concern for EU consumers. EU citizens take several considerations into account when buying products. The most important consideration is the quality of the product, which 97% believe to be very or fairly important. The next most important aspect is the product's price, believed to be important by 87%, followed by the product's environmental impact, which 84% believe to be important. The least important of these factors is the brand name of the product, which fewer than half of EU citizens believe to be important (46%).



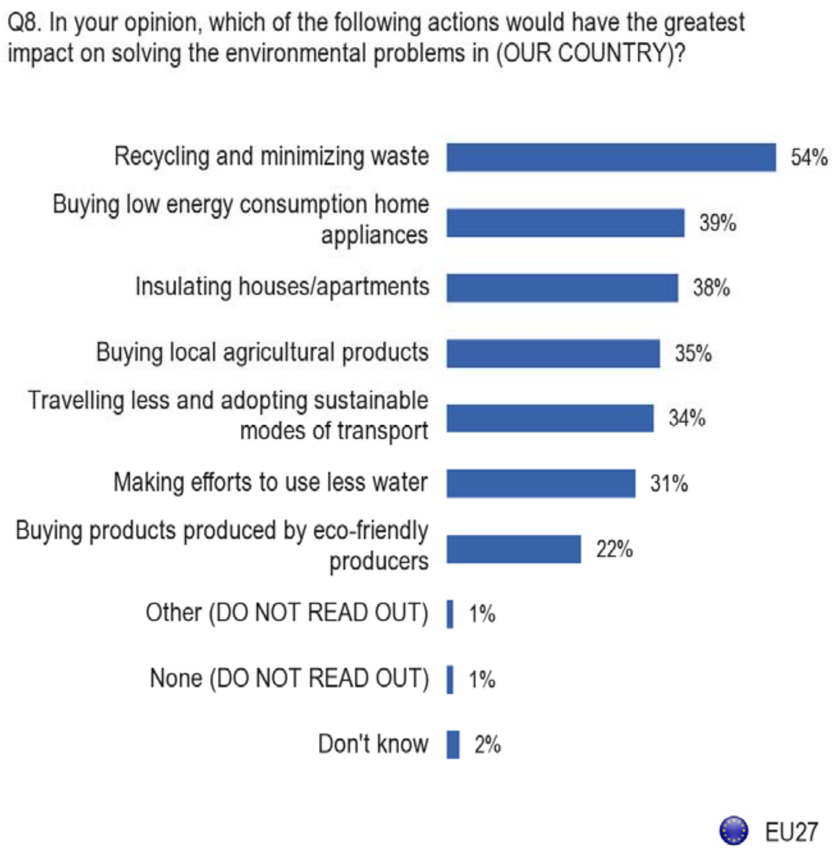
Base: All respondents = 25568

Information on the environmental impact of construction of buildings would be important for many EU citizens' decision to buy a house or apartment if the information was easily available (79%).

3. ACTIONS FOR THE ENVIRONMENT

Europeans support taking a variety of actions for environmental reasons, and they are increasingly changing their behaviour for environmental reasons.

EU citizens believe the actions that would have the greatest impact on solving environmental problems are recycling and minimizing waste (54%) and buying low energy consumption home appliances (39%).

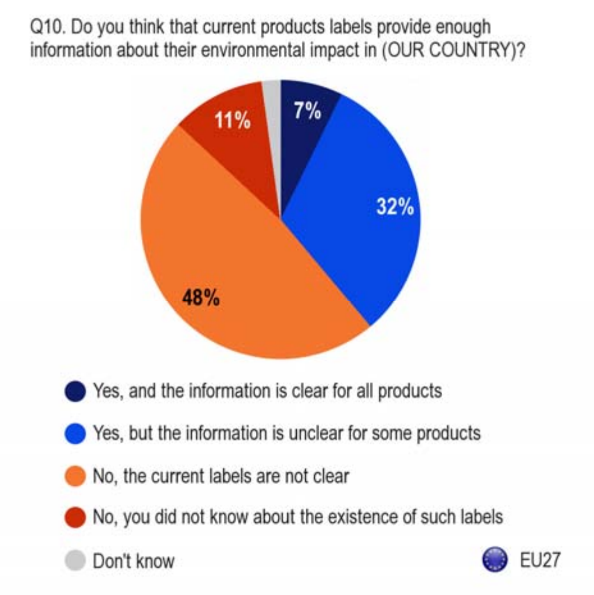


(MAX. 3 ANSWERS)
Base: All respondents = 25568

Most citizens are also engaging in actions for environmental reasons: 84% separated most their waste for recycling, 80% cut down their energy consumption and 70% cut down their water consumption during the last month.

4. CONSUMERS CONFIDENCE ABOUT ENVIRONMENTAL CLAIMS

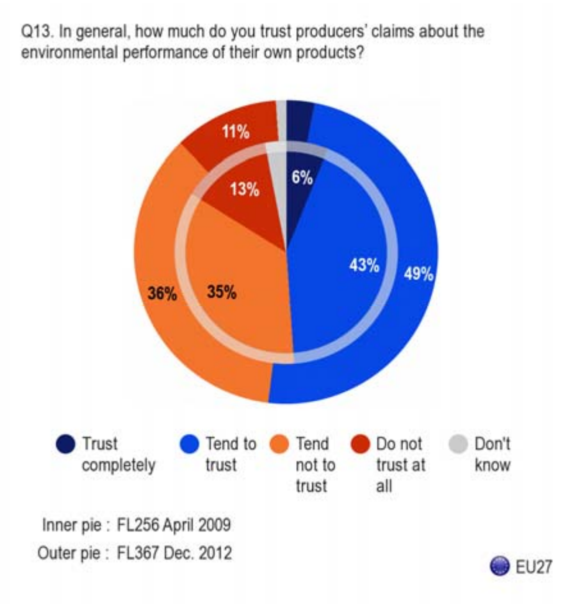
Although two-thirds of the respondents are confident about the labels stating that green products cause less damage to the environment than other products, they are less likely to trust producers' self-claims about the environmental performance of their products.



Base: All respondents = 25568

Six out of ten think that current product labels do not provide enough information about their environmental impact (59%) and a third more believe the information is unclear for some products (32%).

Respondents were also asked where they would like to find environmental information about a product and they could give several answers. Most people would like to find environmental information on product labels (81%), with fewer people supporting listing such information on the shelf containing the product (55%) or in advertisements about the product (41%).



Base: All respondents = 25568

Only just over half of EU citizens generally trust producers' claims about the environmental performance of their products (52%). This represents a small increase in trust since the previous survey in 2009 (+3).

A majority of EU citizens do not trust companies' reports on their own environmental performance (54%), with only 44% trusting these reports. There is strong support among EU citizens for obliging companies to publish reports on their overall environmental performance and the environmental performance of their products (69%).

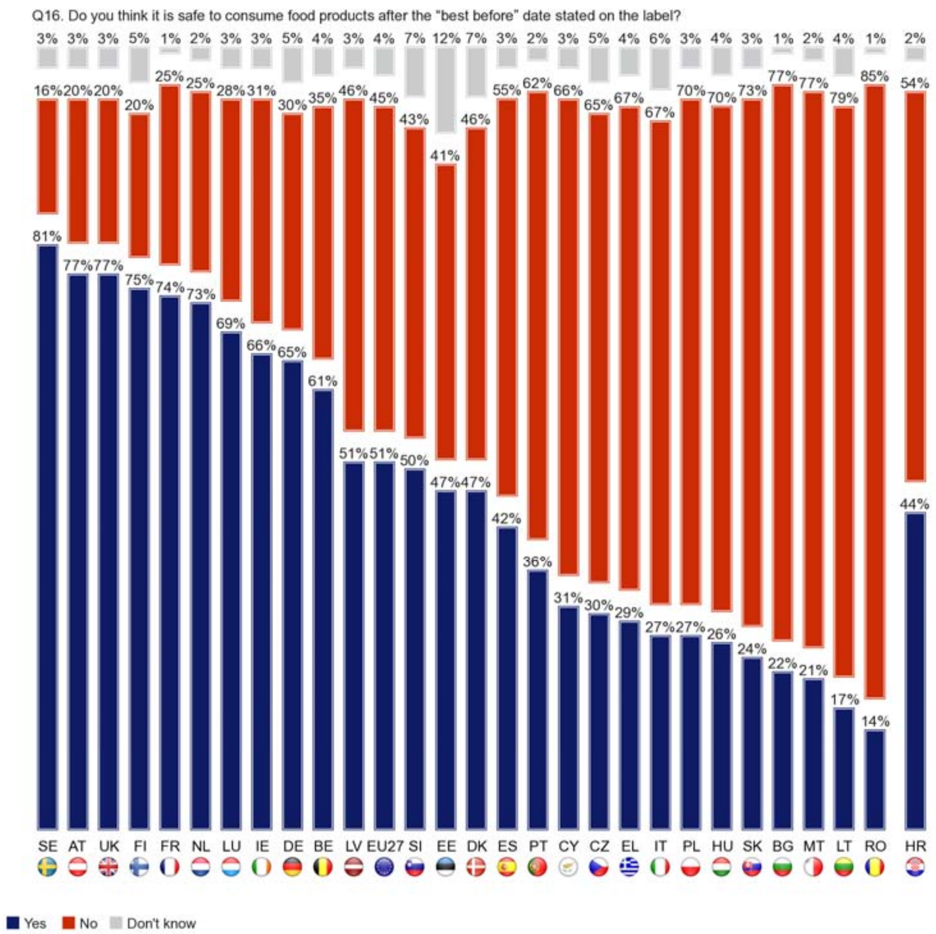
5. SUSTAINABLE CONSUMPTION – FOOD RELATED ISSUES

Fewer than one in twenty citizens claim that they never consume meat (3%) but many say they would be willing to replace most of the meat they eat with vegetables for environmental reasons (50%). The highest meat consumption is in Denmark, where a majority eat meat more than five times a week (55%). By contrast, consumption is lowest in Greece, where most people eat meat two or three times a week (62%).

There is a great support for other changes in meat consumption for environmental reasons: four out of five would be willing to eat less meat but of certified origin (80%) and three quarters would be willing to replace beef or pork with poultry or fish (72%).

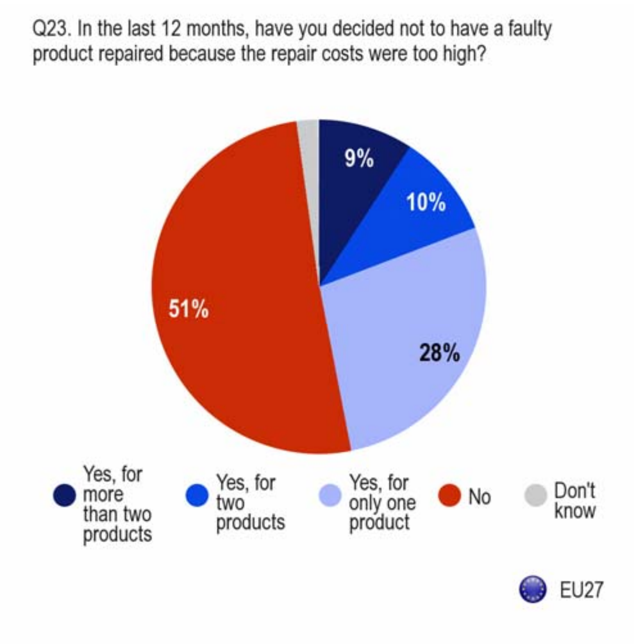
A large proportion of respondents (45%) believe that it is NOT safe to consume food products after the “best before” date stated on the label.

There are very large differences among citizens of Member States in their views on the safety of food past its "best before" date. More than three-quarters of citizens in Sweden (81%), Austria (77%) and the United Kingdom (77%) believe that it is safe to consume food products after the "best before" date stated on the label. This view is shared by just fewer than one in five citizens in Romania (14%) and Lithuania (17%).



Base: All respondents = 25568

6. SUSTAINABLE CONSUMPTION – PRODUCTS LIFESPAN ISSUES



Base: All respondents = 25568

On average, 60% of EU citizens feel informed about the lifespan of the products they buy and 38% do not feel informed.

Almost half of the respondents report that they decided not to have a faulty product repaired in the past 12 months because the repair costs were too high (47%).

More than nine out of ten respondents agreed that the lifespan of products available on the market should be indicated (92%).

Across the EU, two-thirds of people (66%) would be willing to pay more for a product if its guarantee of reliability was extended to five years.

TECHNICAL SPECIFICATIONS

FLASH EUROBAROMETER 367
“ATTITUDES OF EUROPEANS TOWARDS BUILDING THE SINGLE MARKET FOR GREEN PRODUCTS”
TECHNICAL SPECIFICATIONS

Between the 4th and the 10th of December 2012, TNS Political & Social, a consortium created between TNS political & social, TNS UK and TNS opinion, carried out the survey FLASH EUROBAROMETER 367 about “attitudes of Europeans towards building the single market for green products”.

This survey has been requested by the EUROPEAN COMMISSION, Directorate-General for Environment. It is a general public survey co-ordinated by the Directorate-General for Communication (“Research and Speechwriting” Unit). The FLASH EUROBAROMETER 367 covers the population of the respective nationalities of the European Union Member States, resident in each of the 27 Member States and Croatia, aged 15 years and over. The survey covers the national population of citizens as well as the population of citizens of all the European Union Member States that are residents in these countries and have a sufficient command of the national languages to answer the questionnaire. All interviews were carried using the TNS e-Call center (our centralized CATI system). In every country respondents were called both on fixed lines and mobile phones. The basic sample design applied in all states is multi-stage random (probability). In each household, the respondent was drawn at random following the "last birthday rule".

TNS has developed its own RDD sample generation capabilities based on using contact telephone numbers from responders to random probability or random location face to face surveys, such as Eurobarometer, as seed numbers. The approach works because the seed number identifies a working block of telephone numbers and reduces the volume of numbers generated that will be ineffective. The seed numbers are stratified by NUTS2 region and urbanisation to approximate a geographically representative sample. From each seed number the required sample of numbers are generated by randomly replacing the last two digits. The sample is then screened against business databases in order to exclude as many of these numbers as possible before going into field. This approach is consistent across all countries.

Readers are reminded that survey results are estimations, the accuracy of which, everything being equal, rests upon the sample size and upon the observed percentage. With samples of about 1,000 interviews, the real percentages vary within the following confidence limits:

Statistical Margins due to the sampling process
(at the 95% level of confidence)

various sample sizes are in rows *various observed results are in columns*

	5% 95%	10% 90%	15% 85%	20% 80%	25% 75%	30% 70%	35% 65%	40% 60%	45% 55%	50% 50%	
N=50	6,0	8,3	9,9	11,1	12,0	12,7	13,2	13,6	13,8	13,9	N=50
N=500	1,9	2,6	3,1	3,5	3,8	4,0	4,2	4,3	4,4	4,4	N=500
N=1000	1,4	1,9	2,2	2,5	2,7	2,8	3,0	3,0	3,1	3,1	N=1000
N=1500	1,1	1,5	1,8	2,0	2,2	2,3	2,4	2,5	2,5	2,5	N=1500
N=2000	1,0	1,3	1,6	1,8	1,9	2,0	2,1	2,1	2,2	2,2	N=2000
N=3000	0,8	1,1	1,3	1,4	1,5	1,6	1,7	1,8	1,8	1,8	N=3000
N=4000	0,7	0,9	1,1	1,2	1,3	1,4	1,5	1,5	1,5	1,5	N=4000
N=5000	0,6	0,8	1,0	1,1	1,2	1,3	1,3	1,4	1,4	1,4	N=5000
N=6000	0,6	0,8	0,9	1,0	1,1	1,2	1,2	1,2	1,3	1,3	N=6000
N=7000	0,5	0,7	0,8	0,9	1,0	1,1	1,1	1,1	1,2	1,2	N=7000
N=7500	0,5	0,7	0,8	0,9	1,0	1,0	1,1	1,1	1,1	1,1	N=7500
N=8000	0,5	0,7	0,8	0,9	0,9	1,0	1,0	1,1	1,1	1,1	N=8000
N=9000	0,5	0,6	0,7	0,8	0,9	0,9	1,0	1,0	1,0	1,0	N=9000
N=10000	0,4	0,6	0,7	0,8	0,8	0,9	0,9	1,0	1,0	1,0	N=10000
N=11000	0,4	0,6	0,7	0,7	0,8	0,9	0,9	0,9	0,9	0,9	N=11000
N=12000	0,4	0,5	0,6	0,7	0,8	0,8	0,9	0,9	0,9	0,9	N=12000
N=13000	0,4	0,5	0,6	0,7	0,7	0,8	0,8	0,8	0,9	0,9	N=13000
N=14000	0,4	0,5	0,6	0,7	0,7	0,8	0,8	0,8	0,8	0,8	N=14000
N=15000	0,3	0,5	0,6	0,6	0,7	0,7	0,8	0,8	0,8	0,8	N=15000
	5% 95%	10% 90%	15% 85%	20% 80%	25% 75%	30% 70%	35% 65%	40% 60%	45% 55%	50% 50%	

ABBR.	COUNTRIES	INSTITUTES	N° INTERVIEWS	FIELDWORK DATES		POPULATION 15+
BE	Belgium	TNS Dimarso	1.001	04/12/2012	06/12/2012	8.939.546
BG	Bulgaria	TNS BBSS	1.003	04/12/2012	06/12/2012	6.537.510
CZ	Czech Rep.	TNS Aisa s.r.o	1.000	04/12/2012	06/12/2012	9.012.443
DK	Denmark	TNS Gallup A/S	1.018	04/12/2012	06/12/2012	4.561.264
DE	Germany	TNS Infratest	1.001	05/12/2012	07/12/2012	64.336.389
EE	Estonia	TNS Emor	1.000	04/12/2012	06/12/2012	945.733
EL	Greece	TNS ICAP	1.002	04/12/2012	06/12/2012	8.693.566
ES	Spain	TNS Demoscopia S.A	1.000	03/12/2012	05/12/2012	39.127.930
FR	France	TNS Sofres	1.009	05/12/2012	07/12/2012	47.756.439
IE	Ireland	IMS Millward Brown	994	05/12/2012	10/12/2012	3.522.000
IT	Italy	TNS ITALIA	1.000	05/12/2012	07/12/2012	51.862.391
CY	Rep. of Cyprus	CYMAR	503	05/12/2012	07/12/2012	660.400
LV	Latvia	TNS Latvia	1.000	04/12/2012	06/12/2012	1.447.866
LT	Lithuania	TNS LT	1.000	04/12/2012	06/12/2012	2.829.740
LU	Luxembourg	TNS Dimarso	508	05/12/2012	07/12/2012	404.907
HU	Hungary	TNS Hoffmann Kft	1.006	04/12/2012	06/12/2012	8.320.614
MT	Malta	MISCO International Ltd	500	05/12/2012	07/12/2012	335.476
NL	Netherlands	TNS NIPO	1.006	03/12/2012	05/12/2012	13.371.980
AT	Austria	TNS Austria	1.002	04/12/2012	06/12/2012	7.009.827
PL	Poland	TNS OBOP	1.000	04/12/2012	06/12/2012	32.413.735
PT	Portugal	TNS EUROTESTE	1.000	04/12/2012	06/12/2012	8.080.915
RO	Romania	TNS CSOP	1.007	04/12/2012	06/12/2012	18.246.731
SI	Slovenia	RM PLUS	1.006	04/12/2012	06/12/2012	1.759.701
SK	Slovakia	TNS AISA Slovakia	1.000	04/12/2012	06/12/2012	4.549.956
FI	Finland	TNS Gallup Oy	1.001	03/12/2012	05/12/2012	4.440.004
SE	Sweden	TNS SIFO	1.000	04/12/2012	06/12/2012	7.791.240
UK	United Kingdom	TNS UK	1.001	04/12/2012	06/12/2012	51.848.010
TOTAL EU27			**25.568**	**04/12/2012**	**10/12/2012**	**408.806.313**
HR	Croatia	Puls	1.005	04/12/2012	06/12/2012	3.749.400
TOTAL			**26.573**	**04/12/2012**	**10/12/2012**	**412.555.713**