



## Literature Review on Public Attitudes to Fair Trade and ethical consumption

CLIENT:

Fairtrade International

20/02/2019

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## Executive Summary

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This document is part of the baseline study carried out for the Trade Fair Live Fair (TFLF) project. It provides insights into current public attitudes towards Fair Trade and ethical consumption in Europe and aims to help the TFLF project to develop adequate advocacy and campaigning strategies.

The report consists of two parts. Part I (Literature Review on Public Attitudes on Fair Trade and Ethical Consumption) reviews and analyses recent studies and reports that explore attitudes, motives and actions related to Fair Trade and ethical consumption and related questions such as global interdependencies and development cooperation. Part II (EU Consumer's Attitudes to Product and Supply Chain Sustainability: Food & Drink and Cosmetics & Toiletries) is based on data from a consumer survey conducted by Fashion Revolution and Ipsos MORI. It complements Part I of this document as well as the Fashion Revolution Consumer Survey Report on EU consumer attitudes to sustainability and supply chain transparency in the fashion industry (2018), which is based on data gathered by the same survey. It presents and analyses the results and contrasts them with the literature review.

The results of the literature review show that awareness for ethical consumption and related topics overall is high but spread unevenly throughout Europe: Consumers within Northern and Western European countries are more aware than those of the Eastern and Southern EU member countries. Similarly, the share of consumers that make ethical choices when shopping varies widely across EU member states, with Eastern European countries being least involved and the Northern countries – specifically Sweden and Denmark – being clear forerunners. The results further suggest that sustainability labels play a role in European consumers' buying decisions for a (large) minority only. This refers to both ecological and fair traded products. Yet again, differences between countries are considerable. The results therefore clearly point to the need to further promote ethical consumption and related product labels, particularly in the eastern part of the European Union.

Data on consumers' priorities in and barriers toward ethical consumption in general and Fair Trade in particular are limited and available for selected countries only. With respect to consumer priorities, consumers tend to put their preferences on product attributes such as quality, health, or price. When it comes to barriers to ethical consumption, a key element identified is the price. More specifically, the amounts consumers are willing to pay more tends to be below the price premium that fair traded or eco-friendly products ask for.

The literature review furthermore suggests that socio-demographic data play an important role in ethical consumption: For instance, the later the education path is completed, the higher is the probability that consumers favour ethical consumer goods. In terms of gender, women are more likely to be ethically conscious shoppers than men.

A positive relation in favour of ethical consumption was found with personal values that reflect understanding, appreciation, tolerance, concern for humanity and nature. People that are giving more relevance to social status, prestige, and dominance, in contrast, are less likely to be ethical consumers.

The literature review was limited by the lack of studies and of comparable data on the various EU member countries. This applies even more to countries of the geographical South and East of Europe. The Eurobarometer is the most comprehensive source in this respect thanks to which a bigger picture for some key question could be established. Moreover, the data that is available partly is contradictory.

The survey results complement the picture drawn by means of the literature review. With respect to consumer awareness, for instance, the responses suggest a similarly high level as the studies referred to. The responses also go in line with the results of the values and attitudes related studies quoted in the literature review which suggested that socio-economic and cultural context play an important role.

The survey also helps to enlarge the picture on consumers' priorities when choosing ethical products. Looking at the combined responses of the five countries surveyed (France, Germany, Italy, Spain, UK), the results reveal that when it comes to food and drink or cosmetics and toiletries, consumers more

frequently are concerned about environmental issues than when it comes to buying clothing. For the latter, in contrast, more consumers pay attention to fair payment of the workers who made the respective products than to any other aspect.

A key finding of both the literature review and the survey is that results at country level and regarding selected socio-economic criteria are much more diverse, partly reversed, than when looking at aggregated data. This finding may be particularly relevant to initiatives aiming to advocate ethical consumption: Future communication and awareness raising campaigns and related strategies should be tailored to the specific country and to the socio-economic and cultural context the consumers to be addressed are moving in.

Furthermore, the lack of comparable data suggests that in a mid- and long-term perspective a solid research strategy needs to be developed that allows capturing the information necessary and relevant to better understand attitudes and behaviour toward ethical consumption throughout the European Union, serving as basis to advance ethical consumption in general and Fair Trade in particular.

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**Part I:**  
**Literature Review on Public  
Attitudes on Fair Trade and  
Ethical Consumption**

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# 1. Introduction

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This literature review is part of the baseline study carried out for the Trade Fair Live Fair (TFLF) project. It has the purpose of providing insight into current public attitudes towards Fair Trade and ethical consumption in Europe and help the TFLF project develop adequate advocacy and campaigning strategies. The review covers literature that explores attitudes, motives and actions related to Fair Trade and ethical consumption and related questions such as global interdependencies and development cooperation.

The TFLF project aims at increasing awareness of these topics, with the ultimate objective to promote more resilient livelihoods for workers and producers, especially in the global South, that grow or manufacture products consumed in Europe. The achievement of SDG 12 on sustainable consumption and production requires efforts in every step along the value chain and its accomplishment is highly dependent on the behaviour of consumers. Thus, it is necessary to educate consumers on sustainable consumption patterns and lifestyles. Furthermore, tools to guide purchasing decisions in a more sustainable direction are needed.

To support the TFLF project with relevant background information, this study addresses the following three concepts related to sustainable consumption patterns:

**Ethical consumption** is understood as the overarching concept used to describe the consumption of goods made with special concern for environmental and social impact. This includes the impact of production in terms of resource extraction, pollution and waste disposal as well as the social impact on the people involved in the production process, their families and communities. It also includes the impact on human rights of workers, and smallholder farmers, working conditions and payments, and the effect on the local economy. Ethical consumption can also refer to a type of behaviour: “Ethical consumerism”. The latter is a type of consumer activism based on the concept of dollar voting through 'positive buying' that favours ethical products, or 'moral boycott', in that some companies or products are rejected.

**Fair Trade** is a global movement with the aim to secure the rights of marginalized producers and workers, especially in the global South, through alternative trading approaches based on partnerships between producers and traders, businesses and consumers. The main organisations engaged in the Fair Trade movement at the international level, the World Fair Trade Organisation (WFTO) and Fairtrade International, have agreed on the following definition for Fair Trade:

Fair Trade is a trading partnership, based on dialogue, transparency and respect that seeks greater equity in international trade. It contributes to sustainable development by offering better trading conditions to, and securing the rights of, marginalized producers and workers – especially in the South. Fair Trade Organizations, backed by consumers, are engaged actively in supporting producers, awareness raising and in campaigning for changes in the rules and practice of conventional international trade.<sup>1</sup>

Fairtrade (in one word) is the registered international trademark of the Fairtrade Labelling Organisation (FLO).

**Product labels and certifications** are tools to guide consumers in their purchase choices. The different labels can refer to a wide range of criteria and standards, including both social and environmental aspects as well as origin, product quality, and health dimensions. Product labels can refer to a certification of either an entire supply chain or only of a component in a product, for example organically grown cotton in a T-shirt. The Fairtrade label on products, for instance, indicates that the particular product has been produced according to the Fairtrade criteria for environmental, labour and development standards. It also guarantees payment of the price premium that aims to improve economic and social conditions of the farmers and workers, including living wages. Well-known other product labels among all countries in the European Union are for example the Organic Farming logo, the EU Ecolabel, and the labels for Protected

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<sup>1</sup> World Fair Trade Organization and Fairtrade Labelling Organizations International 2009.

Designation of Origin, Protected Geographical Indication, and Traditional Speciality Guaranteed. In addition to these, many countries also have their own labels.<sup>2</sup>

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## 2. Methodology

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### 2.1. Data collection method

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The literature review has been performed between August 1<sup>st</sup> and October 5<sup>th</sup> 2018, based on material produced between the years 2010 and 2018, with the majority published in the last three years.

Data collection methods included:

- Request for submission of material from the TFLF partner organisations (19 resources received by the 5<sup>th</sup> of October 2018)
- Online research
  - General web search
  - Websites of local Fair Trade organisations (mainly studies)
  - Academic databases like Google scholar, Wiley and Science direct, SpringerLink, Jstor, Sage journals, Directory of Open Access Journals (DOAJ), Microsoft Academic, RefSeek, BASE, Bielefeld Academic Research Engine

All search keywords as well as multiple combinations of those key words have been used in English, German, Swedish, Spanish, Portuguese, Italian, French, Dutch, and Danish.

Example of keywords used for online research:

- Consumer
- Consumer survey
- Awareness
- Attitudes
- Opinions
- Perception
- Fairtrade
- Fair trade
- Sustainable consumption &/ production
- EU
- European Union

To facilitate comparison, both among countries and over time, priority has been given to literature covering several countries. The most useful source has been different versions of the Special Eurobarometer<sup>3</sup>, a survey conducted among citizens of the European Union by the European Commission on a more or less regular basis, covering thematic areas of development; agriculture; and climate change.

The literature review has been guided by the following research questions:

1. Which level of awareness do consumers show with respect to production conditions of consumer goods in general and those produced in developing countries in particular (focusing on major food supply chains such as coffee, cocoa, bananas, tea, and rice, and non-food products such as cotton and textiles), including thus the origin of the goods purchased and related working and living conditions and environmental impacts?
2. To which extent are individual consumers aware of the link between their buying decisions and sustainability challenges?
3. Which role do sustainability labels play in making buying decisions?

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<sup>2</sup> European Commission 2017a, European Commission 2018a.

<sup>3</sup> <https://ec.europa.eu/commfrontoffice/publicopinion/index.cfm/Survey/index?p=1&instruments=SPECIAL>. See bibliography for a list of the Eurobarometer that has been used for this study.

4. Which priorities do consumers in Europe set when it comes to making buying choices between locally produced consumer goods, ecologically-friendly produced goods, and sustainability labelled products imported from low cost countries?
5. What are the interests/ motives and drivers of individual consumers for adopting ethical consumption patterns/ buying FT-labelled products?
6. What are motives (barriers) that hold individual consumers back/ prevent individual consumers from buying FT-labelled products
7. Which factors influence the individual consumers' attitude toward fair trade and ethical consumption (by which e.g. psychological, economic, cultural, and/ or family, access to information etc.)?
8. Which is the price sensitivity (willingness to pay) for buying fair trade products particularly and ethical and sustainable products in general?
9. Which factors influence potential value-action gaps, i.e. discrepancies between individual consumer' values, attitudes and actual behaviour in the context of ethical and sustainable consumption in general and fair trade in particular?
10. Which level of trust and /or consideration do individual consumers give to labels indicating ethical or sustainable products in general and fair trade labels in particular?
11. What are differences between European countries with respect to individual consumers' attitudes toward ethical and sustainable products in general and fair trade products in particular? Which are the influencing factors explaining these differences?
12. Which role does the socio-economic context (e.g. individualistic vs. collectivistic countries) play in pro-fair trade consumer decisions as well as on ethical and/or sustainable consumption in general?

The abbreviations for countries used in this report correspond to:

Austria	AT	Estonia	EE	Italy	IT	Portugal	PT
Belgium	BE	Finland	FI	Latvia	LV	Romania	RO
Bulgaria	BG	France	FR	Lithuania	LT	Slovakia	SK
Croatia	HR	Germany	DE	Luxemburg	LU	Slovenia	SI
Cyprus	CY	Greece	EL	Malta	MT	Spain	ES
Czech Republic	CZ	Hungary	HU	Netherlands	NL	Sweden	SE
Denmark	DK	Ireland	IE	Poland	PL	UK	UK

The abbreviation EU-28 will be used to refer to the member countries of the European Union.

## 2.2. Limitations

In contrast to a study based on primary data collection, a literature review is dependent on and reflects upon data already available and suitable to shed light on the topic of interest. Despite a genuine interest in providing precise and meaningful answers to the above guiding questions, this study faces limitations, given the specific character of a literature review. It is important to highlight that the questions therefore primarily serve as orientation. They direct the search for and analysis of relevant information to respond to the overall objective of the study - providing a snapshot of the current status of public attitudes towards Fair Trade and ethical consumption in Europe.

The major limitation is the availability of studies and data covering the research questions. In some of the countries that were included for more in-depth assessment, the available material on the topic is scarce. This is for example the case of Spain and Portugal, where only little or older sources have been found. However, this can also be seen as reflective of the level of awareness of for example Fairtrade in these countries. For Italy and France, more recent sources were available, but publicly accessible reports are scarce and if available, then mostly in a summarized version with limited information on for instance methodology, scope, sample size, or definition of key concepts studied and/or used. For the geographical East of Europe, no country reports were identified, which primarily is based on a lack of availability.

In addition to this, even in the cases where country-specific data are available, they are usually not comparable due to different research or survey questions used, or different methodologies and sample sizes.

The information gaps identified and the impossibility to compare data across countries show that there is a high need for more reliable and comparable data in the future in order for any awareness raising project of the Fair Trade movement to be based on a sound situation analysis.

A second limitation for the study is the quantity of languages spoken in the European countries and therefore the language capacities of the consultants have been deterrent for the selection of countries for more in-depth research. It has been possible to study documents and search for material in English, German, Swedish, Spanish, Portuguese, Italian, French, Dutch, and Danish. But when assessing for example the attitudes in the Baltic or Eastern European countries, only information available in cross-country studies could be included.

### 3. Current status of ethical consumption in the EU

The purpose of this chapter is to analyse to which extent ethical consumption is being adopted by consumers in the different EU member countries. Aspects addressed included amongst others the average annual expenditure for fair trade products, the involvement of consumers in helping developing countries overcoming their challenges, and the role labels play in making purchasing decisions.

#### Key findings

- Sustainability labels overall still play a minor role among consumers of the EU-28 in making buying decisions.
- Forerunners are northern, specifically Northern and Western countries. Southern and Eastern countries make up the rear.
- Current annual spending per capita for Fairtrade labelled products increases constantly over time, yet differs largely between European countries, from less than 1 Euro in Spain to almost 60 Euros in Ireland (not price adjusted).
- Consumers that state to make ethical choices when purchasing groceries or clothing are still a minority throughout the EU, with a spread of more than 40pp between least and most involved countries.
- The likelihood to be an ethical shopper increases with the level of education and is higher among managers, self-employed, students, women, people aged between 25 and 54, people with financial stability, and politically left oriented consumers.

A report from the Spanish coordination platform for fair trade provides interesting data from 2016<sup>4</sup> on the value of Fairtrade purchases per person for 15 European countries. According to this study, the average spending for Fairtrade products in Europe is 15.26 Euros per person and per year. For the member countries of the EU, this figure is slightly less with 14.15 Euros. Among EU countries, Irish consumers spend the most with 57.58 Euros and Spain marks the bottom of this list with only 0.93 Euros per person.

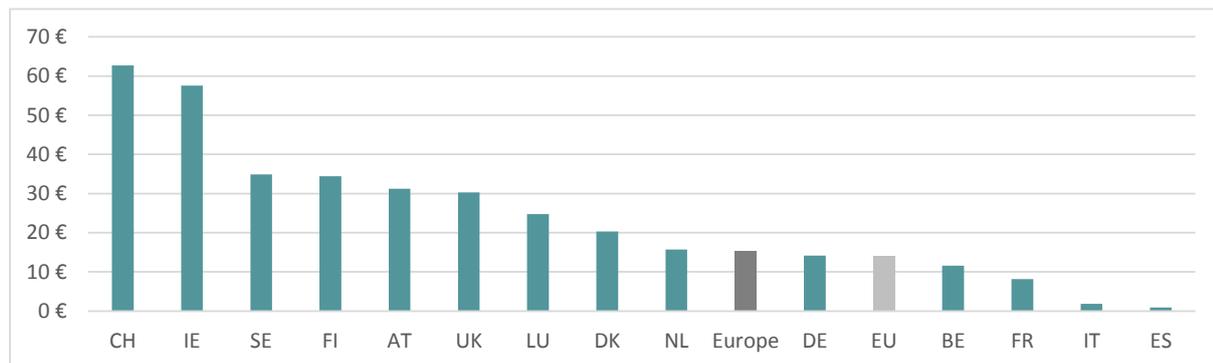


Figure 1: Average annual expenditure per inhabitant on Fairtrade products in 2016 (Euros).  
Source: Coordinadora Estatal de Comercio Justo (2017)

These differences between individual countries are significant and even for the countries that spend the most on Fairtrade products the values are rather low. Despite significant growth rates of Fairtrade sales over the past years, the numbers indicate to which comparatively small extent Fairtrade has penetrated some of the markets<sup>5</sup>. The values were calculated dividing country-specific Fairtrade-labelled sales

<sup>4</sup> Data from Eurostat and Fairtrade International 2016 presented in Coordinadora Estatal de Comercio Justo, 2017, p.15.

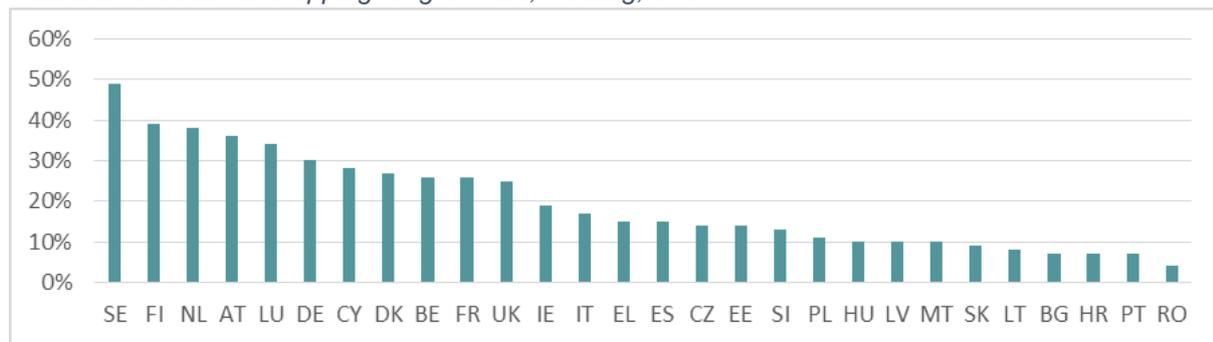
<sup>5</sup> In comparison to overall private individual consumption per year. For food and non-alcoholic beverages, for instance, the average individual consumer of the EU28 spent 2,037 € in 2017. That is, consumption of Fairtrade-labelled products across all product groups make less than 1% of what is consumed on average in the EU per capita per year in food and non-alcoholic beverages

(reported by Fairtrade International in its respective annual report) by the respective country population<sup>6</sup>. For Spain, in contrast, the sales figures cover different labels such as Fairtrade, Naturland Fair, Ecocert-Fair for Life y Fundación de Pequeños Productores (FUNDEPPO) - again, however, without specifying product types. Spain's average annual expenditure per inhabitant, thus, would be even smaller if only Fairtrade-labelled products were taken into account.

The numbers for spending per person are influenced by various aspects such as the price level, the share of people consuming fair products, and the number, type, and value of fair trade products available. The following will provide a more detailed picture on the current level of fair trade consumption for the different EU member states:

In the Special Eurobarometer 476<sup>7</sup> from 2018 which focuses on development cooperation, people were asked how they are involved in helping developing countries. More than half (56%) of respondents said they are not involved at all, which is an increase of 7pp compared to 2016. Interesting for this study is also the amount of people who said that they are involved by *making ethical choices when buying food or clothes*: 21% of the respondents said to do so. On a country level, the picture looks very divers. The following figure shows that in 7 countries not even 1 in 10 persons said to being involved by making ethical buying decisions, with Romania showing the smallest value (4%). Striking is also that in every single one of the 28 EU member states, the majority said to not being involved in helping developing countries by making ethical choices when shopping.

Figure 2: Percent of people who state that they are involved in helping developing countries by making ethical choices when shopping for groceries, clothing, etc.



Source: European Commission 2018b, p.76

This is interesting also when compared to the results with respect to familiarity of the Fairtrade label: In ten countries, the likelihood that consumers are familiar with the label was above 50%, and in some countries above 80% (Netherlands, Sweden, Luxembourg and Austria). Other studies indicate that the above data may serve as proxy but need to be treated cautiously with respect to the explanatory power to indicate the share of consumers actively buying ethical products. A representative survey<sup>8</sup> conducted on behalf of Fairtrade Sweden found that 88% of their respondents buy at least one Fairtrade labelled product per month<sup>9</sup>. Similarly, a representative survey conducted 2017 with Danish consumers between the ages of 18 and 70<sup>10</sup> found that 66% of respondents buy Fairtrade labelled products, even though the majority buys it rarely, 25% at least once per month and only 16% once per day. Put differently, the number of people who said to buy fair trade products is considerably higher than the number of people that stated they are involved in helping developing countries by making ethical choices when shopping. A possible reason for these differences may be a disconnection between what consumers understand what *help developing countries* mean and how they see the role of their consumption choices in this: buying

alone. To name some country examples: In Spain this expenditure (food and non-alcoholic beverages consumption/capita/year) amounts to 1,843 € Euros, in France to 2,479 €, in the UK to 1,871 €, and in Germany to 2,226 € (own calculations, based on Statistisches Bundesamt 2018, not price-adjusted).

<sup>6</sup> Fairtrade International's annual report reflects retail (stores, supermarkets) and out of home (restaurants etc.) sales without, however, specifying the product type.

<sup>7</sup> European Commission 2018b, pp.73-78.

<sup>8</sup> Holmberg & Robertson, 2018.

<sup>9</sup> 29% said to buy more than five fair trade products per month.

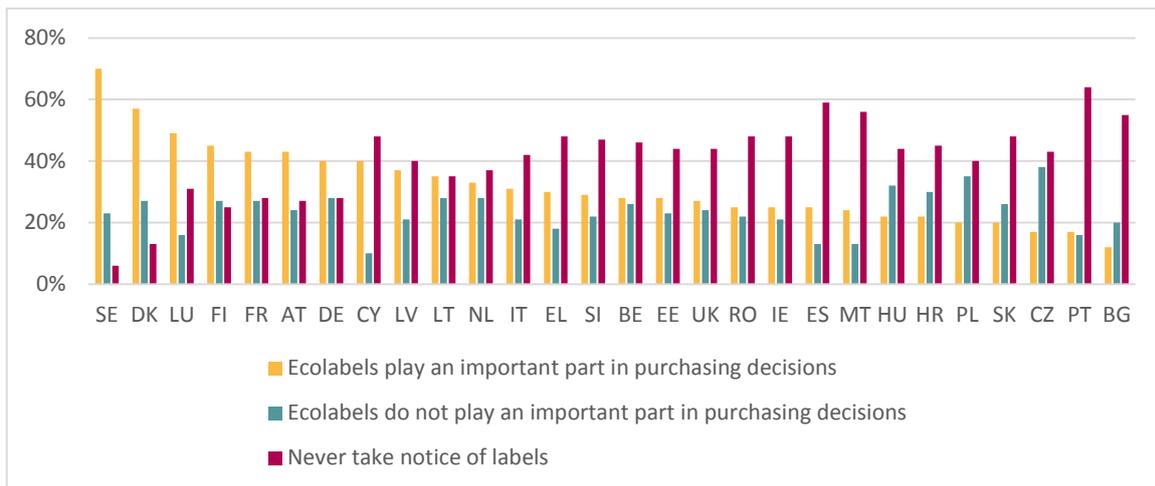
<sup>10</sup> Landbrug & Fødevarer, 2017.

fair trade products doesn't necessarily mean that consumers think that they are actively helping developing countries.

Socio-demographic data show differences for all related aspects covered by the Special Eurobarometer 476.<sup>11</sup> Most striking is the difference when looking at the level of education, with a spread of 21pp<sup>12</sup> between those that finished their education before 15 and those that were 20 years old or older. Almost the same difference can be observed with regards to the profession: The probability that retired and unemployed people say they are making ethical purchases (15%) is considerably lower than the chance that managers say so (35%, followed by self-employed with 29% and other white collars and students with 25% each). Age plays a role too for the buying behaviour, though to a smaller extent: Respondents above 55 years of age showed the smallest likelihood to say they make ethical choices when shopping, respondents from 25 to 39 and from 40 to 54 the highest (24% and 25% respectively). In terms of gender, women are more likely to be ethically conscious shoppers than men (24% vs. 19%). The political dimension shows a difference of 15pp between respondents who position themselves left (31%) and right (16%). Lastly, also the economic situation plays a role: Among those who said to have difficulties paying their bills most of the time, 13% said to make ethical purchases, compared to 24% among those who said to almost or never have difficulties paying their bills.<sup>13</sup> With respect to the interpretation of this data, however, it is important to note that no statement is made on how ethical choices are made and what "ethical choices" particularly refers to.

The Special Eurobarometer 468, which focuses on European citizens' attitudes towards the environment<sup>14</sup>, asked survey participants whether eco-labels play an important role in their purchasing decisions. For the EU-28, 32% of the respondents confirmed that labels play a role, while 25% said that they are not important. The most frequent answer given by the respondents was that they never take any notice of labels, mentioned by 39%<sup>15</sup>. Interestingly, 66% of EU citizens that participated in this survey also said that citizens themselves are not doing enough to protect the environment. Looking at the country level, Bulgaria, Czech Republic, and Portugal showed the lowest percentage of people saying that eco-labels play an important role in their purchasing decisions. The highest share of people considering eco-labels important when they go shopping was found in Sweden, where also the share of people never taking any notice of labels was the lowest. The socio-demographic breakdown for the importance of eco-labels shows very similar patterns to those with respect to the aforementioned ethical purchases.

Figure 3: The role of labels in purchasing decisions



Source: European Commission 2017a, p.113

<sup>11</sup> European Commission 2018b.

<sup>12</sup> Share of respondents who said that they make ethical choices when shopping (10% of those who finished education not later than with the age of 15, and 31% of those who finished education with 20+).

<sup>13</sup> European Commission 2018b, p.78.

<sup>14</sup> European Commission 2016b.

<sup>15</sup> Another 1% said „Other (Spontaneous)” and 5% said “Don't know” (EC 2017b, 113).

Further data on the role of labels in choosing consumer goods at country level were found for Germany and Belgium:

In Germany, 72.4% of respondents who participated in an online survey on the relevance of product labels to evaluate product quality considered labels to be important. The survey included 40 labels and covered aspects such as quality, safety, organic food, fair trade, and vegan for products and services in general. Another study<sup>16</sup> gives an idea for the specific role the Fairtrade logo plays: 36% of the respondents have purchased Fairtrade-labelled products on a regular and 39% on an occasional basis.

Belgian consumers (Flanders) were asked to which extent they pay attention to eco-labels when buying fresh produce (fruits and vegetables). 16 labels were taken into consideration, including Fairtrade Belgium. The results, however, were not broken down per label. Of the 553 respondents, 2% said they would always pay attention to such labels; 14% most of the time; 29% sometimes; 36% barely; and 20% never pay attention to such labels<sup>17</sup>

In summary, according to the above results, sustainability labels overall still play a minor role among consumers of the EU-28 in making buying decisions. Except for Finland, Denmark and Sweden, the majority of consumers does not consider eco-labels to be important or pays no attention to any label when making purchasing decisions. An indication on the role fair traded products play across the EU is given by the share of consumers that say to make ethical choices when shopping. The results show that these consumers are still the minority, in South and East European countries a very small minority. This is also reflected in the average fair trade related spending per capita per country. For fair trade labels specifically, no country-specific data was identified in the scope of this study other than the per capita spending and the results presented for Germany, Sweden and Denmark. The number of people who say to buy fair trade labelled products, however, is considerably higher than the number of people that state they are involved in helping developing countries by making ethical choices when shopping. This may indicate that although fair trade labelled products are bought by a majority of consumers, conclusions on the motivation behind their choices cannot be drawn.

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<sup>16</sup> Globescan 2015.

<sup>17</sup> Goossens et al. 2016.

## 4. Factors influencing ethical consumption

Consumption patterns in general and ethical consumption patterns in particular are influenced by a number of factors. On the one hand, it can be related to *knowledge and awareness* of pressing issues in developing countries and possible ways to address them and on the other, it can be related to *attitudes and values* towards challenges of sustainable development and the prioritization of the different hindering factors as well as responsibilities and ways to address them.

### 4.1. Knowledge and awareness

Adopting ethical consumption patterns requires a minimum level of awareness of both i) the conditions under which consumer goods are produced, especially those made in and imported from developing countries and ii) knowledge about how a consumer can influence production conditions and related environmental and social impacts through purchasing decisions. This chapter first addresses the understanding of challenges in developing countries and how this can be related to consumption patterns in the EU. Secondly, it explores to what extent European consumers are familiar with different labels and what features they associate with them.

#### Key findings

- Although only possible to analyse by proxies, data indicate that the awareness of the impact an individual's consumption can have on developing countries is spread unevenly throughout Europe. Within the Northern and Western European countries, a clear majority appears to be aware of this link. In the Eastern and Southern EU member countries, this applies only to a minority of consumers.
- The results suggest that the higher the level of education and the income is, the higher is the probability to be aware of the impacts an individual's consumption can have. This may be one reason, amongst others, for the differences in awareness between northern and western countries on the one hand and Southern and Eastern countries on the other.
- The socio-economic data further suggest that younger consumers are likelier to have an understanding of development challenges in producer countries. Moreover, consumers oriented towards the political left tend to have trust in an individual's ability to positively influence developing countries' challenges more frequently than consumers who position themselves as politically conservative.
- The number of consumers familiar with the Fairtrade label is higher in Northern and Western EU member states. The Eastern countries, in contrast, show a strong bias towards the organic label compared to the Fairtrade label. Overall both labels are more often known in the North and West of the EU.
- There is a significant shortage of - and thus strong need to systematically and comprehensively generate - data that capture the level of awareness and knowledge of all

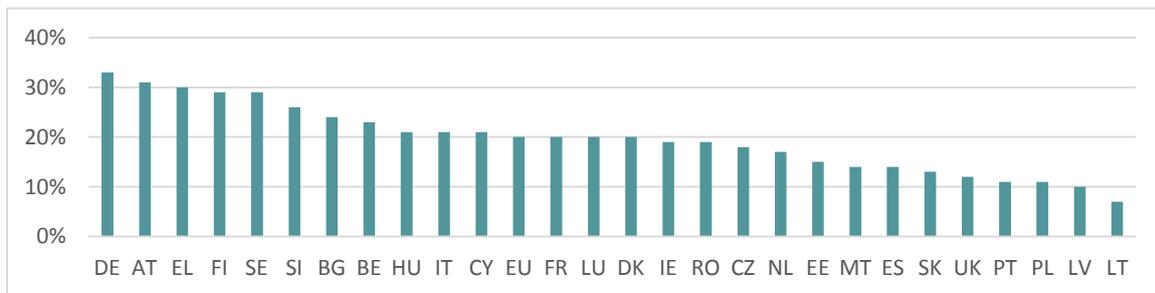
#### 4.1.1. Understanding of developing countries' sustainability challenges

Not many studies or surveys were identified that directly ask for consumer awareness of environmental, living, and working conditions in developing countries while simultaneously drawing the link to consumer goods production and consumption. Nevertheless, an indication of the extent to which consumers are aware of this link may be given by a number of surveys, particularly those conducted EU-wide on behalf of the European Commission with a representative sample of European citizens:

The Special Eurobarometer 476<sup>18</sup> asked EU citizens for their opinion on what the most pressing issues are in developing countries. Most frequently mentioned among the 16 answer options were *peace and security* and *education*, with 35% of the respondents who mentioned both these aspects. Issues most typically linked to ethical consumption and fair trade came in further down the ranking: *Economic growth and employment* are mentioned by 27% (rank 5), *food security and agriculture* ranked seventh (23%), *environmental protection and climate change* were mentioned by 12% (rank 8), *social equality* by 11% (rank 9) and *trade* by 6% (rank 12) of the respondents. With respect to the relevance for this study, these results have to be handled with care as firstly these are average results of all 28 member countries and secondly, they express the respondents' opinion on priority issues that need to be tackled rather than general awareness. Nevertheless, the results indicate to which extent ethical consumption and fair trade are considered important – compared to other issues. More interesting may be that only 2% of the respondents said to not know which issues in developing countries are most pressing, indicating that only a minority is not aware at all of those issues.

In the previous version of the same survey<sup>19</sup>, people were asked what the main obstacles are that hamper developing countries to develop successfully.<sup>20</sup> *Foreign exploitation of natural and mineral resources* (FENMR) came in sixth (of 14 items), being mentioned by 20% of all respondents across the EU. A country comparison provides further indication on the awareness of the environmental impact of consumer goods production in developing countries. It becomes apparent that FENMR is among the 4 most frequently mentioned obstacles among respondents from Austria (31%), Germany (33%), Finland (29%), and Sweden (29%). At the bottom end were Lithuania (7%), Latvia (10%), Malta and Portugal (both 11%), UK (12%), and Slovakia (13%). Furthermore, there is a significant difference in the perception of FENMR as an obstacle for developing countries' prosperity when looking at the education level and profession of the respondents: At the EU level, only 15% of those having finished education with the age of 15 see FENMR as a main obstacle, compared to a higher share among those who are still studying (22%) and those who finished education with 20+ (25%). In terms of profession, self-employed and managers see FENMR as a main obstacle (24% and 26%, respectively), whereas manual workers, housepersons, and unemployed least frequently mentioned this issue (18%, 18%, and 17%). No significant differences can be observed for age and gender.

Figure 4: People who think that foreign exploitation of natural and mineral resources (FENMR) is a main obstacle for development



Source: EC 2017a, p. 58

An indication of consumer awareness of the link between consumer choice in the EU and related social impacts in developing countries is also given by the question on the role an individual can play in tackling poverty in developing countries.<sup>21</sup> For the EU member countries combined, 53% of the respondents agreed or tended to agree to have a role. At the country level, this value varies significantly (see figure 5). While a growing trend could be observed from 2015 to 2016, in 2017 most of the countries have lost a few points and the EU average has dropped from 54% to 53% of agreement.

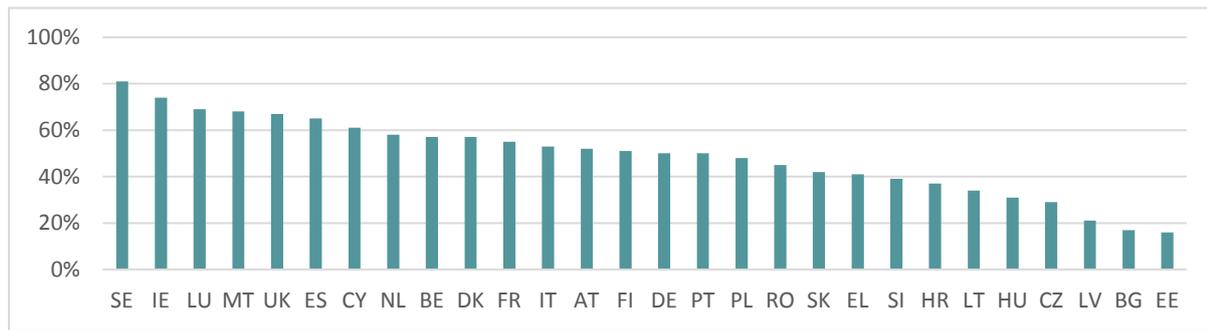
<sup>18</sup> European Commission 2018b, p. 51.

<sup>19</sup> European Commission 2017a, p. 54.

<sup>20</sup> Most frequent mentions refer to problems within the countries themselves, such as *corruption* (54% of respondents mentioned), *bad policies and governments in developing country* (43%), or *conflicts* (41%).

<sup>21</sup> European Commission 2018b, pp.68-72.

Figure 5: People who think that they as individuals can have a role in tackling poverty in developing countries



Source: EC, 2018b

The results seen through a socio-demographic lens are also interesting: The younger the respondent, the likelier the chance to agree. Among those between the ages of 15 and 24, 61% agreed or totally agreed; among those older than 55, only 46% agree. Further, the higher the education level, the likelier the chance to agree. Among the respondents who finished education at 15, 42% agreed; among those who finished education with 20+, 60% agreed. Again, also the profession seems to have an impact on the level of awareness of what ones' own action can achieve. Managers and students are most likely to agree (64%), whereas retired people agreed least often (46%). Also, those who have most difficulties to pay their bills are least likely to respond with "agree" (42%). The survey, moreover, took a look at the political dimension: While respondents considering themselves on the political left are most likely to agree (63%), the rather conservative respondents are least likely (48%) to agree (centre=55%).

Additionally, the relation with the type of actual involvement in tackling poverty in developing countries is shown<sup>22</sup>: Barely surprising, respondents that are not involved personally in development aid are most likely to disagree that an individual can play a role in tackling poverty in developing countries (54% of this group). Among those that are involved in some way, the majority, between 73%-79% for the different prompted answers<sup>23</sup>, do think that individuals can play a role.

The Special Eurobarometers are the most comprehensive surveys related to this topic, especially regarding coverage across the EU member states. Nevertheless, surveys that focus on selected individual countries were also identified, providing more narrow insights on these questions.

A representative phone-based survey conducted on behalf of TransFair within Germany<sup>24</sup> for instance asked for the level of agreement with the statement that there is a strong relation between the local (Western) style of consumption and the situation of people in developing countries. On a scale from 1 (agree fully) to 4 (do not agree) the mean value of all responses was 1.14. Although unfortunately no further details are provided, this value indicates a very high awareness of this relationship among at least 50% of German citizens.

A survey from Globescan<sup>25</sup> to a consumer panel of 1.000 consumers in the UK in 2016 showed that 51% of them recognise the problem of human rights violations in food supply chains and 55% believe that food production is threatened by climate change. Furthermore, a majority said that they think farmers are underpaid, both in developing countries (64%) and in the UK, where 63% agreed. Relating this to the fact that the majority (65%) believe that responsibly produced food is more expensive for consumers, the authors of the report conclude that consumers do, to some extent, draw a link between low food prices and unsustainable food production. Another study from the UK<sup>26</sup> with 8.000 participants has observed a reduction of activities addressing global poverty between 2013 and 2016. This concerned any activities from donating to attending awareness activities and also included ethical consumerism: the share of

<sup>22</sup> European Commission 2018b, p.72.

<sup>23</sup> Prompted answers: Not involved; politically involved; volunteer; give money; crowd funding; and ethical choices while shopping.

<sup>24</sup> Bätthge 2016, p.139.

<sup>25</sup> Globescan 2016.

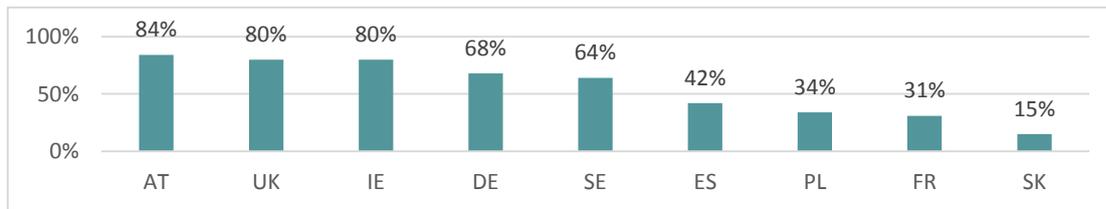
<sup>26</sup> Bond 2016.

respondents stating that they had purchased in favour of global poverty reduction has declined from 22% in 2013 to 16% in 2016.

#### 4.1.2 Familiarity with product labels

A study from 2015 on behalf of Fairtrade International<sup>27</sup> shows that the highest familiarity with the Fairtrade logo among the nine EU countries included was found in Austria, where 84% have seen the logo on products. The lowest familiarity was found in Slovakia.

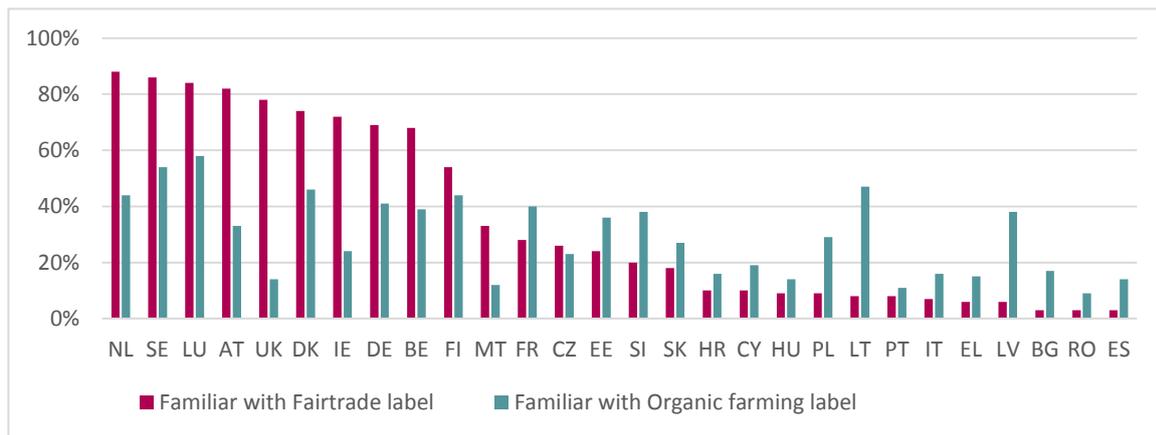
Figure 6: Familiarity with the Fairtrade logo among nine EU countries



Source: Globescan 2015, p.5

The Special Eurobarometer 473<sup>28</sup> assesses the awareness of different labels in all 28 European member countries. The Fairtrade logo is the most often recognised (37%), followed by Organic Farming (27%), the protected designation of origin and protected geographical indication logos (both 18%) and the traditional specialty guaranteed logo (15%)<sup>29</sup>. Awareness of the different logos, however, differs significantly among EU member countries. The Fairtrade label is most well-known in the Netherlands, where 88% of the respondents said to be familiar with it, reflecting an increase in recognition by 12pp compared to 2015. The country is followed by Sweden (86%), Luxembourg (84%), and Austria (82%), all of which also show slightly higher percentages than 2015 (+2pp, +3pp, and +1pp). The bottom ranks are taken by Romania, Bulgaria, and Spain (3% each), with Romania also showing the least awareness of the Organic Farming label (9%). In comparison to 2015, in all three countries the Fairtrade label is slightly less often recognised (-2pp, -4pp, and -1pp). It remains to be verified to which extent these comparatively small changes are reflecting statistical uncertainties only, e.g. as a result of the sampling.

Figure 7: People that are aware of product labels



Source: EC, 2018a

<sup>27</sup> Globescan 2015, Countries included: Austria, Switzerland, Ireland, Germany, Sweden, France, Spain, India, Canada, US, Poland, South Korea, Japan, Slovakia.

<sup>28</sup> European Commission 2018a, p.100.

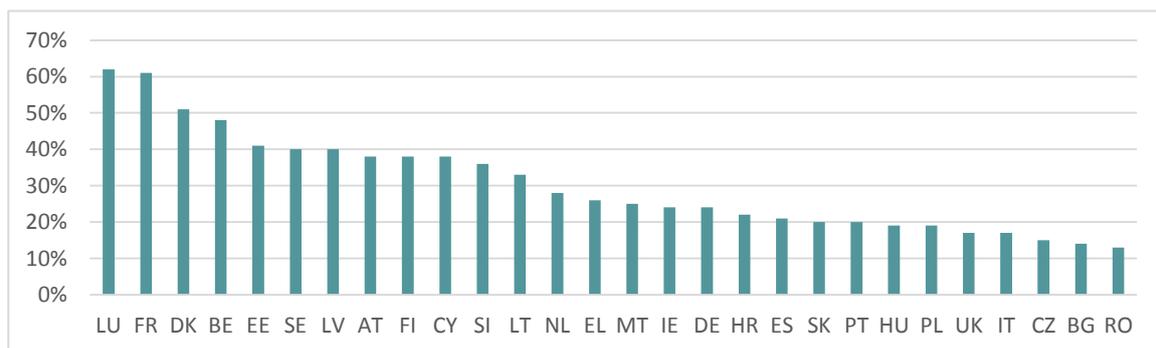
<sup>29</sup> Given the focus of this study, in the following attention is given to Fairtrade and Organic Farming only.

The spread between Fairtrade and the Organic Farming label varies significantly at the country level. In Bulgaria, for instance, the latter is considerably more often recognised (17%). This similarly applies to Spain, where 14% recognised the Organic Farming label. Even stronger differences are shown by Lithuania (47% Organic Farming, 8% Fairtrade) and Poland (29% Organic Farming, 9% Fairtrade). In contrast, those countries at the top of the awareness ranking show significantly stronger differences in favour of the Fairtrade label: In the Netherlands, for instance, it is recognised twice as often as the Organic Farming label. Reasons for these differences may be various (e.g. availability of Fairtrade labelled products and/or the quantity and quality of communication and awareness raising initiatives) and identifying them requires a closer look at the respective countries, which is beyond the scope of this study. Looking at demographic differences, it becomes apparent that younger people (15-24) are those who most frequently recognise both the Organic Farming as well as the Fairtrade label. With respect to education, respondents who ended their education path with 20+ or who are still studying appear to be most aware of the labels. This is also reflected in differentiation by profession, in which managers and students are most likely to know the labels.<sup>30</sup>

Comparing the results of both aforementioned studies (GlobeScan 2015 vs. EC 2018a), the reported familiarity with the Fairtrade label stand out as being significantly different for Spain (42% vs. 3%) and Poland (34% vs. 9%). Although methodology, specific survey question, and sampling process may differ between the two studies, reasons for a difference of this magnitude cannot be derived from the information provided in both sources.

A similar question but with focus on the EU Ecolabel and 12 country-specific labels emphasising the environmental impacts of consumer products<sup>31</sup> was addressed within the Special Eurobarometer 468.<sup>32</sup> Asking survey participants which of the labels are known<sup>33</sup>, the most frequently given answer was “None”. However, 56% of respondents know at least one of the labels. Among the labels that are recognised, the EU Ecolabel is the most well-known (27%), followed by the Blue Angel (23%) and the NF Environnement (18%). The least known labels are Environmentalne Vhodny Produkt (EVP, Slovakia, 3%), Prijatelj Okolisa (Croatia, 4%), and the Österreichisches Umweltzeichen (Austria, 4%). Among the respondents, 11% know three to four, and 5% even more than five of the presented eco labels. At the individual country basis, the EU Ecolabel is known to more than half of the consumers in Luxembourg (62%), France (61%), and Denmark (51%), and least known in Romania (13%), Bulgaria (14%), and Czech Republic (16%).

Figure 8: People that are aware of the EU Ecolabel



Source: EC, 2017b

Awareness of other country specific labels is spread narrower across certain regions within the EU<sup>34</sup>. The Nordic Swan, for instance, is known to more than 90% of respondents in Sweden, Denmark, and by a minority (25%) in Estonia. The environmental label from the Spanish region Catalonia Distintiu de garantia de qualitat ambiental is known to only 8% of consumers in Spain, and furthermore recognised in Luxembourg (8%), Italy (6%), and Ireland (6%). A reason for this low level of recognition in Spain may,

<sup>30</sup> European Commission 2018a.

<sup>31</sup> E.g. Blue Angel in Germany and the NF Environnement in France.

<sup>32</sup> European Commission 2017b.

<sup>33</sup> “For each of the labels below, please indicate the ones you’ve seen or heard about” (EC 2017b, p.101).

<sup>34</sup> European Commission 2017b.

however, be found in the Catalan roots of this label. In contrast, the Slovakian EVP label is the least known across the EU member states, but it is recognised by 33% of Slovakian consumers.

Smaller studies and surveys conducted in selected individual EU member countries addressed the questions of awareness of labels indicating ethically or sustainably produced products. An online survey among 1.000 German consumers conducted in 2017<sup>35</sup> found that 84% have seen the Fairtrade label often or occasionally. When asked spontaneously for labels of ethical consumption, consumers' most frequent response referred to the Fairtrade label (26%, compared to 27% in 2015), followed by the Bio-Siegel (17%, compared to 27% in 2015). And, when asked how familiar people are with different labels prompted, 68% said that they feel very or somewhat familiar with the Fairtrade label. While least familiarity is shown for Rainforest Alliance (26%), UTZ certification is familiar to 30% and FSP/Fairtrade Cocoa Program to 36%. The survey furthermore provides interesting insights into product groups. When prompted for which product type the consumers associate most with Fairtrade, coffee comes out first with 60% of respondents, followed by chocolate (46%) and bananas (40%). The rear is brought up by tea (26%). While coffee, tea, and chocolate are decreasingly associated when compared to previous years, bananas are increasingly recognised since 2011.

In a Spanish qualitative study<sup>36</sup> it was found that two thirds of participants are familiar with the fair trade concept. It is interesting in that it differs significantly from the above-mentioned results of the Eurobarometer 468<sup>37</sup> where awareness of the Fairtrade label was indicated by 3% of respondents only. This difference may indicate a strong under-representation of the Fairtrade label on the Spanish consumer market. It may also be a result of the study design, e.g. with respect to the sample approach, especially given that it is qualitative in nature. But it is not only the Fairtrade label people do not pay attention to: 59% of Spanish consumers stated never to take notice of labels<sup>38</sup>. The study furthermore elaborated on aspects associated with fair trade. Focus groups in the study point at three key elements when describing fair trade: According to the participants, the concept refers to problems with poor social and labour conditions in countries in the global South. Secondly, it is considered a two-step process: fair production in the South and commercialization in the North. And lastly, fair trade is characterised by the existence of NGOs as mediators between the producers in the South and the consumers in the North.

For Italy<sup>39</sup>, 30% of respondents in a survey among 1.015 respondents spontaneously mentioned Fairtrade when asked about sustainability labels, and 44% of respondents were familiar with ethical products. This result differs significantly from the above-mentioned results of the Eurobarometer 468<sup>40</sup>, where awareness of the Fairtrade label was indicated by 7% only. This difference is surprising and raises questions on the reliability of the studies given that one could assume a higher positive response when visually prompted (showing a label) compared to when asked spontaneously. The study further asked those who are familiar with Fairtrade about attributes related to Fairtrade labelled products: The majority (75%) refers to a brand that inspires trust and guarantees reliability. 74% relate Fairtrade to genuine/natural products, to environmentally friendly products, and to products that are controlled throughout the entire production chain. Still 71% think that Fairtrade labelled products are of high quality. The study concludes that the three key words that consumers in Italy relate to Fairtrade are trust, security and genuineness.

In Sweden, spontaneous awareness was tested among 1.002 consumers<sup>41</sup>, showing that 40% of respondents are aware of the Fairtrade label in 2018, compared to 34% in 2011, while with helped awareness (asking specifically about the Fairtrade label) positive response was given by 89%, compared to 65% in 2011. This is very close to the finding of the Eurobarometer 468<sup>42</sup>, which indicated awareness of the Fairtrade label of 86% of respondents. This high awareness can potentially be explained by the fact that the majority, 58%, think that there is a large offer of labelled products available and that 44% agree

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<sup>35</sup> Globescan 2017.

<sup>36</sup> Pereda 2012, pp.29, 35.

<sup>37</sup> European Commission 2017a.

<sup>38</sup> Ibid.

<sup>39</sup> Nielsen Consumer Insights 2018, pp.4.

<sup>40</sup> European Commission 2017a.

<sup>41</sup> Holmberg & Robertson 2018.

<sup>42</sup> European Commission 2017a.

that products with labels are highly visible.<sup>43</sup> Both these numbers have increased over the past four years. The Fairtrade label is the most familiar label to the Swedes together with the Nordic Swan (Nordic ecolabel) that has an awareness level of 39%. The awareness study shows an increase in awareness of what the label stands for (63% in 2018 compared to 54% in 2011), without giving further specifications on which qualities respondents associate with the Fairtrade label.

A study conducted in Denmark among 1.053 participants in a representative group<sup>44</sup> found that 87% of respondents are more or less aware of the Fairtrade label when asked specifically. This is rather close to the finding of the Eurobarometer 468<sup>45</sup> where awareness of the Fairtrade label was indicated by 74%. When asked to spontaneously mention labels that they are aware of, the Fairtrade label is mentioned by approximately 10% which means it is the fourth most frequently mentioned among nine other specific labels.<sup>46</sup> Compared to Fairtrade, the Danish have a higher spontaneous awareness of the environmental labels Ø-mærket (approximately 40%) the Nordic Swan label (approximately 27%) and the health label Nøglehulsmærket (approximately 25%). The study also notes a difference in awareness between age groups, with younger people being more likely to mention the Fairtrade label than older people (18-19 years: 17%, 30-49 years: 13%, 50-59 years: 7% and 60-70 years: 10%).

Besides the awareness of the Fairtrade label it is also interesting to understand how consumers interpret the label on certified products. This question has been addressed by the GlobeScan study<sup>47</sup> that included nine member countries of the EU among others<sup>48</sup>. More precisely, the study asks what people that are familiar with Fairtrade associate with the logo. The mentioned attributes<sup>49</sup> associated with Fairtrade were ranked as follows:

1. Fair price paid to producers, 78%
2. Helps farmers/workers in developing countries escape from poverty, 71%
3. High standard of human rights, 68%
4. Safe working conditions, 62%
5. No child labour, 61%
6. Ingredients from small-scale farmers in developing countries, 58%
7. Extra money to producers (Fairtrade Premium), 54%
8. Supports farmers to reduce impact of climate change (new in 2015), 52%
9. Minimal/no environmental damage, 48%
10. Wildlife conservation, 42%

Unfortunately, the above study does not provide results per country. However, a similar question was asked by the Forum Fairer Handel<sup>50</sup> to German consumers, showing slightly different results to the European average. Within this survey, consumers were asked for the relationship between fair trade and ten prompted items characterizing the product where the value corresponds to "strong relationship" and "rather strong relationship":

1. Fair wages and working conditions for workers in developing countries, 87.6%
2. Prohibition of child labour, 87.4%
3. Fair prices for producers, 87.2%
4. Support of small holder farmers in improving their production, 83.7%
5. Fairness in international trade, 80.7%
6. Reduction of production conditions that harm the environment and health, 79.8%
7. Long-term trade relationships between producers in developing countries and trading partners in Germany, 77.3%
8. Informing consumers about production conditions in developing countries, 75.8%
9. Only products produced organically, 69.4%
10. Fair wages and working conditions for employees in the supermarket, 65.3%

<sup>43</sup> Holmberg & Robertson 2018.

<sup>44</sup> Landbrug & Fødevarers 2017, p.2.

<sup>45</sup> European Commission 2017a.

<sup>46</sup> Landbrug & Fødevarers 2015, pg.5.

<sup>47</sup> Fairtrade/GlobeScan 2015.

<sup>48</sup> Austria, Switzerland, Ireland, Germany, Sweden, France, Spain, India, Canada, US, Poland, South Korea, Japan, Slovakia.

<sup>49</sup> On a scale of 1 to 5, where the values 4 and 5 were considered.

<sup>50</sup> Bätthge 2018.

In summary, the study results presented above suggest that a minimum level of awareness of the conditions under which consumer goods are produced exists throughout all EU member states, especially those made in and imported from developing countries. Due to the lack of availability of EU-wide studies it has not been possible to assess the level of awareness that consumers show regarding working and living conditions and environmental impacts of the production. In general, obstacles for successful development are considered to be mainly related to internal problems. Only a minority sees foreign exploitation of natural and mineral resources (FENMR) as an additional challenge. Among higher educated European citizens as well as self-employed workers and managers, the awareness of foreign co-responsibility tends to be higher. Education and income levels may, amongst others, be reasons why Europe is divided when it comes to the question of whether EU citizens play a role in tackling poverty in developing countries. In half of EU countries, the majority of respondents agrees and in the other half of the countries the majority disagrees. Especially Eastern and Southern European countries tend to demonstrate little awareness compared to Northern countries.

Label-familiarity differs among countries and among citizens of different socio-economic backgrounds. No clear picture can be drawn, due to the lack of data availability and/or the low comparability of studies. Consumers who know the Fairtrade logo also tend to know what it stands for.

## 4.2. Values and attitude towards helping developing countries

This section explores both the attitudes towards helping people in developing countries and which types of values these attitudes are influenced by.

### Key findings

- The large majority of consumers in the EU are in favour of helping people in developing countries, with relatively small differences between the EU member countries.
- Consumers in individualistic countries tend to make ethical purchases more spontaneously. Consumers in collectivistic countries tend to consult information more thoroughly before making ethical purchase decisions. This may be relevant for the design of campaigns promoting ethical consumption in the respective countries.
- Universalists, reflecting attributes such as understanding, tolerance, and concern for humanity and nature tend to be more open towards ethical buying choices. Powerists, associated with social status, prestige, and dominance or control, seem to be less inclined to buying fair trade products. Accordingly, campaigns promoting ethical consumption may need to be tailored to reach the respective value holders effectively.
- Research that explicitly looks at the connection between individual consumers' values and attitudes on the one hand and ethical consumption patterns on the other is scarce. The results identified, however, suggest that it may be worth investigating the underlying mechanisms further in order to facilitate effective promotion of ethical consumption.

Research that explicitly looks at values that drive ethical consumption for the different EU member countries was not identified. Interesting in this context, however, is a study that tried to identify the moderating role of the socio-economic context a consumer relates to.<sup>51</sup> More specifically, the study uses experimental research on different countries representing individualistic vs. collectivistic cultures to establish differences in consumer attitude and behaviour toward fair trade. The results suggest that consumers in individualistic countries prompt more spontaneous fair trade purchasing behaviours than collectivistic countries' consumers. The latter engage themselves in a more deliberate process of buying certified products, meaning that information provision and accessibility are more crucial in such countries. As examples of collectivistic countries, the authors refer to Spain and Portugal – of individualistic countries to USA and Netherlands. It may therefore be worth further investigating, whether or to which

<sup>51</sup> Herdía-Colao et al. 2017.

extent this factor contributes to the smaller share of ethical purchases and consumers' awareness within certain countries.

Additionally, two recent studies were identified that deal with questions around values and consumer attitudes and behaviour toward fair trade, both focusing on Italy. Copalla et al. conducted a non-representative survey<sup>52</sup>, with the sample drawn by means of a web-administered questionnaire submitted through the website of the General Assembly of the Italian Fair Trade, resulting in 586 responses from all regions of Italy. The results are little surprising, yet provide an interesting picture: The research team found a positive relationship between fair trade consumption and values such as universalism, benevolence and self-direction. These values reflect attitudes such as understanding, appreciation, tolerance, concern for humanity and nature. Further, with respect to the economic context they found that the higher the GDP in a certain region, the higher were the expenditures in fair trade labelled products.

The second study<sup>53</sup>, likewise not representative, analysed the relation between universalism and power, and behaviour towards fair trade purchases. Power, in this context, reflects attributes such as social status, prestige, and dominance or control. The results go in line with the findings of Copalla and colleagues, strongly supporting that universalism has a significant effect on the intention to buy fair trade, while power exerted a negative effect on intention to buy fair trade products. In consequence, campaigns and communication strategies that aim at promoting fair trade products may take such insights into account and segment the target groups according the different values they stand for, addressing them with different messages: "Universalists", for instance, may be more responsive if the benefit generated for producers by buying fair trade products is put into the foreground. For "powerists", in contrast, providing a message that caters their desire for social status and prestige may be more effective.

Linked to attitude, the Special Eurobarometer 476<sup>54</sup> asked for the consumers' opinion on the level of importance to help people in developing countries. 89% considered it to be important or very important (as figure 9 shows). Also, within each of the countries surveyed, a large majority said to consider it important or very important to help people in developing countries. However, this value varies, with Luxemburg having the highest (97%) and Estonia the lowest (68%). Striking is also that Portugal is the only country where none of the participants indicated that helping developing countries is not at all important. For the other countries, this value varies between one and nine percent, the latter being shown for Estonia only. Looking at demographic data, a positive relation between the level of education and the likelihood to consider it important becomes apparent. This also applies to the ability to pay the bills – the likelier the ability to pay the bills, the likelier to consider it important to help developing countries. Also, political orientation has an influence: 94% of the respondents considering themselves on the political left consider helping important, while only 84% of the rather conservative respondents think the same.

Figure 9: People who think it is important to help people in developing countries



Source: EC, 2018b, pp.8-10

As shown in the data from the Eurobarometer 476, the majority of Europeans are in favour of helping people in developing countries. However, there is variance both between different countries and different socio economic or political groupings also in line with what the study from Copalla showed with regard to the relation of the GDP of a region and expenditures in fair trade labelled products.

<sup>52</sup> Copalla et al. 2017.

<sup>53</sup> Panico et al. 2017.

<sup>54</sup> European Commission 2018b, pp. 9-11.

### 4.3. Priorities in consumption

To understand the potential for fostering more sustainable consumption patterns, knowing the product features consumers consider important plays a key role. This section addresses the question of which priorities consumers have when making purchasing decisions, both in general and with respect to ethical aspect in particular.

#### Key findings

- Consumers in the EU generally tend to give priority to product characteristics that benefit themselves, e.g. taste, quality, or price.
- Among sustainability characteristics of a product, environmental aspects seem to be prioritised slightly over social issues. Results, however, differ between the countries studied.
- Research identified focused on a small number of selected Northern and Western countries only. As the studies used different approaches, a comparison is possible just to a limited extent.

A Danish study<sup>55</sup> shows that the priorities among the Danish when purchasing food products are given to the individual benefits a product delivers such as taste, price and quality, while environment-related questions can be seen as the second most important group of product attributes, before the importance of the social impact. The below list shows which issues are given priority when buying food products (multiple answers possible).

- |                                       |  |
|---------------------------------------|--|
| 1. Tastes good, 71%                   | 11. Sustainable, 23%                                     |
| 2. Good price (cheap / on offer), 65% | 12. No child labour, 19%                                 |
| 3. Good quality, 64%                  | 13. Fair working conditions for the farmer / worker, 19% |
| 4. Healthy, 52%                       | 14. Ethically sound, 18%                                 |
| 5. Produced in Denmark, 42%           | 15. Fair income to the farmer / worker, 18%              |
| 6. Organic, 36%                       | 16. Allergy safe, 14%                                    |
| 7. Animal welfare, 30%                | 17. Recommended by others / used by some I know, 7%      |
| 8. No chemicals, 28%                  | 18. Exclusive / Looks nice, 5%                           |
| 9. Environmentally sound, 27%         | 19. Other things   |
| 10. Easily accessible, 25%            | 20. Do not know 1%                                       |

Similar to the Danish consumers, the Swedish<sup>56</sup> also give importance to personal benefits first. An explanation for this according to the authors of the Swedish study may be that aspects such as production conditions are ranked lower because it is easier for consumers to relate to the more concrete aspects such as price or product quality in general, whereas environmental impacts from transportation, for instance, are more abstract. In addition, even though the studies are not directly comparable<sup>57</sup>, the priorities for social impact versus environment can be seen as reversed compared to Denmark.

Table 1: Importance of aspects when making buying decisions (consumer products, Sweden)

Important aspects when making buying decisions	Food products %	Other products%
1. That the quality of the product is high	91	92
2. That it doesn't contain hazardous substance or unnecessary additives	87	84

<sup>55</sup> Landbrug & Fødevarers, 2016.

<sup>56</sup> HUI Research, 2017.

<sup>57</sup> The categories are different and the Danish study ask what is *paid attention to when buying food*, with multiple choices available and the Swedish asks *how important, fairly or very, the different items are for deciding what to purchase*.

Important aspects when making buying decisions	Food products %	Other products%
3. That product is healthy	86	59
4. The price of the product	85	87
5. That it respects animal welfare	83	79
6. Under what conditions it is produced	77	76
7. Country of origin for the product or material	71	59
8. That it has an ethical or environmental label	67	61
9. How it is packed	64	57
10. That it generates low levels of greenhouse gases	62	63
11. That the product is organic	59	-

Source: based on HUI Research, 2017

Similar to Sweden and Denmark, a study made in UK in 2018 among >2000<sup>58</sup> adults shows that priority is given to the product characteristics that affect them personally. 26% of respondents said that they never think of who produces their food and drinks and 88% said that the most important when buying food is price and quality while location was mentioned by 71% and 49% mentioned the store's ethical credentials.

MVO Nederland<sup>59</sup> did a study with >2000 consumers in the Netherlands, focusing particularly ethical purchases. It was found that consumers who are interested in ethical purchasing give priority to fair trade (47%). This is followed by the environment (42%) and animal welfare (41%).

<sup>58</sup> Fairtrade Foundation 2018 (complete study not accessed).

<sup>59</sup> MVO Nederland, 2017.

## 4.4. Barriers

Comparing data on attitude towards buying Fairtrade or other sustainable or ethical products with sales figures suggests that there is a gap between expressed intention and actual behaviour. This section looks at the barriers for making more sustainable purchasing choices, aiming to provide indications for the reasons behind this gap. Particularly, reasons for not buying fair trade products, willingness to pay, and trust toward product labels is explored.

### Key findings

- Top reasons for not buying fair trade products include too high prices, brand-loyalty and habits as well as insufficient knowledge about labels. Related research identified, however, covers France, Germany and UK only.
- Fair trade promoters face a trade-off between providing information to consumers to support their choices and avoiding too much information that discourages consumers from forming an opinion that supports well-informed decision-making
- Willingness to pay more differs significantly between countries, product groups, labels, and consumers – ranging from 3% to 20% for the majority of respondents. Data on the average premium a consumer actually has to pay for fair-traded products is scarce. For coffee, the premium is estimated 20% to 30%, being one potential reason for the gap between intention and action to consume more ethically.
- In Northern and Western countries, a higher share of people seems to be willing to pay more (up to 80%) than in Eastern and Southern countries (less than 20%). Reasons may be linked again to income levels, education levels, and lack of information, but should be explored more in-depth in future research.
- Level of trust towards labels related to ethical consumption varies significantly between consumers across the European Union, showing a similar north-west vs. south-east divide as the willingness to pay more.

In 2016, a representative multi-client study was conducted in Germany, finding that 92.6% of the surveyed consumers can imagine supporting a fairer international trade system through buying fair trade products<sup>60</sup>. A representative study conducted by the same author just 2 years later on behalf of the Forum Fairer Handel found that only 68.7%<sup>61</sup> in fact buy fair trade products<sup>62</sup>, reflecting a significant gap between intention and behaviour. What holds consumers back from consuming ethically? Only a small number of recent studies was identified in the scope of this study that focus specifically on the European context, and most report data for Germany only. The found studies have in common that the higher prices related to (more) ethically produced consumer goods constitute a main barrier for consumers toward adopting ethical consumption behaviour. The most detailed and recent study identified was aforementioned.<sup>63</sup> Consumers, both those who buy and those who do not buy fair trade products, were asked to rate the level of importance of 9 prompted reasons for not buying fair trade products. The values reflect the sum of “very important” and “rather important”.

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<sup>60</sup> Bähge, 2016.

<sup>61</sup> Including 14.6% of people who say to buy fair trade products once a year only.

<sup>62</sup> Bähge 2018.

<sup>63</sup> Bähge 2018.

Table 2: Level of importance of reasons for German consumers not to buy fair trade products

Reasons for not buying fair trade products	Consumers who buy fair trade products	Consumers who do <u>not</u> buy fair trade products
Products are too expensive	66.8%	76.4%
I stay with my usual brands	66.9%	72.8 %
Don't know enough about it	60.6%	65.5%
Because of the many labels and signs the topic is just too complicated	53.9%	64.9%
I do not think that fair trade is really helping / having an impact	56.2%	61%
Don't like the (taste of the) products	54.8%	54.3%
The products are simply not available in my area	49%	47%
Don't know, where to buy the products	45.1%	46%
I do not do the shopping	35.7%	43.8%

Source: Bätthe 2018

It seems reasonable that the share of people mentioning one of the above reasons as important is smaller among those who already buy fair trade products, except for product taste and product availability. Striking, in contrast, is a certain conflict with respect to the availability of information, as this bears a challenge for those interested in advancing fair trade products: On the one hand, a solid majority of respondents say that their insufficient knowledge of fair trade is a barrier to buying fair trade products. On the other hand, almost the same share of respondents say that the topic is too complicated and the number of labels rather causes confusion. This goes in line with what Perez & Salmones<sup>64</sup> found in their study with Spanish consumers. The authors conclude that in fact too much information (as e.g. the currently high variety of eco-labels) is not just having no positive effect on the attitude toward fair trade and sustainable consumption but even risks that it may lead to less concerned consumers. The tightrope walk with respect to information provision is even more challenging when seeing that the majority, even among those who buy fair trade products, has doubts regarding the impact fair trade products can have. Interesting is also that habit is not just a reason for making ethical choices (as outlined above) but also comes in as second most frequently mentioned reason for not buying fair trade products.

Consumers in the UK have similar reasons for not buying fair trade, as one of the findings of an exploratory study in the UK<sup>65</sup> shows. The identified barriers toward ethical consumption were:

- Higher prices,
- Lack of knowledge of ethical alternatives
- The fact that ethical statements are considered merely a marketing trick
- Doubts in really making a difference.

Concerning consumers in France<sup>66</sup>, the two main barriers to ethical consumption point to habits, with a reluctance to *leaving the comfort zone*, and the price being too high.

#### 4.4.1. Willingness to pay

Against this backdrop, it is worthwhile having a closer look at the willingness to pay – a research object frequently studied in the context of ethical consumption and fair trade in particular. The Special Eurobarometer 441<sup>67</sup> from 2016 took up this question, showing that on EU-28 level, exactly 50% of respondents say that they are willing to pay more. Strong differences between the EU member states can be found when looking at the values of the individual countries, as the following figure shows.

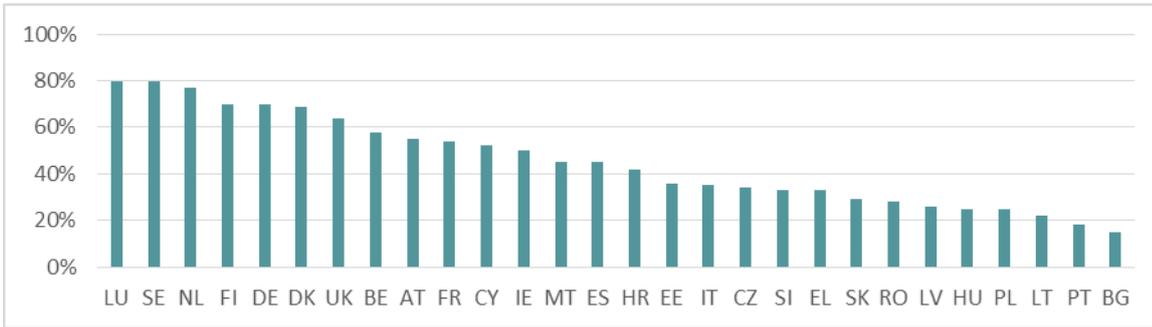
<sup>64</sup> Perez & Salmones 2017.

<sup>65</sup> Bray et al. 2011.

<sup>66</sup> Greenflex, 2017.

<sup>67</sup> European Commission, 2016.

Figure 10: % of Europeans prepared to pay more for groceries or other products from developing countries to support people in these countries



Source: European Commission 2016, p.50

At country level, the results largely reflect the practice – among countries with a high share of consumers already making ethical choices when shopping (see figure 2), the share of those who are willing to pay more is significantly higher. The direct comparison of the two figures (10 and 1) at the same time highlights that willingness to pay more alone is not a sufficient criterion when it comes to buying ethically produced products: For each country, the share of people who are willing to pay more is higher than the share of people who actually are making ethical purchasing choices. Among other criteria, also the accepted extra on the price plays a role, as the following studies show.

A study from UK in 2016<sup>68</sup> showed that 65% of British consumers believed that responsibly produced food products are more expensive. But just over half of the respondents also said that they are willing to pay more. A slight priority is given to social impact where 58% said that they are willing to pay more for food that is produced by people who are paid fairly and whose human rights are respected. But still 53% are also prepared to pay more for food that doesn't damage the environment in the long term. Female and younger consumers tend to have a more positive attitude towards higher prices for fairly produced food. The most prone to accept higher prices are high income households (70%) however, 51% of those with lower incomes were also positive as well as 61% in households with moderate incomes.

In Sweden, willingness to pay more is increasing according to a study by Holmberg & Robertson<sup>69</sup> which includes data from 2011 until 2018. In 2018, 66% of the consumers thought it is worth paying a little bit more for fair trade products than for comparable products without label. Only 12% were not willing to pay more, a share that has not varied significantly over time.

For Germany, Globescan<sup>70</sup> found that a quarter of German consumers feel that the acceptable extra charge for fair trade products would be between 6 and 10%. The remaining three quarters of respondents would be ready to pay a premium below 6%. B athge<sup>71</sup>, in contrast, finds that the average willingness to pay more refers to a price surcharge of 25%. Only 15% of the respondents think they would be ready to pay 30% more.<sup>72</sup> Likewise for Germany, the G utesiegelmonitor<sup>73</sup> finds that the mere existence of a label on a product does not necessarily increase willingness to pay. Only after consumers have informed themselves about the content of the labels, they are willing to pay more. According to G utesiegelmonitor, on average people are willing to pay 2.7% more. Both positive and negative relations have been found, depending on the label and product group. The labels related to ethical consumption are shown below (positive and neutral relationships only):

- Fairtrade label (melitta coffee) +1.05 €
- Bio-label (Melitta coffee) + 0.13 €
- UTZ (Dr Oetker Cocoa) +0.05 €
- Rainforest Alliance (Dr. Oetker cocoa) +0.00 €

<sup>68</sup> Globescan, 2016.

<sup>69</sup> Holmberg & Robertson 2018.

<sup>70</sup> Globescan 2017.

<sup>71</sup> B athge 2016.

<sup>72</sup> Ibid.

<sup>73</sup> Splendid research 2018.

The majority of French consumers (60%) is willing to pay more for sustainable products. This group is subdivided as follows:

- 40% are willing to pay less than 5% more;
- 54% are willing to pay 5 to 10% more;
- 5% are willing to pay more than 10% more, and
- 1% did not state how much they would be willing to pay more.<sup>74</sup>

And lastly, Greenflex<sup>75</sup> looked at the type of products consumers in France are willing to pay more for when produced ethically. The consumers' priority clearly is on food: 64.6% of respondents are willing to pay more. This is followed by sanitary and beauty products, textile, cleaning agents, household appliances, furniture and lastly gardening and DIY equipment, with still 39.7%.

In Italy, those who know Fairtrade said they are willing to pay about 10-20% more than a "generic" ethical product.<sup>76</sup>

In summary, the studies show that willingness to pay differs significantly, not only between countries, but also between product groups, labels, and consumers. The results also show clearly why the prices are a barrier to ethical consumption. Although in many cases consumers are ready to pay more (in the western European countries the majority even), the acceptable surcharge (for the majority 3% to 20%) lies significantly below the prices that are in many cases asked for (it is estimated, for instance, a consumer has to pay 20% to 30% premium for fair trade coffee<sup>77</sup>). The results of the studies on country level differ from the results on EU-28-level. This difference may lie in the way consumers have been asked. The Eurobarometer does not ask exclusively for the willingness to pay more for fair products, but generally for "groceries or other products from developing countries to support people living in these countries (for instance for fair trade products)". Obviously, more people would answer they are willing to pay more if this way they can support people from developing countries then when asked to pay more for sustainable products. It includes consumers who do not know enough about the fair trade concept and also people who do not trust in the labels.

#### 4.4.2. Trust

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As aforementioned barriers highlight, the right quality and amount of information is a critical factor in ethical consumption. In their function to provide orientation towards the consumer, labels therefore play an important role. Today, different labels indicate various product qualities and often promise that the respective products adhere to a set of minimum standards and procedures. Therefore, it is important that consumers can rely on the promises carried by the labels.

The level of trust towards labels related to ethical consumption varies significantly between consumers across the European Union. Globescan<sup>78</sup> asked consumers in Austria, Ireland, Germany, UK, France, Spain, Sweden, Poland and Slovakia for their trust in the Fairtrade label. The probability that consumers say to not trust the label is highest in Slovakia and Poland, where only 32% and 43% indicated either a lot of trust or some trust into Fairtrade. Also in France, consumers seem to be rather critical. Only a minor majority of the respondents indicated their trust into this label (57%). Among Austrian, Irish, British, German and Swedish customers, in contrast, it is a solid majority that said Fairtrade would be trustful.

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<sup>74</sup> Gerard et al 2018.

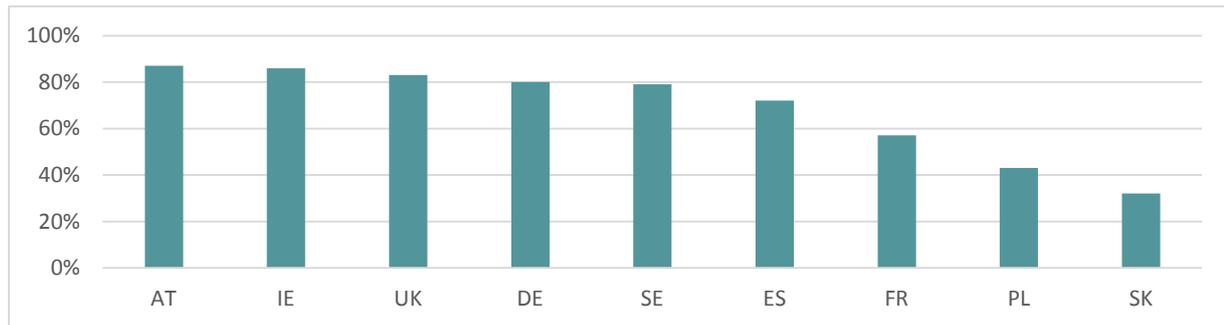
<sup>75</sup> Greenflex 2017.

<sup>76</sup> Nielsen Consumer Insights 2018.

<sup>77</sup> Durevall 2015

<sup>78</sup> Globescan 2015.

Figure 11: The level of trust towards the Fairtrade label



Source: Globescan 2015

In 2017, Globescan<sup>79</sup> took a look again at Germany, finding that the share of respondents who trust Fairtrade is smaller (77%) than just 1 year before. This figure is significantly higher among those respondents who say to buy Fairtrade labelled products (95%). For Germany, furthermore data is available with respect to consumers' trust into label-issuing organisations.<sup>80</sup> According to this study, most people trust in environmental, animal protection or human rights organisations (65.3%), followed by government owned test-institutes (65.1%), German authorities (56.5%), governmentally supported associations, unions, foundations (54.7%), and private non-profit test institutes (52.6%). Less than half of the respondents, in contrast gives trust to the EU (45%), private business unions (24.9%), businesses themselves (20.6%), or private for-profit test institutes (16.4%).

For Denmark<sup>81</sup> it was found that 86% of respondents that are familiar with fair trade trust the Fairtrade label, while 52% said that the trust is high and 34% said that it is moderate.

The country survey for Sweden<sup>82</sup> showed that the amount of people who trust in the Fairtrade label is increasing over time, 62% said that they had some trust the label in 2018 compared to 41% in 2011. The explanation for this fairly low number compared to 79% indicated in the Globescan<sup>83</sup>, is most likely depending on the scale used: only 11% said that to some extent they do not trust the label while 13% said that they do not know and 14% said that they neither trust nor distrust the label.

Without being specific on the various labels, Nielsen Consumer Insight<sup>84</sup> finds that 65% of Italian consumers have high or some trust in ethical products. As main reason for distrust, they mention the control system. This statement is not further specified. Given the context, however, this might refer to the effective control of producers' and traders' compliance with the ethical standards conveyed by such products, for instance Fairtrade certification requirements.

Goossens and colleagues<sup>85</sup> found in their study that 55% of Belgian consumers tend to trust, and 5% completely trust in labels indicating a certain product quality on fresh produce. The study considered 16 labels, including Fairtrade.

It is surprising that according to the study by Gerard et al.<sup>86</sup> 80% of French consumers consider labels/brands specialised in organic, fair trade, and/or new types of consumption trustful. This number differs significantly from the 57% that was indicated three years earlier by Globescan 2015, where consumers were asked specifically for trust in the Fairtrade label.

In summary, confidence in labels and labelling organisations varies significantly throughout the countries covered by above studies and certainly leaves room for trust-building measures. Unfortunately, no data could be identified for other EU member countries.

<sup>79</sup> Globescan 2017.

<sup>80</sup> Splendid Research 2018.

<sup>81</sup> Landbrug & Fødevarer 2016.

<sup>82</sup> Holmberg & Robertson 2018.

<sup>83</sup> Globescan 2015.

<sup>84</sup> Nielsen Consumer Insights 2018.

<sup>85</sup> Goossens and colleagues 2016.

<sup>86</sup> Gerard et al. 2018.

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## 5. Conclusions

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Fair trade and ethical consumption made significant progress over the past decade. Still, the study shows that growth potentials remain large. The share of consumers that make ethical choices when shopping, however, varies widely across the EU member states, with eastern European countries being least involved and the Nordic countries' – specifically Sweden and Denmark – being clear forerunners. Within the European Union, sustainability labels overall still seem to play a minor role in consumers' buying decisions. This refers to both ecological and fair trade products.

The level of ethical consumption is influenced by the level of awareness that consumers have on this and related topics. This study looked especially at the level of awareness of problems in developing countries as well as for the relation between developing countries' problems and consumer choices in the European Union. Information that explicitly addresses these two aspects of awareness, however, is scarce. Nevertheless, data on people who think that foreign exploitation of natural and mineral resources is a main obstacle for development of these countries, and on people who think that they as individuals can have a role in tackling poverty in developing countries provides an indication at least. This is further backed by the results of studies explicitly focusing Germany, the UK, and the Netherlands individually. Results also show that awareness overall is high but spread unevenly throughout Europe: Again, consumers within Nordic and western European countries are more aware than those of the eastern and southern EU member countries.

As further proxy for both the awareness of related issues as well as for the role sustainability labels play in consumers' buying decision, this study had a look on the familiarity with the various labels that are supposed to serve as orientation for consumers in order to assist them in making ethical choices. Striking here is that particularly consumers of western European countries are more familiar with the Fairtrade label than with eco-labels, while for the east of Europe, especially Lithuania, Latvia, Poland and Bulgaria this relation is the other way around. Independent from the type of label, however, it is again the eastern countries that are less familiar with sustainability labels.

The results therefore clearly point to a need to further promote ethical consumption in general and fair trade in particular in the eastern part of the European Union. Interestingly, the smaller share of consumers of those countries consuming ethically does not seem to be a result of the attitude toward helping developing countries overcoming their challenges. This is suggested by the comparatively small differences in the results on this question. However, unfortunately no data or studies were identified that help understanding which other reasons, apart from aforementioned awareness, may be responsible for the differences.

Further, the reviewed literature provides interesting but very limited information on the priorities consumers make when it comes to making buying decisions of consumer goods. Respective information was found only for Denmark, Sweden, UK, and the Netherlands. Generally, priority is given to private benefits the products provide such as quality, health, or price. Looking closer at preferences between ethical purchases, results differ among the countries and cannot be compared, not least because study design and questions asked differ. It is therefore recommended to do further research upon this topic.

Data records on barriers toward ethical consumption in general and fair trade in particular are similarly limited and available for selected countries only. All reviewed studies have in common, however, that the price plays a key role. Among the studies available, the results suggest that consumers often are willing to pay more. The amount they are willing to pay more, in turn, often is below the price premium that fair traded or particularly eco-friendly products are sold for. Other reasons identified that may easier be addressed by tailored communication and marketing strategies, are lack of awareness, habits (e.g. stick to usual brands), confusion caused by the plethora of labels available, limited product availability and doubts in creating the desired impact. Lastly, although not explicitly mentioned in those studies, a barrier to making ethical buying choices may be rooted in missing trust in the labels. Particularly mistrustful consumers toward the Fairtrade label are to find in Poland and Slovakia, with only a minority mentioning to have confidence. The consumers of those countries being most involved in ethical consumption (e.g. Sweden, UK, and Germany) also show the highest level of trust.

Interesting differences with potential implications for future efforts in advancing ethical consumption throughout the EU are also shown with respect to demographic data. With respect to both awareness and actual buying behaviour the patterns are similar. Level of education in all cases plays a key role. The later the education path is completed (as proxy for the level of education), the higher is the probability that the respective questions (awareness and behaviour) are answered in favour of ethical consumer goods. Similarly, a positive relation exists with respect to the profession – managers, students, and self-employed are most likely to respond in favour of ethical consumer goods. Age plays a role too: Respondents above 55 years of age showed the smallest likelihood to respond positively with respect to both awareness and buying behaviour. In terms of gender, women are more likely to be ethically conscious shoppers than men. And lastly, also the political orientation makes a difference, with leftist people appearing to be more ethical-consumption-minded. Clearly, these results call for measures that are tailored to the different target groups, with focus to be given especially to persuasion of those who show a weaker orientation toward ethical consumption.

A positive relation in favour of ethical consumption was also found with personal values that reflect understanding, appreciation, tolerance, concern for humanity and nature. People that are giving more relevance to social status, prestige, and dominance, in contrast, are less likely to be ethical consumers. In consequence, a particularly challenging task to advance ethical consumption lies in persuading the latter type of individuals. An interesting insight is also that countries with a rather individualistic culture appear to be more prone to ethical purchasing on a spontaneous level, whereas indications were found that consumers in collectivistic countries need both more time and information to make respective decisions. This result suggests that information provision and communication strategies may consider how to effectively respond to such specific information needs.

Lastly, it is worth highlighting again that the study faced a lack of literature and particularly of comparable data on the various EU member countries. This applies even more to countries of the geographical south and east of Europe. The Eurobarometer is the most comprehensive source in this respect thanks to which a bigger picture for some key question could be established. Moreover, the data that is available partly is contradictory. In those cases, drawing meaningful conclusions is particularly difficult. It is therefore recommended that in a mid- and long-term perspective a solid research strategy is developed that allows capturing the information necessary and relevant to better understand attitudes and behaviour toward ethical consumption throughout the European Union, serving as basis to develop adequate communication strategies towards the advancement of ethical consumption in general and fair trade in particular.

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**Part II:**  
**EU Consumers' Attitudes to  
Product and Supply Chain  
Sustainability: Food & Drink  
and Cosmetics & Toiletries**

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# 1. Introduction

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During the course of compiling this literature review, Fashion Revolution in cooperation with Ipsos MORI conducted a baseline survey on EU consumer attitudes to sustainability and supply chain transparency. The survey reached 5,000 consumers from France, Germany, Italy, Spain and the UK in the age range 16 - 7587. Overall, emphasis was given to fashion products but it also included food and drink as well as cosmetics and toiletries. The survey results related to clothing are available in Fashion Revolution's Consumer Survey Report (Fashion Revolution, 2018). In the following the most striking results with respect to food & drink and cosmetics & toiletries will be analysed and presented. Data on cosmetics & toiletries, however, were available for one question only. Further, these results will be contrasted against the results of the literature review.

The results will be presented along the questions posed by the survey. Chapter 2 deals with the priorities consumers set when making ethical product choices. This is followed by a chapter showing the information consumers desire with respect to product and producer transparency. The results presented in chapter 4 highlight which global challenges consumers wish brands to help tackling. The last question addressed in chapter 5 deals with the responsibility consumers see in the governments to make ethical consumption easier. Lastly, the discussions and conclusion chapter wraps up the insights gained from the survey and contrast them with the literature review, where possible.

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# 2. Sustainability related product attributes

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Amongst others, the survey captured which of a number of sustainability related attributes in food/drink and in cosmetics and toiletries consumers consider important when making buying decisions. The following question was posed:

*Question 1: Which, if any, of the statements below do you consider to be important when choosing the following products for you and your family? Please select up to 3 statements for each category. It is important to me that the food and drink/ cosmetics/ clothes I buy...*

- *Are produced in a way that is not harmful to the environment*
- *Are grown/made by workers paid a fair, living wage*
- *Are produced without harming animals*
- *Are produced locally*
- *Are packaged in recyclable materials (food and drink only)*
- *Use materials that are produced organically (cosmetics and toiletries only)*
- *Are produced in safe working conditions*
- *Are organic (food and drink only)*

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<sup>87</sup> 1088 adults aged 16-70 in Germany; 1100 adults aged 16-75 in France; 1094 adults aged 16-70 in Italy; 1098 adults aged 16-65 in Spain; 1129 adults aged 16-75 in the UK.

## 2.1. Summary

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### Key findings

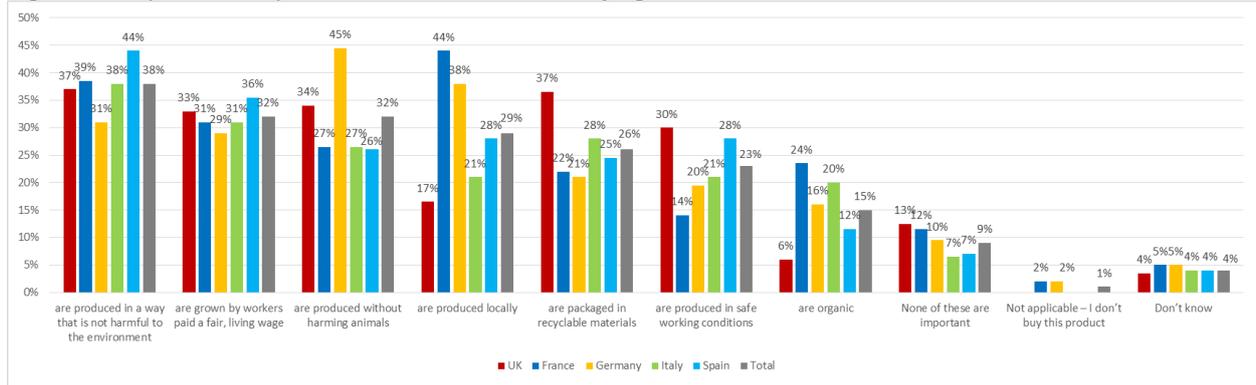
- In most countries, environmentally benign and animal friendly production as well as fair, living wages are the most frequently mentioned product attributes that are considered important when shopping both food and drink and cosmetics and toiletries. Local and organic production appear to be of less concern among the consumers surveyed.
- Despite only minor differences when comparing food and drink responses of the different age groups of all respondents, results suggest 24 to 35 year olds having the smallest concern for all items but local, organic and animal friendly production. For cosmetics and toiletries, results are more similar between the age groups. A closer look at country level, however, reveals a diverse picture with stronger age-related differences within and between the countries and product groups studied.
- All responses combined, differences between women and men are small with women more frequently expressing their concern for ethical consumption aspects, most strongly for animal friendly production. Zooming into country level, differences between men and women are more pronounced in some countries than in others.
- No significant tendency was identified for the different income groups and the prompted items when buying food and drink. On country level, particularly in UK, Spain and France, differences seem to be more pronounced between the lower end and the upper end of income levels, whereas in Germany and Italy most frequently mentioned items are the same at both ends. Furthermore, in each of the countries surveyed, the highest income groups set their priorities differently. For cosmetics and toiletries, results are less pronounced. In UK, Spain and France, the relative frequency with which organic production is mentioned seems to correlate positively with the income level. Local production is the least often mentioned item by each income group in each country.

## 2.2. Results overall and per country

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The results shown in Figure 12 below suggest that when it comes to food products and drink, environmentally benign production overall is important for most of the respondents (in total 38%). Zooming further in, a few outliers become apparent. 45% of German consumers, for instance, consider animal friendly production being important, whereas in France the most frequently mentioned criterion (44%) is local production. When it comes to local production, however, differences between countries are most expressed. Only 17% of the respondents from UK said that this attribute would be important. In contrast, more people in UK said that the use of recyclable packaging materials (37%) and production in safe working conditions (30%) are important than in any other country surveyed. Yet, in total, safe working conditions are important only to a comparatively small number of respondents (23%). Least often mentioned was organic production, with France showing the highest (24%) and the UK the smallest share (6%) of respondents who consider this product attribute important. Fair paid workers come in second, together with animal friendly production, being considered by 32% of respondents as important criterion when buying food and drink. On average, 1 in 10 of the surveyed consumers does not consider any of the aspects being important.

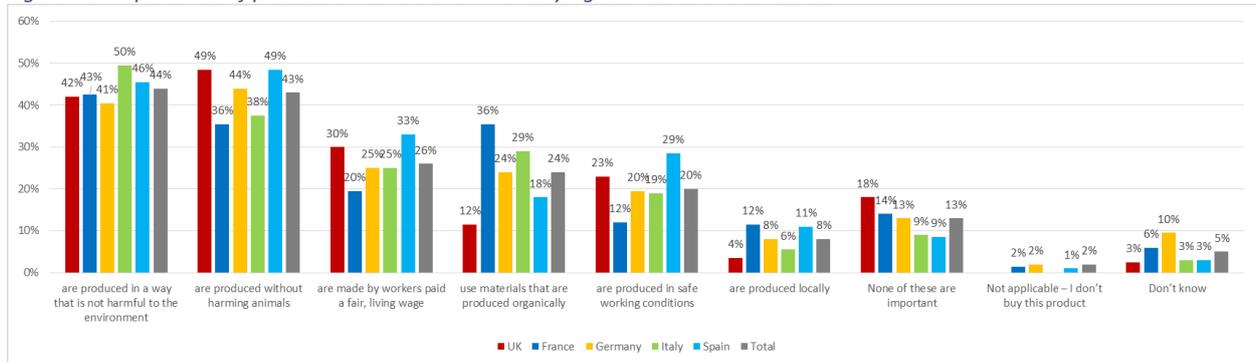
Figure 12: Importance of production conditions when buying food and drink



Source: based on data collected by Ipsos MORI and Fashion Revolution (2018)

The responses with respect to cosmetics and toiletries suggest that more consumers pay attention to environmental issues than for food (Figure 13). Social issues such as fair, living wages and safe working conditions are less often mentioned as being important when shopping for cosmetics and toiletries compared to food and drink (-7pp and -10pp). Local production is least often mentioned. Looking at country level, interestingly in three of the five countries – UK, Germany, and Spain – “are produced without harming animals” is slightly more often mentioned than environmentally friendly production. Striking differences between the countries surveyed also become apparent for animal friendly production, which was most frequently mentioned in Spain and in UK (each 49%) and least frequently said to be important in France (36%). Similarly, fair, living wages and safe working conditions was mentioned most frequently in Spain (33% and 29%) and least frequently in France (20% and 12%). In contrast, this constellation is almost reversed when it comes to the use of organically produced materials: France shows the highest share of respondents (36%), while only in UK a smaller share of respondents said that this criterion is important (12%) than in Spain (18%). In France, moreover, more respondents – in relative terms – said that local production is important (12%) than in any other country.

Figure 13: Importance of production conditions when buying cosmetics and toiletries



Source: based on data collected by Ipsos MORI and Fashion Revolution (2018)

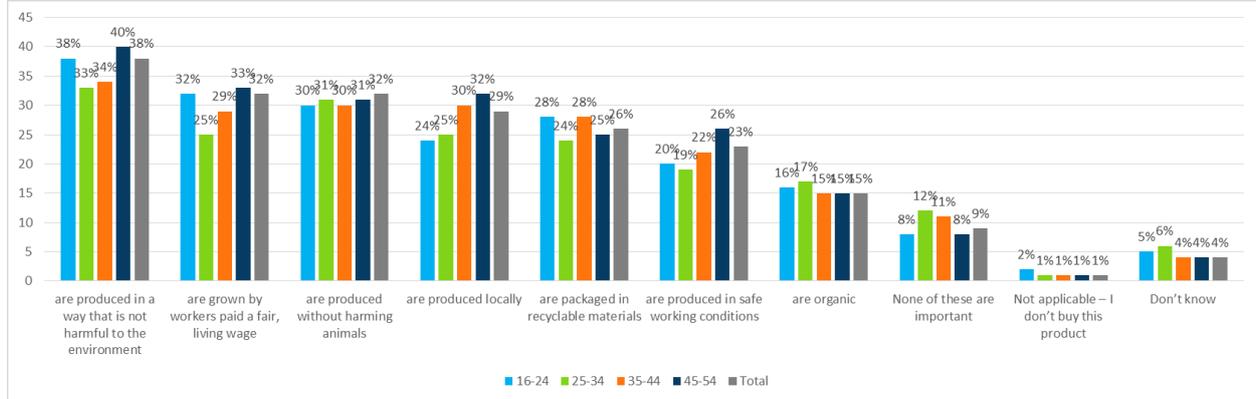
## 2.3. Socio-demographic analysis

### Age groups

For food and drinks, differences among age groups (all surveyed countries combined) are not as pronounced as among countries (see below Figure 14). Striking is that less consumers between 25 and 34 consider fair payment of workers (25%), recycled materials in packaging (24%) and safe working conditions (19%) as an important criterion than consumers of any other age group. At the same time, consumers within this age group most frequently (17%) said that organic production is important. The other age groups, however, follow closely - consumers between 16 and 24 with 16% and consumers older than 34 with 15%. Furthermore, consumers between 25 and 34 also most frequently mentioned that

none of the prompted criteria is important when buying food and drink. Except for organic production and the use of recyclable packaging materials, more people between 45 and 54 mentioned all other criteria as being important than consumers from any other age group.

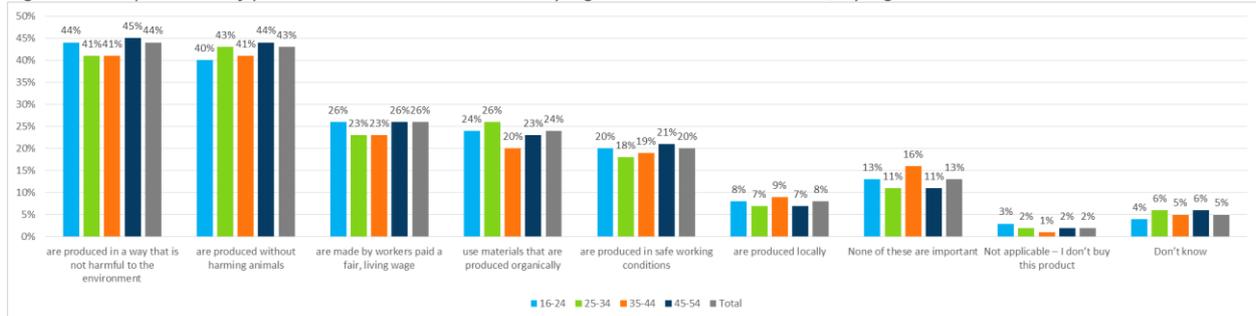
Figure 14: Importance of production conditions when buying food and drink, by age



Source: based on data collected by Ipsos MORI and Fashion Revolution (2018)

With respect to cosmetics and toiletries, the consumers aged between 25 and 34 showed the least mentions for all items prompted except for “use of materials that are produced organically”, which was mentioned most frequently by this age group (26%), compared to the other age groups (20 to 24%). However, in contrast to food and drink, they also least frequently mentioned (together with the 45 to 54 year olds) that “none of these are important” (11%). As Figure 15 below shows, overall differences among the groups are small, with only in one case reaching a spread of 6pp. This refers to the use of “materials that are produced organically”, which is mentioned least frequently by the 35 to 44 year olds. Next smaller spread (5pp) is to be found with the item “none of these are important”. The latter is most frequently mentioned by respondents within the age group 35 to 44 (16%) and least frequently mentioned by the 25 to 24 year olds (11%).

Figure 15: Importance of production conditions when buying cosmetics and toiletries, by age



Source: based on data collected by Ipsos MORI and Fashion Revolution (2018)

### In-country – food and drink

Looking at age differences and selected attributes for each of the countries studied, results differ more strongly. In UK, for instance, environmentally friendly production is most frequently mentioned by all respondents except for the 35 to 44 year olds. The latter's most frequently mentioned item is “are produced without harming animals”, followed by the use of recyclable packaging materials (37%) and fair, living wages (34%). Further, local production is considered important by the 45 to 54 year olds twice as often (22%) as by the youngest consumers surveyed (11%) and as by the consumers aged 35 to 44 (10%). A similar magnitude of divide for the same product attribute is shown by consumers in Germany between 25 to 34 years olds (12%) and 45 to 54 year olds (23%) as well as in Spain (17% of 16 to 24 year olds and 34% of the 45 to 54 year olds). Striking for Spain is also that the younger the respondents are (from 18% of the 45 to 54 year olds to 38% of the youngest age group), the more often “production without harming animals” is mentioned. Other differences that stand out are: In France, the importance of

a fair, living wage is – in relative terms – mentioned by 25 to 34 year olds only about half as often (16%) as by the other age groups (32 to 33%). Further, respondents aged 45 to 54 and 25 to 34 mentioned environmentally friendly production most frequently (48% and 35%), whereas the youngest age group and those aged 35 to 44 ticked the box for local production most frequently (48% and 38%). In Italy, organic production is mentioned by 16 to 24 year olds less than half as often (10%) as by the 45 to 54 year olds (23%). In Spain, the importance of production without harming animals is mentioned less than half as often by the consumers aged 45 to 54 (18%) as by the 16 to 24 year olds (38%). Spain also shows one of the most striking differences between the age groups: “None of these are important” is mentioned by 2% of the 45-54 year olds, by 6% of the 35 to 44 year olds, by 3% of the 16 to 24 year olds but by 14% of the 25 to 34 year olds.

### Cross-country – food and drink

Comparing the importance of the prompted items between the surveyed countries in consideration of the age groups also reveals some interesting insights. Among the 16 to 24 year olds, in France local production is the most frequently mentioned item (38%) whereas in the UK it is mentioned by 11% only, followed only by organic production (9%; France 24%). As in the other countries surveyed, the top item in the UK within this age group instead refers to environmentally friendly production (39%). Less pronounced yet still strong differences can be observed for the item “are produced without harming animals”: In the UK and in France, only 23% of the respondents within this age group stated to consider it important. Respondents of the same age in Germany, in contrast, most frequently mentioned this aspect as being important when buying food and drink (44%). Among the 25 to 34 year olds, in Italy most frequent mentions refer to the use of recyclable packaging materials (32%), in Germany to animal welfare (36%) and in the remaining countries to environmental friendliness (35% to 44%). In this age group, striking are also the differences: i) between France and UK with respect to fair, living wages (16% compared to 30%) and organic production (31% and 9%), and ii) between France and Italy with respect to local production (35% and 12% respectively). Also the results of the age group 35 to 44 show strong differences between France and UK. While of the latter 38% mentioned “are produced without harming animals”, 37% “are packaged in recyclable materials”, 30% “are produced in safe working conditions” and 4% “are organic”, in France these items were mentioned least frequently among the five countries surveyed (22%, 18% and 14% respectively) except for organic production (19%). Lastly, among the 45 to 54 year olds, strong differences are shown between Germany and Spain with respect to fair, living wages (26% and 46%) and production without harming animals (49% and 18%).

### In-country – cosmetics and toiletries

For cosmetics, among the respondents in the UK it is only the youngest age group that most frequently mentioned environmentally friendly production. Those aged 25 to 45 mentioned “are produced without harming animals” most frequently. Strong differences become apparent also with respect to organic production: Those aged 16 to 24 mentioned this item twice as often as those aged 35 to 44. Similarly, production in safe working conditions was mentioned less than half as often by the 35 to 44 years olds as by the 45 to 54 year olds. Even stronger is the difference for local production, which was mentioned by 7% of the youngest and by only 2% of the oldest age group in the UK. In France, all age groups mentioned environmental benign production as being important when buying cosmetics and toiletries, with a minor difference only for the 35 to 44 year olds, who slightly more frequently (1pp) mentioned animal friendly production. The strongest differences can be seen with fair payment of workers. Among the 25 to 44 year olds only about 10% stated that this is an important criterion whereas among the oldest and youngest age groups this share was 25% and 23%. The 35 to 44 year olds, in contrast, stand out when it comes to “none of these are important”, which among them was mentioned by 23% and by only 12% among the other age groups. In Germany, all age groups most frequently mentioned animal friendly production. Striking differences refer to organic production, which was mentioned more than twice as often by the 25 to 34 year olds as by the 16 to 24 year olds. In Italy, environmentally friendly production was mentioned most frequently by consumers of all ages. Only production in safe working conditions shows a significant spread: Among the respondents aged 16 to 24 a share of 12% mentioned this aspect, whereas the respective share among the 35 to 44 year olds is almost twice as high (23%). Consumers in Spain also mentioned the same item (produced without harming animals) most frequently across all ages. Local production was stated as being important by almost double the share of 35 to 44 year olds (15%) as by 16 to 34 year olds (8%).

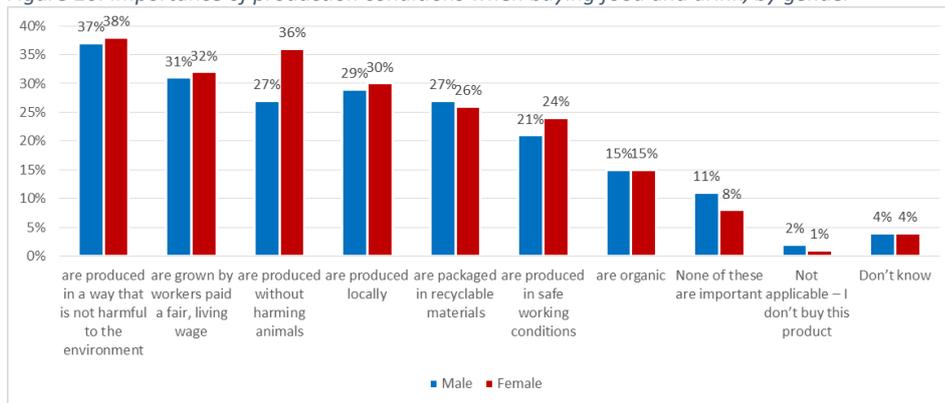
## Cross-country – cosmetics and toiletries

For environmentally and animal friendly production, differences are least pronounced. Among the 16 to 24 year olds, in relative terms almost double as many respondents in UK (33%) said that “are made by workers paid a fair, living wage” is important as respondents in Italy (18%) said. Within the same age group, less than half of the share of respondents in UK and Germany (17% and 16%) said that “use materials that are produced organically” is important when buying cosmetics and toiletries as respondents in Italy said (42%). In Italy and in France about half of the share of respondents aged 16 to 24 (12% and 13%) mentioned safe working conditions being important as respondents in UK, Italy and Spain within the same age group said (25%). Local production was mentioned being important by 6% of the 16 to 24 year olds in Italy but by almost double the share of respondents of the same age in Germany (11%). Likewise, among the 16 to 24 year olds, “none of these are important” was most frequently mentioned by the respondents in UK (17%), while respondents in Spain mentioned it least frequently (8%). Among the 25 to 34 year olds, the most striking difference is shown for the item “none of these are important”. It was mentioned three times as often by the respondents in UK (18%) as by the respondents in Italy (6%). A significant spread is shown between respondents in the UK and in France with respect to the items “are made by workers paid a fair, living wage” (UK 28%, France 11%), “uses materials that are produced organically” (UK 17%, France 35%), “are produced in safe working conditions” (UK 22%, France 9%). Furthermore, in Germany and Spain, local production was mentioned twice as often as in the UK (18% and 9%). Among the 35 to 44 year olds, respondents in Spain mentioned fair, living wages more than twice as often as respondents in Germany and more than three times as often as respondents in France. A similarly large difference is shown for organic production, which was mentioned by 28% of respondents of this age group in France and by 8% of respondents of this age group in UK. However, with a spread of factor five, most striking are the differences between Spain (30%) and France (6%) with respect to safe working conditions. Similarly, respondents of this age group in Spain mentioned almost more than four times as often that local production is important when buying cosmetics and toiletries (15%) as respondents in the UK said (4%). Conversely, respondents in UK said more than four times as often that “none of these are important” as respondents in Spain said (25% and 6%).

## Gender

Differences between men and women seem of minor nature, with a spread of 1pp to 3 pp only for most of the items/ statements (Figure 16). Exceptions are: “produced without harming animals”, which among women was mentioned considerably more often (36%) than among men (27%), and “are organic”, with an equal share of mentions among both groups (15%). Furthermore, whereas in total “fair, living wages” are mentioned as often as animal friendliness (second most frequently mentioned, after environmental friendliness), among women animal friendliness is mentioned more often than fair, living wages. Overall, women are slightly more inclined to consider at least one of the attributes being important (i.e. a higher share among the men stated that none of the attributes are important when buying drink or food (11% vs. 8%). Only “packaged in recyclable materials” is considered by a slightly higher share of men than women (27% vs. 26%).

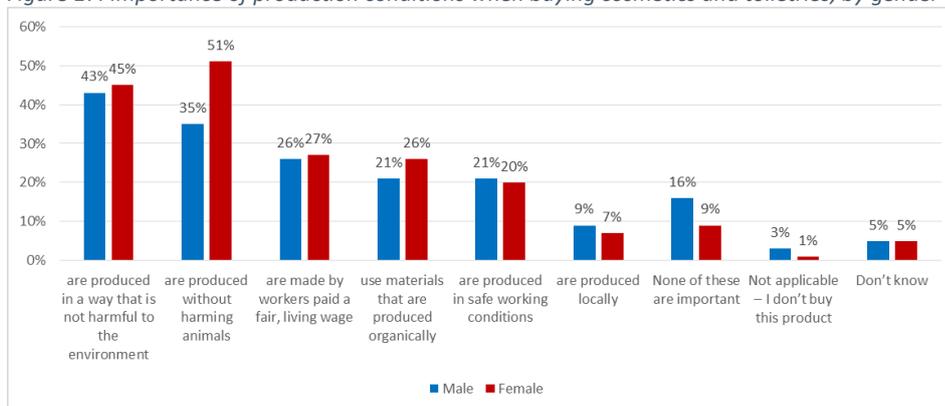
Figure 16: Importance of production conditions when buying food and drink, by gender



Source: based on data collected by Ipsos MORI and Fashion Revolution (2018)

Overall, out of the six potential production criteria prompted, four were mentioned more often by women than by man as being important when buying cosmetics and toiletries. Compared to food and drink, differences among male and female respondents are also slightly more pronounced for certain items and slightly less for others. Most striking is the gender-spread when it comes to animal friendly production – 35% of male respondents said they consider it important that cosmetics and toiletries “are produced without harming animals” (see Figure 17). Among the female respondents 51% said this would be important when buying cosmetics and toiletries. In contrast, whereas for food and drink women said considerably more often than man that fair, living wages are important (a spread of 7pp), for cosmetics and toiletries this differences is only 1pp. Men slightly more often mentioned that local production (9% vs. 7%) and safe working conditions (21% vs. 20%) are important. A starker contrast is shown with “none of these are important”, which was said by 16% of men and 9% of women.

Figure 17: Importance of production conditions when buying cosmetics and toiletries, by gender



Source: based on data collected by Ipsos MORI and Fashion Revolution (2018)

### Cross-country - Food and drink

Whereas in UK, Germany, Italy and Spain women mentioned environmental benign production as often as or slightly more often than men (up to 4pp), it is vice versa in France (41% male, 36% female). Fair, living wages generally is mentioned more often by women in UK, France and Spain (up to 5pp). It is the other way around in Germany and Italy (each 2pp). For animal friendly production, with 5pp the spread between men and women is smallest in Germany (7pp to 12pp within the other countries). “Produced locally” is slightly more often mentioned by women than by men (France showing the biggest spread with 8pp), except for UK and Germany, where men mention this item slightly more often (3pp and 2pp). “Packaged in recyclable materials” is a criterion women mentioned as often as or slightly more often than men (up to 3pp), except for Germany and Spain, where the difference is vice versa (6pp and 5pp). “Safe working conditions” generally is mentioned more frequently by women (with 10pp the strongest difference in UK), except for Germany and Italy, where a slightly higher share among men mentioned this item (1pp

vs. 2pp). In almost all countries women mentioned organic production as often as or slightly more often (up to 2pp) than men. Only in Spain more men (1pp) mentioned this item slightly more frequently. In almost all countries men mentioned “none of these are important” slightly more often (3 to 6pp) than women. Only in Spain men mentioned this item slightly more frequently (1pp).

### Cross-country - Cosmetics and Toiletries

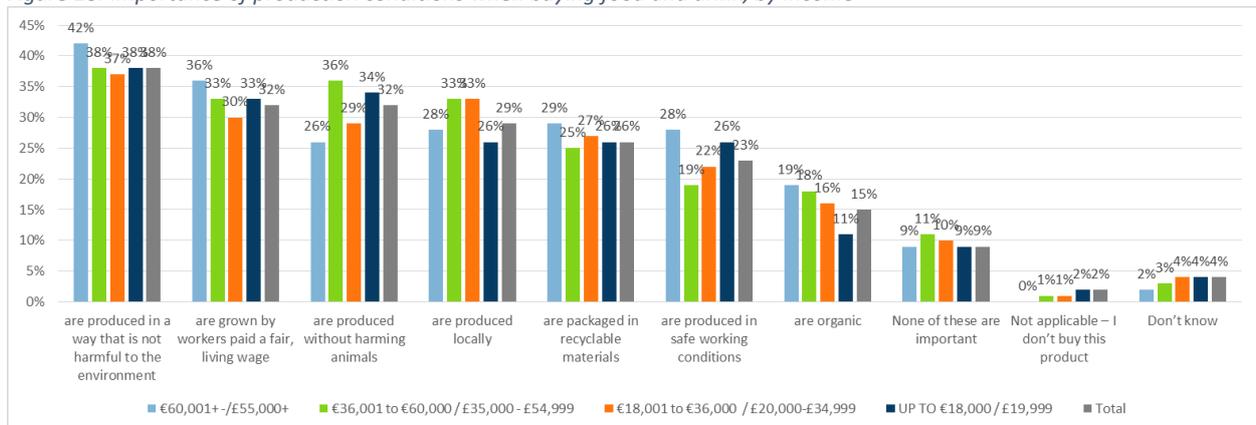
Gender differences between the countries are minor when it comes to the importance of environmentally friendly production. Most striking is that in UK this difference is 6pp (39% among men, 45% among women), whereas in the other countries the spread is between 1pp (FR, DE; ES) and 3pp (IT). “Without harming animals” shows the smallest difference between men and women in Germany (12pp), whereas in Italy the difference is most pronounced (19pp). Gender differences with respect to the frequency “paid a fair, living wage” is mentioned are most pronounced in Spain (37% among women, 29% among men) and least pronounced in UK (30% among both). Organic production in each of the countries surveyed is mentioned slightly more often by women than by men. Most striking is the difference in France, where 30% of men and 41% of women said this criterion is important when buying cosmetics and toiletries. Safe working conditions are considered an important criterion when shopping for cosmetics and toiletries by slightly more women than men in UK (2pp), Italy (2pp) and Spain (1pp). In France and Germany slightly more men than women (2pp and 3pp respectively) said that safe working conditions are important. Gender differences between the countries are also comparatively small when it comes to the importance of local production. The sole outlier here is Italy, where 3% of women and 8% of men said this criterion is important when buying cosmetics and toiletries. In the other countries surveyed, the number of mentions is equal (DE), 1pp (UK and FR) or 2pp (ES). “None of these are important” was mentioned by more men than women in each of the countries surveyed. Most striking is the gender difference when comparing Germany and Italy (4pp) with UK and France (8pp and 10pp).

### Income

#### Overall and per country - Food and drink

Overall, differences between income groups appear to be relatively small (see Figure 18). They are most pronounced with respect to production that does not harm animals (up to 10pp), safe working conditions (up to 9pp), and organic production (up to 8pp). The spreads with respect to animal welfare and working conditions are between the highest and the second highest income group, the latter least often mentioning safe working conditions (19%) and most often mentioning animal welfare (36%). The 8pp spread refers to the lowest and the highest income group: among those earning 18,000€/year or less, organic production is least frequently mentioned (11%).

Figure 18: Importance of production conditions when buying food and drink, by income



Source: based on data collected by Ipsos MORI and Fashion Revolution (2018)

### In-country – food and drink

The share of mentions slightly differs also between the different income groups within each country:

In UK, the most striking difference refers to “are produced without harming animals”: This item is mentioned by 42% of the respondents within the lowest income group and by 24% of the respondents within the highest income group. “Are packaged in recyclable materials” shows a strong difference between the highest income group (mentioned by 44%) and those who earn between € 36,001 and € 60,000 per year (mentioned by 32%). The strongest difference with respect to safe working conditions is shown between those earning up to € 18,000 per year (37% considered it important) and those earning between € 18,001 and € 36,000 (27% considered it important). For organic production, the highest income group stands out: Among them, more than the double – in relative terms – of the respondents (11%) consider it important compared to the lowest and second highest income groups (5%).

For France, “without harming animals” is mentioned more frequently the lower the income level is (mentions among respondents of the highest income level 13%, of the lowest income level 31%). Local production – most striking difference between the second highest income level (53%) and the lowest income level (41%). When it comes to packaging made from recyclable materials, the only outlier are respondents of the consumers earning more than € 60,000 – among them, 11% said this criterion is important whereas among all other income groups this share was between 21% and 25%.

In Germany, noticeable differences between income groups are shown for six out of the seven items prompted: The share of respondents who said that environmental benign production is important increases with the income (26% among those earning up to € 18,000, 40% among those earning more than € 60,000). The share of respondents who said that a fair, living wage for the farming workers is important ranges from 25% among those earning € 18,001 to € 36,000 to 35% among those of the next higher income group. The latter, in contrast, least frequently mentioned that safe working conditions are important (15%). The highest share of respondents who said that this item is important is to be found among those earning €60,001 or more (27%). In relative terms, the strongest differences are shown with respect to organic production: Within the highest income group, the share of respondents who said that organic production is important (29%) is more than double as high as the share among those earning € 36,000 or less (14%). Local production is most frequently mentioned within the income group € 18,001 to € 36,000 (44%), whereas the share of respondents within the other income groups ranges from 33% (up to € 18,000) to 36% (€ 36,001 to € 60,000). Lastly, within the latter income group, 53% said that animal friendly production is important, while only 38% of the next lower income group said so.

In Italy, both fair, living wages and safe working conditions are mentioned most frequently among those earning € 60,001 or more (49% and 42%) and least frequently among those with the next lower income group (25% and 15%). The most striking difference is shown for organic production: The share of respondents who said this is important is three times as high among those with an income of € 18,001 to € 36,000 (27%) as among those earning € 60,001 or more (7%). With respect to environmentally friendly production, the strongest spread is shown between those earning € 18,001 to € 36,000 (36% said this criterion is important) and those earning equal to or more than € 60,001 (56% mentioned this as important).

In Spain, in contrast, environmentally friendly production is mentioned almost equally often among all income groups. Instead, a strong difference is shown with respect to fair, living wages, particularly between the highest and the next lower income group: Among the earlier, 26% mentioned this criterion as being important, among the latter 45%. The results for both local and organic production suggest that in Spain there is a close relation between the importance for the consumers and the income, as both are mentioned more frequently as the income increases (from 24% to 44% and from 9% to 23% respectively). Conversely, “are packaged in recyclable materials” was said to be important less frequently as the income increases (28% to 11%). Lastly, striking is that “none of these are important” is mentioned up to twice as often among those earning equal to or more than € 60,001 (12%) as among the other income groups (6% to 7%).

### Cross-country – food and drink

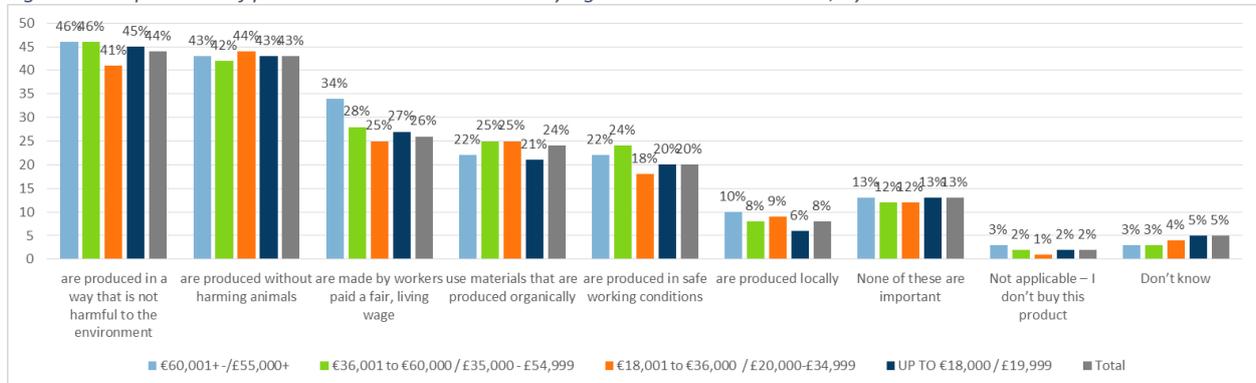
As the above results suggest, the share of mentions also strongly differs within each income group when comparing each of the countries surveyed: Most frequent mentions among those consumers earning more than 60,000/ year are: in the UK “are packed in recyclable materials” (44%; lowest income group: “are produced without harming animals, 42%), in France “are organic” (45%; lowest income group: “are produced locally”, 41%), in Germany “are produced without harming animals” (46%; lowest income group: same item, 43%), in Italy “are produced in a way that is not harmful to the environment” (56%; lowest

income group: same item, 40%), and in Spain “are produced locally” (44%; lowest income group: “are produced in a way that is not harmful to the environment”, 44%).

### Overall and per country - cosmetics and toiletries

Overall, the spread between the income groups is less pronounced with cosmetics than with food and drink. The biggest differences refer to the two criteria typically associated with fair trade: 34% of those earning more than € 60,000 said that fair, living wages are important, which was said by only 25% of those earning € 18,001 to € 36,000. A spread of 6pp is shown for safe working conditions, which were mentioned most frequently among respondents of the income group € 36,001 to € 60,000 (24%) and least frequently among those earning from € 18,001 to € 36,000 (18%). The differences between income groups are less pronounced for the remaining items prompted. Environmentally friendly production is least important for those earning € 18,001 to € 36,000 (41%, compared to a share of 44% to 46% within the other income groups). Furthermore, both local and organic production are mentioned least frequently among those with the lowest income (6% of mentions vs. 8% to 10% among the other income groups, and 21% vs. 22% to 25% respectively).

Figure 19: Importance of production conditions when buying cosmetics and toiletries, by income



Source: based on data collected by Ipsos MORI and Fashion Revolution (2018)

### In-country – cosmetics and toiletries

Zooming further in and comparing the answers of the four income groups for each prompted item within each country, more pronounced differences become visible.

In the UK, for instance, although differences are small, the results show that local production is more often said to be important the higher the income level is (2% to 7%). This applies, in a similar fashion, to animal friendly production (46% to 49%) and fair living wages (25% to 36%), with the exception of the lowest income group, among which respondents mentioned these items most frequently (51% and 32%).

In France, a strong difference is to be found between those earning € 18,001 to € 36,000 and the highest income group when it comes to environmentally friendly production. Among the earlier, 57% said this is important when buying cosmetics and toiletries, whereas among the latter 38% mentioned this item as being important. The frequency with which respondents said that fair, living wages and the use of materials that are produced organically are important increases with the income level (16% to 32% and 33% to 48%). The contrary applies to the share of people who said that none of these are important: The lower the income the more frequently it was mentioned (7% to 19%). The share of people within the highest income group that said that safe working conditions are important (6%) is considerably lower than the respective share of other income groups (from 10% among those earning € 18,001 to € 30,000 to 16% among the second highest income group).

In Germany, results for local production follow the same pattern as in the UK and France: The higher the income, the more respondents said – in relative terms – that local production is important when buying cosmetics and toiletries. The frequency of mentions here was more than double as high among those earning € 60,000 or more (14%) as among those earning up to € 18,000. The same pattern, with less pronounced differences, is shown for fair, living wages. Other striking differences refer to animal friendly and to environmentally friendly production: The earlier is mentioned most frequently within the income

group € 18,001 to € 36,000 (56%) and least frequently within the highest income group (31%). Conversely, the latter is most frequently mentioned within the highest income group (55%), whereas among the other income groups it is mentioned by 38% to 40% of the respondents. The surveyed consumers earning up to € 18,000 said least frequently that organic production is important (18%), whereas among those earning € 36,001 to € 60,000 it is mentioned most frequently (28%).

In Italy, the most striking differences refer to the use of materials that are produced organically: While 11% of the highest income group said this criterion is important, this was said almost three times as often among the respondents earning € 18,001 to € 36,000 (31%). A strong difference is also shown for local production: The share of people who said local production is important is more than double as high within the highest income group (7%) as within the next lower income group (3%). In contrast, the latter said most frequently that environmentally friendly production is important (53%). The respective share of mentions among those earning equal to or more than € 60,001 is 41%. Animal friendly production is mentioned more often the higher the income is (33% to 51%).

In Spain, this tendency is found with respect to i) organic production of the used materials (16% to 22%), ii) “are made by workers paid a fair, living wage” (31% to 48%), and iii) “none of these are important” (8% to 14%). Another salient result refers to environmentally friendly production: As in Italy, the highest share is to be found with the respondents earning € 36,001 to € 60,000 (50%), and the lowest with the respondents earning equal to or above € 60,001 (39%).

### Cross-country – cosmetics and toiletries

Comparing the answers for each income group across all countries surveyed, the results suggest that overall the preferences of each income group are more homogeneous when comparing the countries surveyed than with respect to food and drink. Within each country, almost each income group least frequently said (of all items prompted) that “are produced locally” is important when buying cosmetics and toiletries. The only exception is the highest income group in France, which – among all items – least frequently mentioned “are produced in safe working conditions”. With respect to the most frequently mentioned items for each country and income group, the picture is slightly more diverse. In the UK, each of the four income groups most frequently mentioned “are produced without harming animals” (of all items prompted). Among those earning equal to or more than € 60,001, this item is mentioned also most frequently in Italy and Spain (51% and 49%). In Spain, this is also the most frequently mentioned item in the lowest income group (50%). In France and Germany, the highest income group most frequently mentioned “are produced in a way that is not harmful to the environment” (57% and 55%). Furthermore, in France this item is also the most frequently mentioned one in all other income groups. In Germany, in contrast, all other income groups most frequently said that “are produced without harming animals” is important when buying cosmetics and toiletries. In Italy, in turn, all respondents earning less than € 60,001 mentioned environmentally friendly production most frequently (of all items prompted).

## 3. Product and producer transparency

The respondents were asked to which extent they agree with the statements prompted related to the information they wish to have on products' and producers' contribution to ethical consumption.

*Question 2: To what extent do you agree or disagree with the following statements?<sup>88</sup>*

- *I would like food brands to tell me about where the ingredients used in their products come from*
- *I am interested in learning about what, if anything, food companies do to minimise their impact on the environment*
- *I am interested in learning about what food companies do to protect their workers' human rights*
- *I am interested in learning about what food companies do to improve the lives of people in the societies where they manufacture their products*
- *I like to know how the food I eat was produced*

### 3.1. Summary

#### Key findings

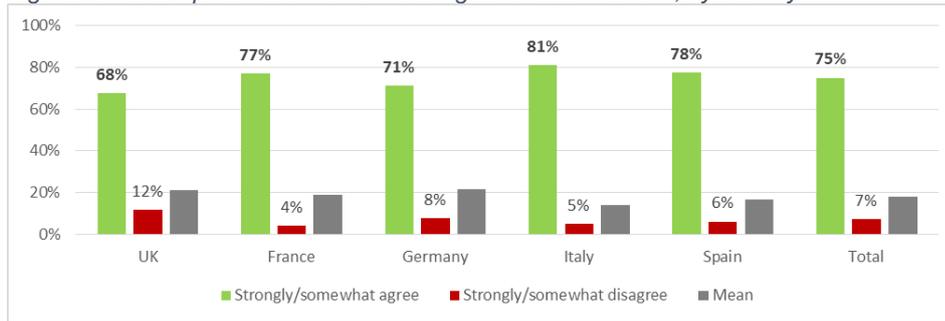
- The majority of consumers is interested in all of the items prompted. Results suggest that Food and Drink's quality and origin are of most concern to consumers, whereas for social aspects least interest is shown.
- In all of the items prompted, women, consumers in the mid to upper income range as well as consumers in Italy most frequently, and men and consumers in the UK least frequently indicated interest.
- The results of all respondents combined, socio-demographic differences are small. Comparing the responses within and across countries gives a much more diverse picture.
- The youngest age group showed the highest interest in social and environmental aspects, whereas the mid to upper range age groups showed the least interest. Age difference show partly converse patterns and are most pronounced for interest in food companies' environmental protection measures in UK.
- Food companies' measures on social impacts and information on the quality and origin of food and drink are least frequently of interest to the lowest income groups. Consumers with an income above € 60,000 least frequently said that they are interested in food companies' measures to protect the environment.
- Gender differences are most pronounced in Spain and when it comes to workers' human rights and environmental protection. Women are more often interested in almost all countries and items prompted. The only exception is Germany, where men slightly more often said to be interested in the origin of food ingredients.

### 3.2. Where the ingredients come from

In total, 75% of the respondents agree that they would like food brands to tell them about where ingredients used in their products come from. Forerunners here are Italy (81%), Spain (78%), and France (77%), whereas Germany (71%) and UK (68%) make up the rear.

<sup>88</sup> The survey participants were asked to indicate whether they "strongly agree", "somewhat agree", "neither agree nor disagree", "somewhat disagree", "strongly disagree", or "don't know". In the following, agreement refers to the combined results of "strongly agree" and "somewhat agree".

Figure 20: It is important to know where ingredients come from, by country



Source: based on data collected by Ipsos MORI and Fashion Revolution (2018)

With respect to gender, female respondents agreed slightly more often (77%) than male respondents (72%). On country level, Germany is the only country where slightly more men agreed to this statement (72%) than women (71%). The strongest gender differences are shown by UK (63% male, 72% female) and Spain (72% male, 82% female).

Looking at the age of the respondents, results show minor differences only. Whereas among those aged 25 to 34 agreement is least frequently indicated (70%), agreement is most frequently shown by the 35 to 54 year olds (73%). In the UK, the results suggest that the age negatively correlates with the share of respondents who agree – the older the respondents, the less often they show agreement with this statement (74% to 61%). In France, the oldest agree significantly more often with this statement (87% vs. 64% to 68%). In the other countries, age differences are more balanced, with a spread of not more than 6%.

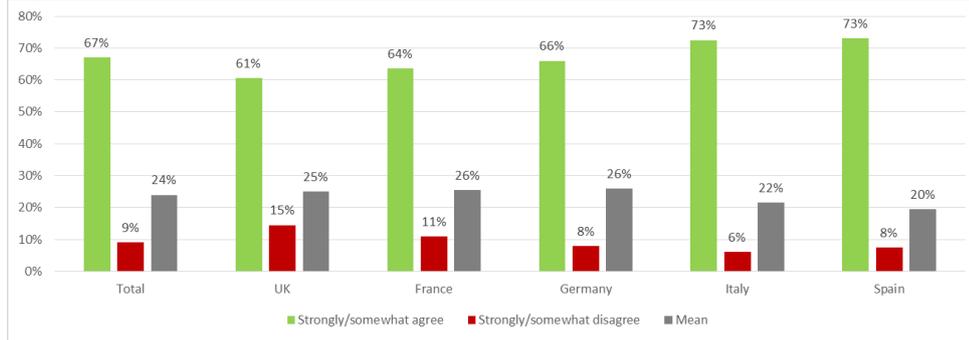
A closer look at income levels reveals that agreement is least frequently indicated by those earning up to € 18,000 (71%), whereas most frequently agreement is shown by those earning € 18,001 to € 60,000 (77% and 78%). On country level, the differences are least pronounced in France (between 73% and 81%), Italy (between 79% and 86%) and Spain (between 77% and 78%). In Germany, results suggest that the level of income correlates positively with the share of respondents who agreed with the statement (67% within the lowest and 75% within the second to highest income group – among the highest income group 74% agreed<sup>89</sup>). In UK, differences are most pronounced, especially between those earning up to € 18,000 (61%) and those earning € 36,001 to € 60,000 (76%).

### 3.3. What food companies do to minimise their impact on the environment

In total 67% of the respondents agreed that they are “interested in learning about what, if anything, food companies do to minimise their impact on the environment”. In UK, France and Germany, slightly less people (61%, 64%, 66%) and in Italy and Spain slightly more people (73%) agreed with this statement.

<sup>89</sup> The slightly smaller percentage is limited in its explanatory power given that only 37 respondents belong to this income group, whereas the next smaller income group consisted of 118 respondents.

Figure 21: It is important to know what food companies do to minimise their impact on the environment, by country



Source: based on data collected by Ipsos MORI and Fashion Revolution (2018)

The gender spread in total terms equals 6pp, with women agreeing more frequently (70%). This spread is most pronounced in Spain, where 79% of women and 67% of men agreed, followed by France with 68% and 59% respectively. In Italy, in contrast, almost the same share of men and women agreed, with the male fraction being 1pp ahead (73% vs. 72%).

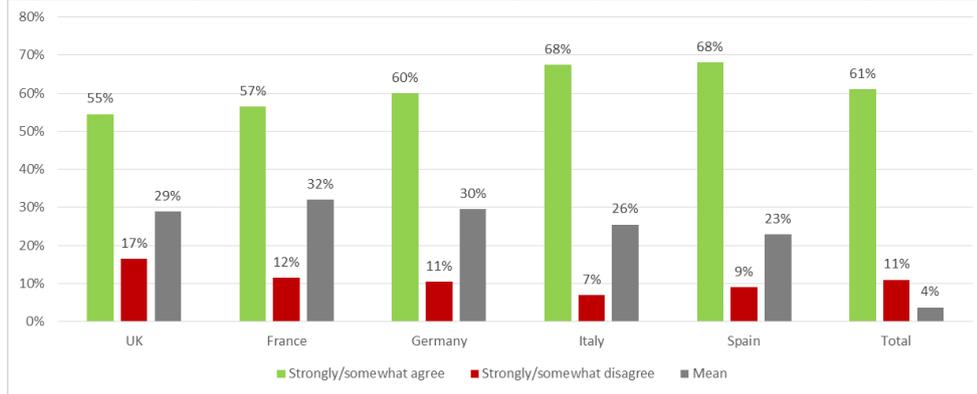
Looking at the different age groups surveyed, the share of respondents who agreed with this statement differs only slightly and indicates a marginally negative correlation with increasing age. Of the youngest age group (16 to 24) 68% agreed with this statement, while of the 35 to 54 year olds 35% disagreed or did not know. Taking a closer look at the individual countries, however, this correlation applies to Germany and UK only. In Germany the outliers are the youngest (74%), while among the three older age groups the share of those who agreed with this statement is almost the same (64% and 63%). In the UK, in contrast, the differences are most pronounced (70% of the 16 to 24 year olds and 46% of the 45 to 54 year olds agreed). In Italy, in turn, it is specifically the oldest age group among which the share of those agreeing with the statement is highest (77% vs. 69% among the youngest).

When it comes to income, the highest share of agreement is to be found among the middle-income groups, i.e. those earning € 36,001 to € 60,000 (70%), followed closely by the next lower income group (69%). Those earning equal to or more than € 60,001 least frequently agreed (64%). The latter also applies to Spain (65%), France (58%), and Germany (61%). In UK, in contrast, within each of the three highest income groups the share of those agreeing with the statement is equal (62%) and only those earning up to € 18,000 fall behind (53%). Conversely, in France the share of those agreeing with the statement is equal (65%) within each of the three lowest income groups.

### 3.4. How companies protect workers' human rights

In total, 61% of the respondents agree to being interested in learning about what food companies do to protect their workers' human rights. In Italy and Spain this share is slightly higher (68%). In France and Germany, in turn, the share of people agreeing with this statement is slightly smaller (57%, 60%). In UK, respondents least frequently agree (55%).

Figure 22: It is important to know how food companies protect workers' human rights, by country



Source: based on data collected by Ipsos MORI and Fashion Revolution (2018)

Among all respondents, women agree slightly more often than men (64% vs. 58%). This also applies to each of the countries surveyed, although to a different extent. Most pronounced are the differences in Spain, where 74% of women and 62% of men agree. France (58% vs. 55%) and Italy (69% vs. 66%) show the smallest differences.

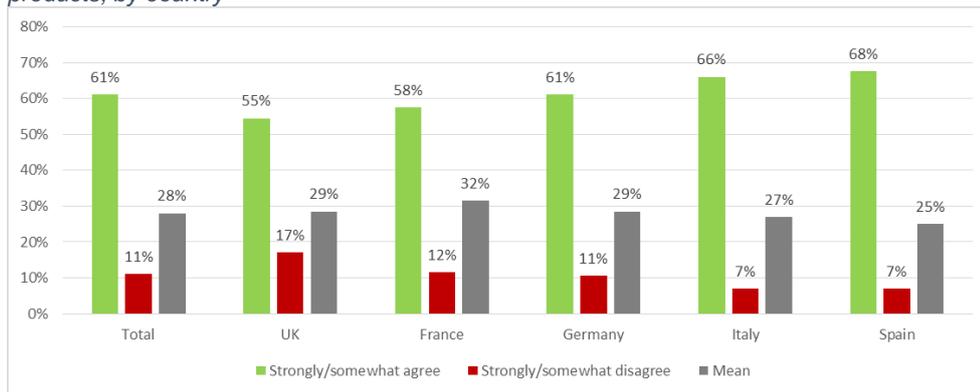
Almost no difference is to be found between the different age groups when looking at responses of all countries combined. Among the 16 to 24 year olds 60% and among all older age groups 59% agreed with this statement. Differences can be found, however, on country level: The most salient result is shown for the UK, where 61% of the 16 to 24 year olds and 62% of the 25 to 34 year olds but only 42% of the 45 to 54 year olds indicated to being interested in learning about what food companies do to protect their workers' human rights. In France, the highest share of respondents agreeing with this statement is to be found among the 45 to 54 year olds (60%), whereas in the youngest age group only 43% and of the 35 to 44 year olds 45% agreed. In Germany and Spain, the youngest age groups, in contrast, most frequently said that they agree with the statement (66% and 71%). For all other age groups in Germany, results suggest a positive correlation between the interest in learning about what food companies do to protect their workers' human rights and the age of the respondent. In Italy, in turn, the highest approval rate is among the 45 to 54 (68%) and the lowest among the 25 to 34 (56%) year olds.

With respect to income, differences are slightly more pronounced. Those earning € 36,001 to € 60,000 most frequently and those earning up to € 18,000 least frequently agreed (65% vs. 59%). In Italy, the interest in learning about what food companies do to protect their workers' human rights seems to increase with the income (from lowest to highest: 62%, 69%, 73%, 74%). This pattern is also to be found in UK (from lowest to highest: 49%, 54%, 56%, 62%). In France, it is the income group € 18,001 to € 36,000 among which the share of those agreeing with the statement is smallest (57%), whereas in Germany it is the highest income group (48%) and in Spain the two lowest income groups (69%). The highest approval rate overall is shown among respondents in Italy by those earning € 36,001 to € 60,000 (82%) and the lowest in UK among those earning up to € 18,000 (53%).

### 3.5. What food companies do to improve the lives of people in the societies where they manufacture their products

61% of respondents said that they agree with the statement that they are interested in learning about what food companies do to improve the lives of people in the societies where they manufacture their products. Again, in Italy and Spain the approval rate was highest (66% and 68%). Least frequently respondents in UK agreed with the statement (55%), followed by France (58%) and Germany (61%).

Figure 23: It is important to know how improve the lives of people in the societies where they manufacture their products, by country



Source: based on data collected by Ipsos MORI and Fashion Revolution (2018)

Overall, more women agreed with this statement than man (64% vs. 58%). Only in Spain this spread is more pronounced (73% vs. 62%). In UK, in contrast, the differences are the smallest (55% vs. 54%).

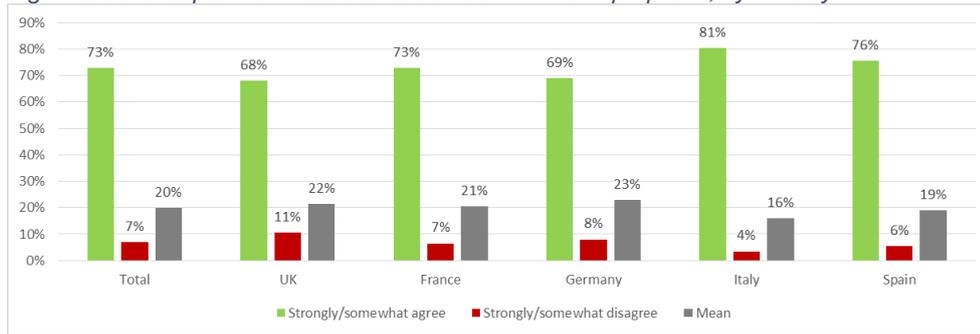
Age differences overall appear to be small, ranging from an approval rate of 58% among 45 to 54 year olds to 62% among 16 to 24 year olds and suggesting, thus, a slightly negative correlation between age and interest in learning about what food companies do to improve the lives of people in the societies where they manufacture their products. Zooming further in, this applies, however, to the UK only: 61% of the 16 to 24 year olds and 41% of the 45 to 54 year olds agreed with the prompted statement. In Germany, the pattern is similar, with 63% approval rate among the 16 to 24 year olds, 59% among the 25 to 34 year olds and 53% among the 35 to 44 year olds. However, the 45 to 54 year olds more frequently agreed with the statement (59%). Among the youngest respondents, the highest share of people agreeing with the statement is in Spain (71%) and the lowest in France (54%). Among the oldest respondents, in turn, the highest share can be found in Italy (66%) and the lowest in UK (41%).

With respect to income levels, the highest approval rate is to be found among those respondents earning € 36,001 to € 60,000 (64%), the lowest among those earning up to € 18,000 (59%). On country level, a slightly different picture becomes apparent. In Spain, for instance, the highest share of respondents agreeing with the statement is to be found within the lowest income group (70%), in France among those earning equal to or more than € 60,001, and in UK among those earning € 36,001 to € 60,000 (62%). In turn, the smallest approval rate in France is shown among those earning € 36,001 to € 60,000 (55%). In this income group in Italy, at the same time, also the overall highest share of respondents agreeing with the statement is to be found (73%). The overall lowest approval rate in contrast is to be found within the lowest income group in the UK (49%).

### 3.6. How the food I eat was produced

73% of all respondents agreed that they would like to know how the food they eat was produced. Whereas this applies to only 68% of the respondents in UK, in Italy 81% agreed with this statement, followed by Spain (76%), France (73%), and Germany (69%).

Figure 24: It is important to know how the food I eat was prepared, by country



Source: based on data collected by Ipsos MORI and Fashion Revolution (2018)

Also with this question the approval rate is higher among women (76% vs. 70%). A particularly strong gender spread is to be found in Spain, where 81% of women and 70% of men agreed with the prompted statement. The smallest gender spread, in contrast, is shown by the responses in Italy (82% vs. 79%). Overall, the women in Italy most frequently and the men in UK least frequently agreed (66%) with the statement.

Differentiation into age groups overall shows that the 45 to 54 year olds showed the highest approval rate (72%), followed by those aged 16 to 24 and 35 to 44 (70%). In the UK, the results suggest a negative correlation between age and the approval rate (from 61% among the 45 to 54 year olds to 70% among the 16 to 24 year olds). In France and Italy, conversely, the results suggest a positive correlation between age and the approval rate (67% to 77% and 71% to 82%). In Germany, no age group agreed more often with the statement than the 16 to 24 year olds (72%) and no age group agreed less often (also overall) than the 35 to 44 year olds (61%). In Spain, the highest approval rate is to be found among the 35 to 54 year olds (76%), whereas the lowest approval rate is shown by the 25 to 34 year olds (71%).

Comparing income groups, most frequent agreement with this statement is shown among respondents earning € 36,001 to € 60,000 (77%) and least frequent agreement with this statement (70%) is to be found in the lowest income group. Also on country level, the highest approval rate is to be found among those earning € 36,001 to € 60,000 for all countries except Italy. Yet, the highest share of respondents in this income group agreeing with the statement is shown by Italy (86%). Furthermore, the results for Italy suggest a strong relation between income and approval rate – the higher the income of the respondents, the higher the share of respondents agreeing with the statement (from 76% among the lowest to 88% among the highest income group). France and Spain both show the lowest approval rate among those earning equal to or more than € 60,001 (70% and 74%). No country nor income group indicated less often agreement with the statement than those respondents in Germany that earn up to € 18,000 (62%). At the same time, no country shows a stronger spread between the age groups' approval rates than Germany (13pp).

## 4. Brands' sustainability action

Consumers were asked for their perceived relevance of brands helping tackling selected global challenges.

Question 3: *Some brands try to be socially or environmentally sustainable. This means that they try to reduce their long-term impact on the world in a number of ways. How important to you, if at all, is it for brands to do this to help tackle the following issues?*<sup>90</sup>

- Global poverty

<sup>90</sup> The survey participants were asked to indicate whether they “strongly agree”, “somewhat agree”, “neither agree nor disagree”, “somewhat disagree”, “strongly disagree”, or “don’t know”. In the following, agreement refers to the combined results of “strongly agree” and “somewhat agree”.

- Climate change
- Protecting the environment
- Gender inequality

## 4.1. Summary

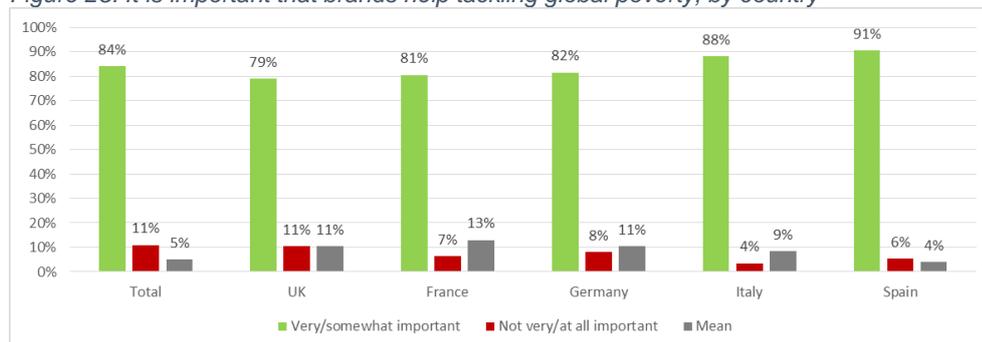
### Key findings

- For each of the issues prompted, a clear majority considered it important that brands help tackling it. Socio-economic analysis largely shows only small differences within and between countries.
- The share of people who said that it is important for them that brands help protecting the environment (88%) is higher than the share of people who said so for any other issue prompted. Respondents least frequently said that it is important for them that brands help tackling gender inequalities (77%).
- UK often stands out with trends in socio demographic criteria being inverse to respective results shown by other countries, especially with respect to global poverty, environmental protection and gender inequalities. Moreover, for each issue prompted, in the UK the smallest share of people considered it important that brands play a role in tackling it.
- Italy and Spain clearly stand out in that they are showing the highest shares of respondents saying that it is important to them that brands help tackling each of the challenges prompted.
- For all countries and items prompted, women are more often interested. Gender inequalities is the challenge that shows the strongest difference between the share of women and the share of men saying it is important to them that brands help tackling it.

## 4.2. Global poverty

In total, 84% of respondents said that it is important that brands try to reduce their long-term impact to help tackling global poverty. More respondents in Spain said this (91%) than respondents in any other country, followed closely by Italy (88%). In UK, France and Germany, the share of people saying that it is important that brands help tackling global poverty is considerably smaller (79%, 81%, 82%).

Figure 25: It is important that brands help tackling global poverty, by country



Source: based on data collected by Ipsos MORI and Fashion Revolution (2018)

The share of women saying that it is important that brands help tackling global poverty is 87%. Men said this slightly less frequently (81%). The gender spread is similarly large in all the countries surveyed.

With 86%, 45 to 54 year olds most frequently said to consider it important that brands help tackling global poverty. Among all younger respondents it was said so slightly less frequently (82% and 83%). In UK, conversely, it was the respondents of the youngest age group who said most frequently that it is important that companies help tackling global poverty (86%). In France, results suggest a positive correlation between age and importance of the brands' respective engagement: the older the respondents were the

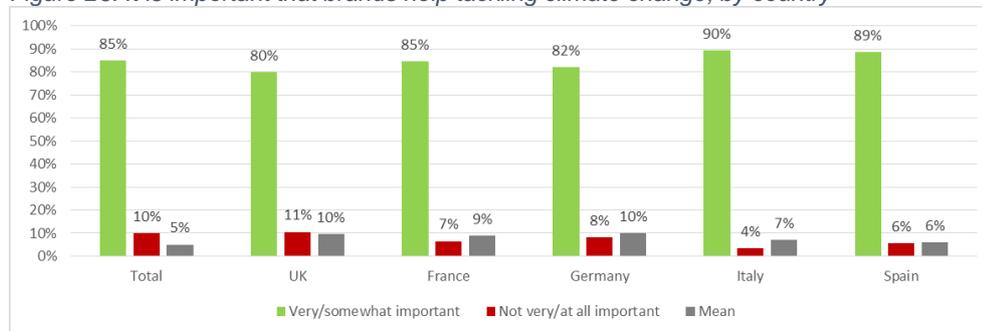
higher was the share of people saying that this is important (from 75% of the 16 to 24 year olds to 83% of the 45 to 45 year olds).

Differences between the responses within each of the four income groups overall are small: Those earning € 18,001 to € 36,000 most frequently said that it is important that brands help tackling global poverty (86%). Least frequently this was said by those earning equal to or more than € 60,001 (82%). Results on country level follow a similar pattern and are similarly pronounced, only with respondents in Spain showing a marginal spread between all age groups of 1pp.

### 4.3. Climate Change

In total, 85% of respondents said that it is important that brands try to reduce their long-term impact to help tackling climate change. Respondents in Italy and Spain said this most frequently (90% and 89%) while respondents in UK were least inclined to say so (80%).

Figure 26: It is important that brands help tackling climate change, by country



Source: based on data collected by Ipsos MORI and Fashion Revolution (2018)

With 86%, women slightly more often said that it is important that brands try to reduce their long-term impact to help tackling climate change. 83% of male respondents said this. The gender spread is similarly pronounced in each of the countries surveyed. Only in France the difference is slightly bigger (82% vs. 87%).

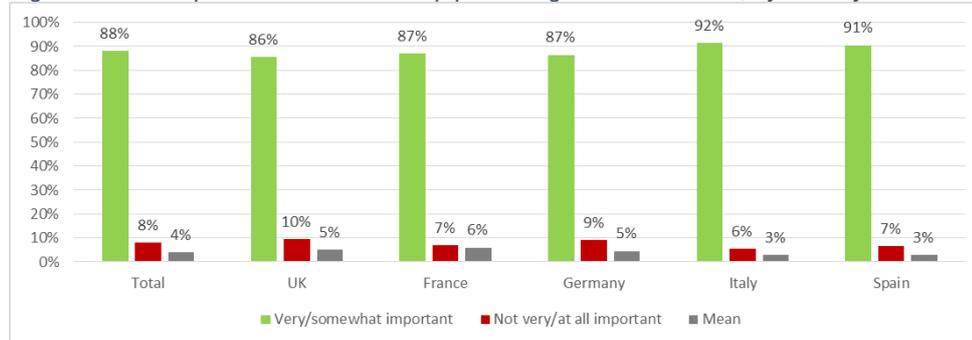
Also, age groups show a small difference only: Of the 45 to 54 year olds 86% said that it is important that brands try to reduce their long-term impact to help tackling climate change. Among the 16 to 24 and 25 to 34 year olds this was said by 84%, and among the 35 to 44 year olds by 83%. On country level the differences are slightly more pronounced. The strongest spread is shown by respondents in Italy between the 16 to 24 year olds (81%) and the 45 to 54 year olds (93%). With 84% of the respondents, only in UK and Germany the youngest more frequently said that brands' efforts to help tackling climate change is important than any other age group.

In total, differences between income groups are similarly pronounced as between age groups: Those earning € 36,001 to € 60,000 most frequently said that it is important that brands try to reduce their long-term impact to help tackling climate change. This was said least frequently by respondents equal to or more than € 60,000 (83%). For Italy and UK, results suggest a slightly positive correlation between income and the tendency to say that brands' efforts to help tackling climate change is important. In UK, the spread between those with the lowest and those with the highest income, however, is minor only (3pp). In Italy, the difference is more pronounced: 85% of those earning up to € 18,000 said that it is important that brands try to reduce their long-term impact to help tackling climate change, while of each of the two highest income groups 93% said this.

## 4.4. Protecting the environment

It is important that brands help protecting the environment was said by 88% of the respondents. In Italy, this was said most frequently (92%). In UK, the share of respondents saying this was the smallest (86%), followed by France and Germany (87%).

Figure 27: It is important that brands help protecting the environment, by country



Source: based on data collected by Ipsos MORI and Fashion Revolution (2018)

Women and men almost equally frequently said that it is important that brands help protecting the environment (89% of women and 87% of men). The gender spread is similarly pronounced in each of the countries surveyed, with France showing the largest difference (89% vs. 85%).

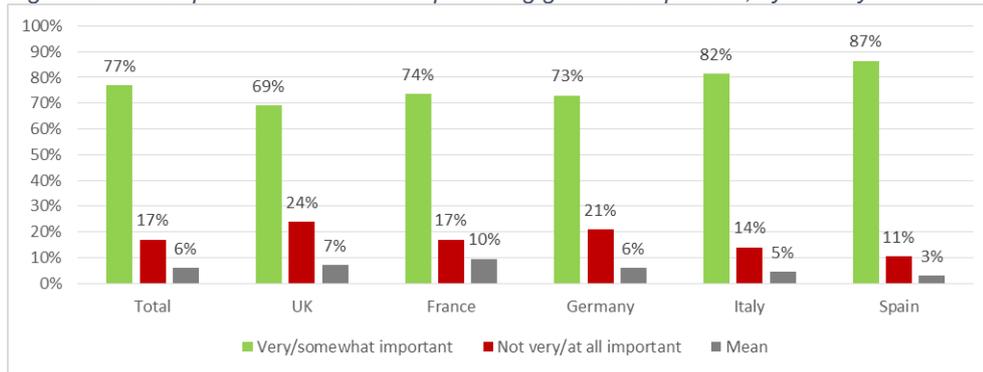
The respondents aged 45 to 54 were most inclined to say that it is important that brands help protecting the environment (90%). Least frequently the 16 to 24 year olds said that brands helping to protect the environment is important (85%). The respective share among the 25 to 34 year olds and among the 35 to 44 year olds was only marginally higher (87% and 86%). In France, Germany and Spain, results suggest a positive correlation between age and share of people saying that it is important that brands help protecting the environment: Each age group – from young to old – shows a slightly higher (up to 4pp) portion of respondents who said this than the next younger age group. In the UK, the 16 to 24 year olds and the 25 to 36 year olds most frequently said that brands’ engagement in protecting the environment is important (89%), whereas this was said least frequently by the 35 to 44 year olds (79%).

Respondents with a middle to upper range income (€ 36,001 to € 60,000) most frequently said that it is important that brands help protecting the environment (91%). Among the other income groups, the share of respondents saying this was only slightly smaller, with the highest and the lowest income groups showing the smallest share (87%). Zooming onto country level, all countries surveyed show a similar pattern, except Italy and Spain. In the latter, results are most balanced, with 90% of each of the two smallest income groups and 91% of each of the two highest income groups saying that brands’ engagement in protecting the environment is important. In Italy, those earning up to € 18,000 clearly said this least frequently (87%).

## 4.5. Gender inequality

Of all respondents, 77% said that it is important that brands help tackling gender inequalities. Respondents in Italy and Spain said this most frequently (87% and 82%) while respondents in UK were least inclined to say so (69%). The shares of respondents in France and Germany saying this was slightly higher (74% and 73%) than in UK.

Figure 28: It is important that brands help tackling gender inequalities, by country



Source: based on data collected by Ipsos MORI and Fashion Revolution (2018)

Gender differences are most pronounced when it comes to brands’ role in tackling gender inequalities compared to global poverty, climate change and environmental protection. Of the female respondents, 81% said that it is important that brands help tackling gender inequality. Among the male respondents, this was said by 72%. On country level, the highest spread can be found in France (68% vs. 79%) and Germany (68% vs. 78%), the smallest spread in Italy (78% vs. 85%) and Spain (83% vs. 90%).

When looking at all responses combined, the results on age differences suggest a slightly positive correlation between age and the share of people who said that it is important that brands help tackling gender inequality. While among the 45 to 54 year olds 80% said so, this applies to only 73% of the 16 to 24 year olds. On country level this correlation is less pronounced. Nevertheless, in each country except for the UK the 45 to 54 year olds most frequently said that brands’ engagement in tackling gender inequalities is important. In the UK, in contrast, this was said most frequently by the 16 to 24 year olds (76%) and least frequently by the 35 to 44 year olds (67%).

Looking at the income level, results show that those earning € 18,001 to € 36,000 most frequently said that it is important that brands help tackling gender inequalities (80%). Least frequently this was said by those earning equal to or more than € 60,001 (73%). In UK, in contrast, the latter said this as often as those earning € 18,001 to € 36,000 (72%). In Spain, in turn, this was most frequently said by those earning € 36,001 to € 60,000 (88%), closely followed by respondents earning up to € 18,000 and € 18,001 to € 36,000 (87%).

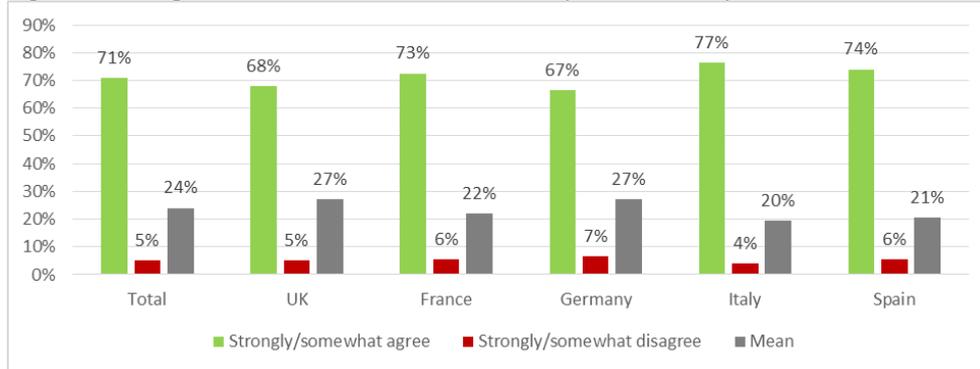
## 5. Government role in ethical consumption

Question 4: *To what extent do you agree or disagree with the following statements?<sup>91</sup> The government should make it easier to purchase food produced in a sustainable way.*

In total, 71% of the respondents agreed that the government should make it easier to purchase food produced in a sustainable way. Most frequently this was said in Italy (77%) and Spain (74%), while Germany (67%) and the UK (68%) make up the rear.

<sup>91</sup> The survey participants were asked to indicate whether they “very important”, “somewhat important”, “not very unimportant”, “not at all important”, or “don’t know”. In the following, agreement refers to the combined results of “very important” and “somewhat important”.

Figure 29: The government should make it easier to purchase food produced in a sustainable way, by country



Source: based on data collected by Ipsos MORI and Fashion Revolution (2018)

With 75%, the approval rate is slightly higher among women than among men (68%). Women in Spain agreed with the statement (80%) most frequently, followed closely by Italy (79%). With 68% of men agreeing with the statement, the respondents in Spain also show the strongest gender spread. In contrast, the approval rates among men and the approval rates among women are closest in Germany (64% vs. 68%).

Taking into account all responses, the results suggest that the older the respondent is the higher is the chance that they agree that the government should make it easier to purchase food produced in a sustainable way: Of those survey participants aged 45 to 54, 80% agreed, while of the 16 to 24 olds 73% agreed and of the age groups in-between 76% agreed. On country level, this pattern is only reflected in Spain and France, with respondents in Spain aged 45 to 54 showing the highest approval rate of all respondents (78%). In Germany and in the UK, in contrast, the 16 to 24 year olds show the highest share of respondents agreeing with the statement.

Of all demographic variables, income seems to have the lowest impact on the share of respondents saying that the government should make it easier to purchase food produced in a sustainable way. In all income groups 73% agreed with the statement, except for those respondents that earn up to € 18,000, of which 72% agreed. The picture changes completely, however, when zooming into country level. In UK, Germany and Italy, the share of respondents that agree with the statement is to be found among those earning equal to or more than € 60,001 (72%, 75%, 80%). In Spain and France, no other income group agreed more often agreed with the statement than the one covering respondents that earn € 36,001 to € 60,000 (75%, 79%). The strongest spread between income groups is to be found in Spain (14pp between those earning € 60,001 or more and those earning € 36,001 to € 60,000).

## 6. Discussion and conclusions

The survey results presented above reveal some interesting additional insights into consumer attitudes and behaviour toward ethical consumption in the UK, Spain, Italy, Germany and France. Both the literature review and the survey were designed in a complementary manner at the outset of and serving as baseline for the Trade Fair Live Fair project. The survey results presented in here, thus, are less suitable as means to triangulate the literature review results but much more as means to enrich them and provide additional insights into consumer attitude and behaviours.

This applies, for instance, to the current knowledge and awareness of the conditions under which consumer goods are produced and about how a consumer can influence production conditions and related environmental and social impacts through purchasing decisions. Interesting results in this context are provided, for example, by the survey question asking for the importance of brands' sustainability actions. A clear majority of mostly more than 80% considers global poverty, climate change and environmental protection as challenges that should be addressed by brands of consumer goods. As a rough proxy, this result may suggest that awareness for these challenges exists among the largest part of the consumers in the countries surveyed. The results further may suggest that with respect to gender inequalities – despite being mentioned by a majority too – respective awareness is less developed, given

the comparatively smaller share of people that considers this challenge as important. Yet, it is important to highlight that this is just one possible interpretation of the results. The survey question asked may also, for instance, simply point to different perceptions of whose responsibility it is to tackle these challenges. In a similar vein, question 2 of this survey, addressing the importance of product and producer transparency, may somehow indicate the awareness of social and environmental challenges related to consumer goods. This interpretation would go in line with the high awareness levels that are found by the studies quoted in the literature review. Yet again, consumers' preferences not necessarily need to be rooted in respective awareness levels but, for instance, be a question of their attitude. Drawing meaningful conclusions here would be skating on thin ice.

In the literature review, studies on priorities consumers set when choosing ethically produced consumer goods was particularly scarce. Here, the survey responses help to enlarge the picture a bit: Looking at the combined responses of the five countries surveyed, the results reveal that priorities with respect to sustainable product attributes differ dependent on the product category. When it comes to food and drink or cosmetics and toiletries, consumers more frequently are concerned about environmental issues than when it comes to buying clothing (Fashion Revolution, 2018). The results for food products generally are in line with the results found for Denmark and Sweden as quoted in the literature review. With respect to clothing, in contrast, more consumers pay attention to fair payment of the workers who made the respective products than to any other aspect. Local production, in turn, receives considerably more often the consumers' attention with food and drink than with cosmetics and toiletries or clothing. The use of recycling materials being important is also mentioned by a small share of consumers only when it comes to clothing.

The survey does not provide any reasons for these differences between product groups. Yet, one explanation may suggest itself: The high number of mentions with respect to animal welfare in connection to cosmetics and toiletries may be linked to a higher level of awareness as a result of the widespread and recurring public and political discourse on animal testing in the cosmetics industry.

However, one of the key findings of the survey is that the results combining all responses in all countries have limited explanatory power: When zooming further in, on country level and on the level of selected socio-economic criteria, a much more diverse picture evolves. It goes to an extent that patterns appearing from the responses in one country, age group or income group may be the contrary to the patterns that appear from the responses in another country, age group or income group. The most generalizable finding is merely that across all countries for most questions and items prompted women more frequently express concern than men.

The results of the survey therefore go in line with the results of those value and attitudes related studies quoted in the literature review which showed that socio-economic and cultural context may play an important role. For initiatives or organisations aiming to advocate ethical consumption, this finding may be particularly relevant for future communication and awareness raising campaigns and related strategies, which should be tailored to the specific country, and the socio-economic and cultural context the consumers to be addressed are moving in.

For producers and distributors of consumer goods, the survey reveals that sustainable product attributes are of relevance to many consumers in the five countries surveyed. Although priorities are - dependent on the product group, the country and the background of the individual consumer - set differently for the information desired and for the sustainable product attributes prioritised, there is a strong demand for ethically produced consumer goods as well as for more transparency on the side of the producer companies and brands.

Likewise evident became the responsibility a clear majority of the surveyed consumers attribute to the government when it comes to facilitating ethical consumption, with slight differences between the countries surveyed.

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## Appendix: Country fact sheets

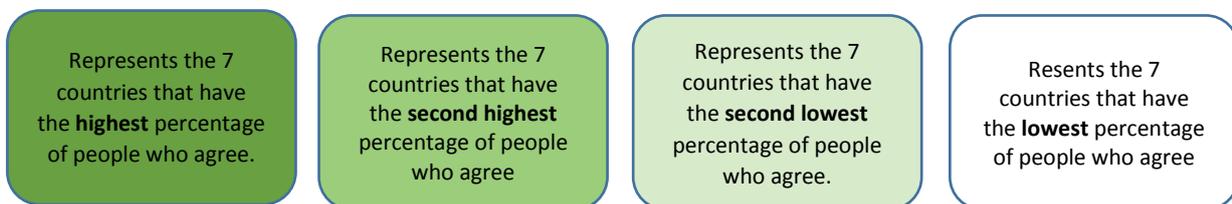
This appendix contains factsheets for the countries Belgium, Denmark, France, Germany, Italy, Netherlands, Portugal, Spain, Sweden, and United Kingdom.

The purpose of the fact sheets is to get a snapshot view of relevant indicators per country. The source of the information is the Eurobarometer which means that the trend for the majority of the indicators will be possible to follow-up through future surveys.

Indicators and sources:

1. Helping people in developing countries (Special Eurobarometer 476, EC 2018b)
2. Tackling poverty in developing countries (Special Eurobarometer 476, EC 2018b)
3. Consumption choices as a way to support people in developing countries (Special Eurobarometer 476, EC 2018b)
4. Higher price for products to support people in developing countries (Special Eurobarometer 441, EC 2016)
5. Role of private companies in the sustainable development of developing countries (Special Eurobarometer 476, EC 2018b)
6. Awareness Fairtrade (Special Eurobarometer 473, EC 2017a)
7. Awareness Organic Farming label (Special Eurobarometer 473, EC 2017b)
8. Awareness EU Ecolabel (Special Eurobarometer 468, EC 2017a)
9. EU Ecolabel /local environmental label not familiar (Special Eurobarometer 468, EC 2017a)
10. Ecolabels important for purchasing decisions (Special Eurobarometer 468, EC 2017a)
11. Ecolabels not important for purchasing decisions (Special Eurobarometer 468, EC 2017a)
12. Never take notice of labels in general (Special Eurobarometer 468, EC 2017a)
13. Importance label ensuring food quality (Special Eurobarometer 473, EC 2018a)
14. Importance food products that respect local tradition and knowhow (Special Eurobarometer 473, EC 2018a)
15. Importance origin of the product from known geographical area (Special Eurobarometer 473, EC 2018a)
16. Purchase of products with environmental label in the last 6 months (Special Eurobarometer 468, EC 2017a)
17. Purchase of local product in the last 6 months (Special Eurobarometer 468, EC 2017a)

The boxes with indicators are colour coded in the following way:

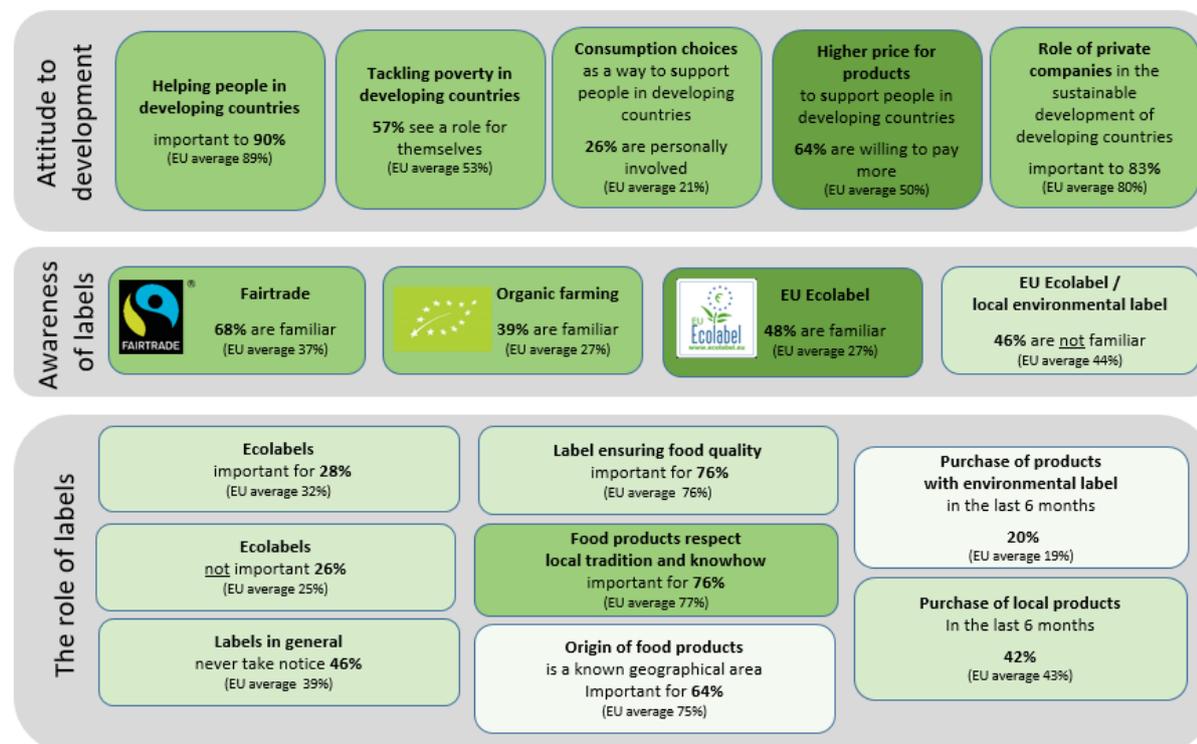


Exemption for this rule is made in the three occasions where a high percentage refers to a high number of people who say that they *don't* or *never* act in favour of a sustainability label. For these, the order for colour coding is reverse (colour 1 = low percentage = low number of people that agree that they don't or never act in favour of sustainability labels).

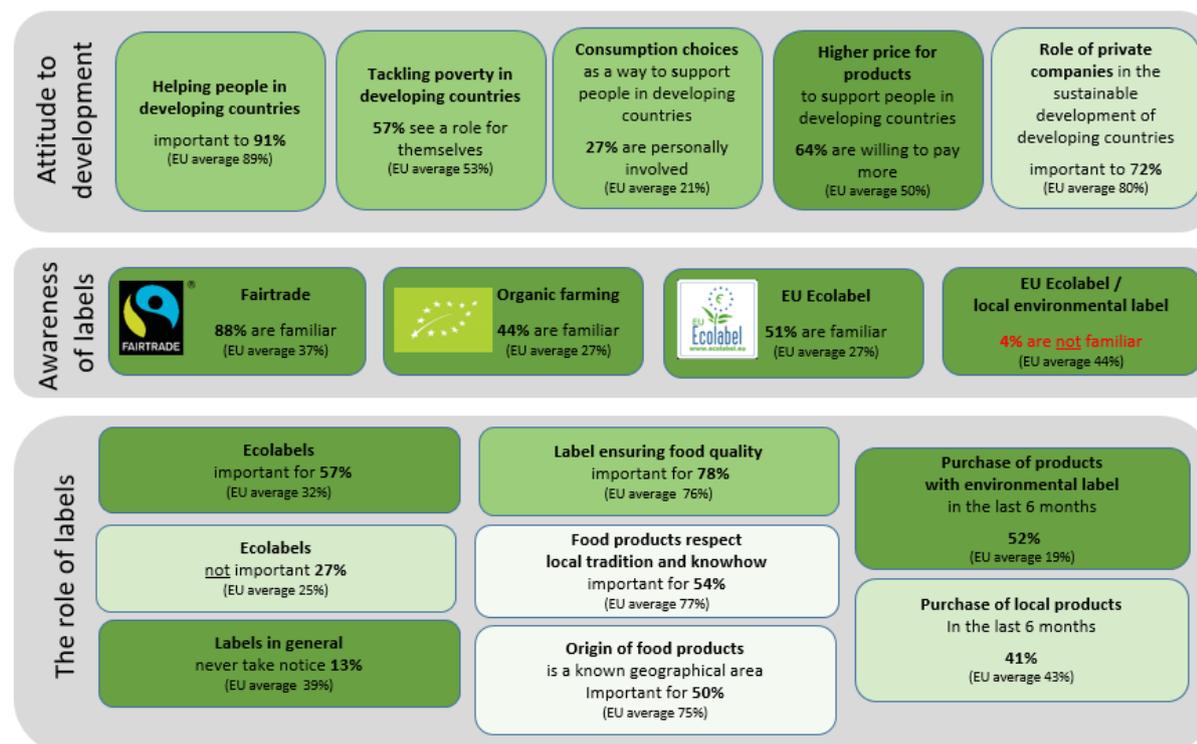
This is true for the following indicators:

- people are **not** familiar with EU Ecolabel nor local environmental label
- eco labels **don't** play an important part in purchasing decisions
- people **never** take notice of labels

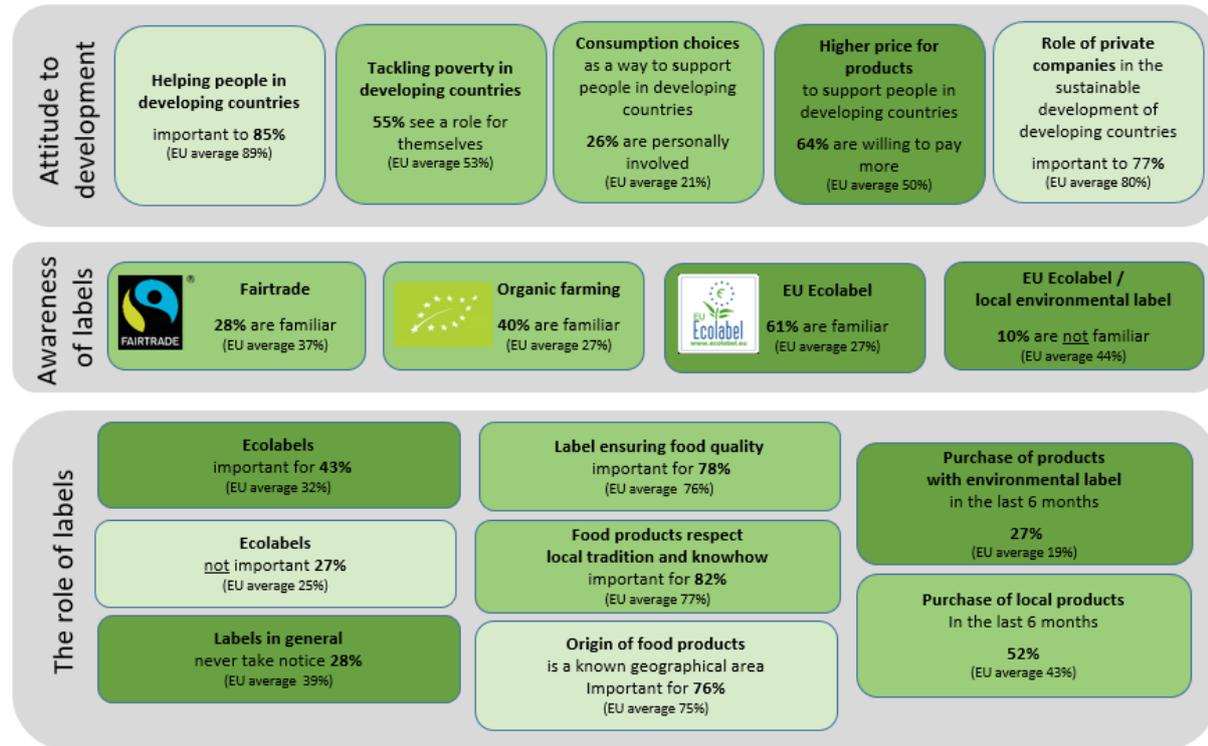
## BELGIUM



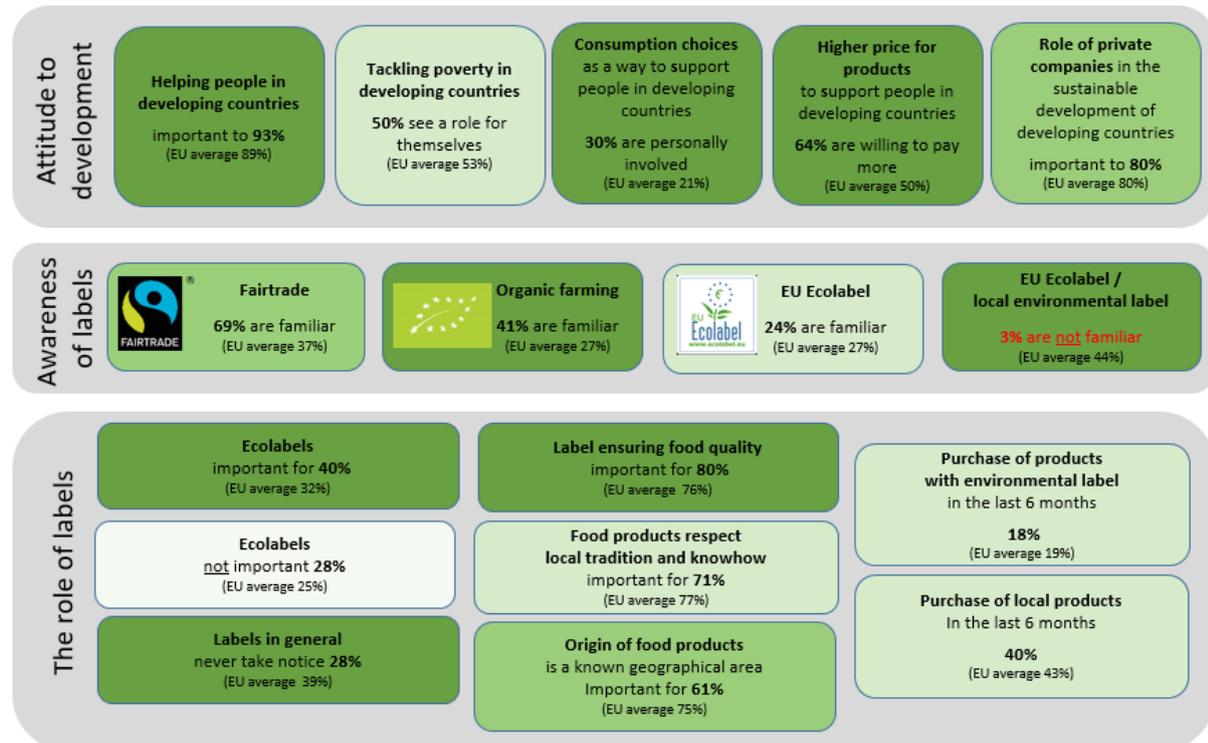
## DENMARK



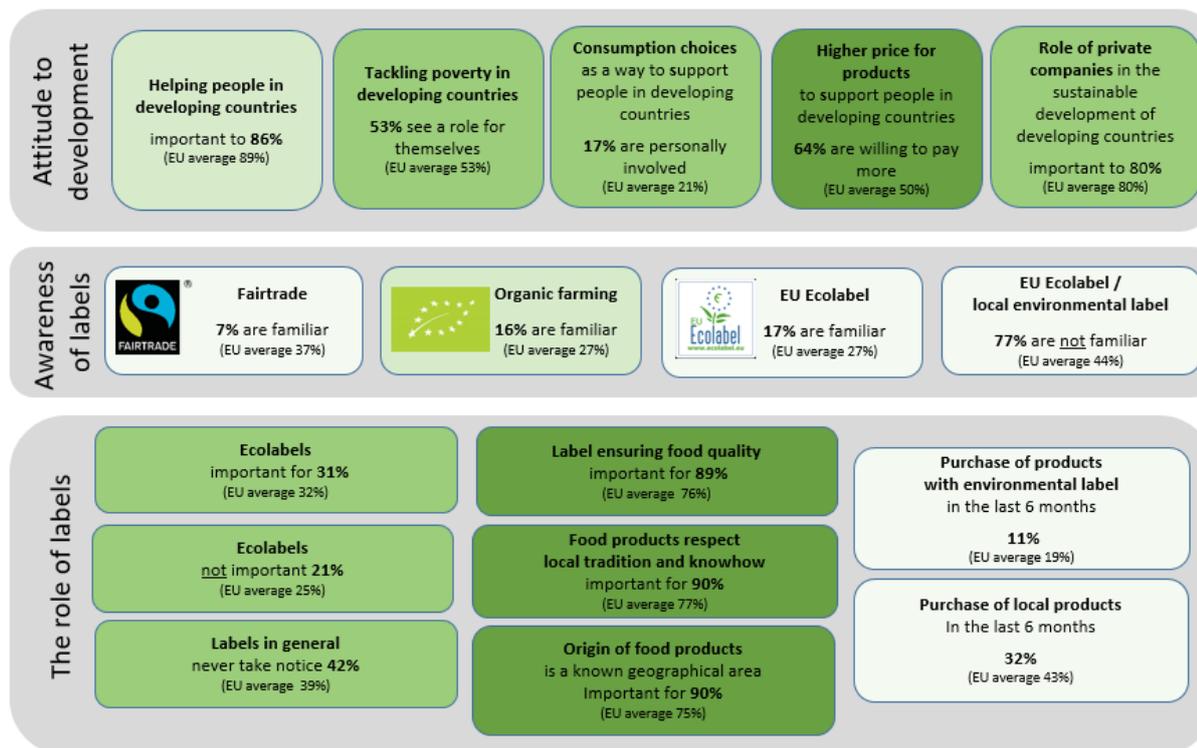
## FRANCE



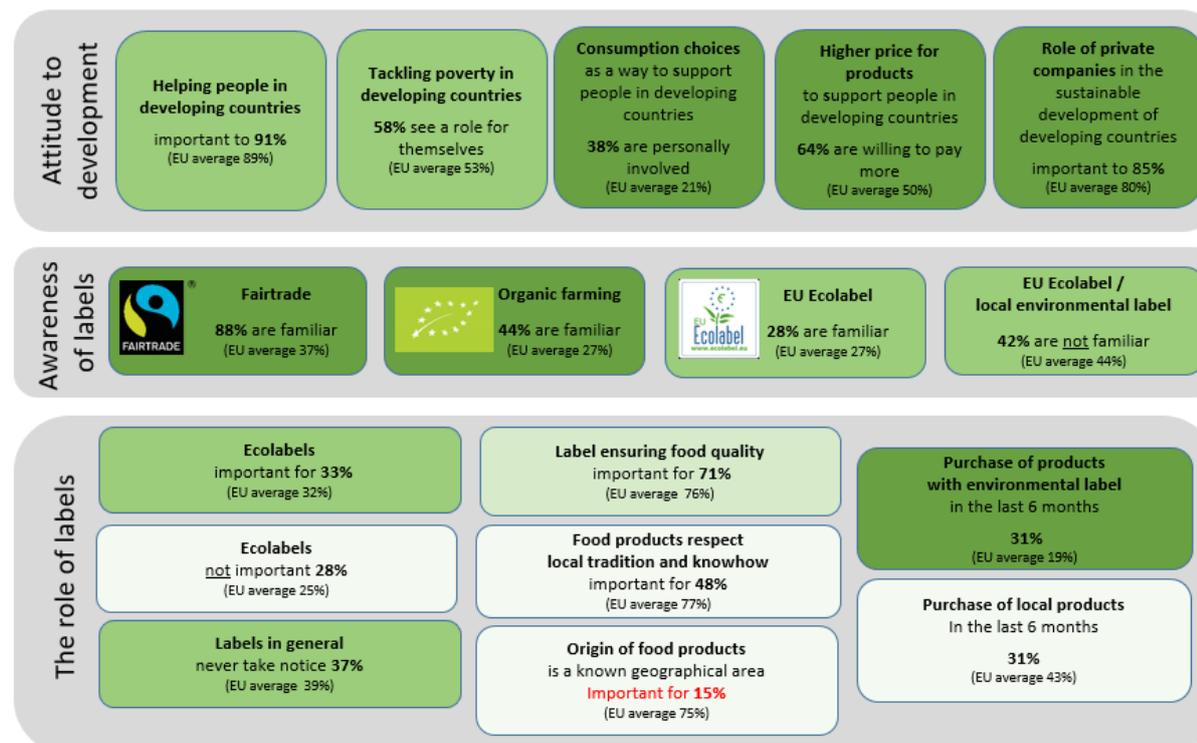
## GERMANY



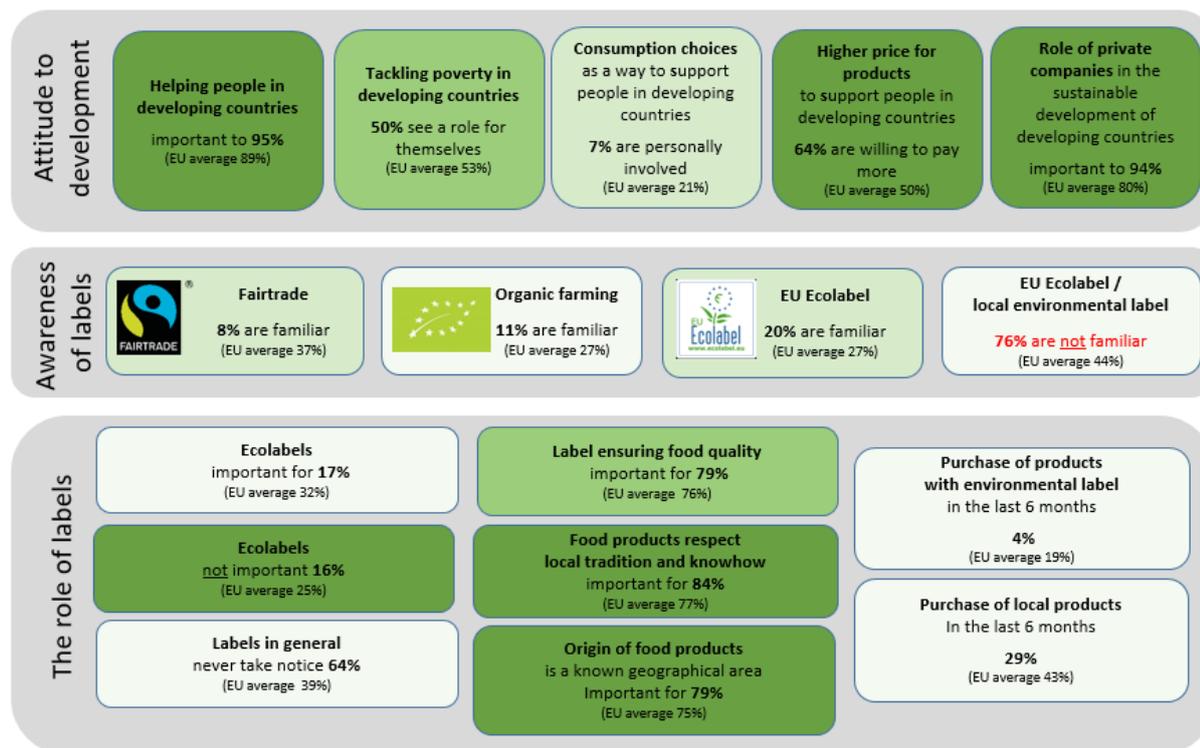
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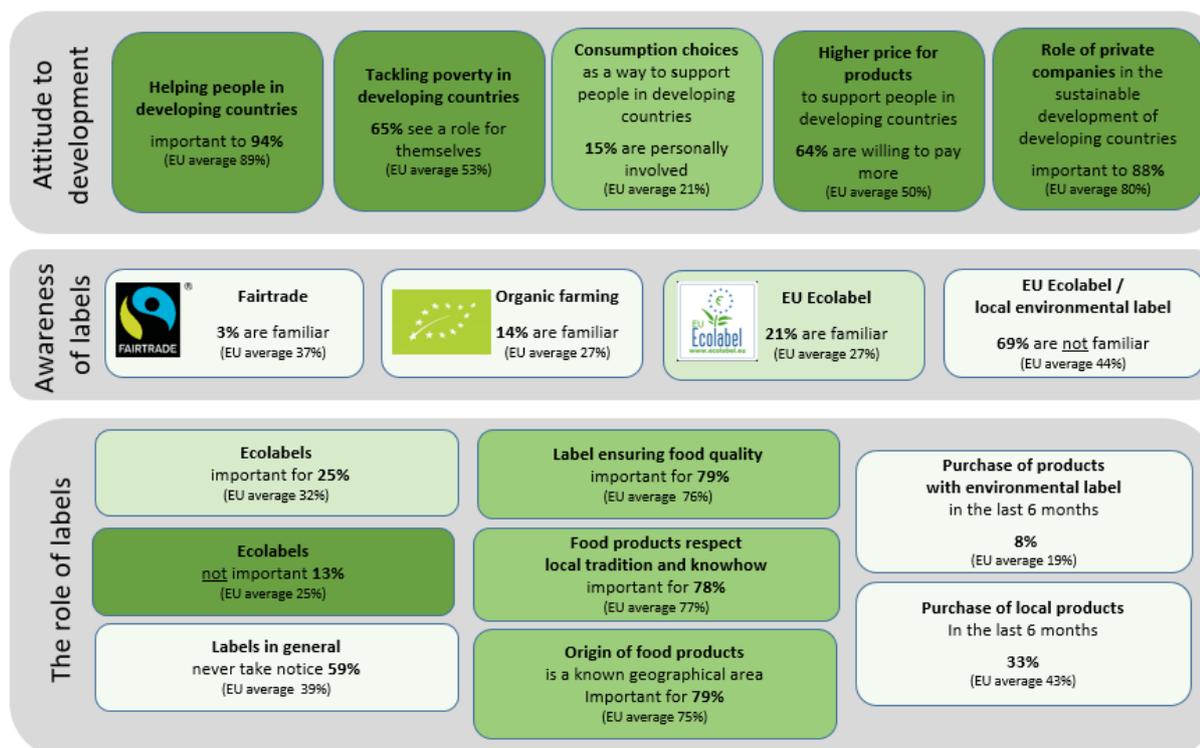
## NETHERLANDS



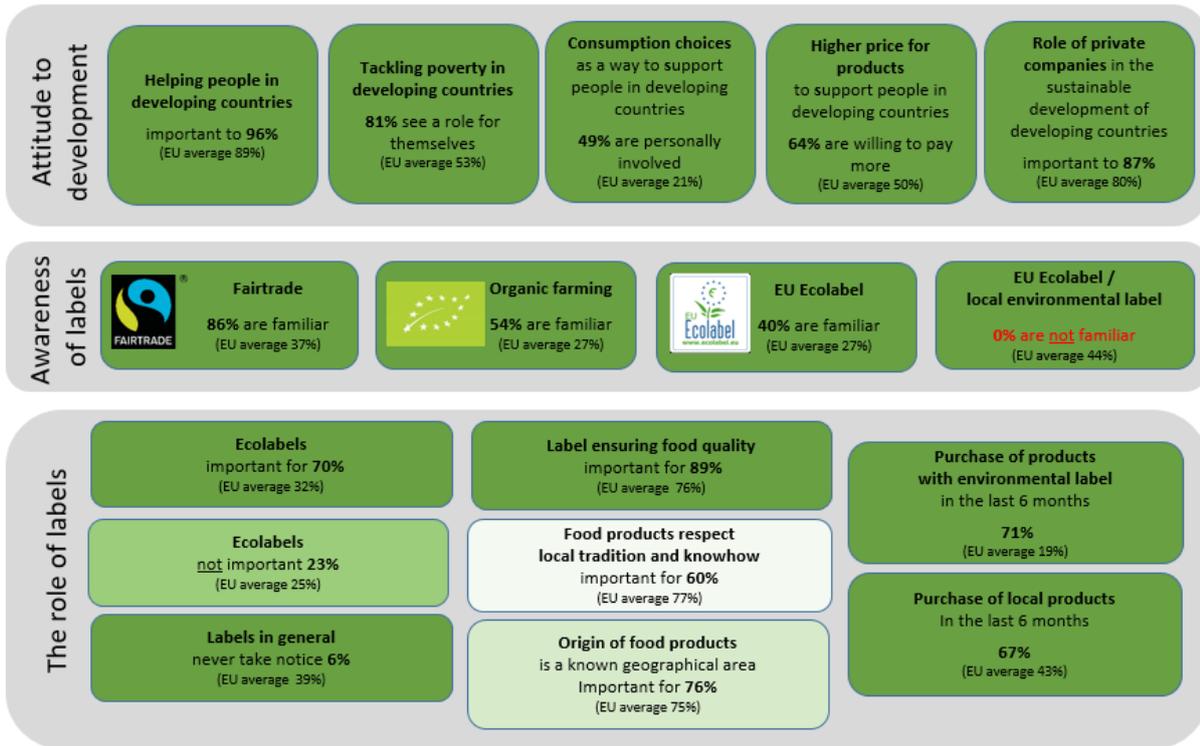
## PORTUGAL



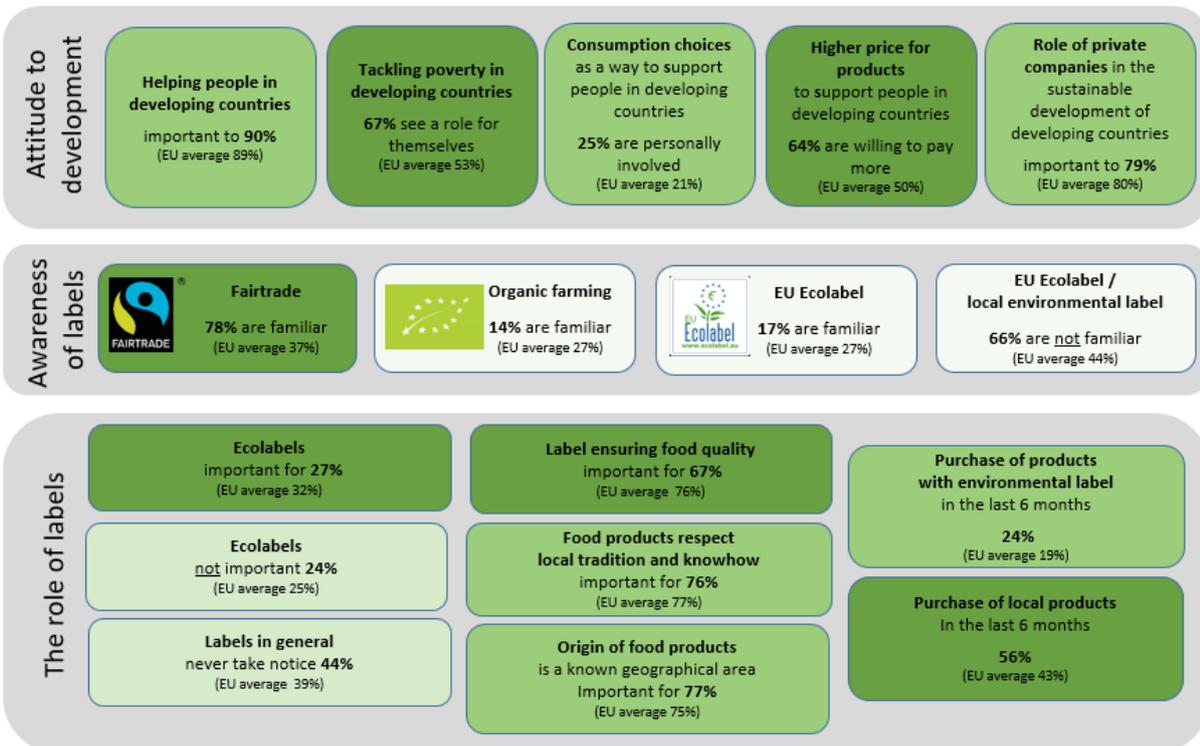
## SPAIN



## SWEDEN



## UK





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