FFIND
BEYOND DATA

Sustainability Study 2026

ITALY • GERMANY • UK • FRANCE • SPAIN

DATA PULSE POWERED BY FFIND

Who We Are

FFIND is an independent data collection agency with roots dating back to the 1990s. With offices in Palermo (Italy), Frankfurt (Germany), and London (UK), we operate in over 75 countries, supporting leading international market research companies—including Kantar, Ipsos, and NIQ—in the delivery of high-quality quantitative and qualitative data.

We believe in a world where everyone has the opportunity to be heard. This belief sits at the core of everything we do, from how we design our fieldwork to how we engage respondents across different cultures, languages, and geographies.

What we do

FFIND specializes in large-scale data collection through a comprehensive ecosystem of methodologies:

- **CATI (Computer-Assisted Telephone Interviewing):** our global network of over 750 native-speaking interviewers conducts more than one million telephone interviews each year in over 35 languages, powered by our proprietary CATI@home system. This is the ideal solution for complex international studies, B2B research, and public opinion surveys.

- **CAWI (Computer-Assisted Web Interviewing)**: online surveys designed for fast, flexible data collection at scale, with Phone-to-Web integration.

- **Social Media Recruitment:** developed by FFIND in 2016, this approach leverages social platforms (Facebook, LinkedIn, TikTok, Instagram) to reach highly specific target audiences with precision—even at very low incidence rates. It is now widely recognized as a benchmark methodology in the industry.

- **Voice Assisted Interviews (VAI):** interviews conducted via smart speakers (Alexa, Google Home), enabling a natural, screen-free data collection experience.

- **Rexee (VR/XR Research):** our proprietary platform integrates Extended Reality technologies into survey design, creating immersive environments for both quantitative and qualitative research, including shelf tests, product testing, retail simulations, and concept exploration.

Why Data Pulse?

People don't act based only on what they do, but on what they believe, interpret, and internally negotiate. Opinions, ambivalence, contradictions, and cognitive biases all shape how phenomena are understood and experienced. And this dimension, while less stable and harder to capture, is often what ultimately drives real choices.

Data Pulse emerges within this space.

Not as a single study, but as an ongoing format through which FFIND develops proprietary, independent, and pro bono research on socially, economically, and culturally relevant topics. The project is grounded in the idea that data collection can serve not only specific business needs, but also contribute to a broader and more nuanced understanding of contemporary reality.

In this sense, Data Pulse represents a natural evolution of FFIND's role, moving from a data collection company toward a more explicit interpretative function. This is not about abandoning methodological rigor, but about complementing it with an additional responsibility: giving shape and context to the data collected.

Each edition of Data Pulse focuses on a specific topic, selected for both its relevance and its level of perceptual complexity. The goal is not to produce a static snapshot, but to explore the internal tensions within the phenomenon being analyzed. In this approach, inconsistencies are not treated as anomalies, but as key elements of interpretation. The contradictions between what people say, think, and do are not errors to be corrected, but signals to be understood.

The first edition of the project focuses on sustainability.
This choice is no coincidence. Sustainability is one of the most prominent topics in public discourse today, but also one of the most difficult to define in a consistent way. It is a concept that spans multiple domains—from the environment to the economy, from politics to individual behavior—and is often used with widely differing meanings.

Methodological notes

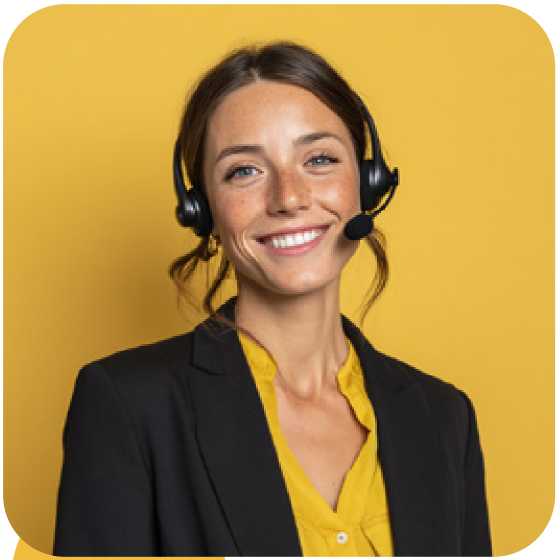
The research uses a mixed methodology: 80% CATI (Computer-Assisted Telephone Interviews) and 20% CAWI (Computer-Assisted Web Interviews) across each of the five countries, for a total of 5,000 interviews (1,000 per country). Fieldwork ran from 9 to 29 March 2026. The CATI sample was drawn via Random Digit Dialing; the CAWI sample via third-party access panels.

Data are weighted by gender, age and geographic area to reflect the adult population (18+) of each country. Native-speaking interviewers trained to ISO 20252 standards; real-time monitoring of 15% of CATI interviews; straight-lining and speeder checks for CAWI.

This document is a multi-country comparative analysis with a demographic deep-dive for each market. The report aims to provide insights into the awareness and sustainable behaviours of consumers in the 5 countries covered by the study.

Sample	5,000 respondents, 1,000 per country, representative by gender, age and geographic area
Countries	United Kingdom · France · Germany · Italy · Spain
Field period	9 – 29 March 2026
Method	CATI 80% + CAWI 20%
Universe	Adult population aged 18+
Weighting	ptot_norm weight (SPSS dataset provided by FFIND srl)
Significance threshold	±6 pp vs national average (±0.30 for Likert values)
Questionnaire	17 structured questions on Likert scale, single choice, multiple choice and openend
Appendices	The complete demographic tables are in the separate volume «Appendices — FFIND Sustainability Study 2026»

The Say-Do Gap: definition and methodological treatment



This study takes into account the Say-Do Gap, defined as the percentage-point difference between: (a) the share of respondents who agree or strongly agree with the statement "In my own small way, my choices can make a difference for the environment" (Q8, responses 4–5 on a 1–5 scale; variable "SAY") and (b) the share of respondents who took at least one concrete action to reduce their environmental impact in the week prior to the interview (Q6, responses 1–2; variable "DO").

A positive gap value indicates that declared self-efficacy exceeds recent behaviour; a negative value indicates the reverse.

The mixed-mode design (80% CATI, 20% CAWI) allows estimation of the magnitude of social desirability bias on this indicator.

Telephone interviews (CATI), mediated by an interviewer, produce systematically higher self-efficacy declarations than self-administered interviews (CAWI). For Italy, the CATI gap is +3.3 pp and the CAWI gap is +1.4 pp: the 1.9 pp difference estimates the component of the gap attributable to social desirability bias. In Germany the differential is 19.5 pp (CATI +11.4 pp, CAWI −8.1 pp), confirming that the interviewer filter asymmetrically amplifies self-efficacy declarations relative to actual behaviour.

The Say-Do Gap values reported in the tables refer to the total weighted sample (CATI+CAWI).

Executive Summary

The FFIND Sustainability Study 2026 is the first comparative survey conducted by FFIND across five European markets (the United Kingdom, France, Germany, Italy and Spain) to measure the level of awareness, behaviour and attitude of adult consumers (18+) towards environmental sustainability.

The overall sample is 5,000 respondents (1,000 per country), weighted by gender, age and geographic area. The study covers 17 questions organised across four thematic areas: awareness and information, consumption behaviours, responsibility and institutional credibility, and willingness to change.

The main findings of the study can be summarised in six key points:

1. **Spain and Italy lead on action**
   Spain records the highest rate of sustainable action (77.2%) in the reference week, followed by Italy (72.7%). France is the market furthest behind, with 60.0% of sustainable actions taken in the reference week.
2. **Distrust towards companies is universal**
   In all five countries, more than 65% of respondents judge companies' environmental communication as not credible. In Italy this reaches 77.1%. Trust in governments is equally low: between 55% and 75% consider their government inadequate.
3. **Cost blocks the transition**
   The premium price of sustainable products is the main barrier in all markets (30–40%). Without incentive policies or cost-reduction measures, the transition will remain structurally limited to the most affluent and educated segments.
4. **Boycotting is already a reality**
   Between 45% and 60% of respondents have boycotted at least one brand for ethical/environmental reasons. The reaction to greenwashing almost always translates into immediate product abandonment and negative word of mouth.
5. **Say-Do Gap: intention is not enough**
   Germany records the highest Say-Do Gap (+7.7 pp): 75.9% believe in their own efficacy, but only 68.2% acted. France (−0.6 pp) and Spain (−1.9 pp) show a negative gap: in these markets those who act exceed those who declare themselves efficacious. Analysis by interview mode reveals that social desirability bias contributes on average to inflating the gap by 2–20 pp depending on the country.
6. **Greenwashing is known, but not fully**
   The term «greenwashing» is known by approximately 40–66% of respondents (with significant differences between countries), but only a minority provides an accurate definition. Consumer critical awareness is growing, but often remains superficial.

Europe: main cross-cutting readings

Distrust in companies is structural, not episodic

Three in four European citizens judge companies' sustainability communication as barely or not at all credible.

This figure cuts across generations, education levels, geographic areas and five different national systems with a consistency that signals a deeply embedded judgement, not a contingent reaction to a recent scandal.

It has been built over time through the accumulation of unverifiable claims, opaque certifications, and communications perceived as marketing dressed up as commitment. For companies with ESG reporting obligations, at a moment when the European CSRD directive demands unprecedented disclosure standards, this figure is not a perception metric: it is a risk metric.

No sustainability statement, however technically accurate, reaches an audience predisposed to believe it. The paradox is acute: companies are being asked to communicate more about sustainability precisely as citizens' capacity to believe that communication reaches an historic low.

Cost is the democratic wall of the ecological transition

The price of sustainable products and choices is the first barrier cited in all five countries.

But the data becomes politically significant when one looks at who cites it most: low-education segments, rural areas, the groups most exposed to economic pressure.

With the cost of living still well above pre-2022 levels and energy weighing increasingly on household budgets, sustainability risks entrenching itself as a class privilege.

The populations that act less, know less about greenwashing and are less willing to change habits are not expressing different environmental values, they are expressing different economic constraints.

The generational paradox: those who do not believe act, those who believe do not act

In France, Spain and the United Kingdom, a pattern emerges clearly that inverts current assumptions about environmental communication.

The 18–34 age group shows sustainable behaviour rates above average — but their confidence in individual efficacy is among the lowest. Over-55s, on the contrary, strongly believe that their choices can make a difference — but they act less in the reference week.

This pattern inverts the logic of traditional awareness campaigns, built on the assumption that motivation produces action. The data suggest the opposite: those who are already motivated do not always act, and those who act do not always feel motivated.

Boycotting as the consumer's political language

More than six in ten Europeans say they would stop buying products from a company found guilty of greenwashing. The figure must be read with methodological caution, as declared intentions overestimate future behaviour.

But its scale signals that sustainable boycotting is emerging as a form of post-institutional political expression: at moments when institutions appear incapable of responding to environmental crises with adequate speed, the directly activated consumer becomes the informal enforcement mechanism.

Fast Fashion and Food & Beverage are the most cited sectors; not coincidentally, they are the ones where the gap between corporate narrative and production practices is most visible and documented in public debate.

Comparative Analysis — 5 countries

The comparative section analyses the 17 study questions across the five European countries, grouping them by thematic area. The objective is to identify common patterns, significant divergences and distinct national profiles that can guide strategic decisions on communication, product and corporate policy.

Context: the geopolitical, economic and climate backdrop

This study was conducted in March 2026, at a moment when European public opinion faces an overlapping set of simultaneous pressures.

The energy crisis triggered by the military escalation in the Middle East, marked by the blockade of the Strait of Hormuz and the consequent rise of crude oil above the 100-dollar-per-barrel threshold, adds to the fifth year of the Russia-Ukraine conflict and a structural pressure on the cost of living that remains far from returning to pre-2022 levels.

This type of cognitive saturation is described in the literature as bandwidth scarcity (Mullainathan and Shafir, 2013): when immediate concerns occupy the dominant share of available attention, long-term priorities, including the ecological transition, tend to be processed with less depth and translate less frequently into actionable intentions.

The study data should therefore be read in this light: not as a static measure of attitudes, but as a snapshot of a contingent psychological positioning, in which environmental concern, while remaining robust, coexists with more proximate material urgencies that inevitably condition its salience.

General Summary Table

The table below compares results across the five European countries.

For each question, all response options are reported, with the main rows (KPIs) highlighted. Green = highest value among the 5 countries; Red = lowest value.

S1 | AWARENESS

Q1 ***How informed do you feel about environmental sustainability issues?***
Scale 1–5 (1=Not at all, 5=A great deal)

	United Kingdom	France	Germany	Italy	Spain
Top+2 box (4+5)	26,8%	22,1%	**37,3%**	23,2%	**20,6%**
Mean score	2.91	2.89	**3,14**	3.03	**2.83**

Q2 ***When you think of sustainability, what is the first topic that comes to mind?***

	United Kingdom	France	Germany	Italy	Spain
Environment and nature	18,9%	24,0%	23,2%	33,1%	34,8%
Climate change	12,6%	11,9%	8,7%	18,3%	14,1%
Consumer choices	16,4%	18,7%	27,7%	17,8%	23,0%
Energy/ energy saving	26,6%	12,3%	20,2%	19,4%	15,1%
Corporate responsibility	9,9%	11,9%	5,8%	5,8%	4,9%
Other	3,8%	7,0%	5,5%	2,1%	3,2%
Don't know	11,8%	14,2%	8,9%	3,6%	5,0%

Q3 ***Can you tell me if there are global days related to sustainability?***
Single response (Yes / No / Don't know)

	United Kingdom	France	Germany	Italy	Spain
Yes	**33,9%**	37,1%	49,1%	**61,2%**	55,3%
of which "World Earth Day"	**23,2%**	**8,9%**	9,2%	20,0%	11,2%

Q4 ***How concerned are you about the following environmental issues?***
Scale 1–5 for each topic (top2 = responses 4+5)

	United Kingdom	France	Germany	Italy	Spain
Climate change	**64,1%**	68,8%	69,8%	74,6%	**76,8%**
Pollution	**71,6%**	73,7%	74,7%	79,3%	**86,3%**
Natural resource waste	**72,1%**	73,6%	72,9%	76,8%	**81,7%**
Biodiversity loss	**59,4%**	62,0%	71,3%	66,6%	**74,7%**

Q5 ***The impact of environmental problems on daily life over the next 10 years will be***
Scale 1–5 (1=No impact, 5=Very strong)

	United Kingdom	France	Germany	Italy	Spain
Top-2 box (4+5)	**59,5%**	70,8%	**71,9%**	68,5%	67,8%
Mean score	**3.64**	**3.90**	3.81	3.79	3.77

S2 | BEHAVIOURS AND SELF-EFFICACY

Q6 ***In the past week, did you do anything concrete to reduce your environmental impact?***
Single response

	United Kingdom	France	Germany	Italy	Spain
At least one sustainable action	66,1%	**60,0%**	68,2%	72,7%	**77,2%**

Q7 ***Which of the following actions do you regularly perform?***
Multiple response — % of total respondents

	United Kingdom	France	Germany	Italy	Spain
Waste sorting/ recycling	81,7%	78,6%	86,9%	79,9%	82,1%
Food waste reduction	78,0%	85,8%	80,9%	79,3%	79,5%
Reduced use of private vehicles	57,5%	58,7%	66,4%	50,4%	61,9%
Purchase of sustainable /local products	57,2%	64,6%	71,6%	51,2%	60,8%
Attention to home energy consumption	67,9%	73,8%	74,1%	71,3%	73,0%
Conscious purchasing/ avoids fast fashion	54,9%	58,3%	63,5%	44,1%	56,4%

Q8 ***«In my own small way, my choices can make a difference for the environment.»***
Scale 1–5 (1=Completely disagree, 5=Completely agree)

	United Kingdom	France	Germany	Italy	Spain
Top-2 box (4+5)	68,0%	**59,4%**	**75,9%**	75,7%	75,3%
Mean score	3.72	**3.51**	3.86	**3.90**	**3.90**
Say-Do GAP*	1.89	-0.60	**7.50**	2.92	**-1.94**

Q9 ***Have you ever stopped buying a product/brand because you considered it insufficiently sustainable?*** Single response + Open End listing boycotted brand(s)

	United Kingdom	France	Germany	Italy	Spain
Yes, at least once	53,0%	55,2%	**58,4%**	52,8%	**51,9%**
Fast Fashion	30,1%	52,6%	39,5%	59,6%	62,1%
FMCG	46,1%	33,6%	60,6%	31,6%	31,6%
E-commerce/ Marketplace	14,3%	12,2%	3,8%	12,5%	5,5%
Food service/ Fast-food	3,5%	3,4%	5,8%	4,8%	6,3%
GDO/Retail	1,2%	0,7%	0,9%	1,3%	10,0%
Other	12,5%	8,9%	0,0%	1,5%	3,0%

S3 | RESPONSIBILITY AND CREDIBILITY

Q10 ***What is the main obstacle preventing you from adopting a more sustainable lifestyle?***
Unprompted single response

	United Kingdom	France	Germany	Italy	Spain
Cost of sustainable products	36,6%	40,4%	29,1%	34,3%	34,9%
Lack of time / practicality	11,6%	10,4%	20,0%	18,1%	17,6%
Limited availability of alternatives	14,4%	18,8%	12,6%	18,4%	12,6%
I do not feel motivated	12,3%	4,5%	8,3%	8,0%	12,0%
There are no obstacles	9,0%	8,2%	13,9%	10,5%	12,0%
I do not know where to start	14,6%	14,2%	15,8%	6,0%	10,1%
Other	1,5%	3,5%	0,4%	4,8%	0,8%

Q11 *Who should do more for environmental sustainability?*

Single response

	United Kingdom	France	Germany	Italy	Spain
Everyone equally	48,5%	**47,5%**	**64,8%**	48,5%	50,6%
Individual citizens	5,2%	**16,2%**	5,2%	8,0%	**4,0%**
Companies and industries	19,2%	**19,4%**	**12,4%**	16,0%	13,5%
Governments and institutions	23,6%	15,3%	**12,4%**	27,2%	**27,8%**
Do not know	3,5%	1,6%	5,2%	0,2%	4,2%

Q12 *How do you rate your government's commitment to environmental issues?*

Scale 1–5 (1=Not at all adequate, 4=Very adequate)

	United Kingdom	France	Germany	Italy	Spain
Inadequate (1+2)	**50,4%**	58,5%	**64,2%**	63,6%	53,1%
Adequate (3+4)	27,3%	**24,1%**	26,6%	24,7%	**31,1%**

Q13 *Companies communicate sustainability in a way that is:*

Single response

	United Kingdom	France	Germany	Italy	Spain
Not credible/ greenwashing	**70,2%**	73,8%	78,4%	77,1%	**80,7%**
Credible	18,2%	**19,1%**	16,7%	18,2%	**8,3%**

Q14 *What is meant by the term «greenwashing»?*

Unprompted single response — postsurvey classification

	United Kingdom	France	Germany	Italy	Spain
Knows the term	**59,0%**	43,3%	52,9%	43,5%	**31,7%**
Correct definition	45,0%	25,3%	29,4%	23,9%	19,4%
Partial definition	14,0%	18,0%	23,5%	19,6%	12,3%

Q15 ***If you discovered that a company was engaged in greenwashing, what would be your reaction?***
Multiple response

	United Kingdom	France	Germany	Italy	Spain
Stop purchasing	68,7%	**48,5%**	55,3%	68,5%	**73,7%**
Not investing/ divesting in shares	67,2%	61,3%	56,3%	62,6%	76,6%
Negative word of mouth (friends + social)	63,8%	60,4%	57,5%	65,3%	62,3%
Do not know	3,5%	9,6%	8,8%	5,3%	3,8%
None of the above	10,6%	14,2%	12,9%	10,0%	8,8%

S3 | MOTIVATIONS FOR CHANGE

Q16 ***How willing would you be to change your habits to reduce your environmental impact?***
Scale 1–5 (1=Not at all, 5=A great deal)

	United Kingdom	France	Germany	Italy	Spain
Top-2 box (4+5)	**28,2%**	30,3%	33,6%	**39,2%**	36,7%
Mean media	**2.99**	3.05	3.11	**3.28**	3.24

Q17 ***What would motivate you to commit more to a sustainable lifestyle***
Multiple response

	United Kingdom	France	Germany	Italy	Spain
See concrete results	36,1%	29,4%	25,7%	42,8%	42,5%
Economic incentives	24,6%	18,7%	17,6%	27,1%	27,5%
Clearer information	12,1%	10,9%	11,7%	14,4%	22,9%
Knowing that others are committed	8,2%	11,6%	15,9%	31,6%	13,3%
Stricter laws	6,5%	12,4%	10,6%	25,6%	12,0%
Already sufficiently motivated	16,5%	21,8%	20,6%	7,5%	20,8%

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ITALY

TARGET ANALYSIS

DATA PULSE POWERED BY FFIND

This chapter analyses the results of the Italian sample (n=**1,000**) with systematic attention to differences across target groups. For each thematic block, the narrative commentary examines the data and highlights the most significant differences between segments. The reference tables present in a single view the distributions by age group (**<35 · 35-55 · >55**), education level **(low · medium · high**), geographic area (**North · Centre · South+Islands**) and area of residence (**urban · rural**).

Green = +6 pp vs TOT.; Red = −6 pp vs TOT.

Awareness and Environmental Information

Environmental awareness in Italy stands at 23.2% in top-2 box terms (scale 1–5; mean score: 3.03). The share of respondents aware of global sustainability days is **61,2**%, an indicator of how far the topic has crossed the threshold of selective attention and entered mainstream knowledge. Italy records a growing environmental sensitivity, sustained by increasingly frequent extreme weather events, floods, droughts, heatwaves, that make climate change tangible in everyday life.

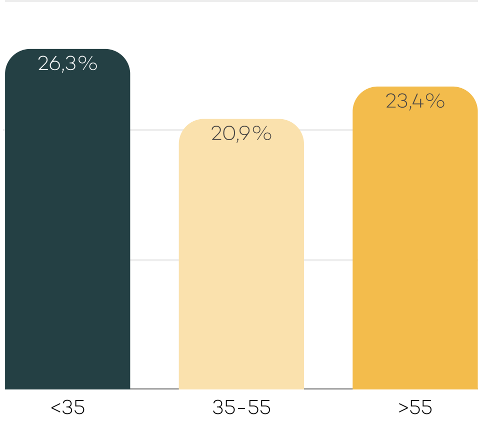
Concern about specific environmental issues is led by pollution at 79.3% top-2 citations, followed by natural resource waste (76.8%) and climate change (74.6%). The perceived impact of environmental problems on one's own life over the next ten years, a measure of how personally and concretely sustainability is felt, is rated strong or very strong by 68.5% of respondents.

The 12.3 pp gap between high-education (32.4%) and low-education respondents (20.1%) on self-reported information is the single largest structural divide in the Italian sample. In a country where roughly 40% of the adult population holds at most a lower-secondary qualification, this is not a nuance: it is the audience split that determines whether environmental communication lands at all.

S1 | AWARENESS

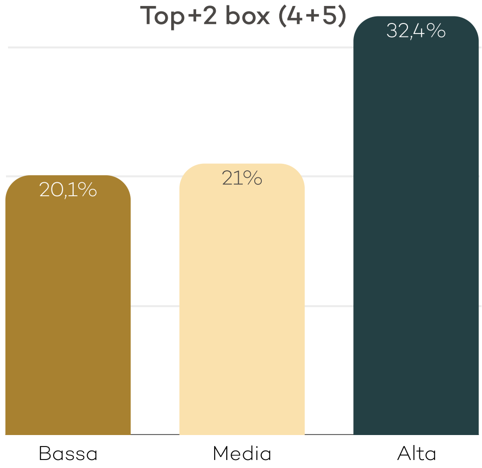
Q1 ***How informed do you feel about environmental sustainability issues?***
Scale 1-5 (1=Not at all, 5=A great deal)

Age group
Top+2 box (4+5)



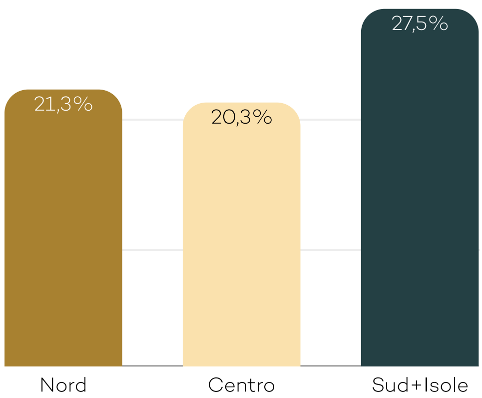
Mean Score		
<35	**35-55**	**>55**
3.11	3.00	3.03

Education
Top+2 box (4+5)



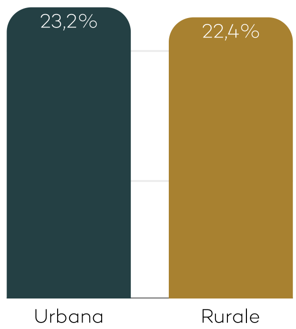
Mean Score		
Low	**Mid**	**High**
2.91	3.02	3.26

Geographic Area
Top+2 box (4+5)



Mean Score		
North	**Centre**	**South+Isl.**
3.02	2.97	3.09

Residence Area
Top+2 box (4+5)



Mean Score	
Urban	**Rural**
3.04	2.99

Q2 *When you think of sustainability, what is the first topic that comes to mind?*

		Age group			Education			Geographic Area			Residence Area	
	TOT	<35	35-55	>55	Bassa	Medio	Alta	Nord	Centro	Sud+Isole	Urbano	Rurale
Environment and nature	33,1%	37,3%	35,8%	30,3%	35,6%	30,3%	34,3%	33,0%	34,0%	32,6%	31,7%	36,1%
Climate change	18,3%	20,2%	21,8%	15,8%	12,9%	20,7%	22,1%	15,8%	17,9%	21,9%	23,2%	20,0%
Consumer Choices	17,8%	16,5%	16,5%	18,9%	20,4%	17,5%	14,1%	19,1%	14,1%	18,1%	17,9%	14,2%
Energy/ Energy saving	19,4%	17,4%	17,2%	21,1%	18,7%	20,4%	18,3%	18,4%	22,9%	18,6%	14,9%	17,2%
Corporate Responsibility	5,8%	2,3%	5,2%	7,2%	5,4%	5,8%	6,4%	6,0%	7,3%	4,6%	6,1%	8,4%
Other	2,1%	2,7%	1,0%	2,6%	2,4%	1,7%	2,4%	2,3%	1,8%	2,0%	3,0%	0,8%
Don't know	3,6%	3,7%	2,6%	4,1%	4,5%	3,4%	2,4%	5,2%	2,1%	2,1%	3,2%	3,3%

Free association confirms this environmental orientation: when asked what they think of first when hearing the word 'sustainability', Italian respondents mostly say 'environment and nature' (33.1%), followed by energy saving (19.4%), climate change (18,3%) and consumer choices (17,8%).

The relative absence of 'corporate responsibility' (5.8%) from spontaneous associations is significant: sustainability in Italy is perceived primarily as a personal and natural value, not yet as an institutional or corporate obligation.

33,1%

In Italy, sustainability is first and foremost associated with the **environment and nature**.

Q3 ***Can you tell me if there are global days related to sustainability?***
Single response (Yes / No / Don't know)

61,2%

Of Italians say they are aware of the existence of a **World Day** dedicated to sustainability.

Yes (knows the world days)					
Age group			**Education**		
<35	35-55	>55	Low	Mid	High
64,3%	66,2%	57,6%	55,5%	62,3%	**68,4%**
Geographic Area			**Residence Area**		
North	Centre	South+Island	Urban	Rural	
59,9%	61,2%	63,2%	63,4%	51,2%	

Education stands out as the main driver: awareness reaches 68.4% among higher-educated individuals, compared to 55.5% among lower-educated groups, highlighting a significant gap.

68,4%

Q4 ***How concerned are you about the following environmental issues?***
Scale 1–5 for each topic (top2 = responses 4+5)

Climate Change

Age group			Education		
<35	35-55	>55	Low	Mid	High
73,6%	77,1%	73,5%	69,0%	78,0%	76,9%

Geographic Area			Residence Area	
North	Centre	South+Island	Urban	Rural
70,3%	78,3%	78,6%	**80,6%**	67,3%

Pollution

Age group			Education		
<35	35-55	>55	Low	Mid	High
77,3%	82,2%	78,4%	74,8%	82,0%	81,2%

Geographic Area			Residence Area	
North	Centre	South+Island	Urban	Rural
76,9%	75,9%	84,7%	**84,9%**	74,0%

Natural resource waste

Age group			Education		
<35	35-55	>55	Low	Mid	High
70,7%	75,5%	79,4%	78,5%	74,5%	78,3%

Geographic Area			Residence Area	
North	Centre	South+Island	Urban	Rural
75,2%	75,4%	79,8%	**80,3%**	79,0%

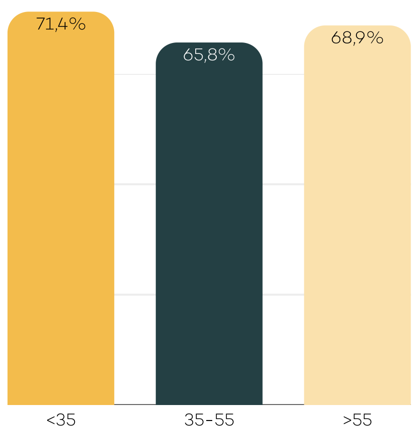
Biodiversity loss

Age group			Education		
<35	35-55	>55	Low	Mid	High
58,5%	64,0%	70,5%	63,8%	67,2%	69,9%

Geographic Area			Residence Area	
North	Centre	South+Island	Urban	Rural
64,7%	69,9%	67,5%	**71,5%**	65,6%

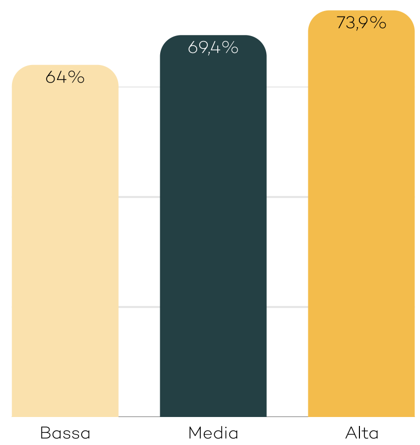
Q5 *In your view, the impact of environmental problems on daily life over the next 10 years will be:*

Age group
Top+2 box (4+5)



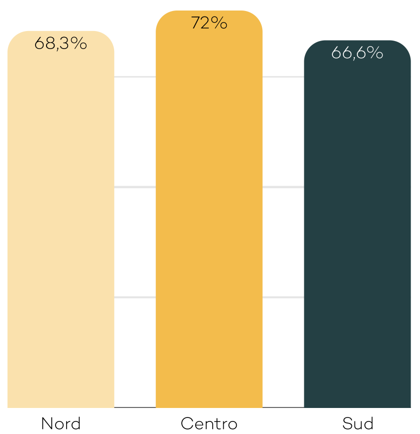
Mean Score		
<35	**35-55**	**>55**
3.90	3.76	3.77

Education
Top+2 box (4+5)



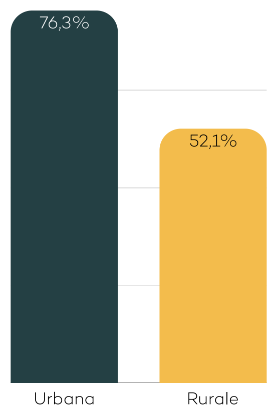
Mean Score		
Low	**Mid**	**High**
3.67	3.81	3.92

Geographic Area
Top+2 box (4+5)



Mean Score		
North	**Centre**	**South+Isl.**
3.78	3.83	3.77

Residence Area
Top+2 box (4+5)



Mean Score	
Urban	**Rural**
3.96	3.56

S2 | BEHAVIORS, SELF-EFFICACY, AND BOYCOTTING

72.7% of respondents in Italy reported having carried out at least one sustainable action in the week prior to the interview — 44.5% did so multiple times, indicating a structured rather than occasional behavior.

The Say–Do Gap, defined as the difference between perceived self-efficacy and actual behavior, stands at 2.98 pp. The breakdown by interview methodology shows that the CATI gap is +3.3 pp, compared to +1.4 pp in CAWI: the 1.9 pp difference estimates the component attributable to social desirability bias.

The ranking in Italy follows the European template closely: waste sorting (79.9%) and food-waste reduction (79.3%) sit at the top, while the behaviours that actually move the carbon needle, mobility, energy, purchasing, lag 20 to 35 points behind.

Italy has institutionalised the low-friction actions and stalled on the discretionary ones.

Q7 ***Which of the following actions do you regularly perform?***
Multiple response — % of total respondents

Waste sorting / recycling

Age group			Education		
<35	35-55	>55	Low	Mid	High
73,6%	**84,3%**	79,5%	76,1%	**82,2%**	81,4%

Geographic Area			Residence Area	
North	Centre	South+Island	Urban	Rural
81,0%	78,1%	79,3%	77,3%	**79,9%**

Food waste reduction

Age group			Education		
<35	35-55	>55	Low	Mid	High
71,2%	81,7%	80,6%	79,1%	76,9%	84,4%

Geographic Area			Residence Area	
North	Centre	South+Island	Urban	Rural
79,4%	80,8%	78,4%	78,7%	79,7%

Reduced use of private vehicles

Age group			Education		
<35	35-55	>55	Low	Mid	High
51,6%	51,2%	49,6%	43,7%	49,7%	62,4%

Geographic Area			Residence Area	
North	Centre	South+Island	Urban	Rural
51,3%	49,0%	49,9%	53,7%	41,3%

Purchase of sustainable/local product

Age group			Education		
<35	35-55	>55	Low	Mid	High
43,5%	49,9%	54,3%	54,6%	46,5%	54,7%

Geographic Area			Residence Area	
North	Centre	South+Island	Urban	Rural
47,4%	49,0%	57,8%	47,3%	58,5%

Attention to home energy consumption

Age group			Education		
<35	35-55	>55	Low	Mid	High
61,4%	68,6%	75,8%	71,7%	68,9%	75,0%

Geographic Area			Residence Area	
North	Centre	South+Island	Urban	Rural
70,3%	68,5%	74,2%	72,8%	70,5%

Conscious purchasing / avoids fast fashion

Age group			Education		
<35	35-55	>55	Low	Mid	High
40,4%	40,4%	47,3%	46,2%	40,4%	47,9%

Geographic Area			Residence Area	
North	Centre	South+Island	Urban	Rural
44,5%	44,1%	43,6%	46,4%	43,4%

Highly-educated Italians act on sustainability 11.7 pp more often than the low-education segment (**80.3% vs 68.6%**).

The gap on declared action is narrower than the gap on declared awareness, suggesting that recycling and food-waste reduction have become near-universal habits that cut across educational divides, while the more discretionary behaviours still track closely with cultural capital.

80,3%

Education-driven gap: highest among highly educated (80.3%), lowest among low education (68.6%).

Q6 ***In the past week, did you do anything concrete to reduce your environmental impact?***
Single response

At least one sustainable action					
Age group			**Education**		
<35	35-55	>55	Low	Mid	High
69,2%	78.1%	71.0%	68.6%	72.2%	**80.3%**

Geographic Area			**Residence Area**	
North	Centre	South+Island	Urban	Rural
75.3%	67.5%	72.0%	75.8%	67.9%

Three-quarters of Italians (**75.7%, mean 3.90**) believe their choices already make a difference, but only 39.2% (**mean 3.28**) declare themselves willing to change habits further.

The two items measure different things, a retrospective judgement on current choices versus a prospective commitment to new ones, but the directional reading is clear: Italians think they have already done their part, and the ceiling for additional change is set by that perception, not by lack of awareness.

Q8 ***«In my own small way, my choices can make a difference for the environment.»***
Scale 1–5 (1=Completely disagree, 5=Completely agree)

Top-2 Box 75,7% | Italy **Mean Score** 3.90 | **SAY-DO** GAP 2.98

	Age group			Education			Geographic Area			Residence Area	
	<35	35-55	>55	Low	Mid	High	North	Centre	South+Isl.	Urban	Rural
Top+2 box (4+5)	70,0%	76,8%	76,9%	71,4%	75,9%	82,2%	76,2%	78,0%	73,6%	76,7%	69,8%
Mean score	3.78	3.96	3.91	3.77	3.92	4.09	3.90	3.99	3.87	3.86	3.76
SAY-DO GAP*	0,82	-1.29	5.92	2.75	3.74	1.90	0.85	10.54	1.66	0.82	1.84

Q16 ***How willing would you be to change your habits to reduce your environmental impact?***
Scale 1–5 (1=Not at all, 5=A great deal)

Top-2 Box 39,2% | Italy **Mean Score** 3.28

	Age group			Education			Geographic Area			Residence Area	
	<35	35-55	>55	Low	Mid	High	North	Centre	South+Isl.	Urban	Rural
Top+2 box (4+5)	38.3%	41.3%	38.4%	34.7%	36.9%	50.7%	38.4%	48.3%	35.1%	34.7%	37.7%
Mean score	3.26	3.34	3.25	3.18	3.26	3.44	3.27	3.38	3.22	3.22	3.22

The two dominant drivers of change for Italians are seeing concrete results (42.8%) and knowing that others are committed (31.6%), followed by economic incentives (27.1%) and stricter laws (25.6%).

Italians respond to evidence and social proof first, with financial incentives placing third. Values-based messaging places a distant last in every segment.

Q17 ***What would motivate you to commit more to a sustainable lifestyle***
Multiple response

		Age group			Education			Geographic Area			Residence Area	
	TOT	<35	35-55	>55	Low	Mid	High	North	Centre	South+Isl.	Urban	Rural
See concrete results	**42,8%**	34,7%	40,5%	46,5%	45,8%	43,6%	36,3%	41,7%	44,5%	43,2%	43,9%	48,8%
Clearer information	**14,4%**	15,9%	12,1%	15,1%	13,9%	14,7%	14,5%	15,4%	11,7%	14,5%	14,5%	11,5%
Economic incentives	**27,1%**	30,7%	35,3%	21,6%	23,3%	30,1%	27,4%	28,8%	24,0%	26,4%	30,1%	28,2%
Knowing that others are committed	**31,6%**	35,3%	36,5%	27,8%	28,2%	32,3%	35,5%	30,3%	29,6%	34,5%	32,8%	27,7%
Stricter laws	**25,6%**	24,0%	27,8%	25,0%	22,7%	25,8%	29,9%	22,3%	29,5%	28,2%	30,1%	22,3%
Already sufficiently motivated	**7,5%**	12,9%	4,0%	7,7%	7,1%	8,7%	5,9%	7,5%	5,5%	8,7%	6,8%	8,5%

Belief in personal efficacy is also stratified by education, though less sharply: 82.2% for the high-education segment against 71.4% for the low-education one, a 10.8 pp gap.

Notably, even the lowest-education Italians score above 70% on this item, an absolute level that would place them near the top in the UK or France.

S3 | BARRIERS AND PERCEIVED RESPONSIBILITY

The cost of sustainable products is the main barrier to behavioural transition in Italy, cited by 34.3% of respondents.

In second place come the limited availability of alternatives (18.4%) and lack of time and practicality (18.1%), signalling that sustainability continues to be perceived as a high-effort option rather than an ordinary everyday choice.

Economic pressures on Italian households, compounded by inflation and labour market fragility, make the premium price of sustainable products a particularly felt barrier.

Q10 ***What is the main obstacle preventing you from adopting a more sustainable lifestyle?***
Unprompted single response

		Age group			Education			Geographic Area			Residence Area	
	TOT	<35	35-55	>55	Low	Mid	High	North	Centre	South+Isl.	Urban	Rural
Cost of sustainable products	**34.3%**	37.3%	42.4%	29.0%	34.4%	37.7%	27.5%	35.3%	35.8%	31.9%	36.1%	41.6%
Lack of time/ practicality	**18.1%**	14.6%	16.9%	19.8%	15.7%	18.4%	21.3%	19.3%	15.2%	18.0%	18.0%	12.7%
Limited availability of alternatives	**18.4%**	19.8%	21.8%	16.1%	14.7%	17.4%	25.9%	15.5%	17.9%	22.7%	22.2%	18.4%
I do not feel motivated	**8.0%**	5.4%	3.1%	11.3%	12.1%	4.4%	8.1%	6.9%	13.7%	6.1%	4.6%	7.8%
There are no obstacles	**10.5%**	7.7%	6.5%	13.5%	13.7%	9.0%	8.4%	10.8%	9.8%	10.5%	10.1%	7.0%
I do not know where to start	**6.0%**	8.8%	3.8%	6.2%	6.0%	6.8%	4.3%	7.4%	4.1%	5.1%	3.6%	9.1%
Other	**4.8%**	6.5%	5.4%	4.0%	3.4%	6.3%	4.4%	4.8%	3.6%	5.6%	5.3%	3.4%

On the question of perceived responsibility, 48.5% of respondents in Italy believe responsibility lies equally with everyone, governments, companies, and citizens alike. Governments (27.2%) and companies (16.0%) are identified as priority actors when a single actor must be named.

The assessment of government performance is clearly negative: 63.6% consider it inadequate, and only 24.7% rate it as equal to the environmental challenges at hand.

Q11 *Who should do more for environmental sustainability?*

Single response

		Age group			Education			Geographic Area			Residence Area	
	TOT	<35	35-55	>55	Low	Mid	High	North	Centre	South+Isl.	Urban	Rural
Individual citizens	**8.0%**	9.4%	7.1%	8.0%	7.8%	7.9%	8.4%	10.3%	4.0%	7.0%	5.7%	10.6%
Companies and industries	**16.0%**	17.4%	16.4%	15.4%	13.7%	16.8%	18.2%	14.0%	18.8%	17.4%	16.3%	10.6%
Governments and institutions	**27.2%**	28.3%	32.3%	24.2%	26.7%	28.6%	25.5%	27.7%	29.4%	25.3%	30.8%	26.1%
Everyone equally	**48.5%**	44.2%	44.2%	52.2%	51.8%	46.2%	47.8%	47.7%	47.8%	50.1%	46.9%	52.6%
Do not know	**0.2%**	0.6%	0.0%	0.2%	0.0%	0.5%	0.0%	0.2%	0.0%	0.3%	0.3%	0.0%

Q12 *How do you rate your government's commitment to environmental issues?*

Scale 1–5 (1=Not at all adequate, 4=Very adequate)

		Age group			Education			Geographic Area			Residence Area	
	TOT	<35	35-55	>55	Low	Mid	High	North	Centre	South+Isl.	Urban	Rural
Judged inadequate (top2: 1+2)	**63.6%**	63.6%	68.0%	61.3%	57.5%	67.4%	66.0%	65.0%	56.5%	65.7%	63.8%	67.6%
Judged adequate (top2: 3+4)	**24.7%**	23.3%	20.7%	27.3%	27.4%	22.7%	24.2%	24.0%	27.3%	24.3%	23.3%	23.3%

63,6%

Strongly negative perception: nearly two-thirds rate government action as **inadequate**.

Peak criticism: **highest among 35–55 age group** (68.0%).

S4 | INSTITUTIONAL CREDIBILITY AND GREENWASHING

Boycotting in Italy is mainstream: 52.8% declare at least one exit action in the reference year, one in three of whom repeatedly.

For any brand operating here, the baseline assumption must be that roughly half of the potential audience has already boycotted someone for sustainability reasons and knows how to do it again. Fashion brands are top of mind among boycotting Italians, especially among the youngest respondents.

Those living outside cities also cite marketplaces much more strongly, likely reflecting a purchasing behaviour closer to local proximity.

The most common response upon discovering greenwashing is to stop purchasing (68,5%), followed by negative word of mouth with friends and family or on social media (65,3%).
This latter mechanism, which operates outside the direct control of brands, is particularly insidious: reputation is still built and destroyed primarily through person-to-person interaction, both offline and online.

Q9 ***Have you ever stopped buying a product/brand because you considered it insufficiently sustainable?*** Single response + Open End listing boycotted brand(s)

		Age group			Education			Geographic Area			Residence Area	
	TOT	<35	35-55	>55	Low	Mid	High	North	Centre	South+Isl.	Urban	Rural
Yes, at least once	52.8%	48.4%	52,4%	54,3%	48.0%	53,4%	59,2%	51,2%	49,1%	57,2%	49,9%	53,9%
Fast Fashion	59.6%	76,3%	53,3%	58,3%	44,8%	65,3%	33,8%	62,4%	73,0%	49,3%	62,1%	62,0%
FMCG	31.6%	20,0%	37,8%	31,5%	30,3%	31,1%	15,3%	33,1%	25,0%	33,4%	29,8%	33,1%
E-commerce / Mktplc	12.5%	9,8%	18,1%	9,9%	9,6%	12,4%	5,8%	14,5%	6,4%	13,5%	6,5%	24,2%
Food service / Fastfood	4.8%	3,5%	3,9%	5,7%	7,4%	2,7%	0,9%	3,7%	3,2%	6,8%	5,2%	2,9%
Retail / Supermarket	1.3%	1,9%	3,1%	0,0%	3,0%	0,7%	0,0%	2,4%	0,0%	0,8%	2,9%	1,7%
Other	1.5%	1,8%	1,8%	1.3%	4,9%	0,6%	0,0%	0,0%	0,0%	3,9%	4,5%	0,0%

Q14 *What is meant by the term «greenwashing»?*

Unprompted single response — postsurvey classification

		Age group			Education			Geographic Area			Residence Area	
	TOT	<35	35-55	>55	Low	Mid	High	North	Centre	South+Isl.	Urban	Rural
Knows the term	**43,5%**	46,6%	51,9%	38,1%	30,2%	47,8%	57,1%	44,5%	38,9%	44,8%	48,1%	39,4%
Correct Definition	**23,9%**	30,7%	32,0%	17,5%	12,3%	27,8%	35,3%	22,2%	23,5%	26,6%	30,2%	21,4%
Partial Definition	**19,6%**	15,9%	19,9%	20,6%	17,9%	20,0%	21,8%	22,3%	15,4%	18,2%	17,9%	18,0%

Q13 *Companies communicate sustainability in a way that is:*

Single response

		Age group			Education			Geographic Area			Residence Area	
	TOT	<35	35-55	>55	Low	Mid	High	North	Centre	South+Isl.	Urban	Rural
Not credible	**77,1%**	72,0%	79,0%	77,7%	73,9%	76,6%	83,1%	75,7%	79,8%	77,5%	82,7%	75,1%
Credible	**18,2%**	22,8%	17,5%	17,0%	21,2%	18,6%	12,6%	20,6%	15,3%	16,3%	13,8%	19,0%

Q15 *If you discovered that a company was engaged in greenwashing, what would be your reaction?*

Multiple response

		Age group			Education			Geographic Area			Residence Area	
	TOT	<35	35-55	>55	Low	Mid	High	North	Centre	South+Isl.	Urban	Rural
Stop Purchasing	**68,5%**	61,7%	73,3%	68,1%	63,6%	68,8%	75,9%	68,6%	70,7%	67,2%	70,1%	67,1%
Not investing/ divesting in share	**62,6%**	57,1%	63,2%	64,0%	63,2%	60,8%	65,1%	62,7%	60,5%	63,8%	63,4%	61,1%
Negative word of mouth (friend+social)	**65,3%**	62,7%	72,5%	62,2%	61,7%	66,2%	69,3%	64,3%	62,3%	68,5%	67,5%	62,7%
Do not know	**5,3%**	8,1%	2,6%	5,9%	6,8%	5,6%	2,4%	6,4%	3,5%	4,8%	4,1%	6,5%
None of the above	**10,0%**	10,6%	7,4%	11,1%	12,0%	9,1%	8,3%	10,0%	13,0%	8,1%	10,4%	8,8%