2024

CIRCULAR VOICE
TIMES OF CHANGE

CONTENT

INTRODUCTION

Every day, we choose to consume different products and services. Some choices have a greater impact on sustainability than others. But what influences us when we make these decisions? Of course, many aspects contribute to our behavior – perhaps most notably supply and availability – which in turn are effects of decisions made in business and politics, based on decisions made long before products reach the stores, whether physical or online.

To pave the way towards a circular economy and create better conditions for sustainable behavior in the future, we need to understand today's consumers. That is why we have produced Circular Voice. A report that deep dives into consumers' views and behaviors regarding sustainability from various perspectives.

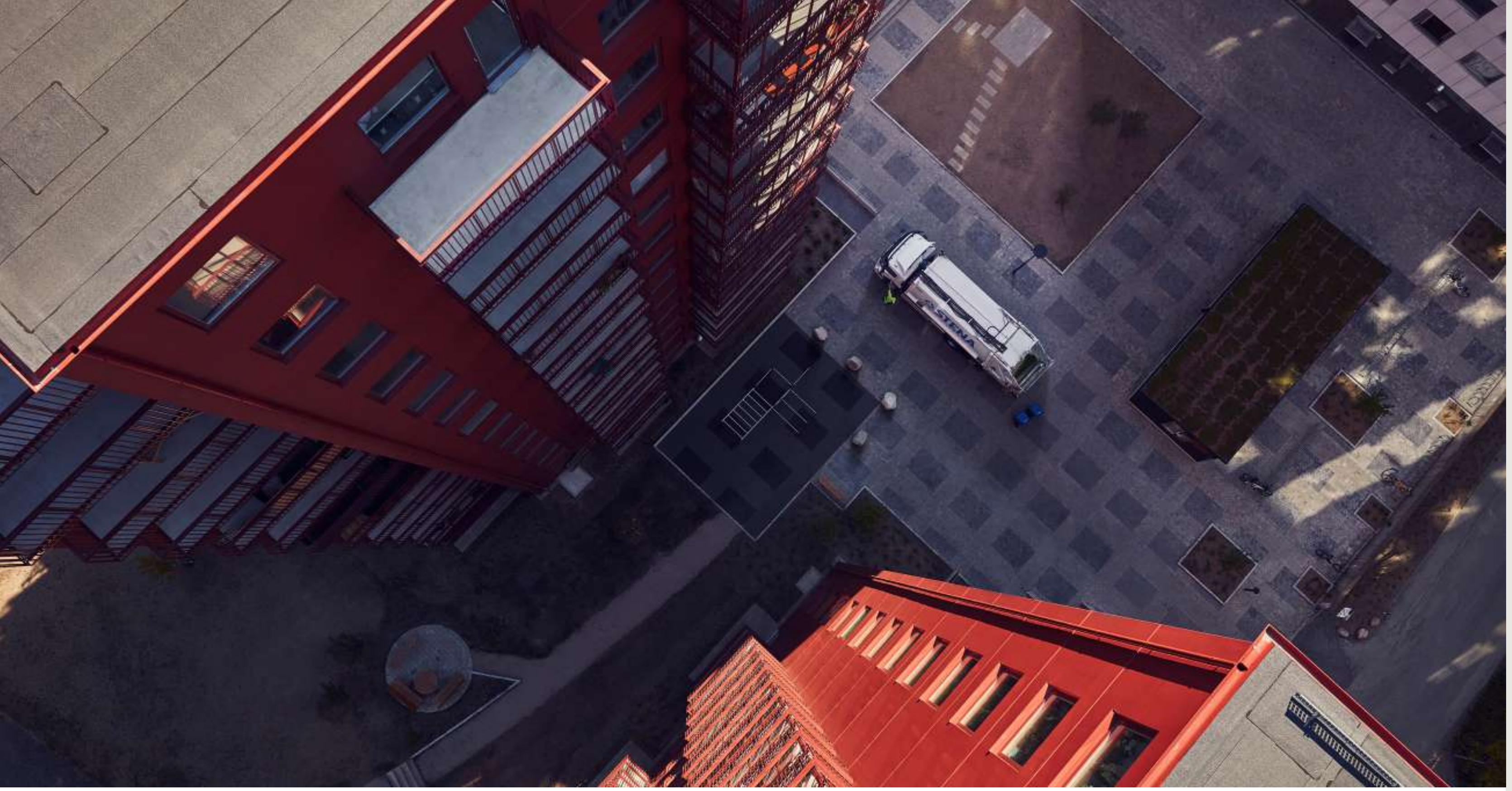
The report highlights how different messages and approaches from companies can affect consumer confidence – and ultimately their consumption behaviors. We investigate what motivates consumers to make sustainable and environmentally friendly choices, the role trust and credibility play in their decision-making, and what barriers exist. In addition, we highlight questions about how global events such as the climate change, recession, and war impact consumption and we analyze differences between various consumer groups to better understand how to reach different generations of consumers in the best way.

The results show that consumer confidence in companies' sustainability work has declined over the last five years. At the same time, interest in questions regarding sustainability have increased. In other words, there appears to be room for improvement in how companies communicate – and significant opportunities for those who succeed in doing so in a credible way.

To achieve a circular economy, we must use the resources already in circulation more efficiently. For example extending the life of products, minimizing waste of resources and increasing recycling rates. The increased use of recycled and recyclable products reduces the use of virgin natural resources, which benefits both the climate and society. Therefore, it is crucial to understand how we can assist consumers and make it easier for them to make choices that accelerate the transition to a circular economy.

We hope that the findings in this report are of interest to you – whether you are a consumer, opinion leader, journalist, business person or public decision-maker.

Thank you for your time!



ABOUT THE SURVEY

The survey was conducted by Ipsos on behalf of Stena Recycling in May 2024. A total of 5,000 consumers aged 18–65 years in Sweden, Denmark, Finland, Norway and Poland participated in the study, with 1,000 respondents in each country.

ABOUT STENA RECYCLING

Stena Recycling operates 170 recycling facilities in seven countries: Sweden, Norway, Denmark, Finland, Poland, Germany and Italy. Every year, six million metric tons of waste is recycled from around 100,000 customers in different industries. The recycled materials are then sold as raw materials on a global market.

Stena Recycling collaborates with customers in partnerships regarding circularity across the entire materials value chain. The company's experts help companies with sustainable solutions that promote a circular economy. This includes product design, training and the optimization of process and material flows that support companies' transition to climate neutrality and a circular business model.

For more info visit: www.stenarecycling.com

CHAPTER 1 – CONSUMER CONFIDENCE

CONSUMERS' ATTITUDE TOWARDS COMPANIES' SUSTAINABILITY WORK

Communicating environmental and sustainability issues has become a matter of course for many companies. However, as media reports have highlighted investigations and allegations of so-called greenwashing – when companies present an overly positive picture of the environmental impact of a product or initiative – consumer attitudes towards companies' environmental and sustainability communication have shifted. One in three consumers has become more skeptical about the way companies communicate these issues – and two in five have little to no confidence in environmental and sustainability information.

DECLINING CONFIDENCE IN COMPANIES' ENVIRONMENTAL AND SUSTAINABILITY COMMUNICATION

In the past five years, confidence in companies' communication regarding environmental and sustainability initiatives has decreased. One in three consumers (34%) report having little or much less confidence in the communication provided about these initiatives and the decline in confidence has been most prominent in Sweden (39%), Finland and Denmark (36%).

Has your confidence in companies' communication about environmental and sustainability initiatives changed in any way in the past five years?

	Total	Denmark	Norway	Poland	Sweden	Finland
I trust companies much more today	5%	6%	3%	6%	4%	5%
I trust the companies a little more today	24%	22%	23%	25%	24%	25%
I trust the companies a little less today	24%	26%	23%	18%	28%	25%
I trust the companies much less today	10%	10%	10%	10%	11%	11%
No, it has not changed	30%	29%	34%	32%	26%	30%
Not sure/don't know	7%	7%	8%	9%	7%	5%

34% ***of consumers trust companies' environmental and sustainability communication less today than five years ago.***

Although some have greater confidence in how companies communicate about their environmental and sustainability work today, compared with five years ago, it is striking how many people's confidence in the companies' environmental and sustainability communication has decreased. In order to win the trust of more consumers, companies should be able to document evidence of their sustainability efforts with data and in that way increase transparency," says Gisela Lindstrand, Head of Sustainability, Brand & Communications at Stena Metall.

TRUST IS DECLINING – BUT INTEREST IN SUSTAINABILITY WORK IS INCREASING

While trust has declined, consumers' interest in companies' communication about sustainability initiatives and environmental initiatives has increased significantly over the past five years. A majority of the respondents (53%) said that they have become a little or much more interested, with Sweden (57%) and Denmark (56%) showing the highest levels of increased interest. In contrast, 15% of consumers report that their interest has decreased slightly or significantly during the same period. A quarter of respondents (28%) stated that their interest remained unchanged.

A majority of consumers trust the content of companies' environmental and sustainability information that is communicated in advertising and other communication. Only 11% express no confidence in the information whatsoever.

Has your interest in companies' communication about environmental and sustainability initiatives changed in any way in the past five years?

	Total	Denmark	Norway	Poland	Sweden	Finland
I have become much more interested	12%	14%	9%	13%	12%	13%
I have become a little more interested	41%	42%	38%	37%	45%	42%
I have become a little less interested	10%	9%	11%	8%	11%	9%
I have become much less interested	5%	3%	6%	4%	5%	5%
No, it has not changed	28%	26%	32%	32%	23%	28%
Not sure/don't know	5%	6%	5%	6%	5%	3%

MOST CONSUMERS STILL TRUST COMPANY INFORMATION

Advertising, marketing and communication are the main tools for companies to inform consumers about their environmental and sustainability matters. Despite the fact that one in three respondents say their confidence in companies' environmental and sustainability work has decreased, most consumers trust the information that is communicated, with 54% expressing either full or partial trust. However, among these consumers, only 11% completely trust communication regarding environment and sustainability. Trust is highest in Poland, where 62% of respondents report they trust the information, followed by Sweden at 60%. At the same time, a large proportion of consumers are skeptical. Two out of five disagree to some extent or completely with the statement that they trust environmental and sustainability communication.

To what extent do you agree or disagree with the following statement? "I generally trust the environmental and sustainability information that companies communicate in their advertising and other communication."

	Total	Denmark	Norway	Poland	Sweden	Finland
Completely agree	11%	12%	12%	12%	12%	12%
Somewhat agree	43%	31%	31%	31%	31%	31%
Somewhat disagree	29%	37%	37%	37%	37%	37%
Completely disagree	11%	15%	15%	15%	15%	15%
Not sure/don't know	7%	5%	5%	5%	5%	5%

"Sustainability issues are given more attention in the media and politics, which naturally affects consumer attitudes. The increased interest in these questions are of course good news, but the responses in the survey also send a signal that companies and the business community need to improve the way they communicate information in the future, ensuring that consumers can trust the information and the efforts being made," says Ulf Arnesson, Executive Director, Business Development at Stena Recycling.

CHAPTER 2 – CREDIBILITY AND TRANSPARENCY

HOW TO ENSURE CREDIBLE COMMUNICATION

Companies' environmental and sustainability efforts are always in the spotlight. While many businesses view this work as a fundamental part of their business, it seems more difficult than ever to gain the trust of consumers. More than half of the respondents believe that companies are communicating their environmental and sustainability efforts in order to boost sales, with only one in five perceicing this communication as a genuine desire to create change. However, there are ways to build consumer trust: more communication and greater transparency.

Why do you think companies are talking so much about environmental and sustainability issues today?

	Total	Denmark	Norway	Poland	Sweden	Finland
It is advertising aimed at being able to sell more	55%	54%	56%	51%	53%	59%
Because they believe consumers demand it	49%	54%	50%	45%	48%	50%
Because "everyone else" is doing it	40%	37%	51%	40%	40%	34%
Because they have to for legal reasons	32%	25%	33%	32%	31%	38%
Because they really want to make a difference	20%	23%	17%	15%	21%	23%
Because they are proud of their work	15%	12%	13%	15%	17%	16%
Other	2%	2%	2%	2%	1%	2%
Not sure/don't know	6%	5%	6%	9%	6%	5%

MANY CONSUMERS ARE SKEPTICAL

How much information should companies provide about environmental and sustainability issues to build credibility among consumers? The fear of greenwashing has resulted in greenhushing - where companies implement environmental initiatives and set sustainability goals but remain silent about them. However, it turns out that a majority of consumers (54%) want more communication on these topics and only 3% believe that companies should communicate much less about these issues. Finland (65%) and Poland (60%) are the countries who have the highest demand for increased communication.

ENVIRONMENT AND SUSTAINABILITY – TOO MUCH INFORMATION OR NOT ENOUGH?

How much should companies communicate about environmental and sustainability issues to build credibility with consumers? The fear of greenwashing has resulted in greenhushing - which means that companies carry out environmental and sustainability measures and set goals but keep quiet about this instead of communicating these actions. However, it turns out that a majority of consumers (54%) want to see increased communication about the environment and sustainability. Only 3% believe that companies should communicate much less about these issues. Finland (65%), and Poland (60%) are the countries where most want to see increased communication.

Should companies communicate more or less about the environment and sustainability in order for you to trust them?

	Total	Denmark	Norway	Poland	Sweden	Finland
They should communicate much more	24%	20%	15%	28%	24%	33%
They should communicate a little more	30%	27%	27%	32%	32%	32%
They should communicate a little less	7%	7%	8%	5%	8%	7%
They should communicate much less	3%	2%	5%	3%	3%	3%
My trust would not change whether they communicate more or less	24%	31%	31%	18%	22%	17%
Not sure/don't know	12%	12%	13%	13%	11%	9%

TRANSPARENCY IS IMPORTANT TO CONSUMERS

Concrete evidence, investments and external audits seem to be top priorities for many. A majority of consumers (50%) would trust companies that provide evidence of their environmental and sustainability efforts, agree to be audited by external experts (46%) and invest in environmental and climate-promoting projects (37%).

Highlighting progress and investments is a natural part of many companies' communication. At the same time, a large proportion of consumers (47%) believe it is crucial for companies to admit mistakes and errors in order to be able to trust their environmental and sustainability messaging.

"It is interesting to see that the ability to admit mistakes and errors are the factors that consumers value the most. I believe many companies have the impression that this would have the opposite effect. Overall, the results clearly show that transparency is very important in various ways, for example through audits by external experts. It puts pressure on companies not to promise more than they can reasonably achieve," says Ulf Arnesson, Executive Director, Business Development at Stena Recycling.

Factors that are most important for consumers to feel confident about companies' environmental and sustainability information:

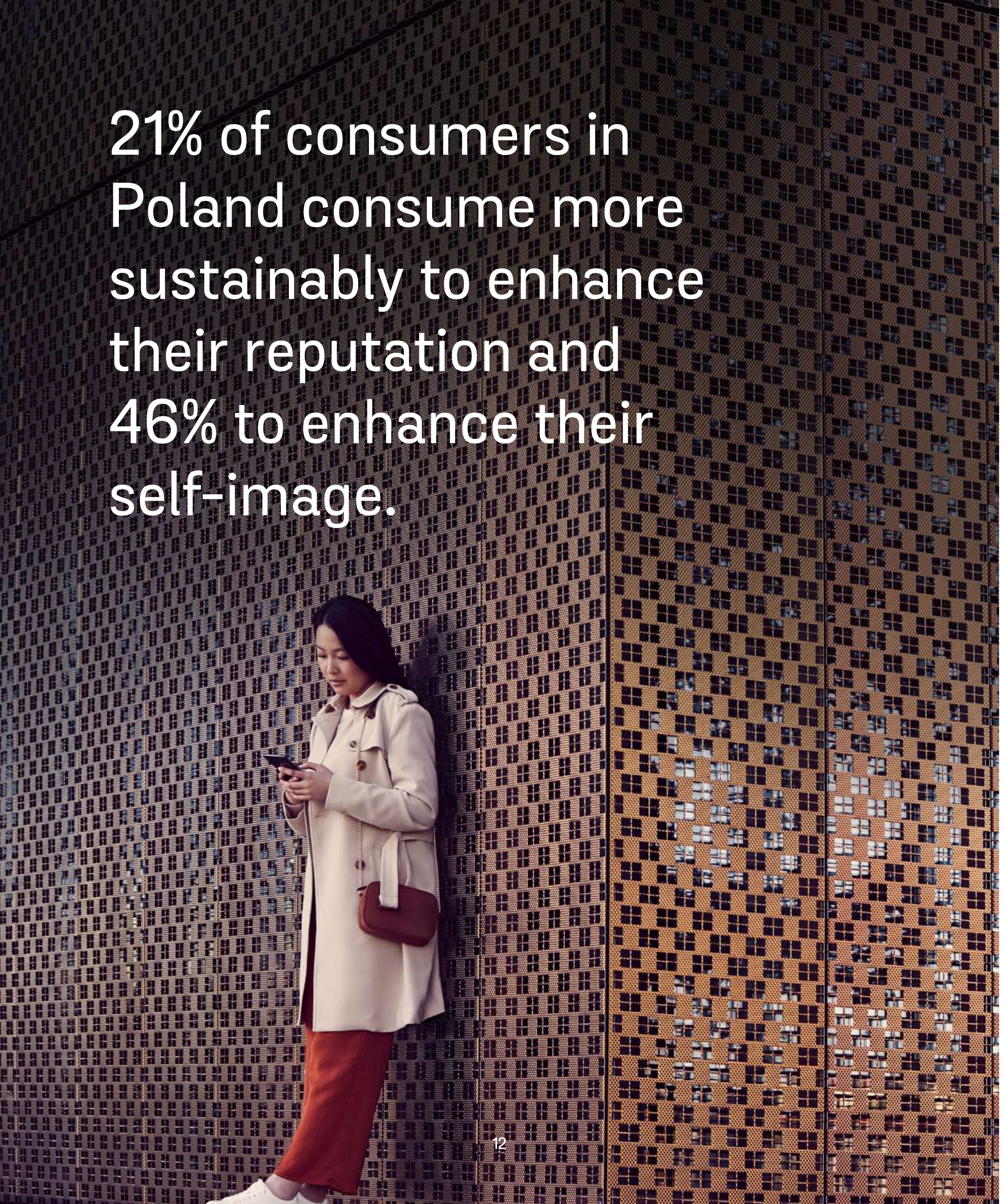
That they provide evidence of what their environmental and sustainability work leads to – ***50%***
That they admit mistakes and errors – ***47%***
That they agree to being audited by external experts – ***46%***
That they invest in projects or initiatives that benefit the climate and the environment – ***37%***
That they use existing ecolabels – ***35%***

Some factors are more or less relevant in different countries. In all countries except Sweden, the wish for proofing what their environmental and sustainability work leads to, is at the top of the list. Swedes instead rank audits by external experts high, and that companies are willing to admit mistakes and errors.

Which factors are most important for you to trust companies' environmental and sustainability information?

	Total	Denmark	Norway	Poland	Sweden	Finland
That they admit mistakes and errors	47%	48%	50%	37%	51%	47%
That sustainability work is part of their business idea	27%	26%	25%	21%	30%	33%
That they invest in projects or initiatives that benefit the climate and the environment	37%	36%	36%	35%	37%	41%
That they provide evidence of what their environmental and sustainability work leads to	50%	49%	56%	43%	50%	50%
That they have credible spokespersons	22%	19%	21%	26%	21%	23%
That they communicate their work through marketing and advertising	16%	11%	12%	18%	18%	18%
That they use existing ecolabels	35%	38%	31%	26%	35%	43%
That they agree to audits by external experts	46%	46%	48%	35%	53%	47%
That they are described in positive terms in the media	17%	19%	16%	14%	16%	20%
Other	2%	2%	2%	2%	2%	2%
I don't trust companies' environmental and sustainability work whatever they do	9%	8%	10%	15%	6%	7%

21% of consumers in Poland consume more sustainably to enhance their reputation and 46% to enhance their self-image.



CHAPTER 3 – BARRIERS AND MOTIVATIONS

ECONOMY, IGNORANCE AND SELF-IMAGE IS AFFECTING OUR CHOICES

Sustainable and environmentally friendly choices are made for various reasons, but there are also a number of barriers that affect consumers' behavior. For example, lack of knowledge, price and lack of motivation. Additionally, as the market meets a new generation of consumers, image and self-perception are also becoming increasingly important.

NINE OUT OF TEN CONSUMERS WANT TO MAKE SUSTAINABLE DECISIONS – BUT THE MOTIVATION DIFFERS

Only 10% of consumers say that they don't care about making sustainable and environmentally friendly choices, with the figure being even lower in Poland, at 7%. So what truly motivates us? The majority believe that the most important factor is contributing to a healthier planet. 35% also place significant value in having a positive impact on the social sustainability of the manufacturing process. When making sustainable choices, 36% of consumers find it crucial that environmentally friendly products match the quality of other alternatives.

There are also other drivers for Finnish and Polish consumers. For nearly half (45% and 46% respectively), it is important that their self-image is enhanced by doing something good for the environment, compared to 10% of Norwegians. In Poland, 21% also state that a motivating factor is that the image others have of them becomes more positive, which is something only 5% of Norwegians attach any importance to.

What is important to you when choosing products and services that are presented as more sustainable and environmentally friendly?

	Total	Denmark	Norway	Poland	Sweden	Finland
That what I buy is of the same quality as other alternatives	36%	36%	46%	33%	40%	24%
That others' image of me becomes more positive	9%	8%	5%	21%	8%	6%
That my self-image is enhanced by doing something good for the environment	27%	15%	10%	46%	19%	45%
That the choice I make contributes to a healthier planet	51%	50%	50%	53%	55%	45%
That the choice I make has a positive impact on the social sustainability of the manufacturing process	35%	33%	34%	41%	39%	27%
Other	2%	3%	3%	1%	1%	2%
I don't care about making sustainable or environmentally friendly choices	10%	10%	12%	7%	9%	11%
Not sure/don't know	8%	9%	8%	8%	6%	8%

PRICE A BARRIER FOR THE MAJORITY

Despite the desire to make more sustainable and environmentally friendly decisions, several obstacles stand in the way. Price is a major barrier, cited by 52%, and another key issue is a lack of trust, with one-third (33%) expressing doubt that the product or service is truly sustainable. For a third (33%), a lack of information also poses a challenge, as they find it difficult to determine which products or services are sustainable. 17% report that their efforts wont make a difference anyway. Image also plays a role here, with 7% avoiding making sustainable and environmentally friendly choices if they believe no one will notice.

These factors prevent consumers from choosing more sustainable and environmentally friendly alternatives:

It is too expensive – **52%**
I don't trust that the product or service is sustainable/environmentally friendly – **33%**
It is too difficult to find out which products and services are sustainable – **33%**

What, if anything, could make you not choose more sustainable and environmentally friendly alternatives?

	Total	Denmark	Norway	Poland	Sweden	Finland
It is too expensive	52%	53%	58%	47%	56%	47%
It is too difficult to find out which products and services are sustainable	33%	34%	30%	41%	24%	37%
I don't trust the product or service to be sustainable/environmentally friendly	33%	30%	36%	38%	31%	28%
I don't think I can make a difference anyway	17%	13%	16%	25%	14%	16%
I think I can make a difference, but I don't think it's my responsibility	10%	9%	7%	12%	9%	11%
If no one sees or knows, I don't care about choosing the more sustainable option	7%	6%	5%	9%	6%	8%
Other	2%	3%	2%	1%	1%	2%
Not applicable, I always choose the more sustainable option	5%	5%	4%	3%	6%	7%
Not sure/don't know	8%	8%	9%	11%	7%	6%

It is clear that companies need to find new ways to encourage consumers to make decisions that promote the environment, but they also need to become better at providing the right information. The widespread belief that sustainable and environmentally friendly goods are more expensive is a misconception that companies need to make an effort to eradicate. When you want to reach consumers in the younger generation, it is clear that softer factors such as self-perception and public image also influence decisions. This offers significant potential to find new ways to motivate consumers," says Ulf Arnesson, Executive Director, Business Development at Stena Recycling.

SOCIAL MEDIA – POSITIVE OR NEGATIVE?

A large proportion of consumers state that their consumption habits are influenced by social media and influencers in some way. Finland has the lowest percentage of respondents (42%) saying that they are not affected by social media – followed closely by Poland (44%) and Sweden (47%). This clearly indicates that social media affects our consumption – but does it have a positive or negative impact on the climate?

16% of consumers state that social media provides information and inspiration regarding sustainable and eco-friendly alternatives to products and services they already use. Being able to showcase their finds on social media motivates 12% of consumers, with Sweden and Poland having the highest percentages (15%). One in ten consumers is also inspired by influencers to shop more second-hand. However, influencers don't just have a positive impact. 11% say that influencers lead them to make unnecessary impulse purchases.

20% of Polish consumers receive information and inspiration for sustainable consumption on social media. The same figure in Norway and Denmark is 13%.

Do social media and influencers affect your consumption habits in any way?

	Total	Denmark	Norway	Poland	Sweden	Finland
I receive information and inspiration on social media about sustainable/environmentally friendly alternatives to products and services I already use	16%	13%	13%	20%	17%	19%
I consume more sustainably (e.g. through second-hand or sustainable/environmentally friendly alternatives) in order to be able to show it on social media	12%	9%	7%	15%	15%	14%
Influencers inspire me to shop more second-hand	10%	10%	10%	9%	11%	13%
Influencers drive me to make more unnecessary impulse purchases	11%	9%	12%	9%	13%	11%
Influencers inspire me to consume fewer goods and services	8%	7%	6%	8%	7%	11%
Social media is a source of information and makes me more aware of my environmental impact – but I have not changed anything yet	12%	11%	10%	14%	12%	14%
Other	2%	2%	2%	1%	2%	1%
I am not influenced by social media	48%	53%	52%	44%	47%	42%
Not sure/don't know	9%	8%	10%	11%	7%	7%

How social media and influencers impact consumers:

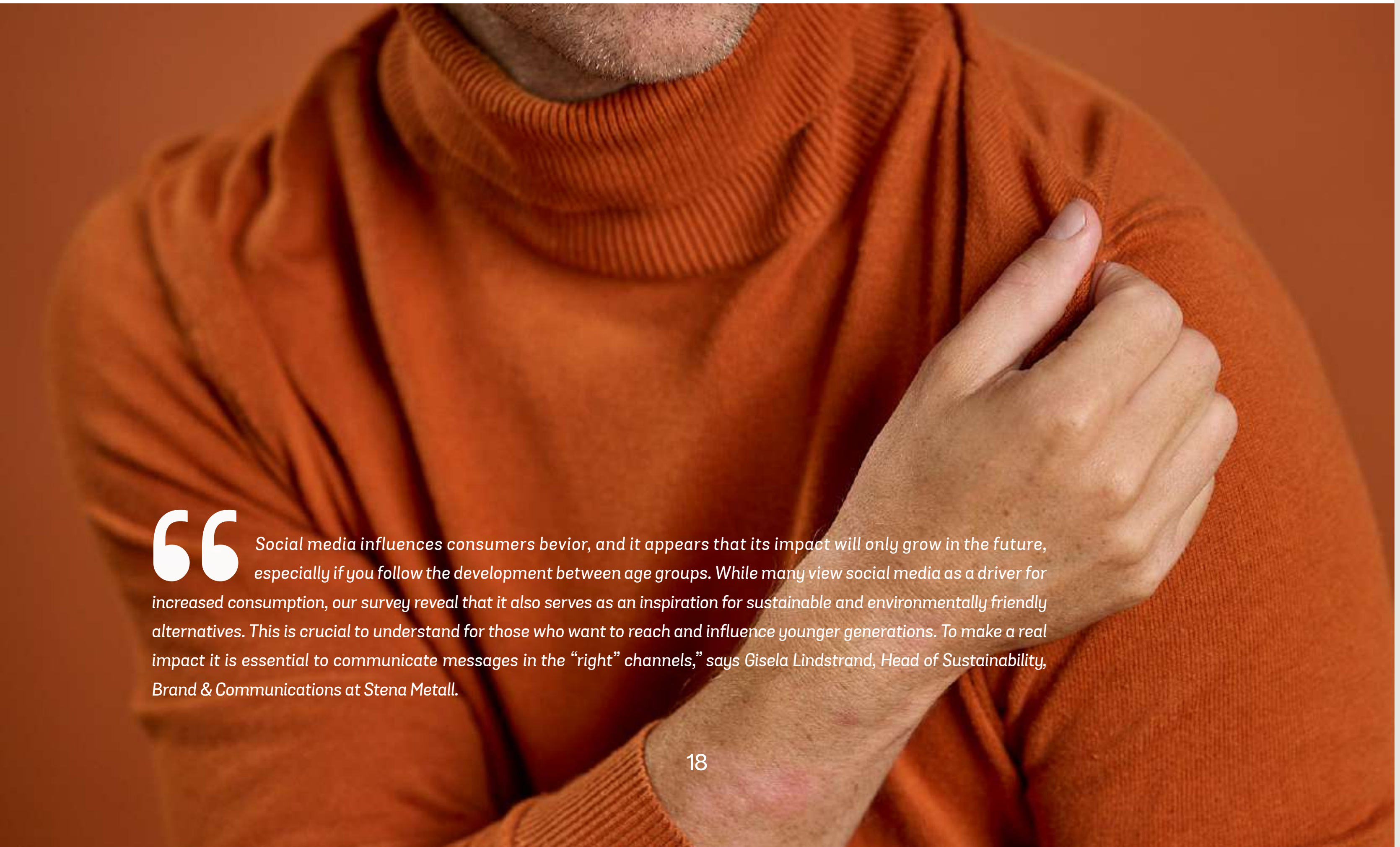
I get information and inspiration on social media about sustainable/environmentally friendly alternatives to products and services I already use – ***16%***
I consume more sustainably (e.g. through second-hand or sustainable/environmentally friendly alternatives) in order to be able to show it on social media – ***12%***
Influencers drive me to make more unnecessary impulse buys – ***11%***
Influencers inspire me to shop more second-hand – ***10%***

MORE PEOPLE BUY SECOND HAND

12% of consumers say they make more sustainable choices, such as buying second-hand, in order to showcase it on social media. Nearly as many (10%) are inspired by influencers to shop more second-hand. However, it's not just social media and influencers driving this trend. 38% of consumers report that external factors such as climate change, war and the economic development have led them to buy more second-hand than before, with this figure rising to 42% in Sweden and Finland.

Have current external factors such as climate change, war and the economic development affected how you buy second-hand?

	Total	Denmark	Norway	Poland	Sweden	Finland
Yes, I shop more second-hand than before	38%	39%	35%	35%	42%	42%
Yes, I shop less second-hand than before	9%	7%	6%	13%	8%	11%
No, none of these	43%	46%	48%	41%	41%	39%
Not sure/don't know	10%	8%	11%	12%	9%	9%



"Social media influences consumers bevior, and it appears that its impact will only grow in the future, especially if you follow the development between age groups. While many view social media as a driver for increased consumption, our survey reveal that it also serves as an inspiration for sustainable and environmentally friendly alternatives. This is crucial to understand for those who want to reach and influence younger generations. To make a real impact it is essential to communicate messages in the "right" channels," says Gisela Lindstrand, Head of Sustainability, Brand & Communications at Stena Metall.

CHAPTER 4 – RECYCLING

CONSUMER DRIVERS AND THE ROLE OF THE EXTERNAL ENVIRONMENT

The world around us has been affected by several global negative events in recent years. From the pandemic, to economic recession and war – with climate change remaining a constant concern. These events have reshaped how we live our lives and the choices we make. People are reflecting more on the value of things than before, they recycle more, choose locally produced products, and actively make more sustainable decisions. Yet, alongside this shift, there is a noticeable sense of fatigue. While many aim to extend the lifespan of products, high costs appear to be an obstacle that keeps the throwaway culture alive. Although many have changed their behavior, a third of consumers do not feel they have the opportunity or the motivation to adopt a more sustainable lifestyle.

THE MAJORITY FAVOR REPAIRING PRODUCTS – BUT CHALLENGES REMAIN

More than half of consumers (54%) report growing interest in extending the life of products. However, more than two in five (44%) admit throwing away products because it is cheaper to buy new ones. 41% think that repairing an item is not worth the cost compared with the purchase price.

Additionally, it becomes clear that there is gap in knowledge about how to repair products and many express dissatisfaction with the availability of repair services and information. 27% don't know where to find repair servicves and 31% think there are too few of these options.

54% of consumers have become increasingly interested in extending the life of products. However, a low purchase price means two out of five consumers prefer to buy new products rather than repairing.

Have current global events such as climate change, war and the economic environment affected your interest in extending the life of products?

	Total	Denmark	Norway	Poland	Sweden	Finland
Yes, I have become more interested in extending the life of products	54%	55%	54%	45%	57%	58%
Yes, I have become less interested in extending the life of products	9%	7%	6%	12%	10%	12%
No, none of these	26%	27%	29%	31%	24%	22%
Not sure/don't know	11%	11%	12%	13%	9%	9%

What, if anything, would cause you to throw away products that could have been repaired? Multiple answers possible!

	Total	Denmark	Norway	Poland	Sweden	Finland
I can't be bothered to repair the products	15%	15%	17%	11%	20%	15%
There are too few repair services available	31%	23%	40%	33%	31%	27%
It's not worth it considering the purchase price	41%	35%	43%	39%	35%	51%
It is cheaper to buy a new product	44%	43%	52%	39%	42%	45%
I think the product is produced to have a short lifespan	23%	25%	27%	23%	24%	16%
I don't know who to contact to have the product repaired	27%	27%	34%	20%	32%	23%
I don't care enough	6%	4%	6%	6%	7%	8%
Not applicable, I always repair things if possible	13%	12%	10%	18%	11%	14%
Other	1%	2%	2%	1%	1%	1%
Not sure/don't know	5%	6%	5%	3%	5%	4%

CLIMATE CHANGE, WAR AND THE ECONOMIC ENVIRONMENT DRIVE CONSUMERS TO SHOP MORE LOCALLY

In a world that has been characterized by insecurity and uncertainty in recent years, consumers have chosen to consume more locally. Nearly half (42%) report buying more locally produced food, while 32% state that their consumption has not been affected. The trend of shopping more locally is most common in Sweden (48%) and Finland (47%). In contrast, Denmark has the fewest number (34%) who have started to consume more locally produced goods.

48% of Swedes choose more locally produced goods due to climate issues and geopolitical events

MORE PEOPLE RECYCLE CORRECTLY AND SWEDES RECYCLE THE MOST

Just over six out of ten consumers (57%) report that climate change and other global events have increased their willingness to recycle more correctly. At the same time, one in four state that their willingness remains unchanged.

Interest in recycling has grown most in Sweden (62%), Finland (60%) and Norway (57%).

Have current global events such as climate change, war and the economic environment affected your consumption of locally produced products?

	Total	Denmark	Norway	Poland	Sweden	Finland
Yes, I consume more locally produced goods	42%	34%	40%	43%	48%	47%
Yes, I consume less locally produced goods	10%	13%	5%	8%	11%	11%
No, none of these	32%	31%	38%	33%	29%	29%
Not sure/don't know	16	22%	17%	15%	13%	13%

The survey shows a willingness to preserve the value of things and to extend the life of products. The fact that the majority recycle more than before and care about doing it correctly is very positive for the efforts to achieve a circular economy," says Ulf Arnesson, Executive Director, Business Development at Stena Recycling.

Six out of ten consumers care more about recycling correctly.

Have current global events such as climate change, war and the economic environment affected your willingness to recycle?

	Total	Denmark	Norway	Poland	Sweden	Finland
Yes, I care more about recycling correctly	57%	55%	57%	53%	62%	60%
Yes, I care less about recycling	7%	6%	5%	7%	6%	9%
No, none of these	29%	32%	30%	30%	25%	27%
Not sure/don't know	8%	7%	8%	10%	7%	7%

Have current global events such as climate change, war and the economic environment affected the extent to which you recycle products?

	Total	Denmark	Norway	Poland	Sweden	Finland
Yes, I recycle more today than before	54%	54%	51%	51%	59%	56%
Yes, I recycle less today than before	7%	7%	5%	8%	7%	7%
No, none of these	31%	32%	36%	31%	27%	30%
Not sure/don't know	8%	7%	8%	10%	7%	6%

ONE IN FIVE LACKS MOTIVATION TO CONSUME MORE SUSTAINABLY

Consumers are increasingly thinking about sustainability and environmental issues and are influenced by current global events. At the same time, many consumers show little desire to change their habits. While six out of ten consumers (57%) have become more aware of the value of things, only one-third (34%) actively make more sustainable decisions. The biggest change has taken place in Finland (39%) and Sweden (36%).

A fifth of consumers lack the motivation to adopt environmentally friendly consumption habits, and 12% believe that they cannot change anything. In addition, twice as many Polish consumers as Danes, 6% and 3% respectively, believe that it is too late to make a difference and that they therefore think less about sustainable consumption.

Most Finns actively make sustainable decisions. One in five consumers are not motivated to change their behavior at all – despite climate change and other global events.

Have current global events such as climate change, war and the economic environment affected your view of the value of things?

	Total	Denmark	Norway	Poland	Sweden	Finland
Yes, I have become more aware of the value of things	57%	57%	58%	48%	61%	59%
Yes, I care less about the value of things	10%	9%	5%	14%	9%	13%
None of the above	22%	23%	24%	24%	20%	18%
Not sure/don't know	12%	10%	13%	15%	10%	11%

Have current global events such as climate change, war and the economic environment affected your motivation to consume in a more sustainable and environmentally friendly way?

	Total	Denmark	Norway	Poland	Sweden	Finland
It has made me actively make more sustainable decisions	34%	33%	29%	34%	36%	39%
It has made me reflect more on how I consume, but I have not been motivated enough to change anything	19%	22%	20%	17%	20%	15%
It has made me reflect more on how I consume, but I am not able to make any changes	12%	12%	10%	12%	12%	16%
It has made me feel that it is too late to make a difference and I therefore think less about sustainable consumption	4%	3%	4%	6%	5%	4%
Other	2%	2%	2%	2%	2%	2%
No, it has not affected me at all	21%	21%	25%	22%	20%	17%
Not sure/don't know	8%	8%	10%	8%	7%	7%

An unsettled world has made more people think more sustainably. However, a lot of people, especially men, feel unable to change their consumption to be more sustainable and environmentally friendly. Both the business community and society can play a vital role by simplifying and shortening the path to sustainable decisions," says Ulf Arnesson, Executive Director, Business Development at Stena Recycling.

CHAPTER 5 – THE ROLE OF POLITICS AND THE POTENTIAL OF THE EU

HOPELESSNESS MEETS HOPE WHEN CONSUMERS THINK ABOUT THE FUTURE

Consumers express mixed feelings about the EU's ability to drive the climate issue forward. Many are skeptical that the Union's climate targets can actually be achieved, but are hoping for stricter regulations and requirements. This, consumers believe, is essential to actually make a difference and create greater trust in companies' sustainability efforts and the accuracy of their information. Additionally, consumers are optimistic about the role of AI in shaping future climate initiatives, both through technological development and as an vital resource in adressing the national energy challenges.

DANES MOST HOPEFUL ABOUT THE EU CLIMATE TARGETS

When consumers evaluate the chances of achieving EU's climate targets for 2030 – and reduce emissions by 55% compared to 1990 – it is obvious that many are skeptical. A majority (51%) believe that the countries will probably or definitely not achieve the targets , while only 8% of consumers feel confident that the climate targets are within reach. Danes are the most optimistic that they may or will achieve the targets, with more than two in five (44%) believing this, significantly higher than in Norway (26%).

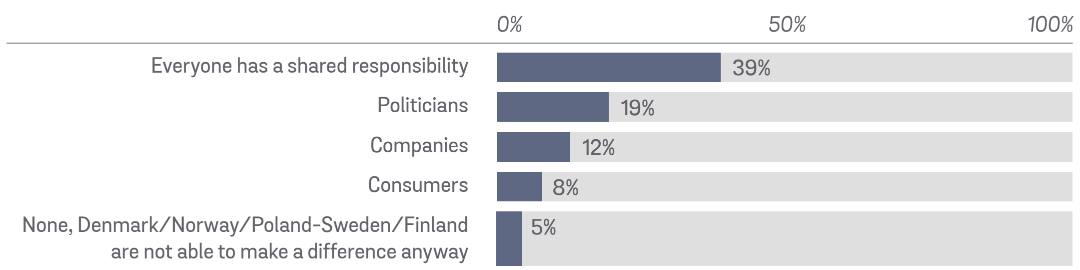
Regarding the question of who is considered responsible for achieving the goals, the biggest belief is in the collective. Two out of five (39%) believe that everyone share the responsibility, followed by politicians (19%), companies (12%), and consumers (8%). 5% feel that no one is responsible, as the country is not able to make a difference anyway.

Only 8% believe their country will achieve the EU climate targets.

Do you think that Denmark/Norway/Poland/Sweden/Finland will achieve the EU's climate targets for 2030 and reduce emissions by 55% compared with 1990s levels?

	Total	Denmark	Norway	Poland	Sweden	Finland
We will achieve the targets	8%	12%	5%	9%	10%	6%
We may be able to achieve the targets	29%	32%	21%	30%	30%	32%
We are unlikely to achieve the targets	34%	33%	40%	25%	32%	37%
We will definitely not achieve the targets	17%	11%	21%	21%	16%	16%
Not sure/don't know	12%	12%	13%	15%	12%	10%

Who do you think is most responsible for achieving the EU's 2030 climate targets and reducing emissions by 55%, compared to 1990s levels?



"As 2030 rapidly approaches, the survey reveals that many doubt the possibility of meeting the EU's climate target for reduced emissions. At the same time, it is interesting to see that the younger generation appears to be more optimistic compared to older generations, despite the sense of hopelessness among youth reported in the media. The survey also indicates that consumers in general believe in the importance of shared responsibility for achieving these goals and that politicians nor the business community can solve these challenges on their own," says Ulf Arnesson, Executive Director, Business Development at Stena Recycling.

THE MAJORITY WANTS TOUGHER EU ACTION ON CLIMATE CHANGE

When consumers consider what is necessary at the EU level to advance the climate transition, there is a clear consensus: tougher measures are needed. Half of the respondents (50%) believe that enforcing regulations and requirements on member states that fail to comply with environmental and climate legislation is crucial for making real impact. In contrast, 17% believe that each country should be allowed to make its own decisions and 9% think that the EU should prioritize other things over climate and sustainability. The greatest confidence in the EU's ability to influence change through regulation, is shown by consumers in Denmark (58%) and Sweden (57%). Interestingly, twice as many consumers in Poland (26%) compared to Sweden (13%) believe that each country should be able to decide for themselves.

The issue of greenwashing – when companies make false claims about their sustainability efforts – has received significant attention in recent years. But with upcoming EU regulations, consumers feel that this will increase their trust in companies. Six out of ten consumers (57%) anticipate having a bit more or much more confidence in the accuracy of companies' sustainability claims once the Green Claims Directive is implemented.

Who do you think has the greatest responsibility for Denmark/Norway/Poland/Sweden /Finland achieving the EU's 2030 climate targets and reducing emissions by 55% compared to 1990's levels?

	Total	Denmark	Norway	Poland	Sweden	Finland
Politicians	19%	20%	20%	19%	22%	13%
Consumers	8%	9%	5%	7%	9%	8%
Companies	12%	16%	10%	11%	13%	10%
The media	2%	2%	2%	3%	2%	2%
Everyone has a shared responsibility	39%	40%	40%	35%	36%	45%
Someone other than above	1%	1%	1%	1%	1%	1%
No one, Denmark/Norway/Poland/Sweden/Finland are not able to make a difference anyway	5%	3%	6%	6%	5%	7%
No one, it's already too late	1%	1%	1%	2%	1%	2%
No one, Denmark/Norway/Poland/Sweden/Finland are already doing well enough	6%	3%	8%	6%	5%	7%
Not sure/don't know	6%	5%	7%	9%	5%	5%

50% want to see stricter regulations for countries that do not comply with EU legislation.

Do you think that the EU should introduce stricter regulations for member states that do not comply with legislation linked to climate and sustainability?

	Total	Denmark	Norway	Poland	Sweden	Finland
Yes, I think it is necessary in order to make a real difference	50%	58%	49%	35%	57%	49%
Yes, for other reasons	8%	9%	8%	5%	7%	9%
No, I think each country should be able to decide for themselves	17%	12%	15%	26%	13%	22%
No, I think they should prioritize other things over climate and sustainability	9%	7%	10%	13%	8%	8%
No, for other reasons	4%	2%	5%	5%	4%	3%
Not sure/don't know	13%	13%	14%	16%	12%	10%

In the near future, new, more stringent EU rules on greenwashing – i.e. when companies make claims about their sustainability work that are not correct – will be introduced. Will it make you trust the companies more or less?

	Total	Denmark	Norway	Poland	Sweden	Finland
It will make me trust the accuracy of the information much more	13%	18%	11%	14%	10%	11%
It will make me trust the accuracy of the information a little more	44%	45%	45%	38%	48%	42%
It will not make any difference to me	22%	18%	23%	23%	24%	25%
It will make me trust the accuracy of the information a little less	5%	3%	4%	6%	4%	7%
It will make me trust the accuracy of the information much less	4%	4%	3%	5%	3%	4%
Not sure/don't know	13%	11%	15%	15%	11%	11%

"Our survey indicates that the majority believe that there should be clear regulations for EU member states to follow when it comes to environmental and climate matters. It is positive to see so many consumers will have a greater trust in companies' sustainability work when new rules regarding greenwashing are implemented. Although there are, and will continue to be, challenges for companies to communicate their sustainability efforts in a credible way, I am convinced that these new EU regulations will play a crucial role in enhancing transparency," says Ulf Arnesson, Executive Director, Business Development at Stena Recycling.

Three out of ten consumers believe AI can accelerate technological advances in sustainability.

MIXED PERSPECTIVES ON AI'S CLIMATE IMPACT

One in four consumers are hopeful about AI's capacity to drive technological advancements in sustainability, and 30% see promise in AI's ability to enhance energy efficiency in the fure. On the other hand, one in five consumers worry that AI can contribute to disinformation about environmental and climate issues.

Almost twice as many Finns (21%) as Norwegians (12%) are concerned that AI may accelerate processes and projects that has a negative impact on the climate. 16% of Danes feel that AI will have no effect on the environment or climate whatsoever.

Do you think that artificial intelligence (AI) will have an impact on the environment and climate in the future? Multiple answers possible.

	Total	Denmark	Norway	Poland	Sweden	Finland
AI can accelerate technological advances in sustainability	27%	26%	28%	24%	30%	28%
AI can be a source of information about the environment and climate	26%	26%	28%	26%	25%	26%
AI can contribute to smarter energy use	30%	28%	33%	24%	31%	33%
AI requires a lot of energy and large carbon dioxide emissions, which is negative for the environment	17%	17%	20%	15%	16%	18%
AI can accelerate processes and projects that have a negative environmental impact	16%	16%	12%	13%	16%	21%
AI can be a source of disinformation about the environment and climate	22%	20%	24%	20%	20%	24%
Other	1%	2%	2%	1%	2%	1%
No, I don't think AI will have any impact on the environment and climate in the future	13%	16%	11%	13%	14%	13%
Not sure/don't know	20%	19%	24%	20%	22%	16%

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