ENVIRONMENTAL BAROMETER 2024

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Fostplus

Ipsos

THE VOICE OF THE CONSUMER

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FOST PLUS ENVIRONMENTAL BAROMETER

The Fost Plus environmental barometer investigates shifts in Belgian consumer attitudes towards environmental issues and behavioural trends in dealing with waste, packaging, new concepts and sustainable consumption.

The previous environmental barometer dates back to 2014. In recent years, research has mainly focused on rather specific operational or dedicated topics (P+ pilot projects, introduction/adoption of the New Blue Bag, sorting behaviour with regard to complex packaging, OOH sorting behaviour, sorting motivation, etc.).

Given the **far-reaching social changes**, that have occurred since then, and of course our current and future challenges and focuses, it was high time to take the temperature of consumers (behaviour, attitudes, perceptions, motivations, etc.) by means of a large-scale survey.

WE WORKED WITH A METHODOLOGY CONSISTING OF SEVERAL STEPS:

CURATION

Zoom out, obtain a systematic basic understanding of the broader field of "environmental issues" based on recent data from surveys and other sources.

QUANTI

Surveying and quantifying attitudes, behaviour and perceptions in relation to the macro-context and reality of Fost Plus (CAWI, n = 1,000).

QUALI

Zoom in, qualitative deep dive to capture emotional motivations and dimensions in particular (6 online group discussions).

The survey was conducted by Ipsos (fieldwork June - September 2024).

KEY INSIGHTS

2

There is a clear tension between increasing environmental awareness and inconsistent behaviour/behavioural change – the so-called **say-do gap** (cf. intention/behaviour).

A key factor here is major global events (Paris Climate Agreement, COVID-19 pandemic, climate marches, extreme weather events, societal disapproval of plastics, etc.) that have gradually raised environmental awareness over the past decade.

URGENCY VS ACTION

Economic concerns, apathy and a form of eco-fatigue contribute to this gap. Climate is not a top priority: the personal impact it will have on individuals is downplayed.
The degree of perceived impact is indeed directly proportional to the level of engagement.

PACKAGING AND OVERCONSUMPTION

Packaging is a necessary evil: useful if limited, harmful and annoying if excessive. While most consumers acknowledge that over-packaging is problematic, packaging is rarely a factor in purchasing decisions. Practical barriers (e.g. convenience, cost) and ingrained habits (routines) discourage consumers from reducing packaging use and perpetuate the use of disposable packaging.

80% say there is too much packaging

yet only **50%** opt for minimal packaging in their purchasing behaviour.

75% agree that as little packaging as possible is important

46% do not buy products that are over-packaged.

PRICE, QUALITY, BRAND AND ORIGIN
are buying criteria that precede packaging.

Degree of concern about excess packaging varies with retail type or purchasing context.

The more impulsive the purchasing context and the less frequent the shopping occasions, the lower the concern is: non-food & on-the-go versus supermarket & online purchases. Small local shops are not seen as problematic in terms of packaging.

Consumers do not see themselves as primary actors: they assign this role to the manufacturers/producers.

PLASTIC IS TOP OF MIND

It is most often seen as one of the most problematic types of waste in Belgium and is also the most frequently mentioned term that is spontaneously linked to the notion of "packaging". This perception is apparently even stronger in Belgium than the European average. In second place comes... chemical waste.

SORTING BEHAVIOUR

Home sorting is well-established and routine in 2024.

This routine is supported by its perceived accessibility and overarching importance (which corresponds to the broad awareness around environmental issues).

When asked which things (from a list of suggestions) people can do themselves and have the most positive impact on the environment, "sorting and recycling waste" scored **39% compared with 50% in 2014**.

It is still the top answer in 2024, but other points score higher today than in 2014: conscious consumption, fewer plastics, consuming less and reusing products.

POINT FOR ATTENTION:
a practical sorting exercise still indicates that

- aluminium trays (**13%**: residual waste) and
- styrofoam (**6%**: PMD)

are usually incorrectly sorted.

The reasons for and importance of sorting score highly (saving raw materials and increasing recycling rates). This shows that motivation has evolved positively along with awareness of playing an active role in the recycling process, cf. avoiding blaming and coping. Sorting is also an obligation we meet almost with pleasure. In conclusion, we have a better and more concrete understanding of the impact of sorting.

The New Blue Bag (introduced '19 - '21) feels like the next level, but the notion of "packaging" is sometimes forgotten.

Although sorting at home is well established (82% say they always sort), sorting outside the home remains inconsistent due to logistical/infrastructural and practical problems. However, the highest-scoring sorting location is at the workplace.

REUSE & REDUCE

The importance of reuse is widely recognised, but real enthusiasm for it is lower than for "traditional" sorting. In order of importance, the following aspects are cited: good for the environment, positive contribution to society, financial benefits, makes me feel good.

Reuse is broadly interpreted as giving a new lease of life/use to a packaging item regardless of its function.

Linking a monetary value to behaviour gives it a sense of "importance" (positive reinforcement).

In this way "insignificant" behaviour can become a new habit or routine.

There is an open and receptive attitude towards reuse: there is potential, it's not a "no go".

Reuse is largely uncharted territory. The barriers include loss of convenience, impracticality, price and hygiene concerns.

CONSUMER SEGMENTATION

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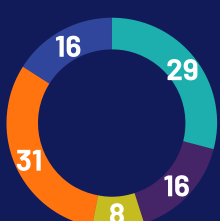
SEGMENTATION

In order to better understand the realities and dynamics and, above all, to respond to them appropriately, a segmentation is used of like-minded people in terms of attitudes and behaviour.

For example, this enables communication to be delineated better and tailored in terms of content and form to certain profiles (or not). Cf. a dedicated value proposition.

Based on their level of environmental engagement (macro -> feel) and willingness to take action (micro -> behave),

5 consumer segments are defined. These are listed below with their respective shares in Belgium.



- Activists
- Willing Contributors
- Discerning Realists
- Passive Compliers
- Disengaged Distancers

29% ACTIVISTS

Great concern about environmental issues and call for systemic change. The most engaged group: individuals in this group are very concerned and therefore act accordingly.

16% WILLING CONTRIBUTORS

Also concerned about environmental issues, with average engagement. Older, affluent and share the concern. They have a sense of responsibility and will therefore do their bit, but within the limits of what is convenient and what they regard as realistic.

- Sorting is a routine, I trust the process, am part of the solution.
- Reuse may be the way forward, but it must be clear and concrete.

8% DISCERNING REALISTS

Low concern, average engagement based on a consumer role. Have differing views on the macro issues; do show commitment to society but contribute in their own way and are far from convinced by all practical implications.

- I accept the importance of sorting but have doubts about its impact.
- Reuse doesn't quite fit into my busy life, cf. time and effort.

31% PASSIVE COMPLIERS

Sustainable behaviour if it is easy and fits in with their habits, often influenced by social expectations. Share the concern at macro level but disagree with the practical implications and rules and will therefore only do the bare minimum.

- Sorting is a chore, but it has to be done. Convinced that it doesn't really make a difference.
- I'm not interested in reuse, I can just see a lot of inconvenience.

16% DISENGAGED DISTANCERS

Minimum environmental commitment, immediate and tangible benefits are important. Have concerns other than the environment, and their low level of concern about the macro level causes them to show little engagement as consumers.

FINDINGS

PASSIVE COMPLIERS

In Belgium, the largest group is "passive compliers":

I only do what's necessary or expected of me and therefore take minimal account of the environment.

A segment with a low sense of ESG urgency may engage in commonly accepted routines in order to be a good citizen, but are unlikely to go further.

Money is a concern and they are not convinced of their impact.

- More likely to be male and Flemish

DISCERNING REALISTS

The "discerning realists" segment is noticeably smaller in Belgium than the global average (worldwide, GCA). Cf.

I only focus on what has real impact and look after the environment in my own way.

Segment with unconventional views: sceptical about urgency and the established rules, but still engaged, though in their own way.

- More adolescents and young adults (18 - 44y), more men, more in Brussels and Wallonia, lower social classes.

SOME SPECIFIC VANITY METRICS

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82% of Belgians feel that environmental issues have a direct effect on daily life & health

and **56%** attribute this to climate change.
At the same time, this is not a top priority for Belgians, whereas poverty, inflation, crime and healthcare are, to a greater extent.

OVERPACKAGING ISSUE

95%

We see a broad layer of consumers who recognise over-packaging as an issue and say that the amount of packaging (in overall terms) could be significantly reduced.

This is also linked to our lifestyle.

83% support the "**absolute necessity**" of packaging, however.

90% perceive **cardboard packaging** as more **sustainable** than plastic packaging.

55+ people aged have more outspoken opinions in the above respects than other age groups.

16% Disengaged Distancers & 8% Discerning Realists
have relatively little opposition to packaging, or, where applicable, excess packaging.

The importance of freedom of choice for consumers and the functional usefulness of packaging (different sizes based on need, preservation, protection during transport) receives more support among:

- The older age groups (45+ onwards).
- People in Flanders have more outspoken opinions about this.
- Disengaged Distancers and Discerning Realists are less vocal about it.

71%

The importance of sorting & recycling is supported by a general awareness of the need to protect the environment

However, the secondary driver is affirming one's own good behaviour (68%, a pat on one's own back). Disengaged Distancers & Discerning Realists – in keeping with their behaviour – are less convinced that this is important for the environment.

There is a high level of agreement on tackling litter

74%

find this important in terms of environmental protection.

The importance of reusing and returning used packaging is widely supported. However, the proportion of Belgians who are very outspoken about this in terms of importance (33%) is lower than for sorting & recycling (66%).

for **1 in 3**

of those who consider "reusing and returning packaging" important,
the economic factor and environmental considerations play a role, in other words "the economic benefit".

Again, **Disengaged Distancers** and **Discerning Realists** are less convinced of the importance of reusing packaging. More than the other segments, they cite "self-centred reasons":
"it makes me feel good."

78%

25 – 35-year-olds used more reusable options

although still less than home sorting (**93%**).

However, there is a high level of openness to the use of reusable packaging. Only a minority have clearly negative attitudes to it.

The most popular scenario is returning reusable packaging to a collection point: 87% positive vs 13% negative.

The practical implications are a major obstacle for those who are negative towards reusable packaging: 'it's a hassle'. Hygiene plays an important role in the case of refilling at a point of sale.

CONCLUSIONS

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MACRO VERSUS MICRO: DYNAMIC

MACRO
Within society, the level of understanding of environmental and climate issues is high: people understand that there are problems and that they need to be addressed.

VS

MICRO
On how to go about this, however, opinions are divided, with regard to the question of responsibility (individual vs. institution) and types of solutions.

SAY-DO GAP

The dynamic between the macro and micro levels reveals the say-do gap. Despite the fact that there is a fairly broad consensus on environmental issues and more concretely on the fact that we would be better off using or consuming less packaging, this has a limited impact on sustainable consumer choices. There is a significant group of consumers who do take this into account (although they are significantly fewer in number than those who recognise the issue). However, the expectation among a majority is that producers should make more efforts.

To try to bridge the say-do gap **3 ELEMENTS** are put forward:

CONSIDER (ECONOMIC/FINANCIAL) INCENTIVES:
Financial incentives or perceived benefits have a positive impact on "eco-friendly" habits, especially with respect to the "mushy middle" – those who are the least involved but capable of being convinced.

DE-COMPLEXIFY SUSTAINABLE CHOICES (MAKE COMPLEXITY SIMPLE):
Making sustainable packaging more accessible and more affordable may promote behavioural change between segments.

CLARIFY INDIVIDUAL IMPACT
Giving consumers a clearer understanding of the collective impact of their choices, especially on reuse and waste reduction, may increase sustainable engagement.

CONSUMERS ARE AWARE OF THEIR ENVIRONMENTAL IMPACT

In 2014 the most important action a consumer could do was clearly "**sorting & recycling**";

In 2024 there is an awareness that **the way we consume** (how much, what, which products, use of plastic, energy, reusable products) impacts the environment.

We can also identify this awareness in the drivers for sorting. What was vague in 2014 (better for the environment) has become much more concrete in 2024 (make new products from sorted waste, facilitate recycling, burn less waste).

THE ROUTINE OF HOME SORTING

Home sorting is strongly established in Belgium; even within the less committed segments, a majority sort at home very frequently. The motivation for this is mainly to protect the environment, followed by a kind of self-affirmation that "I'm doing a good job".

POTENTIAL FOR REUSE

There is definitely support for alternative, newer ways of dealing with packaging and waste, but this needs further development.

TWO BARRIERS TO THIS ARE:

- The perception that it is expensive and/or that people cannot afford it.
- The practical details of implementation are not yet clear.

RECOMMENDATIONS

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EMPHASISE GENERAL USEFULNESS AND EFFECTIVENESS IN COMMUNICATION

There is broad understanding regarding the environment, so the basis from which communication starts is already established. Convincing consumers of the usefulness and impact of the various ways on how to handle waste with a higher degree of awareness can reduce the say-do gap.

VARIOUS FORMS OF REUSE

In the further implementation of the various forms of reuse, two points are important:

- Uniformity in implementation.
- Systems should be clear and approachable so that there are no practical barriers and the effort feels minimal. Identify exactly what the barriers are and, where possible, provide the tools to overcome them.

FOCUS ON ECONOMY FOR CONSUMERS

New systems are still too often seen as expensive and exclusive when in reality there are also economic benefits.

DIFFERENT SEGMENTS

Regarding the different segments:

PASSIVE COMPLIERS

Motivate this segment by convincing them of the effectiveness of the various systems. For this group, it is important for there to be a low entry barrier, for instance through a combination of regulation and awareness-raising.

DISCERNING REALISTS

This segment is quite small but also shows potential. Here, personal benefit is more important than in other segments for convincing them to adopt positive behaviour.

WILLING CONTRIBUTORS

Already show a lot of commitment but stop at the limits of their convenience. It is important to introduce systems to show that it does not have a significant impact on convenience but it does have a significant impact on the issues.

December 2024.
This summary reflects key behavioural and attitudinal insights.
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