SCELTA 5

Developing the Circular Economy by Leveraging Purchasing Trends

2025 Edition

CONAI

ISTITUTO DI MANAGEMENT

Sant'Anna

Scuola Universitaria Superiore Pisa

WHAT IS IT?

The SCELTA Project is a study conducted by CONAI and the Institute of Management of the Sant'Anna School of Advanced Studies, aiming to investigate consumer attitudes toward the circular economy.

Launched in 2019, it reaches its 5th edition in 2025.

SCELTA 5 PROJECT
Objectives

1. To analyze **pro-environmental consumption trends** aligned with the principles of the circular economy.

2. To understand consumer perceptions regarding:
   - the **measures included in the new Packaging and Packaging Waste Regulation (PPWR)**,
   - the **environmental impact of packaging**,
   - **recent regulatory developments on green claims**.

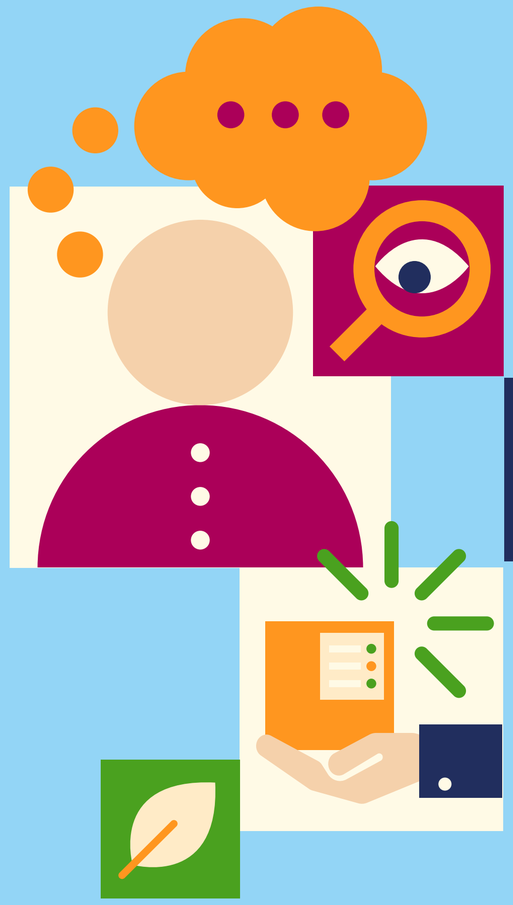
3. To ensure continuity in terms of topics covered with previous surveys, in order to continue **the "observatory" activity** on consumption consistent with the circular economy and with low environmental impact.

METHOD AND SAMPLE

The survey was conducted via an **online questionnaire** administered in **October 2024** to a sample of **1,031 respondents**. This sample is representative of the Italian population aged 18 to 70.

Methodological Note

Due to rounding, the percentages in some charts do not total 100%. The decision to present numbers without decimals is intended to facilitate a clearer and more immediate reading of the results.



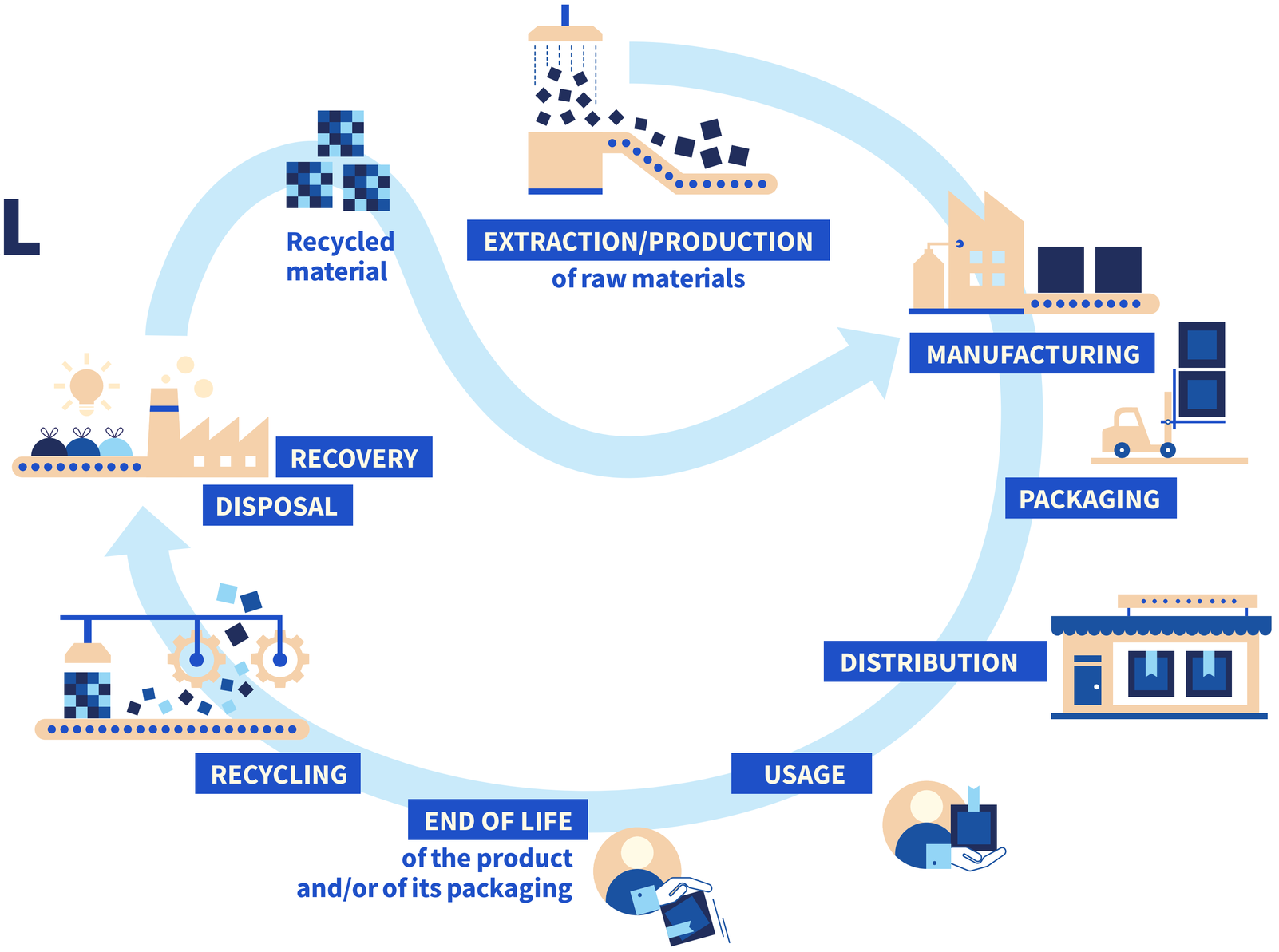
PERCEPTIONS

of Packaging Measures and Packaging Environmental Impact

What is Meant by PACKAGING ENVIRONMENTAL IMPACT

Every product, including its packaging, generates environmental impacts.

One of these impacts concerns climate change, specifically the carbon dioxide (CO_2) emissions generated and released into the atmosphere throughout the entire life cycle of the product and its packaging.



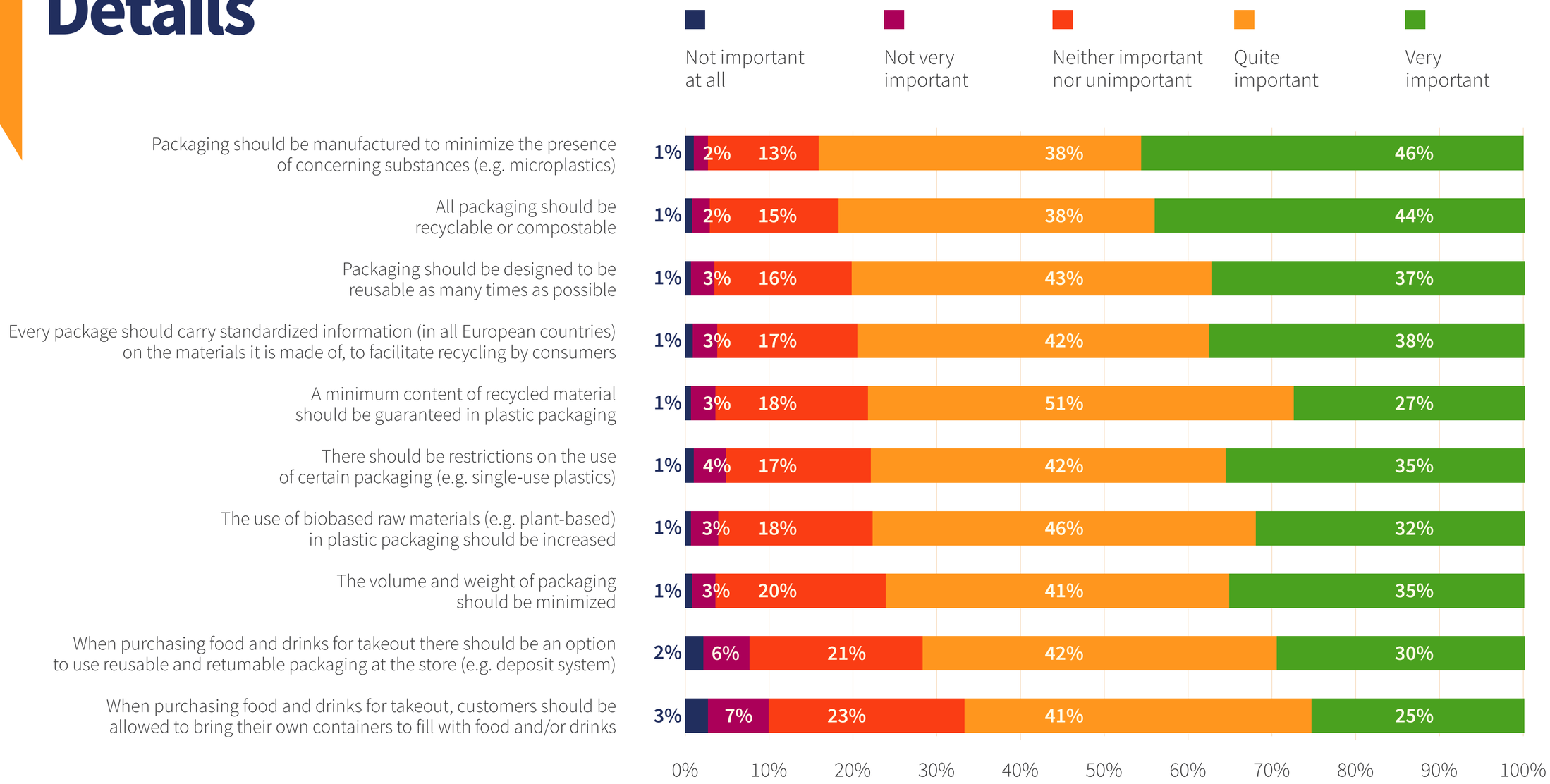
What is the Perception of Italian Consumers on Measures to Reduce the Environmental Impact of Packaging?

In response to growing environmental concerns and the need for more sustainable consumption practices, Europe is considering the introduction of standardized measures to reduce the environmental impacts of packaging (Regulation 2025/40).

Accordingly, the survey has investigated consumer perceptions on the importance of initiatives that will become mandatory for companies in the next few years and will have an impact on the packaging production, usage and disposal.

In general,
between 84% and 66%
of respondents consider mandatory initiatives to be “fairly” or “very important.”

Details


Not important at all
Not very important
Neither important nor unimportant
Quite important
Very important
Packaging should be manufactured to minimize the presence of concerning substances (e.g. microplastics)
1%
2%
13%
38%
46%
All packaging should be recyclable or compostable
1%
2%
15%
38%
44%
Packaging should be designed to be reusable as many times as possible
1%
3%
16%
43%
37%
Every package should carry standardized information (in all European countries) on the materials it is made of, to facilitate recycling by consumers
1%
3%
17%
42%
38%
A minimum content of recycled material should be guaranteed in plastic packaging
1%
3%
18%
51%
27%
There should be restrictions on the use of certain packaging (e.g. single-use plastics)
1%
4%
17%
42%
35%
The use of biobased raw materials (e.g. plant-based) in plastic packaging should be increased
1%
3%
18%
46%
32%
The volume and weight of packaging should be minimized
1%
3%
20%
41%
35%
When purchasing food and drinks for takeout there should be an option to use reusable and retumable packaging at the store (e.g. deposit system)
2%
6%
21%
42%
30%
When purchasing food and drinks for takeout, customers should be allowed to bring their own containers to fill with food and/or drinks
3%
7%
23%
41%
25%
0%
10%
20%
30%
40%
50%
60%
70%
80%
90%
100%

What is the Perception of Italian Consumers on the Environmental Impact of Packaging?

The survey explored how consumers perceive the environmental impact of packaging.

Specifically focusing on **consumer goods**, we explored consumers' ability to correctly identify the extent to which the packaging contributes to the overall environmental impact of the entire product in terms of climate change.

Liquid laundry detergent

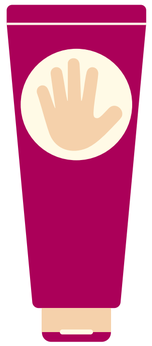
in a plastic bottle

1.5L

Hand cream

in plastic tube

75 ml



Meat

in an aluminum can

70g

Whole fruit yogurt

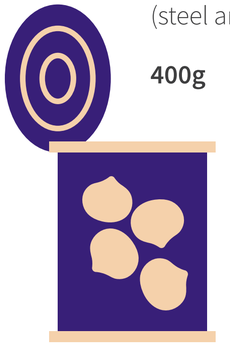
in a paper pot

125g

Chickpeas

in a tin can (steel and tin)

400g



Borlotti beans

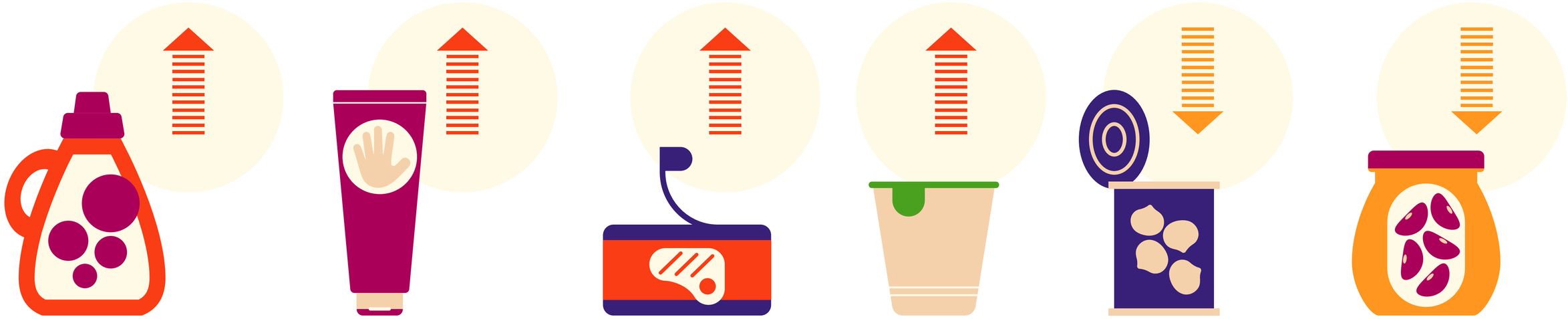
in a glass jar

370g

Results

Consumers overestimate the impact of the plastic detergent bottle, the aluminum can containing meat, the paper pot containing yogurt, and the hand cream in a plastic tube, while they underestimate it for chickpeas in a tin can and beans in a glass jar.

In some cases consumers overestimate the impact of packaging while in other cases they underestimate it.



Details

Liquid laundry detergent
in a plastic bottle
1.5L

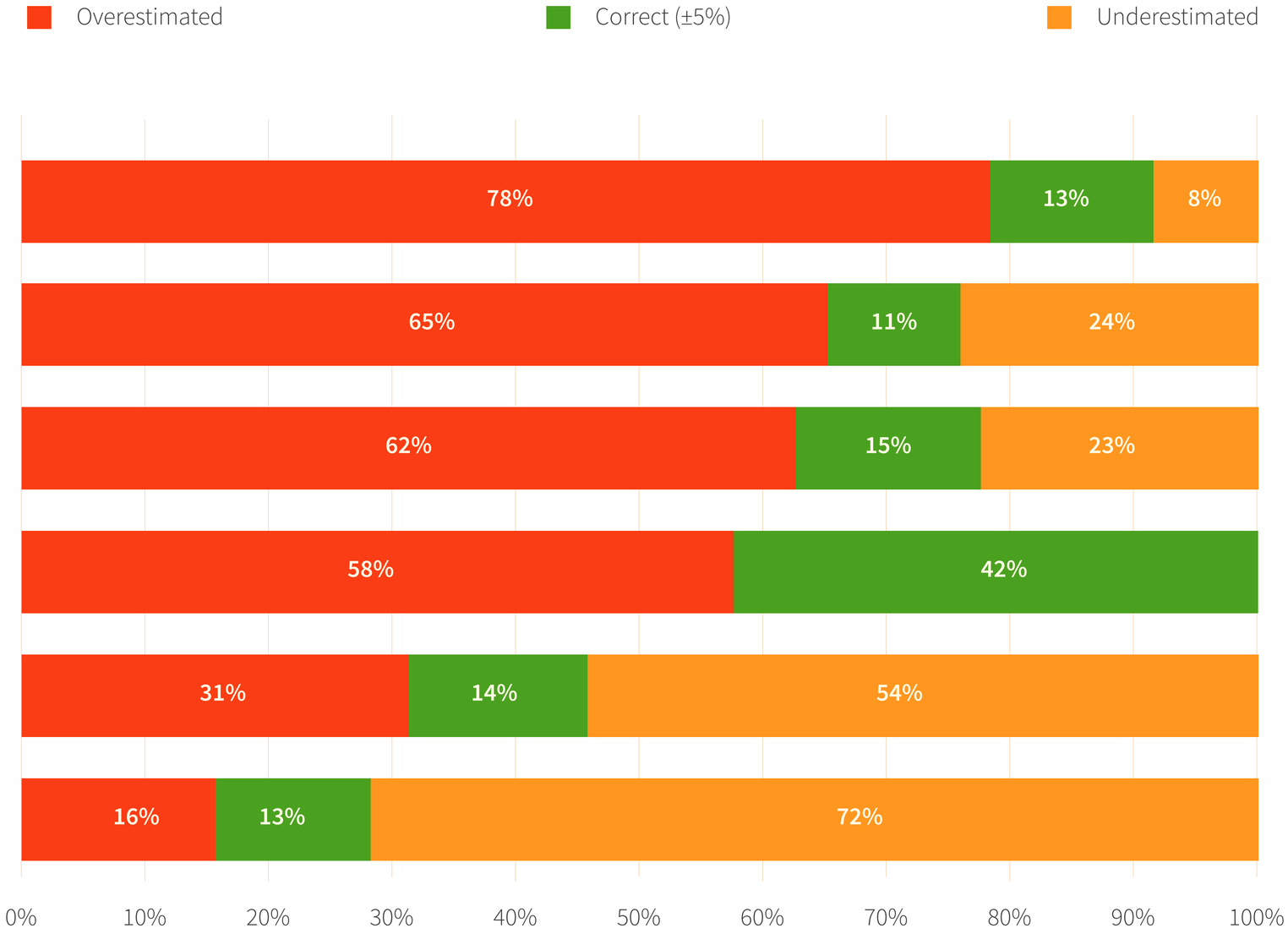
Hand cream
in plastic tube
75 ml

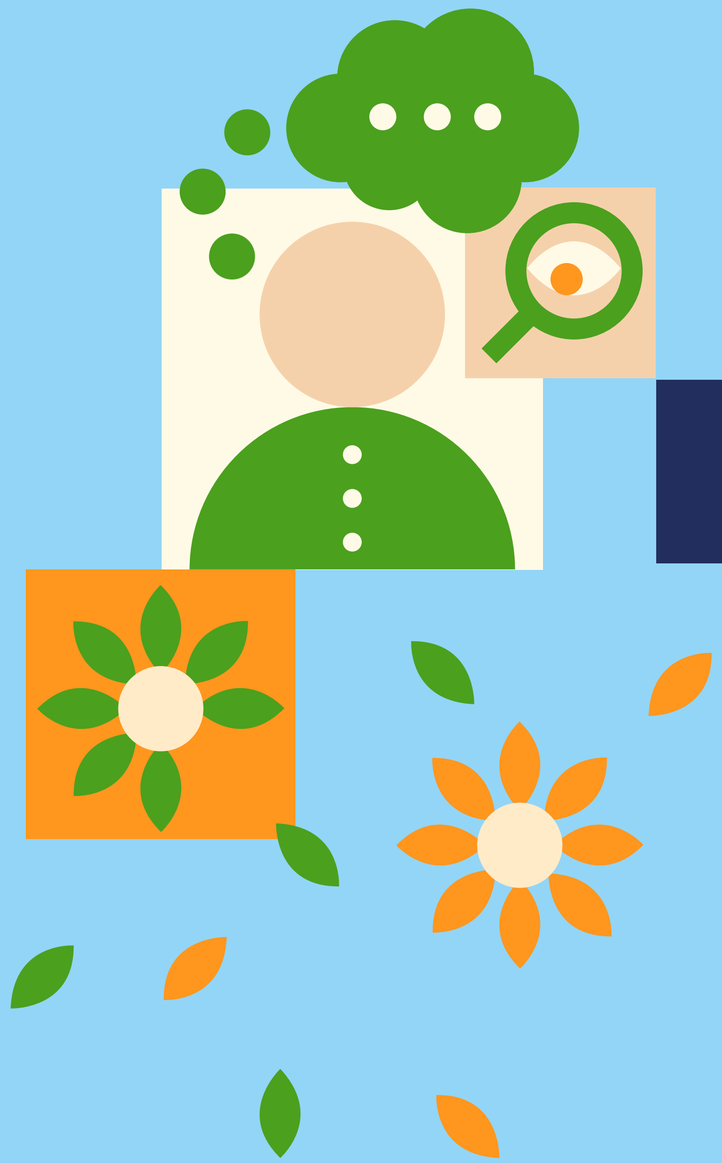
Meat
in an aluminum can
70g

Whole fruit yogurt
in a paper pot
125g

Chickpeas
in a tin can (steel and tin)
400g

Borlotti beans
in a glass jar
370g

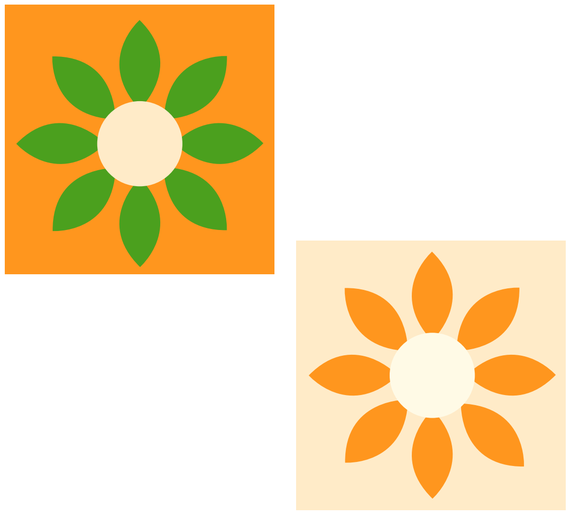




GREEN CLAIMS

Knowledge, Influence, and Perception of Deceptiveness

What Do “GREEN CLAIM” and “CARBON CLAIM” Mean?

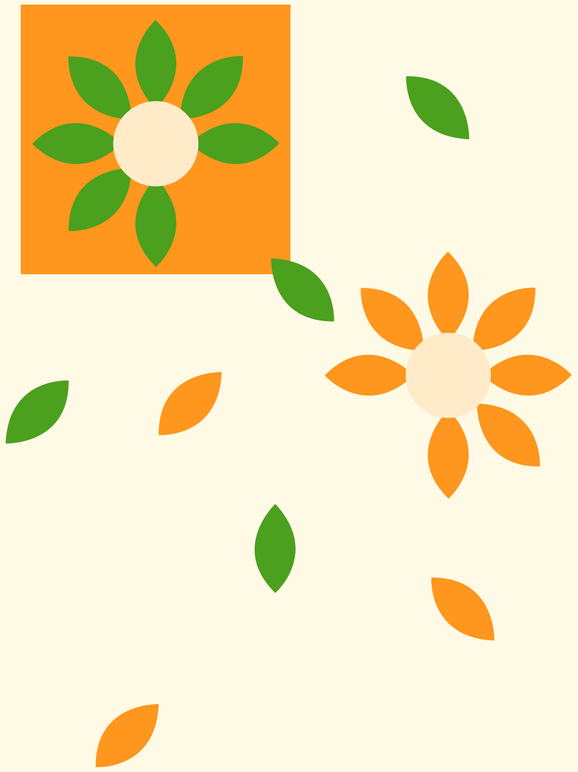


The growing societal focus on the climate crisis, along with the need to meet regulatory requirements and stakeholder expectations, has led to **the widespread use of various sustainability-related statements** (“green claims”), **particularly those concerning carbon emissions** (“carbon claims”) at the product, process, or company level.

At the same time, ensuring accurate consumer information and preventing misleading practices such as greenwashing has prompted European legislators to introduce **new regulations.**

Directive 2024/825/UE, known as “Empowering Consumers for the Green Transition,” establishes new measures requiring companies to enhance the accuracy and transparency of their green claims.

The new restrictions introduced by Directive 2024/825/EU in Annex I of Directive 2005/29/EC are:



- Displaying a sustainability label that is not based on a certification system or not established by public authorities.
- Making a generic environmental claim for which the economic operator cannot demonstrate the recognized excellence of environmental performance.
- Making an environmental claim about the product as a whole or the economic operator's activity as a whole when it only concerns a specific aspect of the product or a specific element of the operator's activity.
- Claiming, based on the offsetting of greenhouse gas emissions, that a product has a neutral, reduced, or positive environmental impact in terms of greenhouse gas emissions.
- Presenting requirements imposed by law on the Union market for all products in a given category as if they were a distinctive feature of the economic operator's offer.

Points: 2 bis, 4bis, 4 ter, 4 quater, 10bis.

UNDERSTANDING of “Carbon claims”

Based on your knowledge, would you say the following statements are true or false?

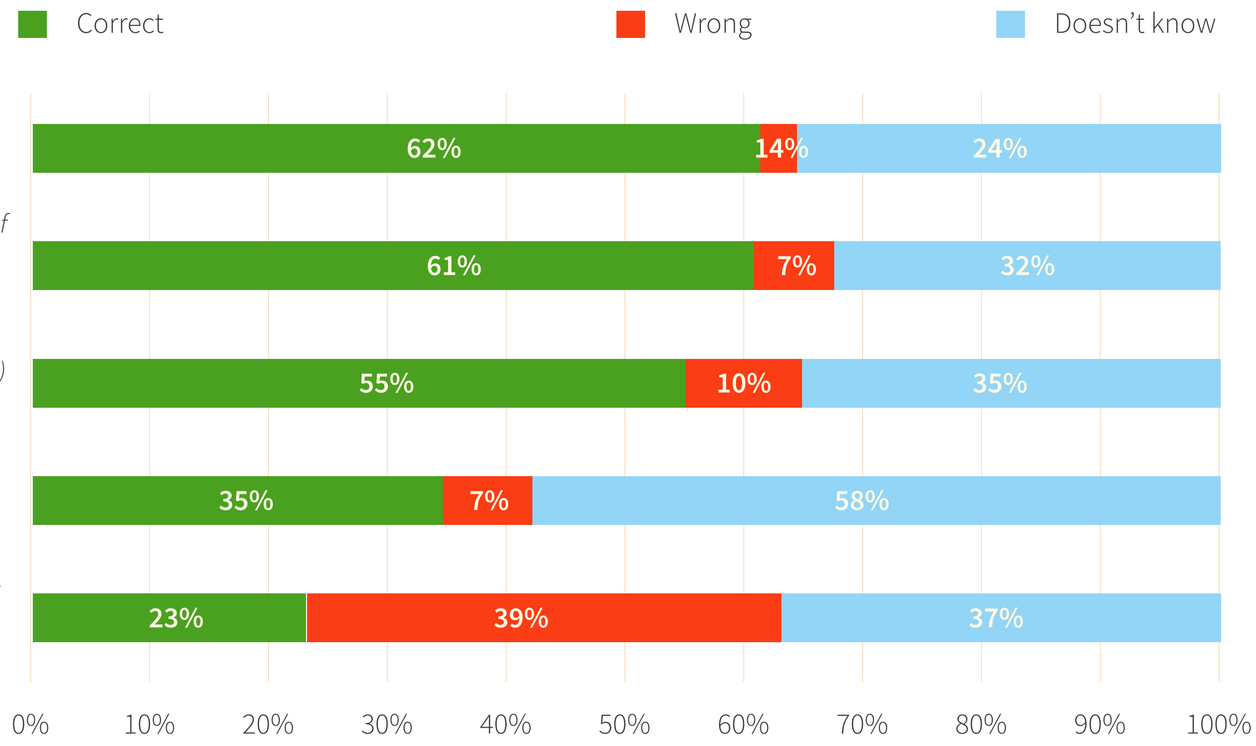
The statements “Reducing CO_2 emissions” and “ Offsetting CO_2 emissions” mean the same thing. **(FALSE)**

Compensating for CO_2 emissions (carbon offsetting) means balancing the amount of CO_2 generated by any productive activity through measures that can absorb it (e.g. through financing reforestation projects). **(TRUE)**

Decarbonization refers to the process of reducing the carbon-hydrogen ration in energy sources. It is a process aimed at reducing the amount of carbon dioxide (CO_2) in the athmosphere. **(TRUE)**

Carbon insetting actions are initiatives to reduce emissions responsible for climate change, carried out by a company within its own production chain and the territories/communities connected to it. **(TRUE)**

If a product has a certification for climate neutrality (es. carbon neutral, carbon free, climate-neutral certified), it means that its production did not generate any CO_2 emissions. **(FALSE)**



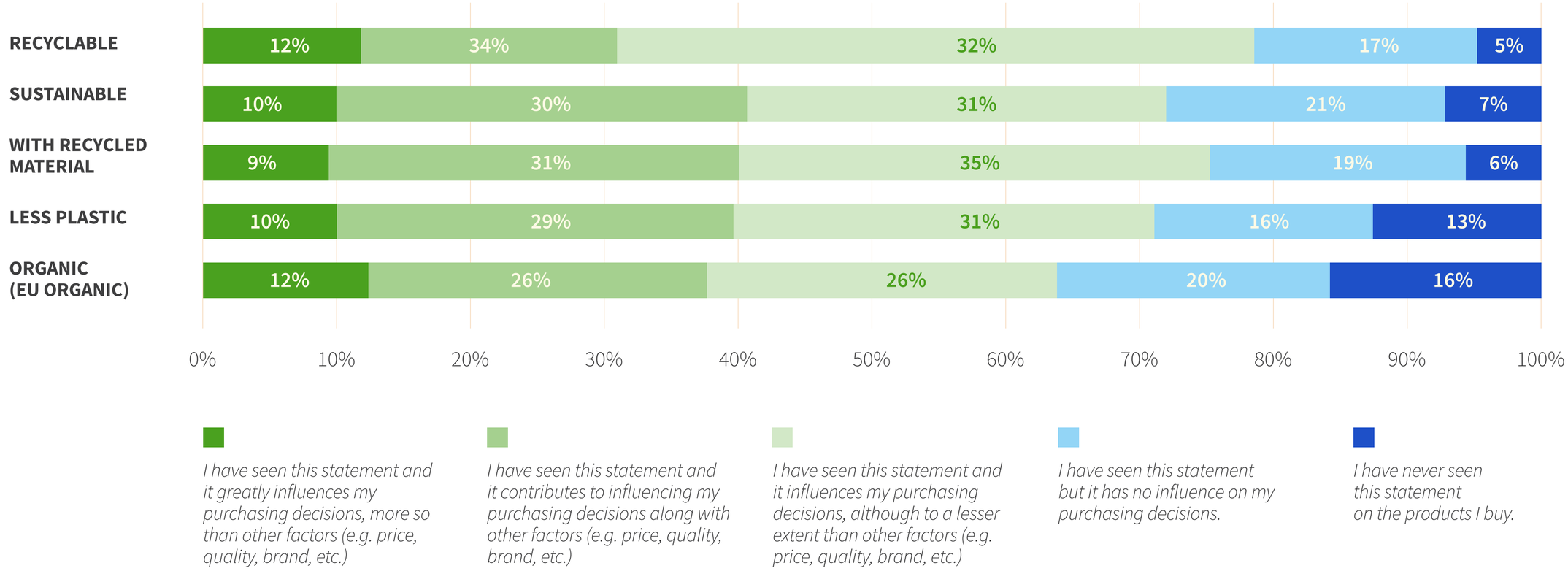
UNDERSTANDING of “Carbon claims”

The most critical scenario concerns climate neutrality certifications like “carbon neutral”, understood by only 23% of respondents; while 39% are mistakenly convinced that such claims distinguish products whose production has not generated any emissions, thus becoming potential victims of greenwashing.

Less than 47% of consumers are familiar with the meaning of carbon claims, while about 37% on average declare that they do not know the meaning.

INFLUENCE of Green claims

Regarding the environmental claims displayed on products, please indicate which response is most applicable to you for each of the following statements.



INFLUENCE of Green claims

The claim that most influences purchasing behavior is “Recyclable”, with 46% of consumers stating they are influenced or strongly influenced by this statement. This is followed by “Sustainable” (40%), “Made with recycled material” (40%), and “Less plastic” (39%). Last, though with similar importance, is “Organic” (38%).

The analysis reveals that **environmental claims significantly influence consumer purchasing decisions**, but this influence is often balanced by other factors such as price, quality, and brand.

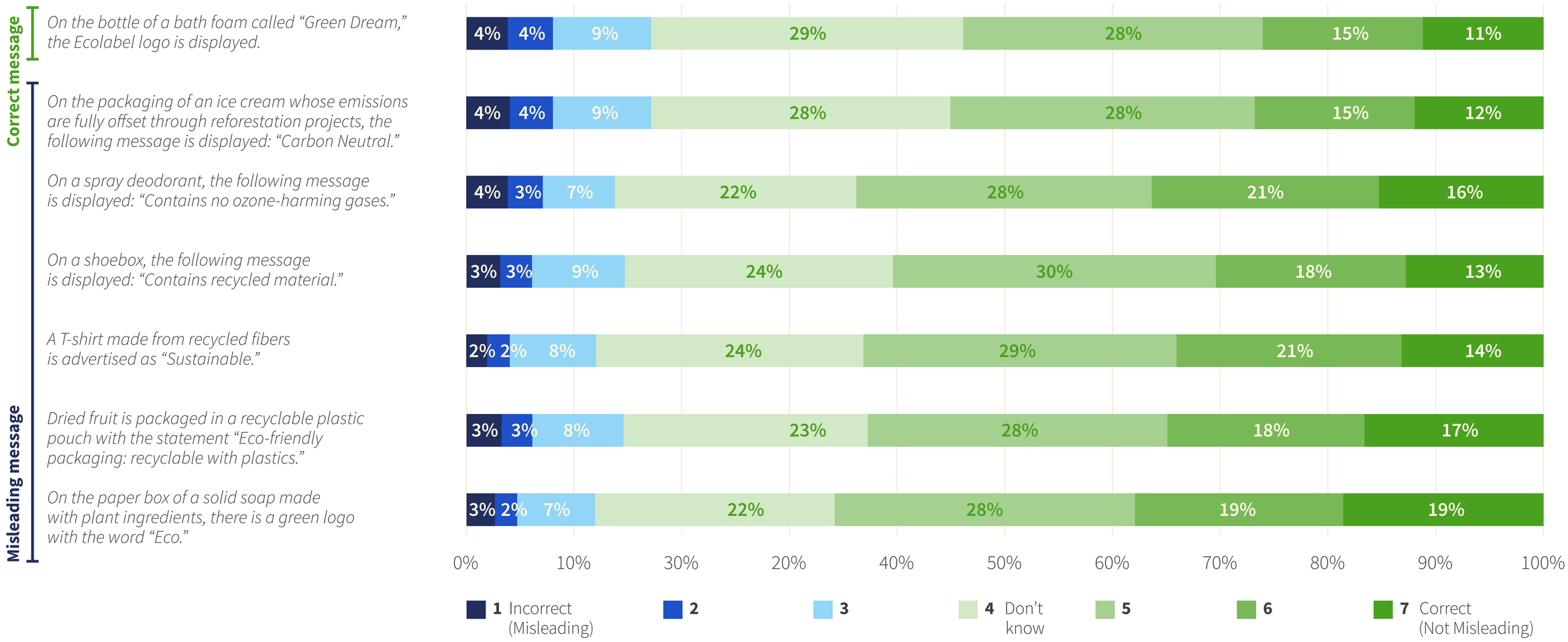
Nonetheless, for all the claims examined, the majority of consumers recognized, at least in part, their influence on purchasing decisions.

There is concern about the influence of vague and unverifiable claims like “Sustainable”.

46% of consumers are influenced by the statement “Recyclable”.

Last, though with similar importance, is “Organic” (38%).

Perception of MISLEADINGNESS/ ACCURACY of Claims



Perception of MISLEADINGNESS/ ACCURACY of Claims

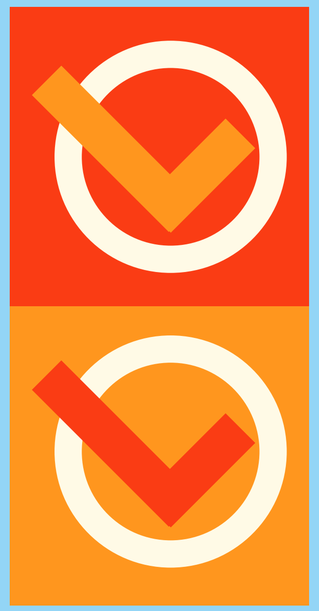
The majority of consumers do not perceive the misleadingness of claims that violate the restriction introduced by Directive 2024/825/EU.

The only correct claim among those presented (the “green dream” claim based on the Ecolabel mark, which is a type I or excellence environmental label) is perceived as misleading by 15% of respondents; 29% are unable to determine if it is misleading or not; 54% consider it correct.

On average, 61% of consumers have an incorrect perception of the misleadingness of claims, while 24% are unable to assess it.

GREEN CLAIMS

Conclusions



OVERALL, THESE RESULTS HIGHLIGHT:

- **the challenge in educating consumers about environmental claims;**
- **the need to strengthen policies and communications that help consumers better understand the real meaning of various environmental assertions and when a claim can be considered compliant with regulations or misleading.**

EXPERIMENT 1

Reusable vs. Disposable Options in Restaurants

EXPERIMENT 1
Preliminary Concepts

PURPOSE:
To examine how customer perceptions vary based on the type of packaging used for condiments, made available in a trattoria.

DESIGN

Two types of packaging were selected (reusable bottles and single-use sachets).

The analysis focused on:

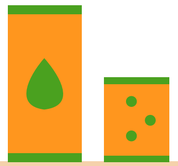
- The impact of the presence or absence of informational messages explaining the restaurant's reasoning for adopting a specific packaging solution.
- The effect of being alone or in company on customers' perception.

EXPERIMENT 1

GROUP 1
You are in a Trattoria sitting at **a table with five friends**, ready to enjoy your ordered meal.
You would like to enhance it with some condiments.

GROUP 2
You are in a trattoria, sitting **at a table alone**, ready to enjoy your ordered meal.
You would like to enhance it with some condiments.

The condiments (e.g., oil, salt, pepper, vinegar) are made available to you in the center of the table.



a **REUSABLE PACK**

b **SINGLE-USE PACK**

Respondents are divided into **two groups** (in company / alone) and **randomly** view one of the **four stimuli**.

Subsequently, **a questionnaire** assesses consumers' perception of the four proposed stimuli.

Without a message about the reason

Reusable bottles

Single-serving packets

With a message about the reason

Reusable bottles on which the following message is displayed:
The reason for our choice:
Reusable bottles help to reduce the use of natural resources and waste production.

Single-serving packets on which the following message is displayed:
The reason for our choice:
The single-serving packets help to ensure the hygiene and safety of our customers.

EXPERIMENT 1: Key takeaways

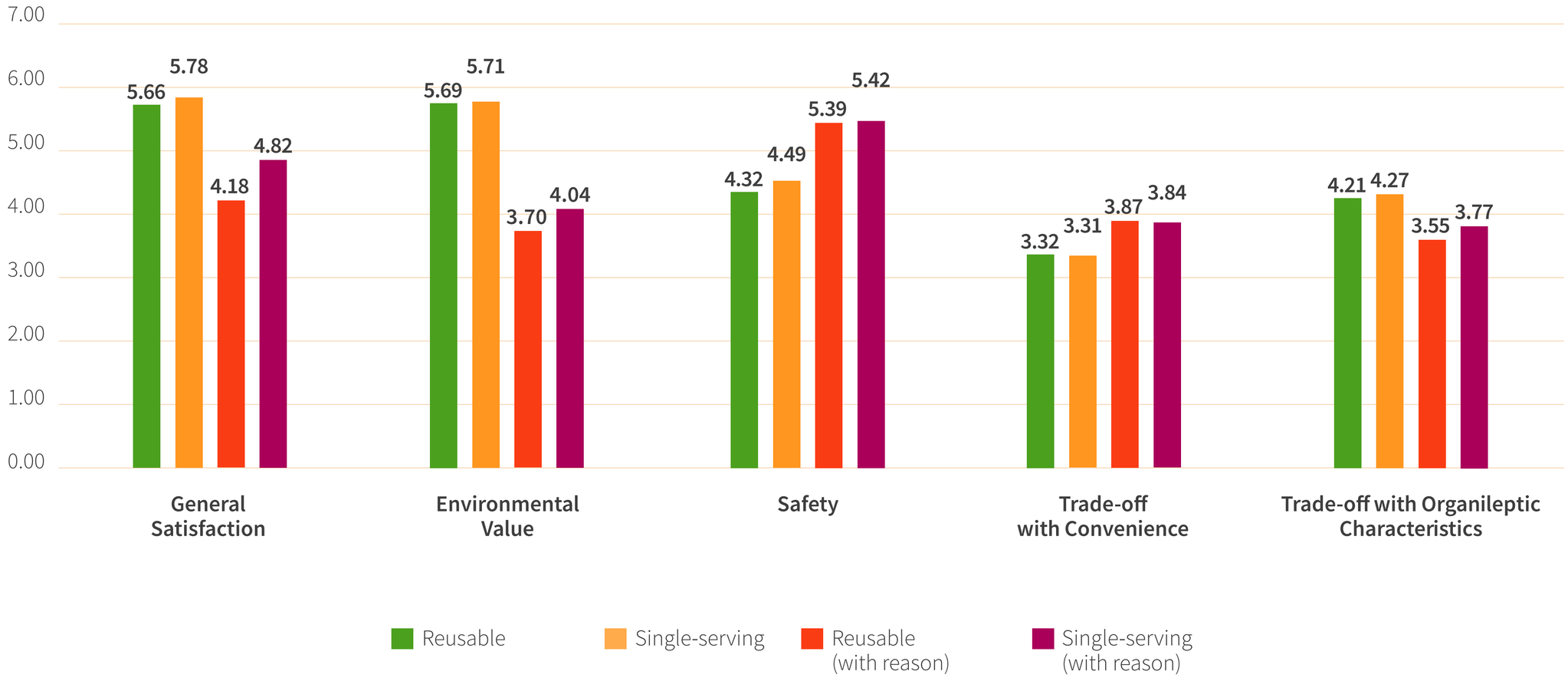
- Being **alone or in company** does not influence the perception of the two packaging options (reusable bottles / single-serving packets).

- The **reusable solution** generally produces **greater consumer satisfaction** than the disposable one, but is perceived as riskier in terms of failing to preserve the organoleptic characteristics.

- **Explicitly stating the environmental reason for adopting the reusable solution does not increase satisfaction or the perception of its environmental value;** we can deduce that consumers are already aware that the reusable solution is more beneficial for the environment, and stating this in a message adds nothing to what they already implicitly perceive.

- **Mentioning the reason for safety/hygiene, however, significantly increases satisfaction towards the disposable solution,** perceived as safer in terms of hygiene but more inconvenient to use.

EXPERIMENT 1
Details



EXPERIMENT 2

Influence of Environmental and Hygiene Messages on the Choice of Takeaway Packaging

EXPERIMENT 2
Preliminary Concepts

PURPOSES:

- **To explore consumer choices regarding the use of reusable packaging (bottles brought from home or provided by the store) for takeaway beverages, as opposed to the disposable option;**

- **To determine if the presence of messages about environmental benefits or reassurance about safety in terms of hygiene can help shape consumer choices towards reusable options.**

DESIGN

The sample is randomly divided into **six homogeneous groups** in terms of sociodemographic characteristics.

Groups 1-2-3 were presented with SCENARIO A.
Groups 4-5-6 were presented with SCENARIO B.

Each group was then asked to choose from several purchasing options.

EXPERIMENT 2
Scenario A

YOU ARE AT HOME. **You decide to go to a nearby bar to buy a takeaway beverage to consume once you return home. You know that the bar offers the following purchase options. Which would you choose?**

	OPTION a	OPTION b	OPTION c
 **GROUP 1** **Without claim**	**Get** your favorite drink already packaged in a bottle **2.50 €** **1.5 L**	**Bring from home** your own bottle and fill it with your favourite drink **2.00 €** **1.5 L**	**Fill** one of our reusable bottles with your favourite drink **2.50 €** **(but we return 0,50 € if you bring back the bottle)** **1.5 L**
 **GROUP 2** **With environmental claim**	**Get** your favorite drink already packaged in a bottle **2.50 €** **1.5 L**	**Bring from home** your own bottle and fill it with your favourite drink **2.00 €** **1.5 L** *With this choice, you contribute to protecting the environment!*	**Fill** one of our reusable bottles with your favourite drink **2.50 €** **(but we return 0,50 € if you bring back the bottle)** **1.5 L** *With this choice, you contribute to protecting the environment!*
 **GROUP 3** **With safety/ hygiene claim**	**Get** your favorite drink already packaged in a bottle **2.50 €** **1.5 L**	**Bring from home** your own bottle and fill it with your favourite drink **2.00 €** **1.5 L**	**Fill** one of our reusable bottles with your favourite drink **2.50 €** **(but we return 0,50 € if you bring back the bottle)** **1.5 L** *Our bottles are carefully sterilized before each reuse to ensure high standards of hygiene and safety!*

EXPERIMENT 2
Scenario B

YOU ARE OUT OF THE HOUSE. **You want to buy a beverage to take away and consume at home. You go to a bar that offers the following purchase options. Which would you choose?**

	OPTION a	OPTION b
 **GROUP 4** **Without claim**	**Get** your favorite drink already packaged in a bottle **2.50 €** **1.5 L**	**Fill** one of our reusable bottles with your favourite drink **2.50 €** **(but we return 0,50 € if you bring back the bottle)** **1.5 L**
 **GROUP 5** **With environmental claim**	**Get** your favorite drink already packaged in a bottle **2.50 €** **1.5 L**	**Fill** one of our reusable bottles with your favourite drink **2.50 €** **(but we return 0,50 € if you bring back the bottle)** **1.5 L** *With this choice, you contribute to protecting the environment!*
 **GROUP 6** **With safety/ hygiene claim**	**Get** your favorite drink already packaged in a bottle **2.50 €** **1.5 L**	**Fill** one of our reusable bottles with your favourite drink **2.50 €** **(but we return 0,50 € if you bring back the bottle)** **1.5 L** *Our bottles are carefully sterilized before each reuse to ensure high standards of hygiene and safety!*

EXPERIMENT 2: Key takeaways

- In both scenarios (whether the consumer is moving from home or is already out), **there are no differences in the choices made by the control group and the choices of the group that views the environmental message**.

  This is likely because consumers are already aware of the environmental reasons for adopting reusable packaging.

- When a **message about hygiene** (sterilization after each use) is provided, **the choices change** compared to the control group: the percentage of consumers choosing the disposable option increases, and the percentage choosing the reusable bottle provided by the store decreases.

  Probably when it is explicitly reminded to the consumer that someone else has already used the bottle, their predisposition towards it is reduced.

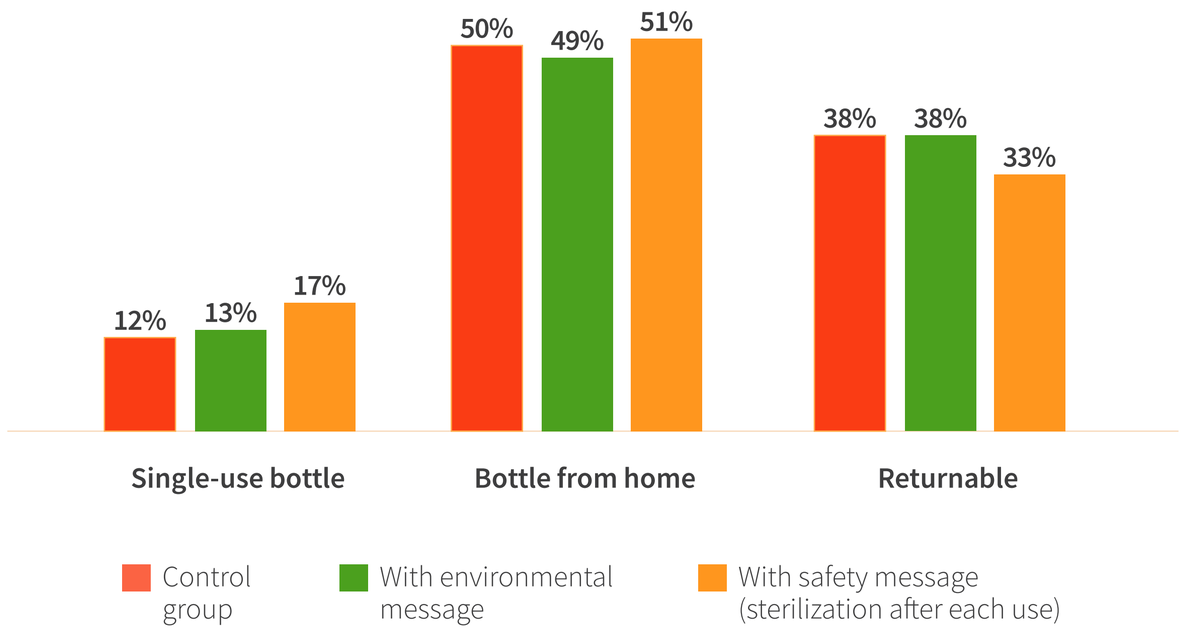
IN SUMMARY

The environmental message has no effect on the choices; the hygiene message has a slightly negative effect on the choices of reusable packaging provided by the store, shifting favor towards disposable options.

EXPERIMENT 2
Details

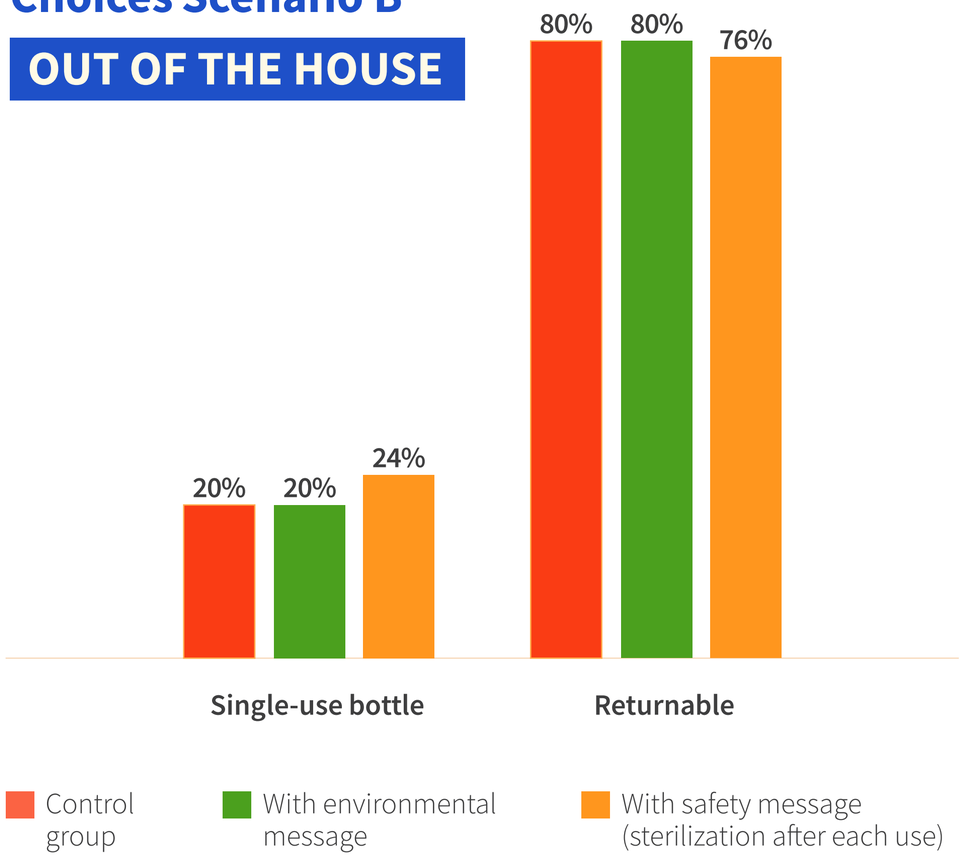
Choices Scenario A

AT HOME



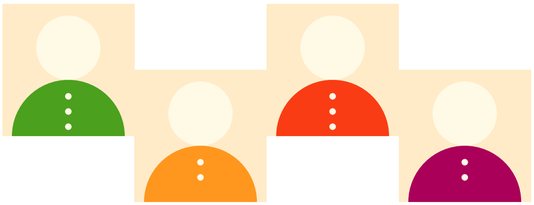
Choices Scenario B

OUT OF THE HOUSE




CLUSTER
ANALYSIS

Preliminary Concepts



As emerged from the survey conducted:

1. Consumers can undertake **multiple actions** to promote a more circular economy – both through purchasing choices and by adopting virtuous behaviors during the consumption and use of products.

2. Circular choices and behaviors can be adopted with **varying frequency.**

- Cluster analysis allows the identification of **different groups of consumers** who are similar to each other with respect to a set of chosen characteristics or behaviors.

- The characteristics chosen to form the clusters are based on the adoption of behaviors related to the **creation, preservation, and optimization of circular value** during the purchase and post-purchase phases.

- After grouping consumers into homogeneous and mutually exclusive groups, it is possible to **profile** each group with **respect to other relevant variables (sociodemographic, psychographic, cognitive, and behavioral)**.

Selected Behaviors for Building Clusters

Circular value CREATION

- Purchasing of **products with low environmental impact**, **packaging** made from **recycled materials**, etc.
- **Proper disposal of end-of-life** products/materials

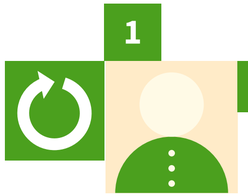
Circular value CONSERVATION

- Purchasing **durable** and **reusable goods**
- Adopting new models of purchasing and consumption (e.g. **sharing economy and second-hand**)
- **Maintaining** and **reusing** goods during the use phase

Circular value OPTIMIZATION

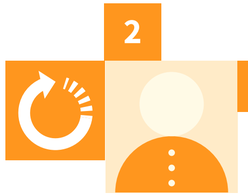
- Making **wise purchasing choices** of products to avoid waste and choose **minimal** and single-material **packaging**
- **Preventing waste** at the consumption stage through **efficient use** of products, water and energy.

The four Clusters



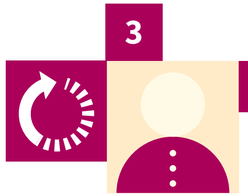
CIRCULARS par EXCELLENCE

They very frequently adopt behaviors of generating, preserving, and optimizing circular value both in the purchasing phase and in the use and end-of-life phases.



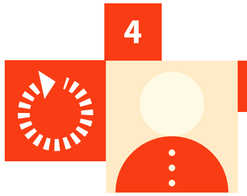
CIRCULARS in PROGRESS

In the post-purchase phases, they frequently implement actions to generate, preserve, and optimize circular value, while in the purchase phase, virtuous behaviors are adopted with minor frequency.



CIRCULARS by NECESSITY

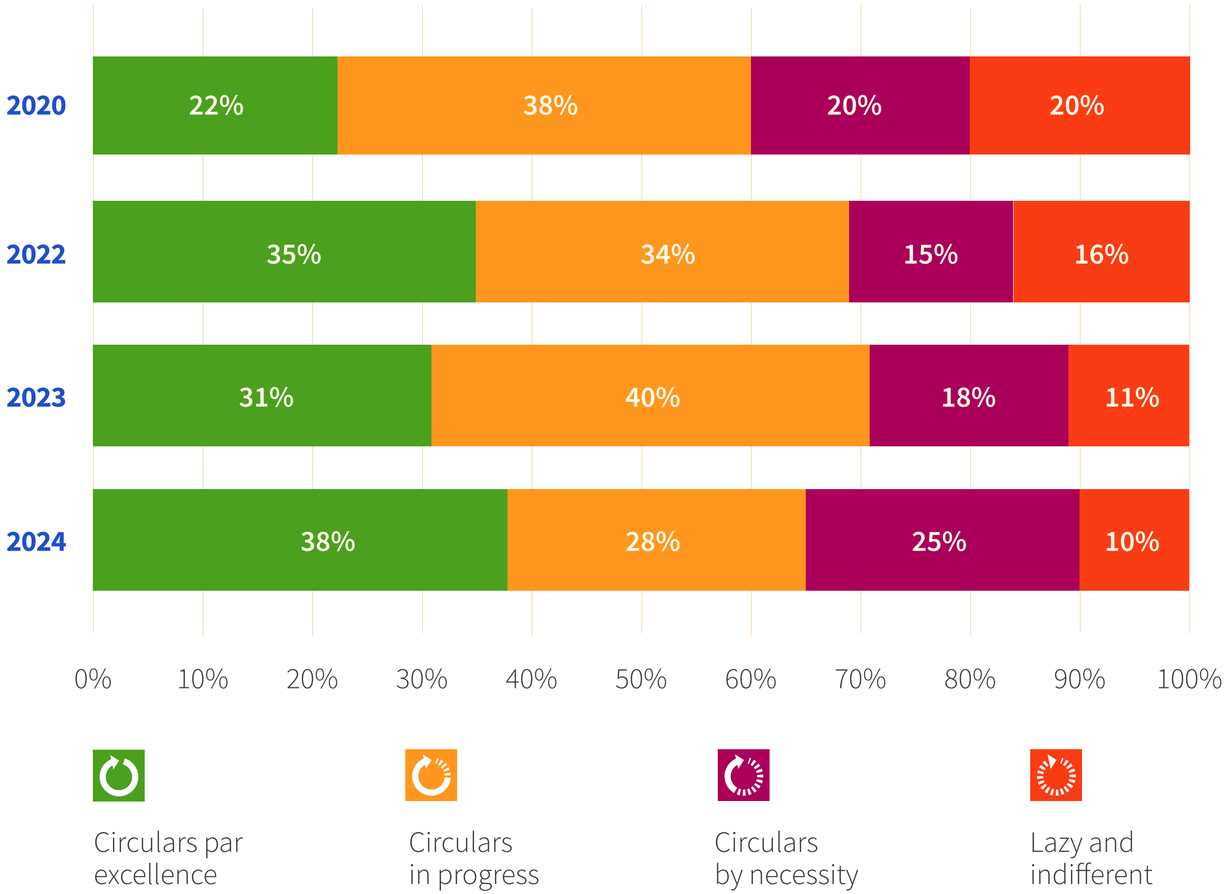
They rarely adopt circular behaviors during the purchase phase, while they are more engaged in the post-purchase phase, where the benefits are also tied to economic utility (e.g., they avoid waste during consumption and practice recycling).



LAZY and INDIFFERENT

They show low commitment to adopting circular behaviors, which occur only occasionally in all phases (purchase, use, and end-of-life). This is the only group that does not regularly practice recycling (a behavior now deeply rooted in the population).

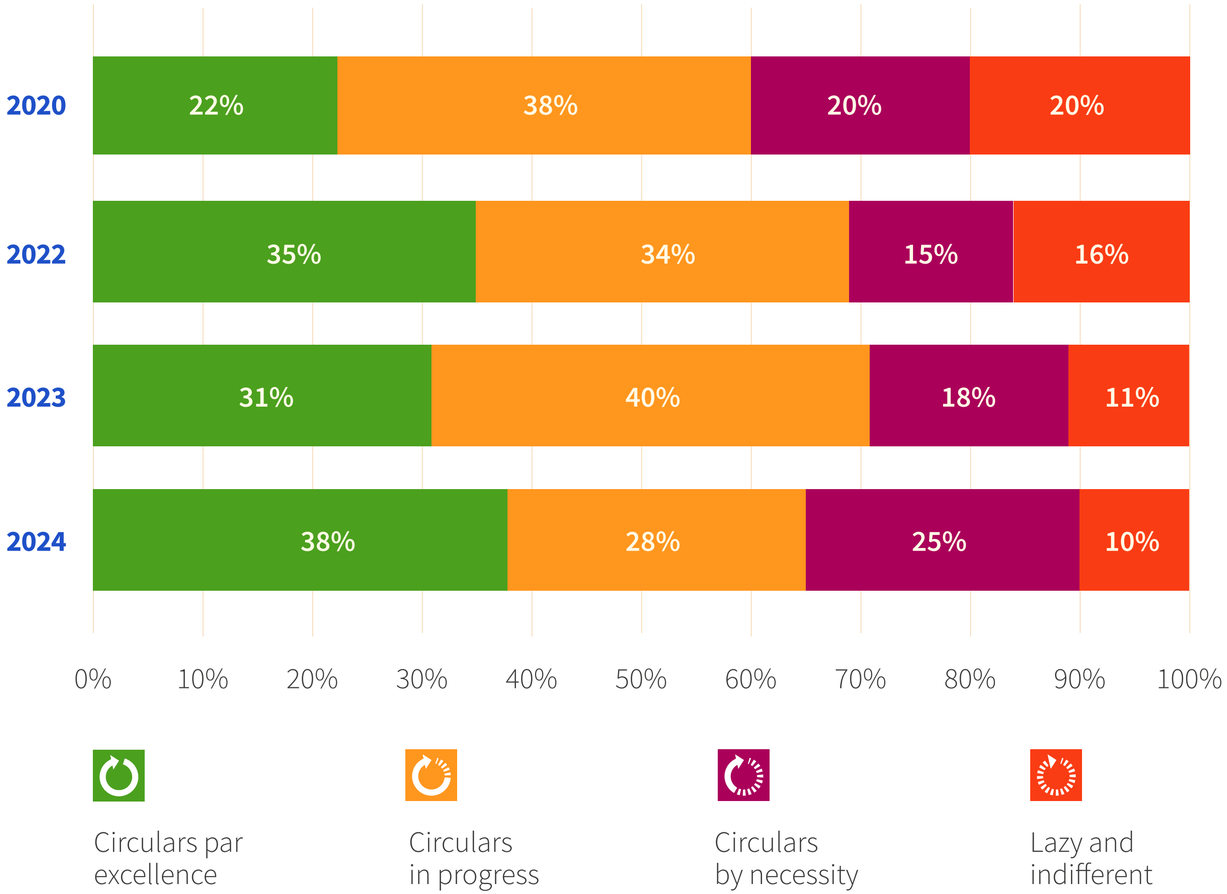
Time Comparison
Clusters' Size



- The proportion of **Circulars par Excellence** has risen compared to 2020 (+16%), and relative to last year (+7%).

- There has been a significant increase in the number of **Circular by Necessity** consumers compared to previous years. Members of this cluster rarely engage in circular behaviors during the purchasing phase but are more inclined toward actions that yield economic benefits, such as waste prevention in the usage phase, reuse, and proper disposal at the end of life. This cluster's growth (+7%) aligns with the rising inflationary trend that has seen the cost of many food products and FMCGs increase.

Time Comparison
Clusters' Size

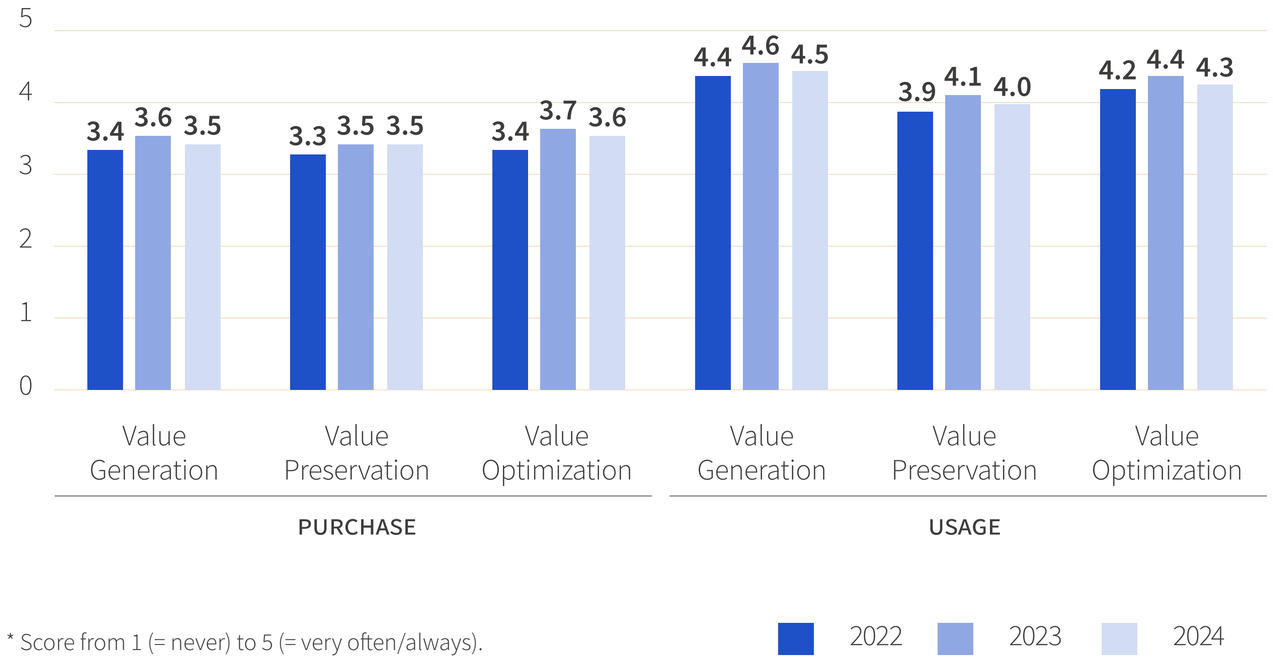


- The **Circulars by necessity** group (28%) has seen a significant decrease compared to previous years (-12% compared to 2023). Analyzing the volume of adjacent groups, part of the Circular in progress appears to have matured into making circular choices in both the purchasing and post-purchasing phases, enhancing the cluster of circular consumers. Conversely, a portion of these consumers might have reduced their circularity preferences, opting instead for more economically advantageous purchases and thus feeding into the "Circular by Necessity" cluster.

- The **Lazy and indifferent** cluster is consistently decreasing since 2020 (-10%) and 2022 (-6%), with a relatively stable figure compared to last year (-1%). This data indicates that over recent years, more consumers are committing to circular behaviors.

Time Comparison
Behaviours' Frequency

AVERAGE FREQUENCY OF BEHAVIOURS* – Time comparison (2022–2024)



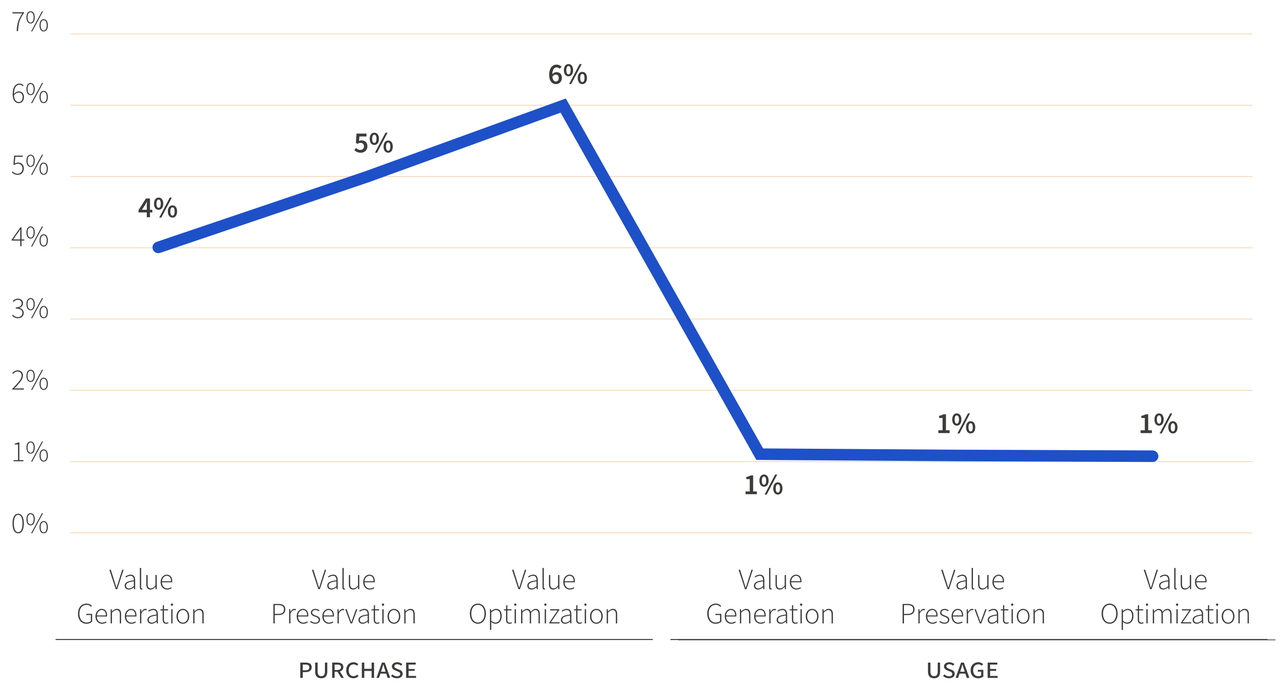
* Score from 1 (= never) to 5 (= very often/always).

- Analyzing behaviors across all clusters, the **average frequency of all actions** related to the creation, conservation, and optimization of circular value **has increased compared to 2022 but has slightly decreased compared to 2023**.

- While behaviors related to **the usage phase are more ingrained and frequent** among the population, there is **a notably positive trend for purchasing-related behaviors**, with an increase of +6% for optimization behaviors, +4% for creation, and +5% for conservation.

Time Comparison
Behaviours' Frequency

AVERAGE % CHANGE (2022 VS 2024)



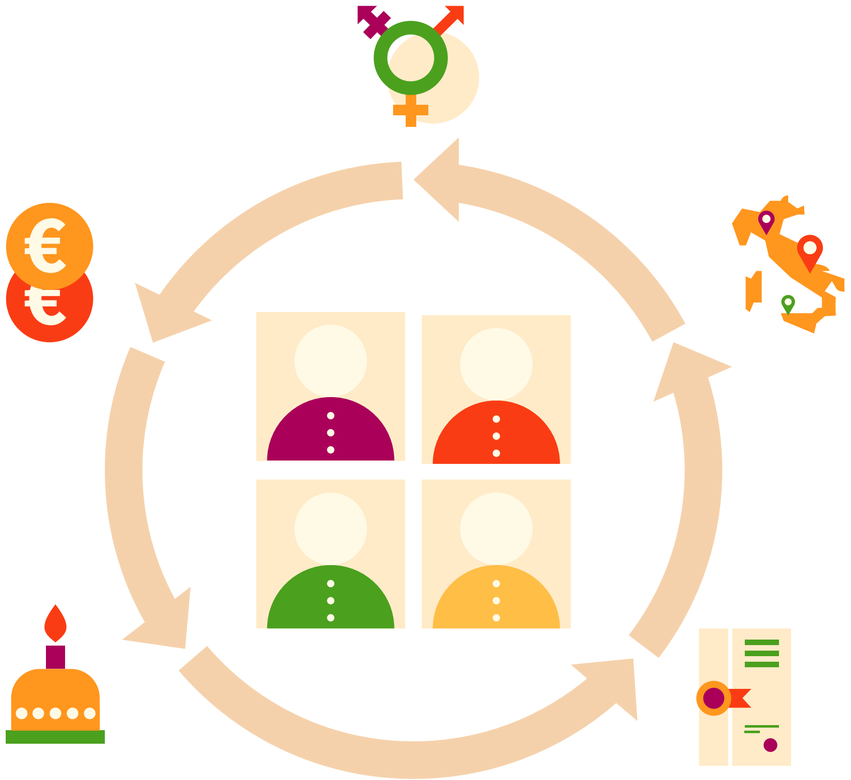
- The most frequent behaviors involve **the creation and optimization of value during use** (i.e., proper disposal and efficient use of products).

- Despite the significant inflation in recent months, **consumers have increasingly adopted behaviors that provide an economic benefit.**

Cluster Analysis
Sociodemographic Variables

	CIRCULARS par EXCELLENCE	CIRCULARS in PROGRESS	CIRCULARS by NECESSITY	LAZY and INDIFFERENT
	• **Female** prevalence (56%)	• **Female** prevalence (52%)	• **Male** prevalence (56%)	• **Male** prevalence (63%), in contrast with the strong female presence of 2023
	• Compared to the sample distribution, **Generation X** (ages 43-55) is more represented (+31%)	• Compared to the sample distribution, the **Baby Boomer generation** (ages 56-70) is more represented (+9%)	• All generations are evenly distributed: **Millennials** (ages 27-42) and **Gen Z** (ages 18-26) show a higher but slight representation (+2% and +7%, respectively) compared to the sample distribution	• Compared to the sample distribution, **Generation Z** (ages 18-26) is overrepresented (+6%), while the **Baby Boomer** generation is underrepresented (-9%)
	• Greater origin from the South and the Islands (41%). *This result also emerged in the cluster analysis conducted in 2022 and 2023*	• Homogeneous distribution by **geographic area**	• Origin predominantly from **Northern Italy** (51%), especially **Northwest**	• Origin predominantly from **Northern Italy** (534%)
	• There are no substantial differences in education level	• Slight prevalence above the average of consumers with a **lower secondary school diploma** (+4%)		• No substantial distinction by education level

Cluster Analysis
Sociodemographic Variables



The clusters are generally **cross-sectional across sociodemographic categories**, meaning that **behaviors** related to the creation, conservation, and optimization of circular value are not explained by sociodemographic differences but are rather **expressions of personal and value dimensions** .

However, some slight **differences** (with statistical significance $p<0.05$) have been found in sociodemographic distributions related to **gender**, **age,** and **geographical origin**.

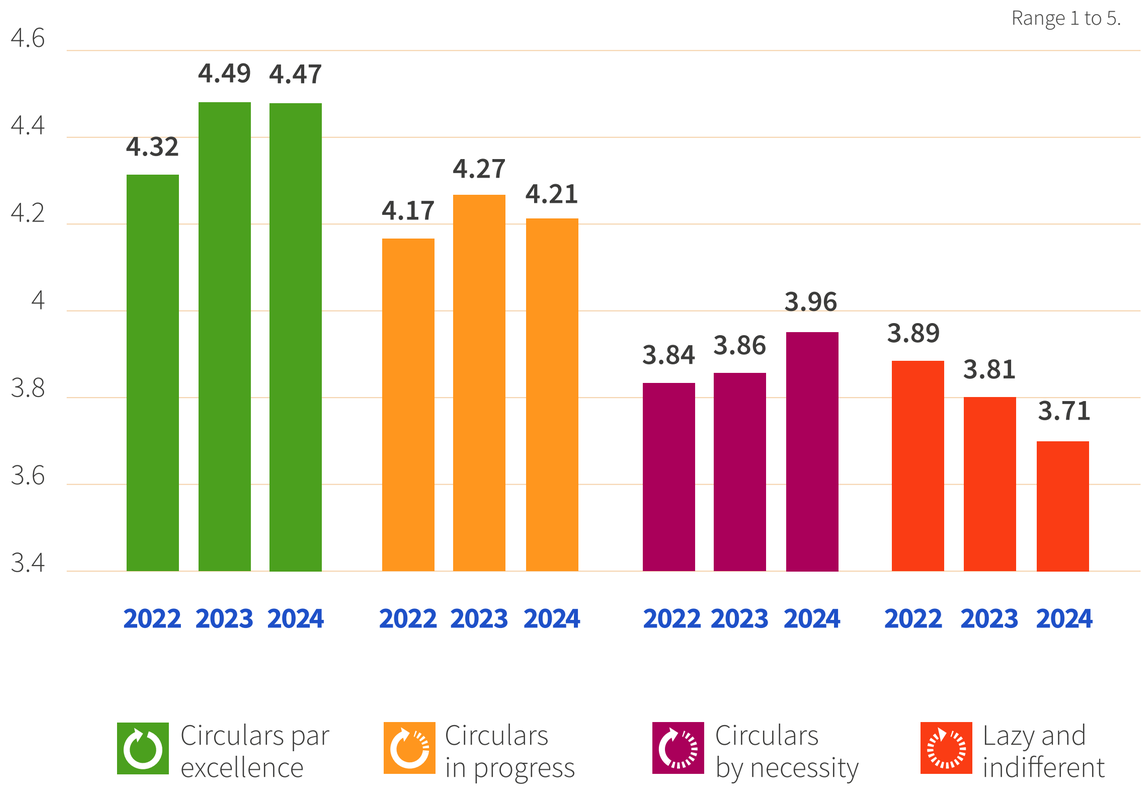
Cluster Analysis: Psychographic, Cognitive and Behavioural Variables.

ATTITUDE TOWARDS THE CIRCULAR ECONOMY

The attitude towards the circular economy characterizes a large portion of the population (all clusters show relatively high average values).

It is particularly relevant for the “Circular par Excellence” and “Circular in progress” consumers, indicating a coherent relationship between personal beliefs and actual action.

These attitudes have strengthened compared to last year, except in the “Lazy and Indifferent” group.

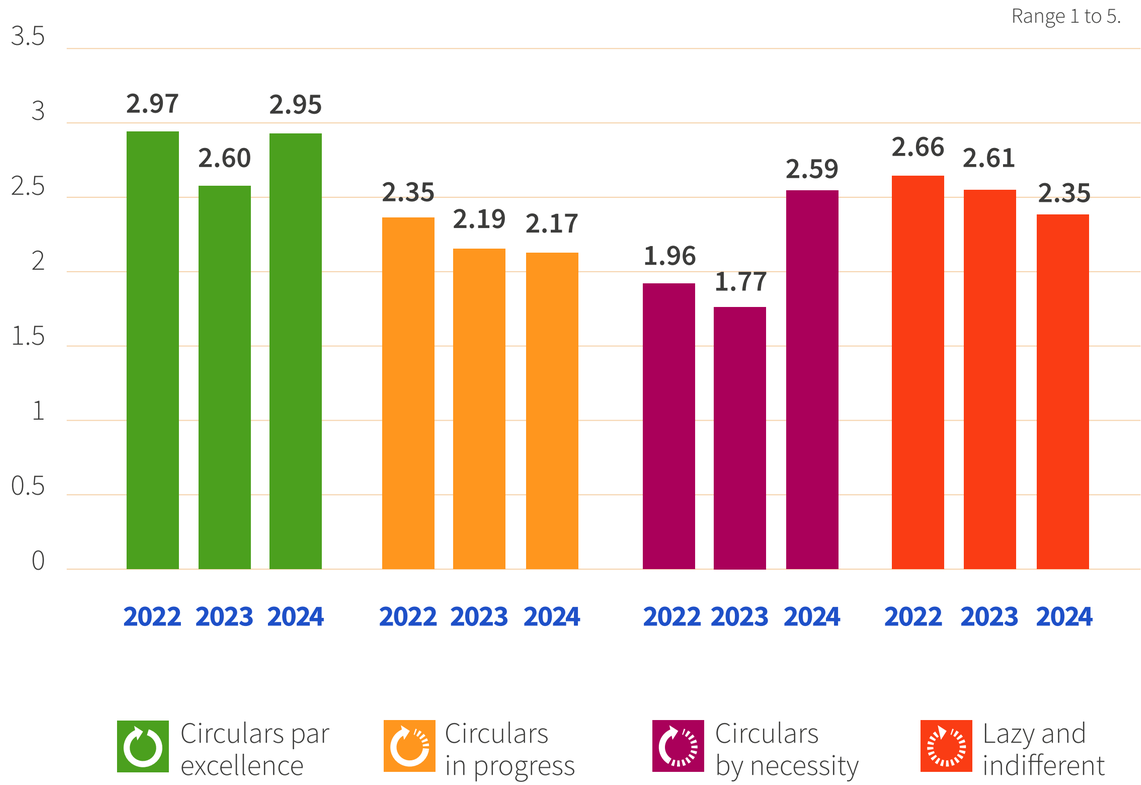


Cluster Analysis: Psychographic, Cognitive and Behavioural Variables.

FORMS OF ONLINE CONSUMPTION

Circulars par Excellence and Circulars by Necessity report the highest values in the use of online purchasing methods and in seeking digital information (through websites, apps, QR codes).
However, the motivations differ:

- Circulars par Excellence are driven by the desire to find more sustainable products that they cannot find locally. This group actively seeks digital solutions to access a broader range of eco-friendly options.
- Circulars by Necessity are guided by economic convenience and the reduced effort required by online shopping. Additionally, this group has a predominance of Generation Z: digital natives who are more inclined to integrate technology into their daily lives.

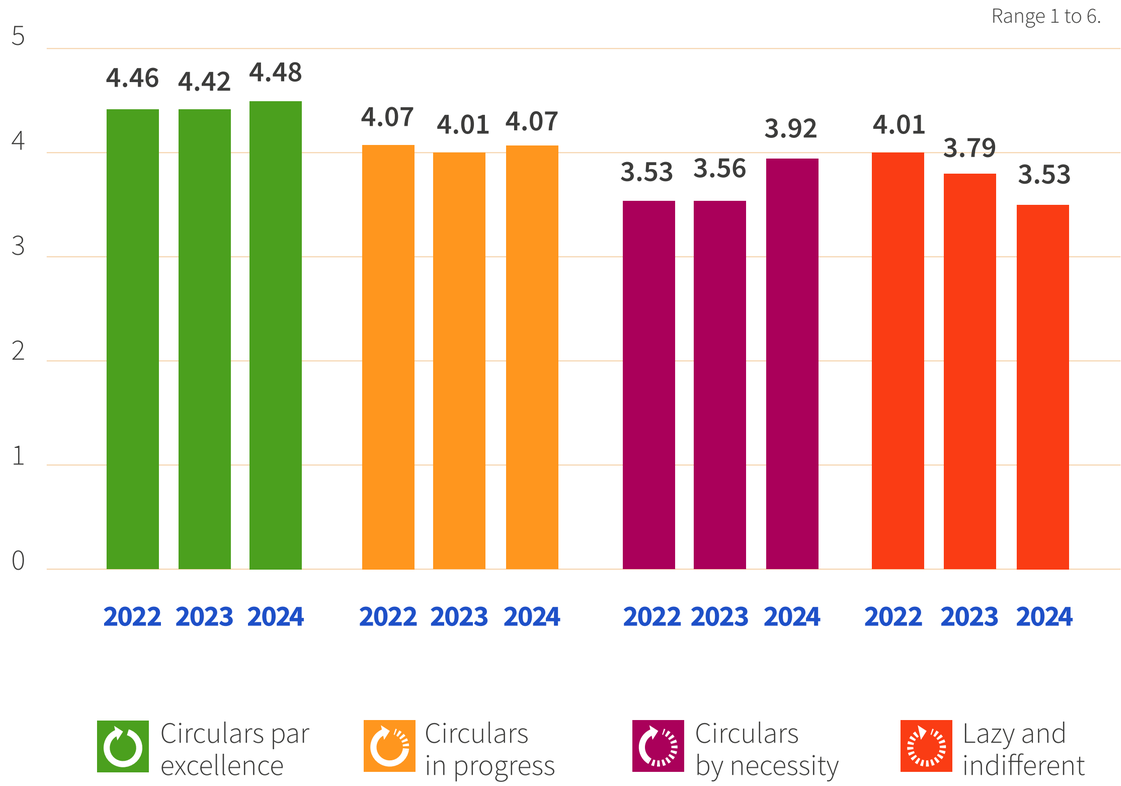


Cluster Analysis: Psychographic, Cognitive and Behavioural Variables.

APPRECIATION OF INFORMATION

Accessibility to information remains a significant aspect for most consumers: it increases their trust, reducing skepticism and concerns about product quality.

All groups show relatively high scores, but this appreciation is particularly pronounced among the Circular Consumers par Excellence.

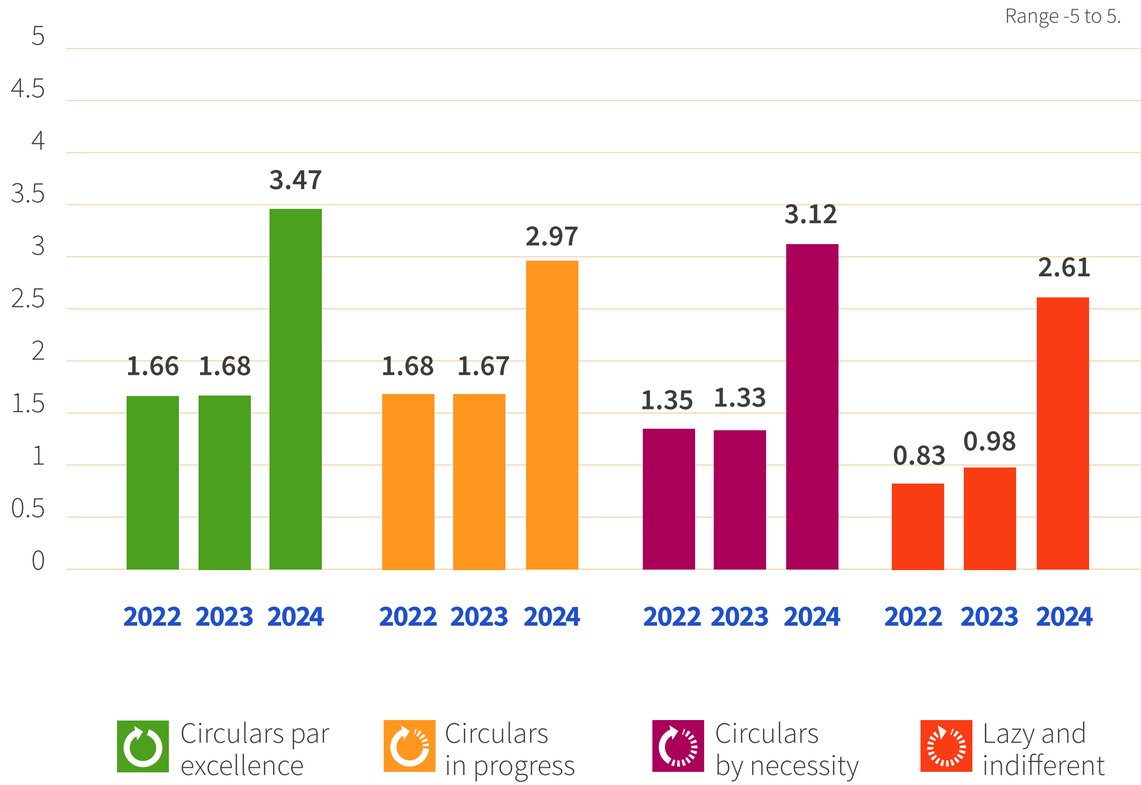


Cluster Analysis: Psychographic, Cognitive and Behavioural Variables.

KNOWLEDGE ABOUT CARBON CLAIMS

Circulars par Excellence and Circulars in progress generally have a better understanding of carbon claims*.

All consumer groups have significantly increased their knowledge compared to last year: even those less inclined toward circular practices are becoming more informed about the impact of products on climate change.



* Claims regarding companies' implementation of emission offsetting and reduction actions to combat the climate crisis.

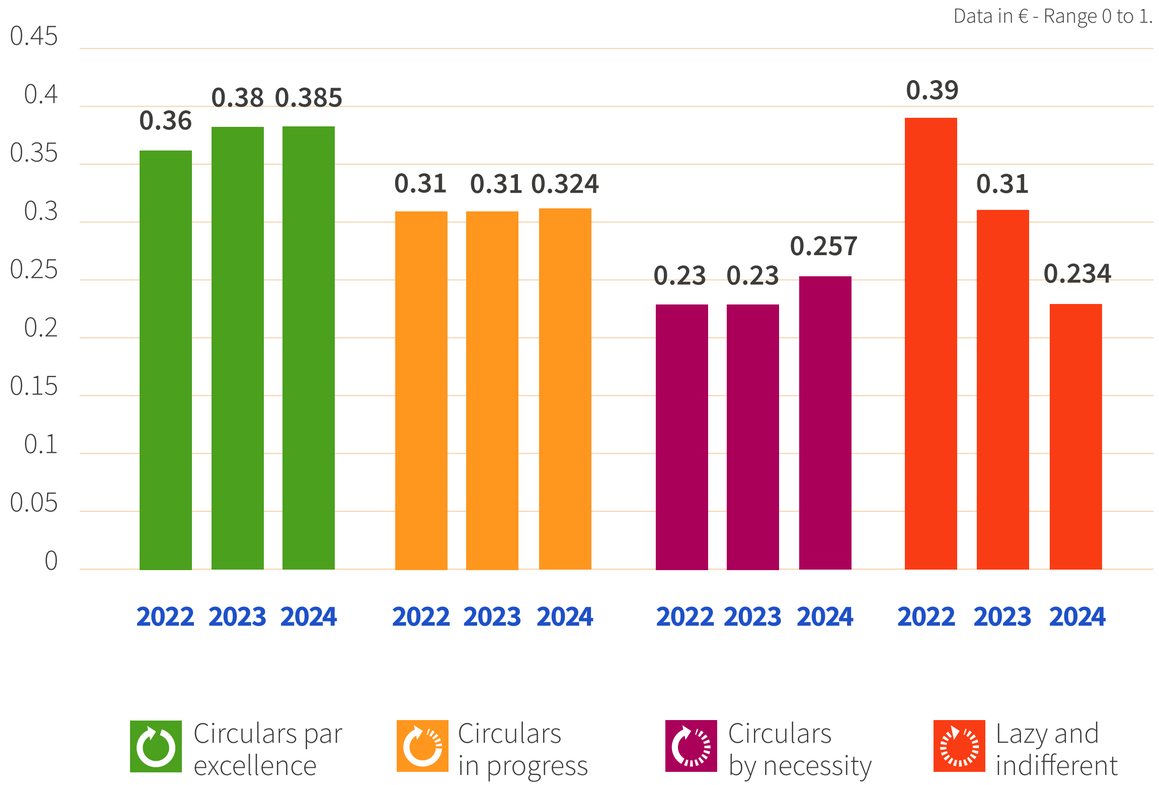
Cluster Analysis: Psychographic, Cognitive and Behavioural Variables.

WILLINGNESS TO PAY FOR RECYCLED PACKAGING

Willingness to pay was measured by presenting participants with a product priced at €3.00 and investigating their willingness to pay (extra) for the same product with recycled packaging.

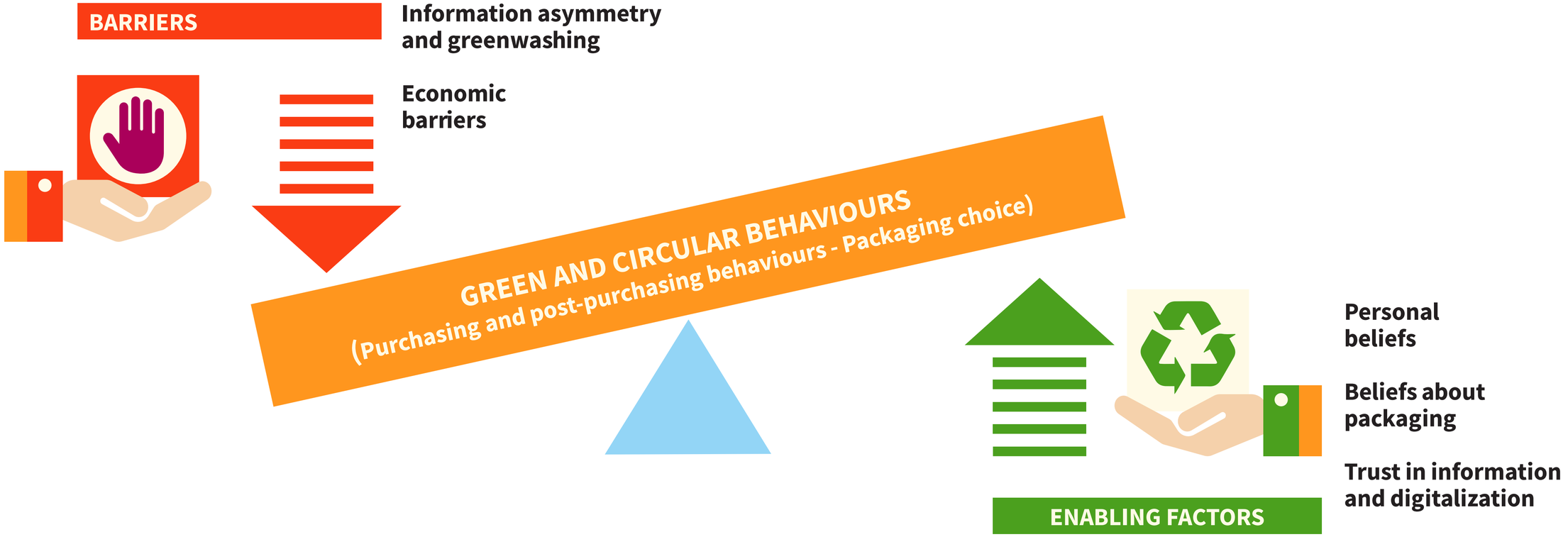
Circulars par Excellence consistently maintain their willingness to pay for low-environmental-impact options over time.

Lazy and Indifferent consumers have reduced their willingness to accept additional costs, driven by other consumption priorities, intensified by the effects of inflation.

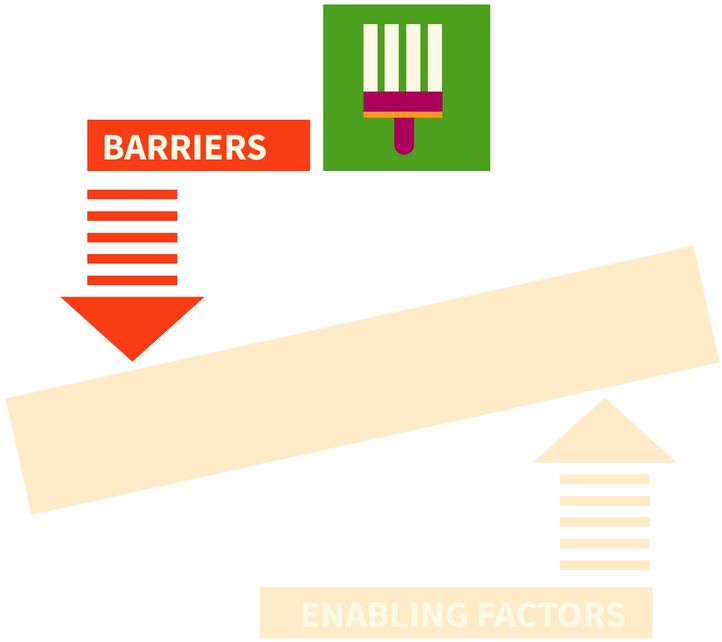


ENABLING FACTORS and BARRIERS to CIRCULAR BEHAVIOURS

What Factors Enable or Hinder the Adoption of Circular Behaviors by Consumers?



KEY TAKEAWAYS
Information Asymmetry and Greenwashing



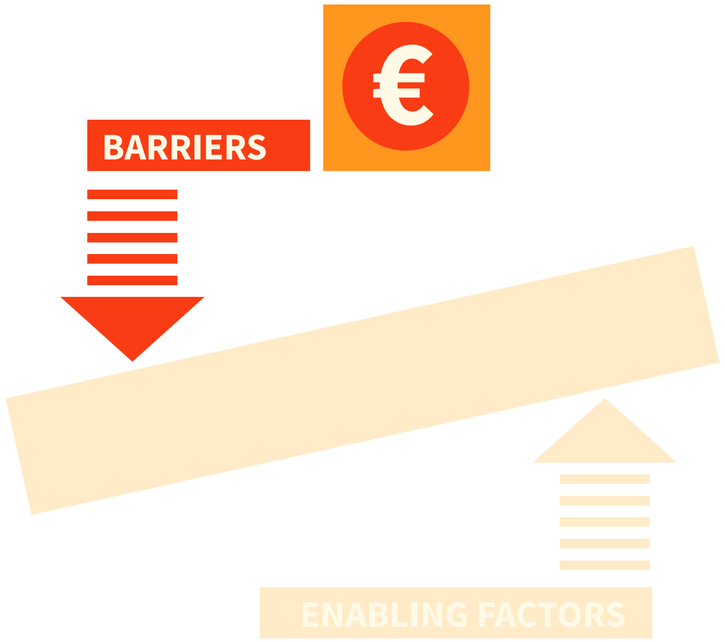
The survey reveals that the majority of consumers **do not understand the meaning or misleadingness of various environmental claims**, making them potential victims of greenwashing.

Unable to recognize misleading environmental assertions or verify their validity, consumers often **favor products with vague and unsubstantiated slogans** such as “sustainable” or “zero impact” over products with legitimate, specific claims based on widely recognized methodologies or third-party independent certifications.

At the European level, efforts are underway to make environmental communication more rigorous and substantiated. An important step has been taken with the new **Directive 2024/825/EU**, which introduced new definitions and restrictions regarding environmental claims, amending the historic Directive 2005/29/EC on unfair commercial practices.

The new restriction target currently widespread communication practices that consumers are not yet able to recognize as misleading. Efforts will be needed to **enhance consumers’ ability to read and evaluate environmental information available in the market**.

KEY TAKEAWAYS
Economic Barriers

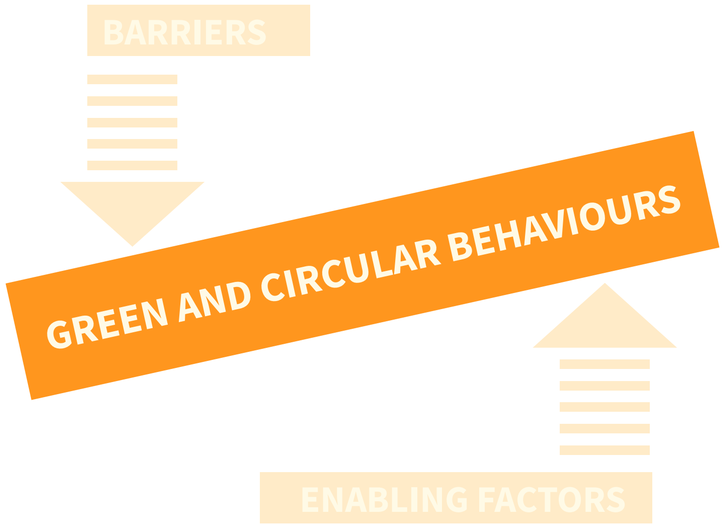


The value attributed to environmental features is evident from the survey. For instance, most consumers believe that packaging made from recycled materials costs more than "virgin" materials, and **the majority (78%) are willing to pay a premium** for this feature.

However, **the percentage of consumers willing to pay has declined over time** (78% in 2024 vs. 89% in 2022). This trend can be interpreted in light of **inflationary pressures** that have reduced consumers' purchasing power in recent years. It may also result from a process of "commoditization", where a feature that was initially innovative and distinctive becomes standard or increasingly common in the market, leading to an expected reduction in price. Indeed, among the reasons cited for unwillingness to pay, the most common is that "recycled packaging should cost less", followed by family budget constraints.

In more informal terms, one could say that **a technology "goes mainstream" or "loses its exclusivity" as it becomes more widespread**.

KEY TAKEAWAYS
Purchasing and Post-Purchasing Behaviors



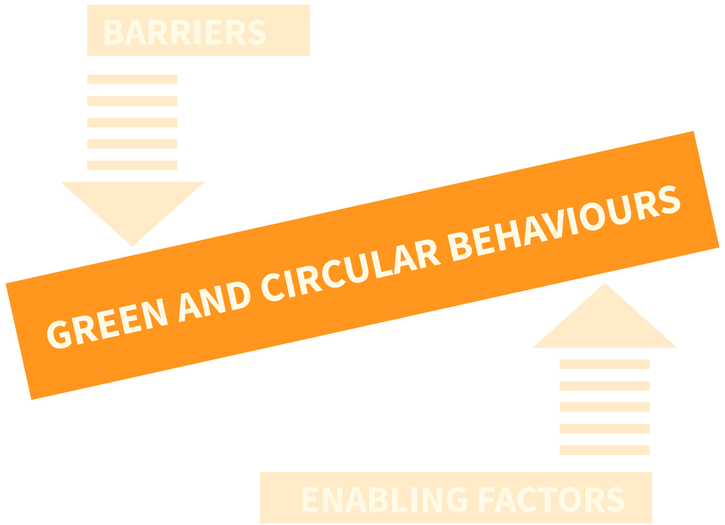
The comparison between 2023 and 2024 shows an average increase of at least 3% in the adoption of environmentally low-impact purchasing behaviors across all categories. **Products with certifications of low environmental impact and recycled or recyclable packaging are chosen with increasing frequency**, a trend that has shown strong growth since 2020.

The most embedded behaviors in Italians' routines include avoiding the purchase of excessive quantities of food, preventing waste during meal preparation, favoring local supply chains, choosing durable clothing, and correctly sorting waste for recycling.

Attention is also growing toward products that provide information on the use of renewable energy, the reduction of $CO_{2\text{-eq}}$ emissions, and carbon offsetting.

Some habits, however, are still less widespread, such as buying second-hand clothing (although this has shown significant growth in recent years), renting, and other consumption models. Despite persistent sociocultural barriers, there is a **positive trend toward reuse and a gradual openness to new forms of consumption that can reduce waste and the use of new resources**.

KEY TAKEAWAYS
Packaging Choice Behaviors



The proportion of Italians consistently choosing packaging with environmental features, both informational (up to +16% from 2020 to 2024) and physical (up to +12% from 2020 to 2024), is increasing. However, behaviors related to purchasing bulk products remain less common.

MONOMATERIAL, SIMPLE DESIGN, RECYCLABILITY

63% of consumers often or always purchase products with **monomaterial or simple design packaging, which are easier to recycle**. Both behaviors have seen **significant growth** since 2020, with increases of 21% and 7%, respectively.

RECYCLED CONTENT

The share of consumers choosing **personal care products with recycled packaging is steadily growing**.

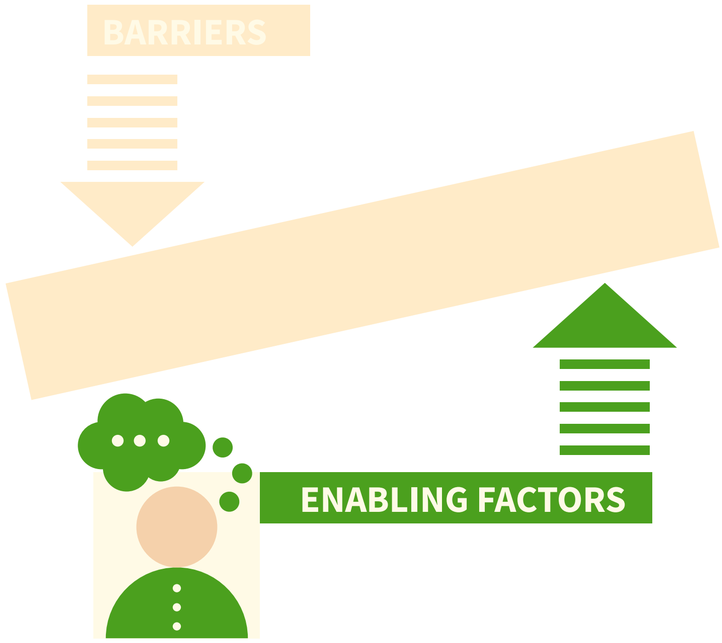
REUSE

52% of consumers frequently (often or always) **reuse food packaging**, showing a 16% increase compared to 2020 and remaining stable compared to last year.

BULK PRODUCTS

Purchasing bulk detergent products remains the least frequent behavior among consumers, with only 38% adopting it often or always. This trend may be attributed to the limited availability of these options in stores and supermarkets.

KEY TAKEAWAYS
Personal Beliefs as Drivers of Circularity



Personal **attitudes and beliefs are an important driver** that motivates individual actions toward adopting behaviors consistent with the principles of the circular economy and those with a lower environmental impact.

ENVIRONMENTAL AWARENESS AND RISK PERCEPTION

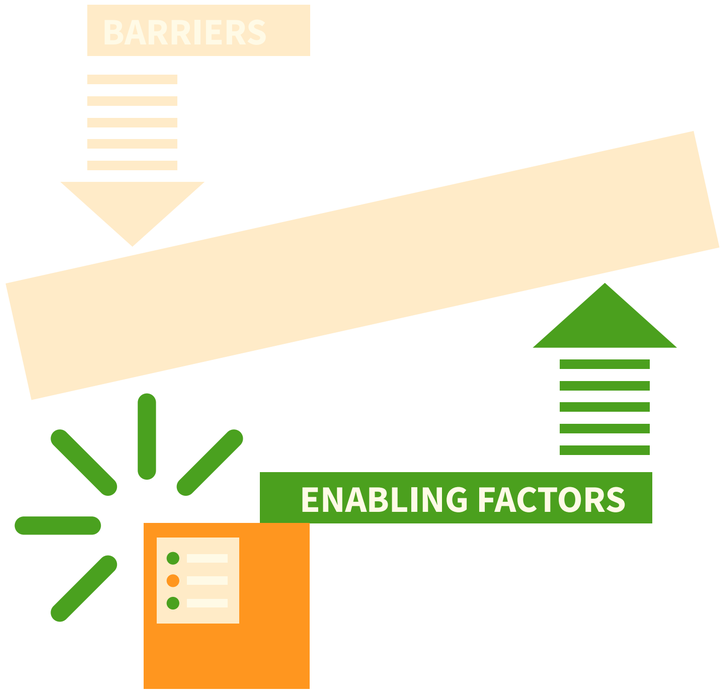
In line with previous surveys, the survey conducted in October 2024 confirms **the growing trend of environmental awareness** and concern among people regarding the consequences of human activities on the planet.

Among the most perceived global risks, climate change ranks first. In third place - after hunger and poverty - is **environmental pollution caused by human activity**.

ATTITUDES AND PERCEPTION OF THE EFFECTIVENESS OF INDIVIDUAL ACTIONS

Consequently, these concerns and awareness lead the majority of the population (around 90%) to have a **positive predisposition** toward the themes of the circular economy and a **greater perception of the effectiveness that individual actions can have in reducing environmental impact**.

KEY TAKEAWAYS
Beliefs about Packaging



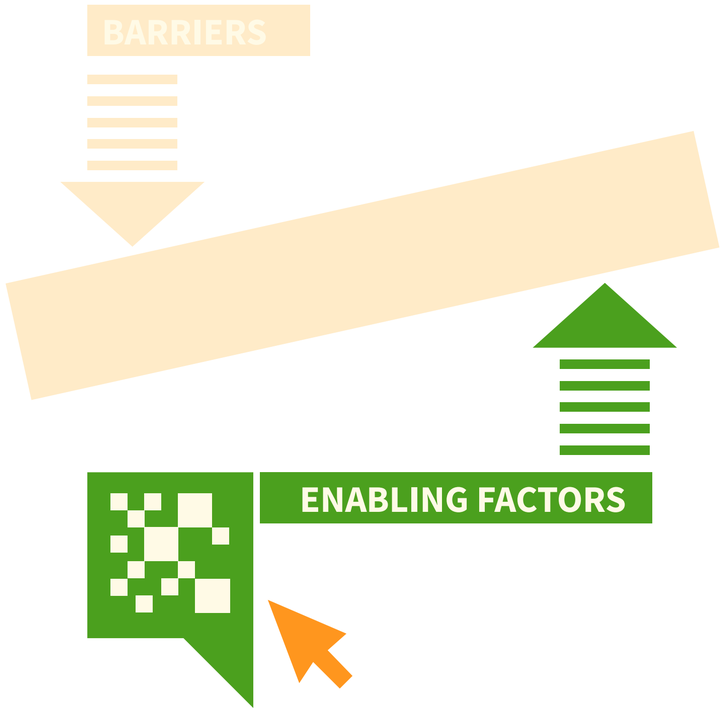
When it comes to packaging, consumers hold strong beliefs about its essential role in **protecting food from pathogens such as viruses and bacteria and preserving its freshness**. However, they are also aware of the **need to take action to reduce its environmental impact** and are open to various measures aimed at achieving this goal.

Eight out of ten people believe that all packaging should be recyclable or compostable and support standardizing packaging information to facilitate recycling efforts.

Additionally, 78% of respondents believe that a **minimum content of recycled material** should be guaranteed in plastic packaging.

There is also an openness toward reusable packaging solutions. Most respondents consider it somewhat or very important to allow consumers to bring their own containers when purchasing takeaway food and beverages (66%) and to use reusable and returnable packaging (72%). Experimental findings further highlight a predisposition toward reusable packaging solutions, which consumers implicitly perceive as environmentally beneficial.

KEY TAKEAWAYS
Trust in Information and Digitalization



Among the **sources of environmental information** most trusted by consumers (out of a ranking of 11 sources) are universities/research centers (74% of respondents have full or moderate trust), consumer associations (66%), and international/national NGOs, such as WWF (66%). Private companies are the source with the least consumer trust (44%). However, **trust in companies has increased by 20% since 2019**.

Most consumers appreciate having **access to additional information**, even through digital tools, as it increases trust in products. This appreciation is consistent across sociodemographic groups.

Digitalization stands out as a significant enabling factor, with a marked increase in the use of QR codes to access detailed product information, including their environmental impact

SUMMARY and CONCLUDING REMARKS

SUMMARY AND CONCLUDING REMARKS

- Despite current challenges, the 2024 survey data and comparisons with previous years' findings show a **positive and continuous trend towards more environmentally conscious purchasing and consumption habits, providing a solid foundation for further developments**.

- A significant segment of the Italian population, **over one-third**, can be defined as the **"circular consumer par excellence"**.

- This group could potentially grow further by leveraging tools and strategies that encourage more sustainable practices.

- In this phase of regulatory changes, **it is crucial that businesses communicate the environmental characteristics of their products in a specific, transparent, and reliable manner**, thereby strengthening consumer trust and awareness.

SUMMARY AND CONCLUDING REMARKS

- It is equally important to **raise awareness and educate the public** through large-scale educational initiatives, both to highlight the need to **modify the current consumption model** and to teach how to **recognize reliable environmental claims and labels**.

- To further promote circular consumption models, businesses should also commit to ensuring the quality and reliability of refurbished, used goods and services related to sharing and rental, highlighting the environmental benefits of these approaches. Only by adopting **a comprehensive view** that considers all factors influencing consumption choices will it be possible to translate growing interest in sustainability into concrete and lasting actions.

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