Europe, Corporate Social Responsibility and Consumers.

Observatory on the consumption styles and trends

Fourth edition

Summary results

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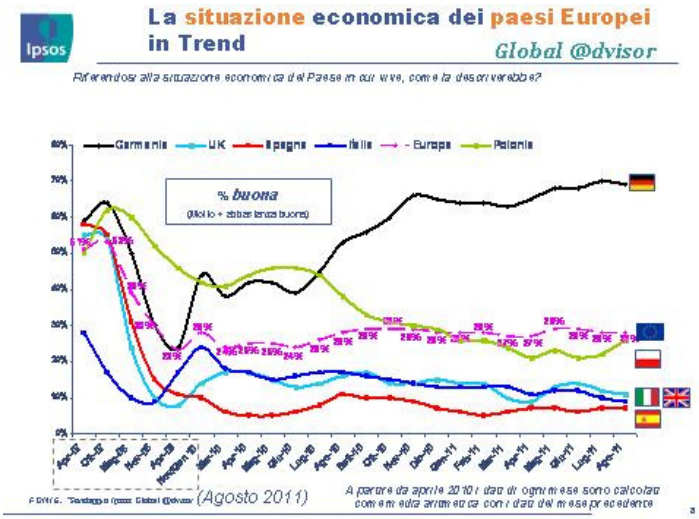
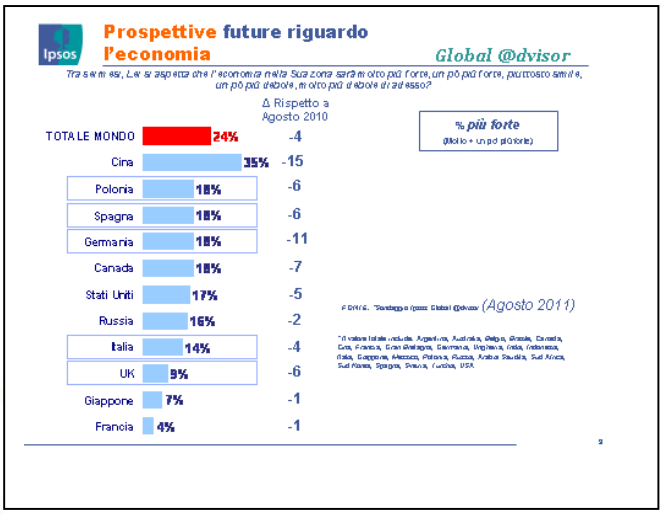
Background

The International economic situation continues to be a constant source of worry for people, except for those in Germany, which represents "a discordant voice", maintaining a positive and above-average trend. For the other countries involved in the survey judgements on the domestic economy indicate performance levels that are not only below the European norm, but also lower than the same period last year.

The figures also show how people have a negative outlook, in other words they see future prospects that are not particularly comforting with regard to the economy of their own country. The result that stands out most evidently is how, whichever country is considered, the trend is shown to be a negative one compared to the previous year. Only 24% of the respondents (worldwide) considers that the economic situation of their country will get stronger, in particular the emerging or less "mature" economies such as China (35%).





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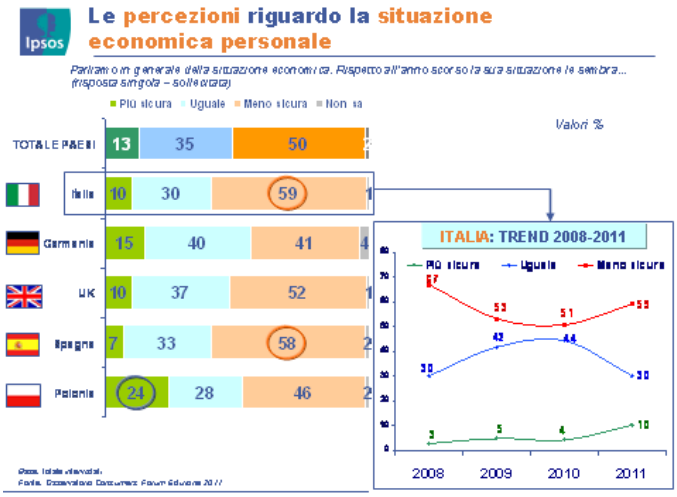
The national situation influences people's personal condition: in the countries considered, 50% of the sample regards their own personal situation as more uncertain, especially in Italy (59%) and in Spain (58%), followed by England (52%). The German respondents are poised between a sensation of stability and of insecurity (40% and 41% respectively). Poland represents an exception. Despite the fact that worry holds sway, we observe a greater presence of "positive" judgements (24% state that their personal financial situation is more secure compared to the previous 12 months).

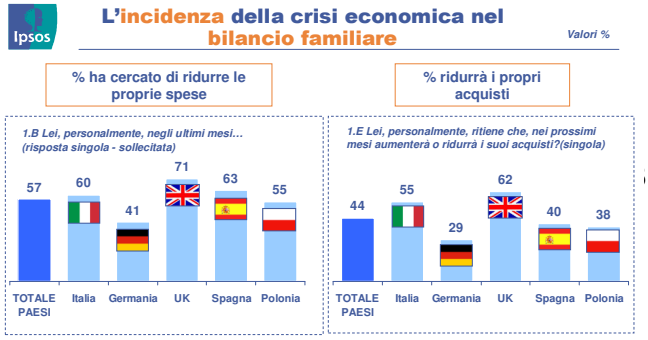


In what way and to what extent has the national economic situation influenced their family budget?

Generally speaking the more immediate consequence is that people cut their spending, a behaviour that is shared by more than half of the respondents in the majority of the countries considered (57% of the total) particularly in the UK (71%), Spain (63%) and Italy (60%) (with a smaller percentage in Germany).

Anglo-Saxons and Italians also display a fairly similar trend in relation to their perceived availability of money (in both cases the majority of the respondents consider they have less available money, 57% and 50% respectively) and, in keeping with this, the predominant attitude is to cut down on expenditure (62% UK and 55% Italy).

In this somewhat "depressed" European context, Germany seems to show a greater dynamism as regards attitude towards spending: although 2 out of 5 Germans actually had less available money and cut their spending compared to the previous year, less than one respondent out of 3 states that they will reduce their expenditure in the future.



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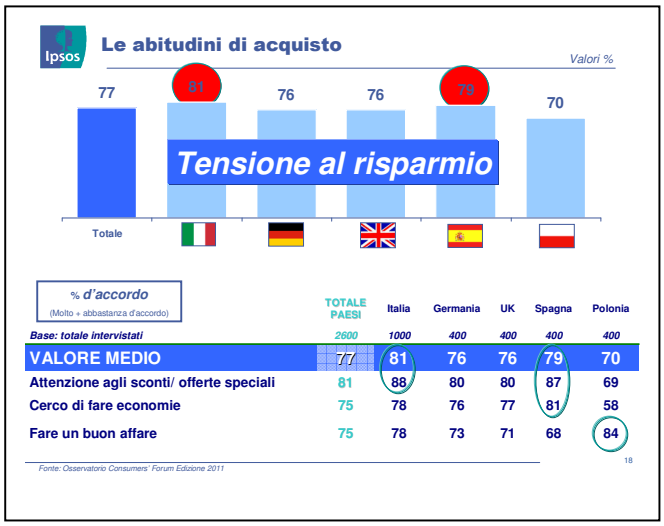
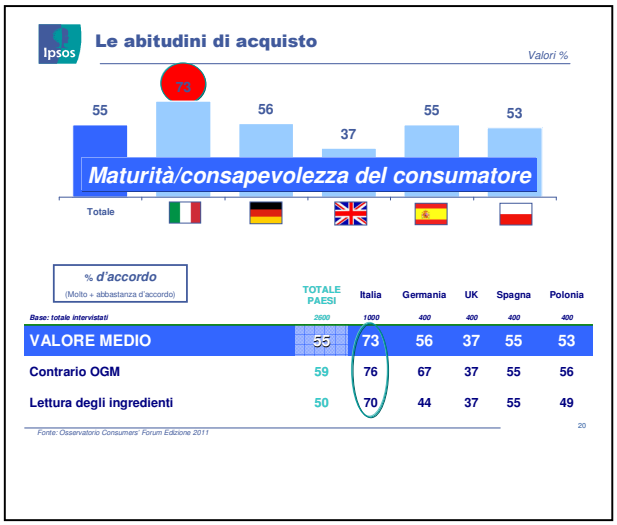
Consumption habits and attitudes

As the vast literature on the subject has taught us, several different components rotate around people's consumption habits and choices. These are all linked to each other and mutually influence each other.

The choice to buy or not buy something, to choose or not to choose a certain brand is therefore the result of exogenous and contingent factors but it also involves the emotive-axiological sphere of each person. Buying behaviour is formed therefore of "opportunities" (understood in the economic/financial sense but also the sense of emotive gratification), "responsibilities" and increased awareness. As we can see from the figures, this trend is also confirmed in the countries considered.

The unfavourable economic situation highlights a growing trend towards money-saving (81% of the respondents say that they keep an eye open for discounts/special offers, in particular amongst the Italian and Spanish consumers – 88% and 87% respectively), alongside which they carry out a "critical review" of their past purchases: on average about one consumer out of three claims to have bought too many things, especially amongst the Italian and Spanish respondents. Parallel to this, the current European consumers show that they have increased their own self-awareness: they are attentive and informed consumers: 50% of them carefully read the ingredients, 70% in Italy. At the same time the "playful" component of the purchase act and of the item purchased remains an important factor in their choices, both inasmuch as a moment of leisure (for about 2 out of 5 respondents, considering the total sample), and with regard to the confirmation/ achievement of a distinctive status (34% of the total sample, especially in Italy 44%).





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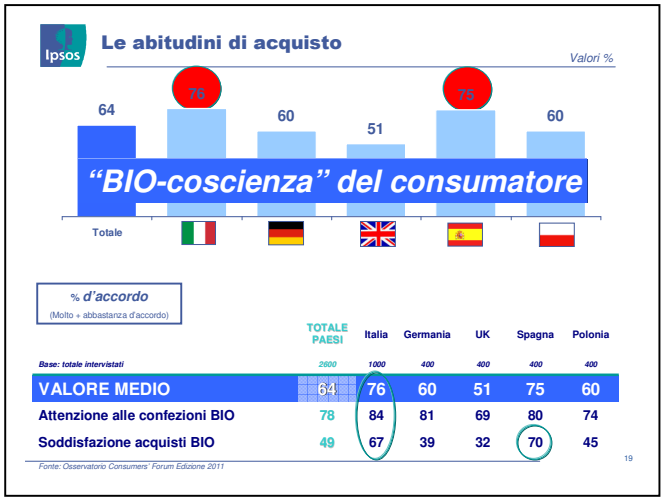
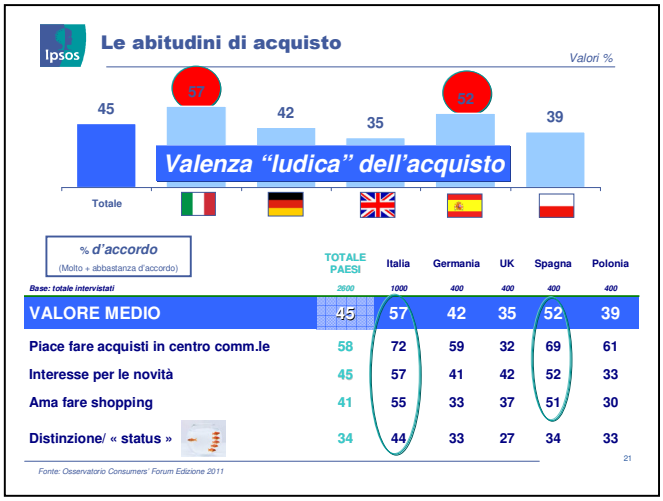
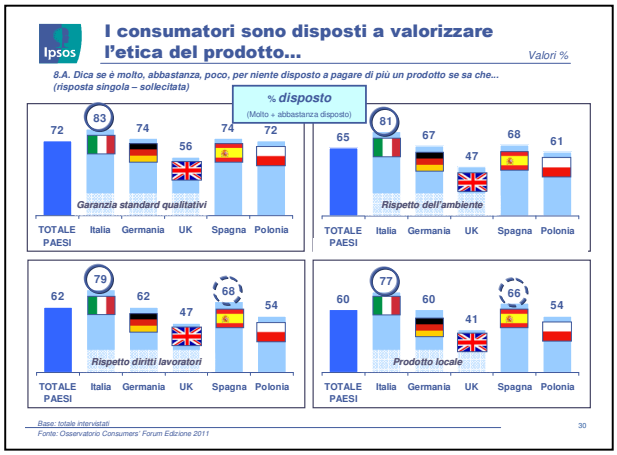
Furthermore, the figures show the presence of an "ethical conscience", which is expressed as a high degree of attention for non-polluting packagings (78%), for the gratification afforded by the BIO purchases (49%) but also in the predisposition to buy goods produced in compliance with the rules of protection of the worker (62%), of the environment (65%) and of the territory (60%). The Italians in particular seem to be more sensitive to this aspect, displaying a greater predisposition to purchase, whereas the English are shown to be more lukewarm.

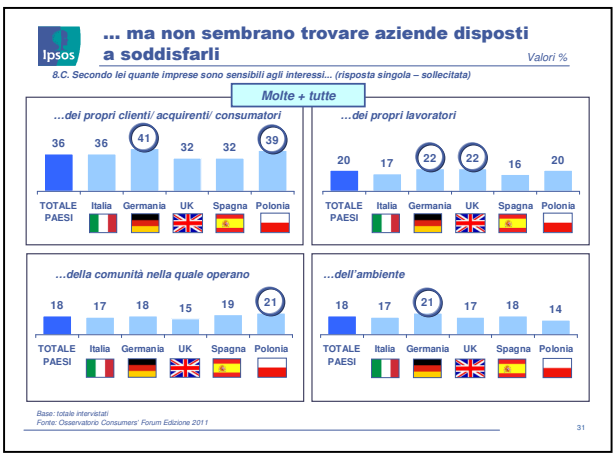




The theme of ethical consumption and Corporate Social Responsibility

The predisposition to adopt an "ethical buying behaviour" is closely linked to the theme of corporate social responsibility. From this point of view the consumers display an evident dysharmony between demand and supply: though on one hand they show themselves to be willing to make an "ethical" purchase, on the other only a minority considers that the companies are really sensitive to the interests of their workers, the environment, the community they operate in or their own users. The demand for ethical behaviours does not yet seem to find an appropriate corresponding supply on the market; this opens up important spaces of "dialogue" for companies that wish to address this need on the part of consumers.





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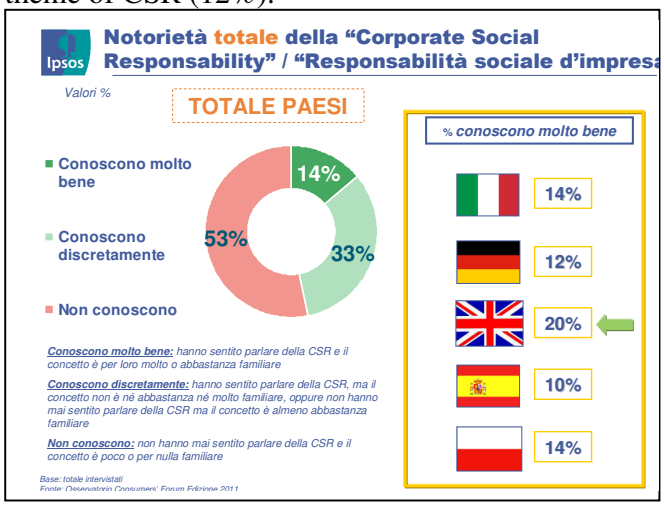
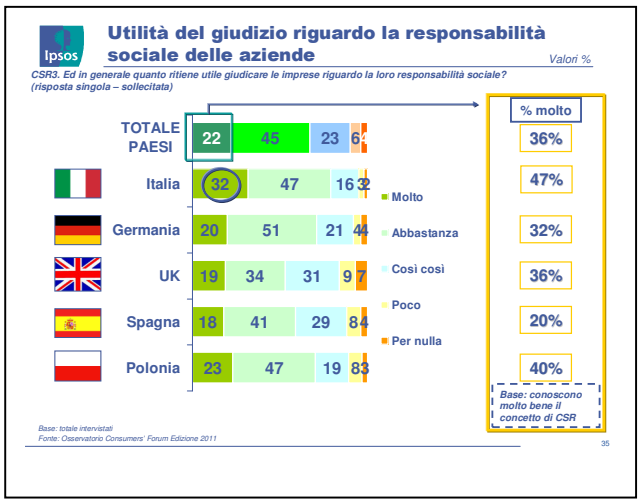
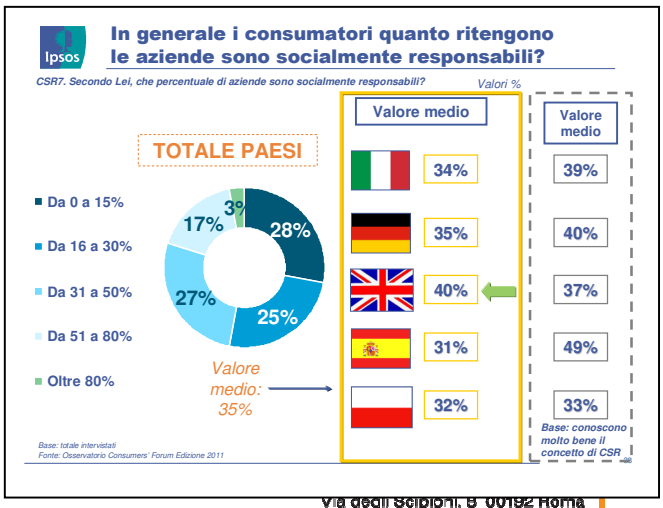
The theme of CSR is particularly in "vogue" these days, in consideration, too, of the importance that it holds for the forthcoming strategies for Europa 2020. The topic seems to be somewhat obscure to the large part of the European respondents: 53% are not aware of it at all, even after reading the description, and about one third have a somewhat nebulous perception of it. Those who state their are very aware of it, equal to 14% of the total sample at European level, include in particular the Anglo-Saxon respondents (20%). The Germans, vice versa, are the ones who are the least familiar with the theme of CSR (12%).



Once the concept has been explained however, CSR is regarded as an important parameter of judgement for the purposes of evaluating companies in the opinion of two out of three respondents (67% of the total sample). It is in fact the shared opinion that a company, while still having to legitimately pursue its financial targets, should also play a "social" role, bearing in mind the needs of its own closest stakeholders but above all displaying care and attention for the "entire universe" that, directly or indirectly, comes into contact with it. The facts however, in the perception of the sample at least, show how, in the view of the respondents, only a very small minority the of companies are "socially responsible" (on average a little over one out of three companies considering all the countries: 35%) and few Europeans are able to indicate some of them with any certainty.





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But what activity makes a company responsible?

In the opinion of the respondents, the bases of an "ethical" behaviour lie first of all in the respect for the rights of the company's own workers (43% total sample, 49% in Germany). It is of course also essential that product quality be guaranteed (36% for the whole sample, in particular in Poland: 43%). As can be seen, to a large extent many of these attributions mirror that need linked to the increased self-awareness that current consumers have acquired and that, necessarily, they project into the dispenser of a service.

Le basi di un comportamento etico

Valori %

8.E. Secondo lei, cosa deve garantire un' azienda per essere considerata etica? (risposta multipla – sollecitata)

TOTALE CITAZIONI

	TOTALE PAESI	Italia	Germania	UK	Spagna	Polonia
Base: totale intervistati	2600	1000	400	400	400	400
Il rispetto dei diritti dei propri lavoratori	43	37	42	(49)	45	46
La qualita' dei propri prodotti	36	37	33	31	(42)	(43)
Il rispetto delle regole e delle leggi	30	33	33	24	22	(37)
Un prezzo equo	27	23	24	(37)	26	25
La trasparenza verso il consumatore	26	(33)	28	16	(33)	19
La difesa dell'ambiente	26	25	28	(33)	21	19
La difesa delle categorie sociali deboli	12	12	13	11	12	11

Base: totale intervistati
Fonte: Osservatorio Consumers' Forum Edizione 2011

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A company's social responsibility also depends on the type of communication that it establishes with its userships, regardless of how effective it is. In the opinion of the respondents, a socially responsible company's way of communicating of should first of all avoid any explicit references to violence or to instruments of violence such as weapons. A responsible communication also observes the rules of decorum: it must avoid therefore excessively explicit sexual attitudes or references, as well as references to themes that might encourage attitudes or behaviours that are against the law or only just on the side of legality.

Responsabilità sociale e advertising: cosa evitare

Valori %

CSR22. Parliamo adesso di responsabilità e pubblicità. Secondo lei la pubblicità di un'azienda responsabile dovrebbe usare il meno possibile... (risposta multipla – sollecitata)

Principali Risposte	TOTALE	U	D	16-34 anni	35-44 anni	45-60 anni
Atteggiamenti violenti	37	32	(42)	31	41	40
Armi	26	24	28	25	26	27
Atteggiamenti esplicitamente sessuali	25	20	(30)	23	26	25
Atteggiamenti che suggeriscono di violare le leggi	24	24	25	19	27	(29)
Alcool e sigarette	20	21	19	20	22	19
Riferimenti religiosi	17	20	15	18	17	17

Base: totale intervistati Fonte: Osservatorio Consumers' Forum Edizione 2011

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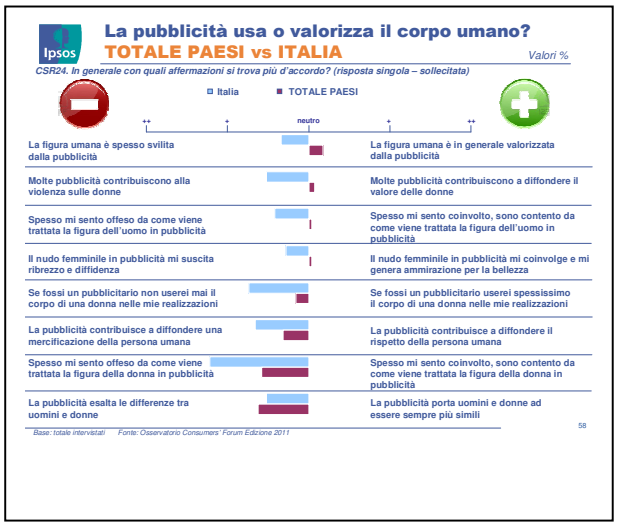
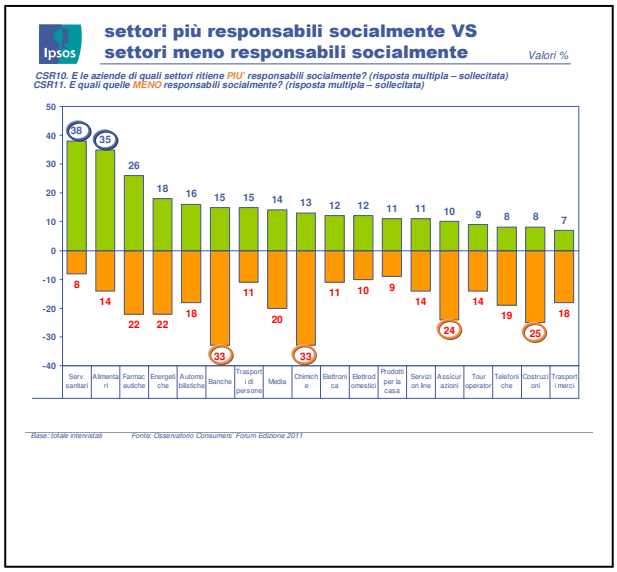
Adverts often use the human body, indiscriminately too. The respondents' evaluations on this theme are fairly heterogeneous and reflect the reality of the different countries. As far as Italy is concerned, the figures show a polarisation of the judgements expressed by the Italians, who tend to be more critical with regard to the use of the human body for commercial purposes, so much so as to presuppose that is it being "abused" rather than used. It is also interesting to note the difference in perception between men and women, confirming a segmentation in the judgements, which – for the women – are decidedly more critical with regard to the use of the female figure.



In territorial terms the European companies are the ones considered to be more responsible, whereas the Chinese companies on the contrary are deemed to be the least sensitive to the issue of social responsibility. With regard to the sectors that are more or less "responsible", at the top of the list the respondents place the companies that provide health-related services and the food companies; the last positions are vice versa occupied by the chemical companies, the banks and the construction companies.



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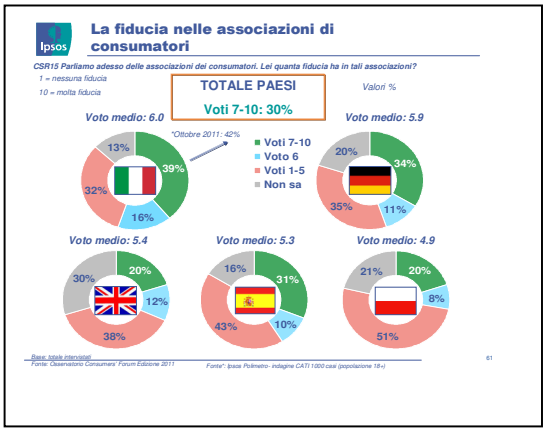
The consumer associations: trust, role, protection

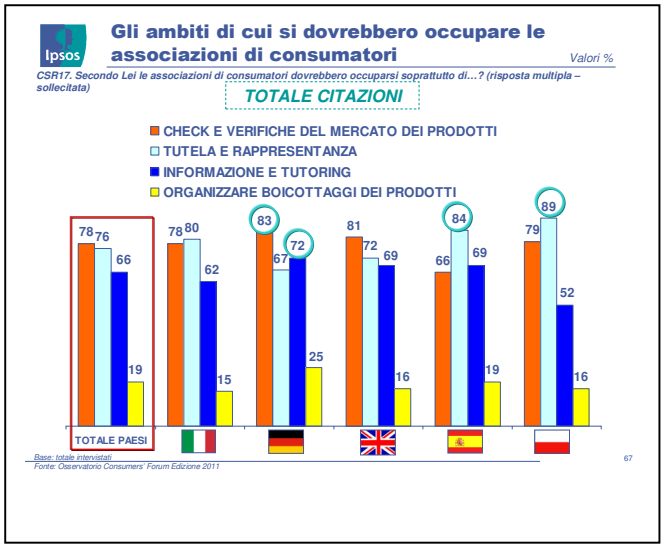
Overall, only 30% of respondents declare a high degree of confidence (from 7 to 10) in the consumer associations. The situation varies considerably in relation to the different countries considered; in Italy there appears to be a more open / receptive attitude (39% of high scores from 7 to 10), the more sceptical are concentrated in Poland (51% those who give negative judgements, from 1 to 5). England represents an interesting case, which is positioned at the same level as Poland as regards attestations of maximum trust: only 20% of the English respondents give scores of from 7 to 10. The English however do not show themselves to be critical but instead tend to "hold" their judgement. With regard to the role that these associations could play in making companies more socially responsible, the figures show a certain territorial homogeneity: it is generally considered that the contribution is important but not fundamental; the figure is higher in those countries in which people have less trust in the behaviour of companies.



But what is the main task that the consumers assign to the consumer associations?

The main function that the associations have to perform, in the opinion of the respondents, is that of checking and monitoring the market as a whole; this is followed a short distance behind by a function of protection, assistance and representation, followed by a role of tutoring and informing the consumer.

In the evaluation of the respondents, the choice of an association through which a person can be protected differs a great deal according to the territorialities and reflects the various national realities: in Italy, Spain and Poland people tend to attach the main importance to specialisation, in Germany to activism and visibility in the media, while in the UK, lastly, historicalness and tradition hold sway. These figures are also confirmed with regard to the qualities that an association should possess in order to be effective in a dialectic relationship with a company.



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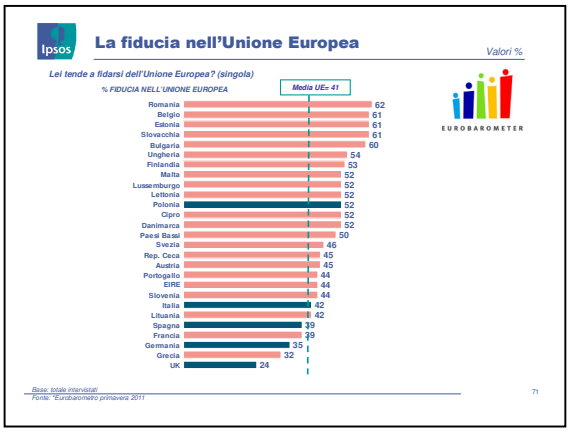
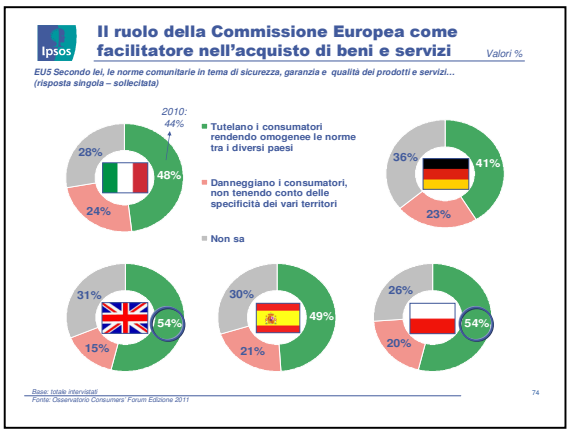
The European Union and consumers

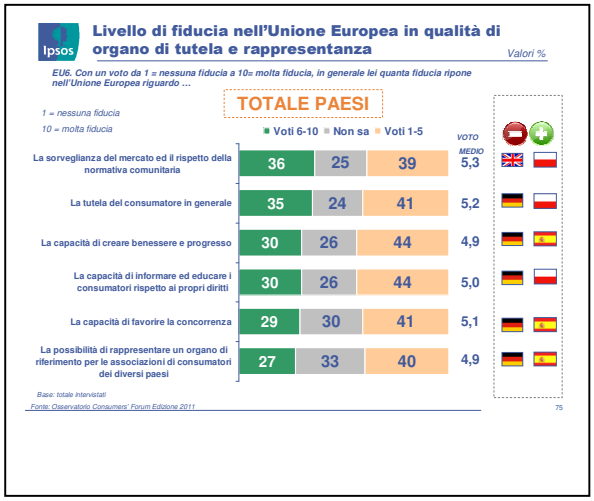
On the whole the trust that the various member states place in the EU stands at around 40% (source: Eurobarometer). As regards the countries considered in the survey we observe more positive values for the Polish respondents (52%) and a more critical position on the part of the English (24%). Germans and Spanish show themselves to be more "lukewarm" (39% for both countries), the Italians stay in line with the total (42%). As a result the sense of belonging to the "European global village" reflects in part this attitude; Poles and Italians feel part of it to the same degree (48%), the English on the other hand seem to take their distance from it (32%). The role of the EU in its position as tutor over the uniformity and correctness of the commercial exchanges elicits generalised consensus: the tendency is to consider the community norms more as an opportunity than as something detrimental, an opinion also shared by the English and the Germans who had highlighted a less positive evaluation.

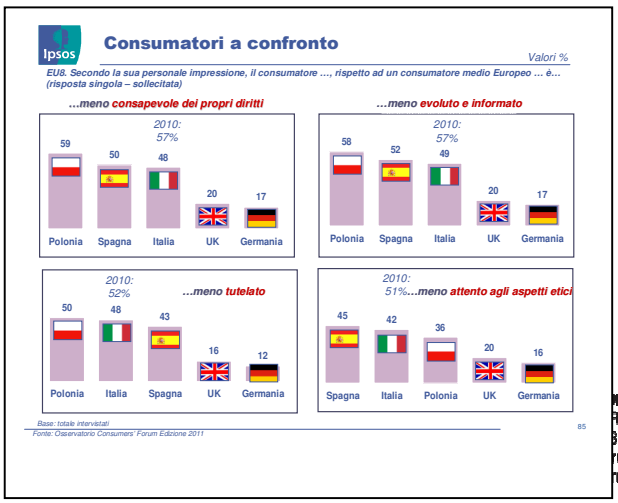




However, though in general the EU is considered a guarantee, large spaces for improvement emerge both in relation to the practical application of these activities and their communication (on average about a third of the total sample is unable to express an evaluation).

The respondents' self-perception with regard to their own level of awareness, protection and information compared to an average European consumer is very interesting. The figures show us a "territorial split" which on one side brings together Germans and English who rate themselves as more informed, more aware of their own rights, more mindful of the ethical aspects and more protected. On the other side, apparently very distant, we find the Italian-Polish-Spanish axis, which vice versa considers itself to posses sizeable cognitive and behavioural gaps.

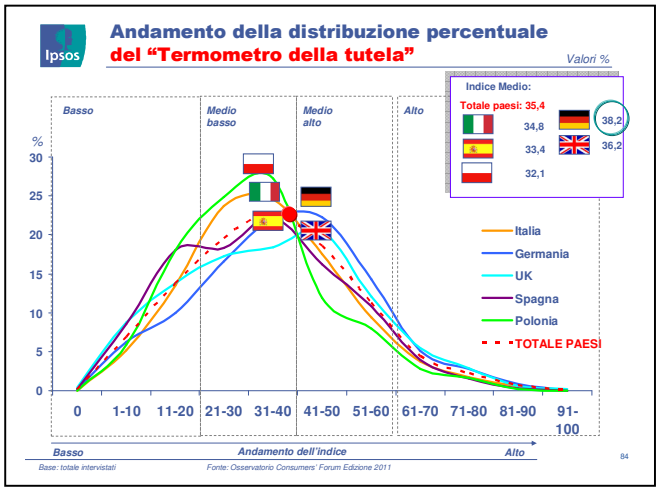


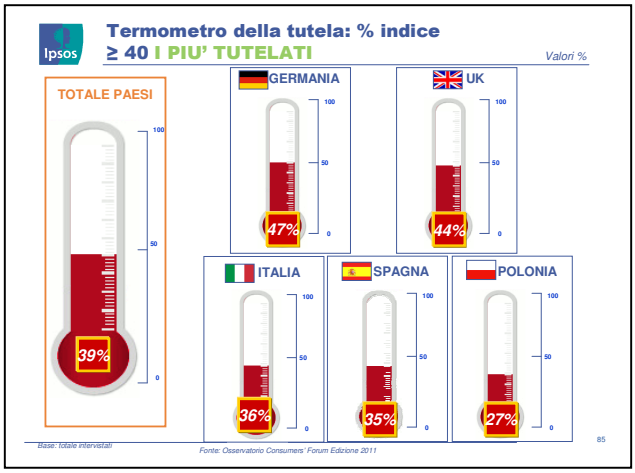


The consumer "protection thermometer"

The research enabled us to construct a "protection thermometer" of European consumers that takes account of all the judgements expressed with regard to the players that are involved in the buying process or that, for various reasons, are interested in it in their capacity as organs of protection and surveillance (for example the European Union and, for some aspects, the consumer associations). The "protection thermometer" is therefore the result of the combination of a set of factors that is not only linked to the consumers' purchasing behaviour or to their attitude to the product or to the emotive value that they get from this buying act, but that also takes account of how the consumers perceive themselves in terms of their own level of "evolution" (that is to say of maturation and awareness with regard to their own rights, information, their own level of attention to ethics and to the environment,) as well as the citizen-consumer's opinion of the other important components in the buying process i.e. on one hand the companies and, on the other, the organs of protection and control (that is to say the supranational bodies or the associative network).

The results of the "protection thermometer" confirm a distance between the Anglo-German block, with more positive scores for the protection and the level of evolution of the consumer (in Germany the percentage of those who feel tendentially protected is equal to 47%, in the UK to 44%), and, on the other side, the Mediterranean area (Italy 36% and Spain 35%) and Eastern Europe (Poland 27%) which vice versa reveals a lower level of trust and confidence, with a lot of space for improvement.
The community directives for the year 2020 also go in this direction.





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