



SUSTAINABLE CONSUMPTION PATTERNS IN VISEGRAD REGION

Polish report

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Main Findings

Environmental knowledge

Polish consumers are characterized **by moderate ecological knowledge**.

A slim majority of Polish respondents agreed either strongly or somewhat that they often read articles about environmental or/and social impacts of products they buy and that they very often pay attention to environmental labelling before deciding to buy. At the same time only slightly more than a third declared to have enough knowledge to choose more sustainable products.

Environmental concern

Compared with the environmental knowledge Polish consumers represent a relatively **higher level of environmental sensitivity**. They represented, however, a slightly lower level of environmental sensitivity compared with all V4 countries.

Perceived consumer effectiveness and marketplace influence

A very clear majority of Polish consumers **feels they have influence on companies' behaviour**, other members of their community and on solving environmental problems.

Polish consumers have a slightly stronger feeling about their influence, compared with average V4 countries.



Environmental actions within last twelve months

Polish consumers are much **more active in the after purchase behaviours** than in the before purchase. The most frequent activities were those that do not require a lot of knowledge and engagement, are well known but additionally can bring some economic reward. We could call them “every day practices” like for example segregating household garbage.

Polish consumers more frequently manifest **positive buying behaviour** - favouring more sustainable than “moral boycott” - avoidance of unsustainable products.

Barriers

For Polish consumers the **biggest barrier** is **insufficient availability** of the sustainable products.

Then: **too high price** of sustainable products and **lack of confidence** in the eco-labels.

The **least important barrier** turned out to be: **unsatisfactory attractiveness** of sustainable products.

Buying behaviour - consumerism

Polish respondents manifests **rather non-consumerist attitude**, declaring in great majority, that the buy things only when they really need them.

The question is to what extent this attitude arises from a conscious opposition to consumerism and to what extent from economic limitations.

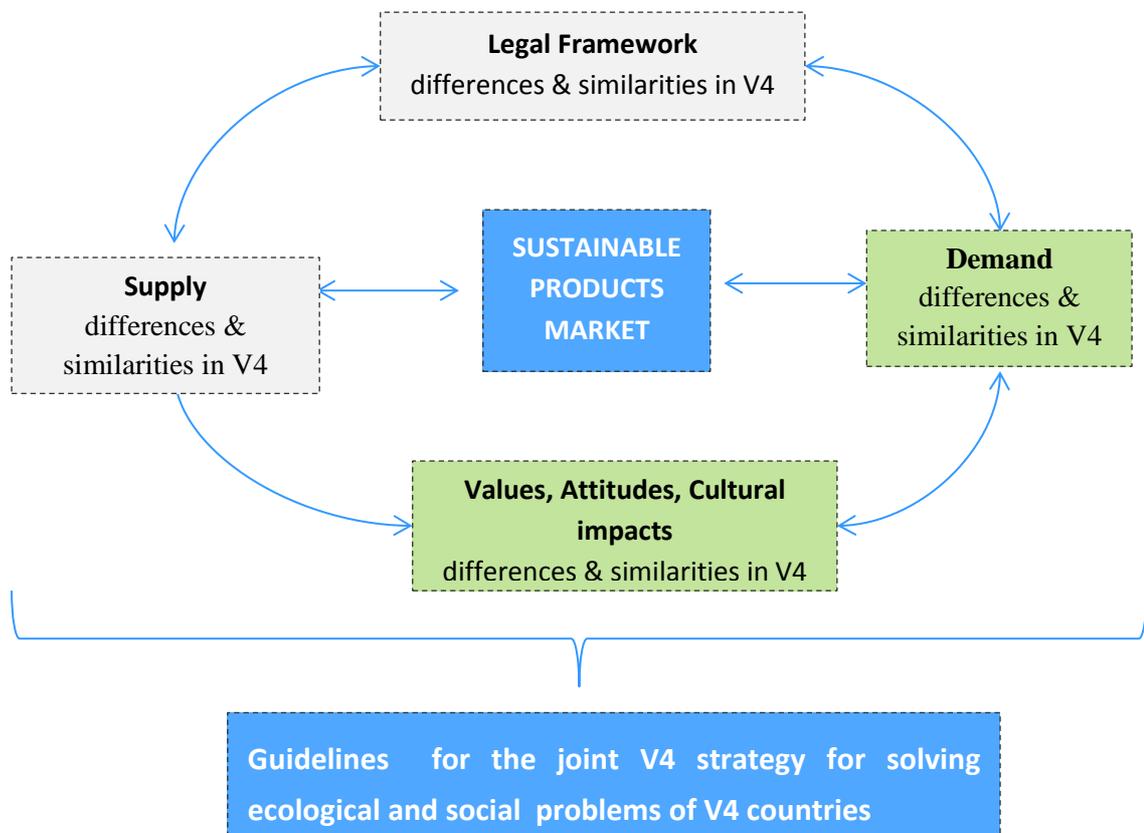
The most typical consumerist behaviour for Polish respondents turned out to be **difficulties in resisting discounts**.

The consumerist behaviours, that is, shopping just for pleasure or buying product that is not used afterwards, seem to be more typical of Polish vs. V4 sample.

The Approach

The objective of this project is to support and strengthen the cohesion of the V4 countries in their efforts to achieve a more sustainable consumption culture and thus more sustainable production models in the selected consumer goods' markets. In the project this will be done within the analysis of intermediate connections and influences of:

- Demand side of the market – consumers
- Values, attitudes and cultural impact
- Supply side of the market – produces
- Legal framework



The report was prepared in the framework of the project "Prospects of the Visegrad cooperation in promoting a sustainable consumption and production model" The project is supported by the International Visegrad Fund <http://visegradfund.org/>



The results of this report will concentrate on the first two points: **the demand side of the market represented by consumers , their values and attitudes.**

The importance of demand side analyses result from the fact that gradual environmental degradation, shrinking of non-renewable resources, and lower quality of life are directly or indirectly arising from **snowballing consumption.**

These unfavourable processes concern increasingly also V4 countries and will not stop unless consumption patterns are modified. Therefore the sustainability agenda has gradually been shifting to include consumption alongside production. Manufacturers may use new designs and technologies to minimize the impact of a product on the environment, but their efforts are pointless if consumer do not buy more sustainable goods and do not change their consumption habits.

Research Aims

The main objective of the project was to too access current consumption patterns in V4 countries, identify the factors that influence those patterns and finally to draw the conclusions for more sustainable consumption models. In particular, the survey examined following aspects of consumers' behaviour:

- Environmental knowledge
- Environmental concern
- Perceived consumer effectiveness & Perceived marketplace influence
- Environmental actions within last twelve months
- Barriers
- Buying behaviour

The idea is based on the assumption that we might live better by consuming less, making more conscious and rational purchasing decisions. Therefore a change in the attitudes of consumers towards a more responsible behaviour is needed. It is a gradual process that needs appropriate knowledge, awareness, and frequently the modification of long-standing habits.



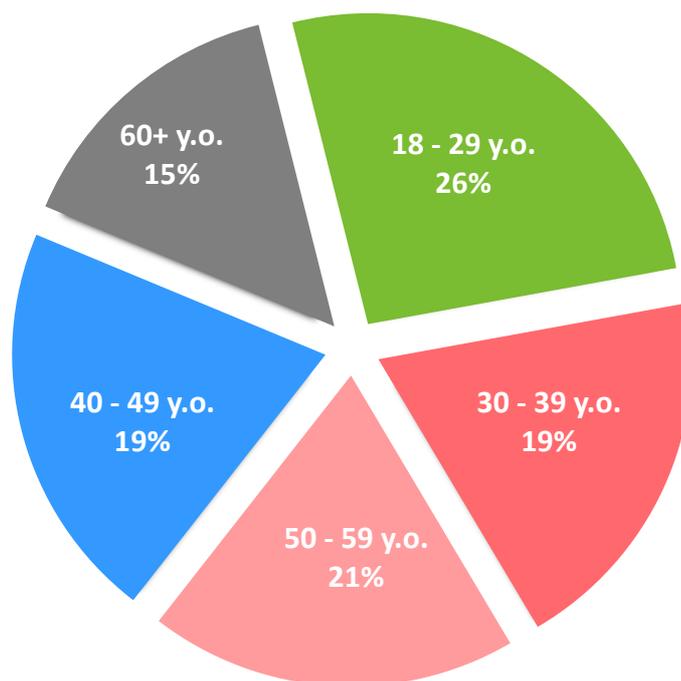
Information about the research

A consumer survey was conducted to examine Polish citizens' attitudes and behaviours in the context of sustainable consumption. To ensure sample size and comparability across countries the fieldwork was conducted by TNS Global in the end of March 2015. **2000** randomly-selected V4 citizens, aged 18 and over, were interviewed in the four Visegrad countries.

The interviews were carried out via Computer Assisted Web Interviewing (CAWI) –global and national access panel database of respondents - reaching 500 citizens in each country.

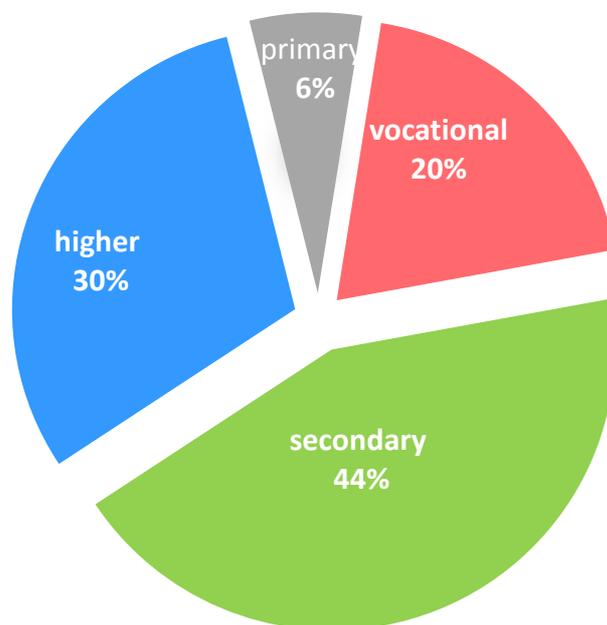
Structure of respondents in Poland

Age

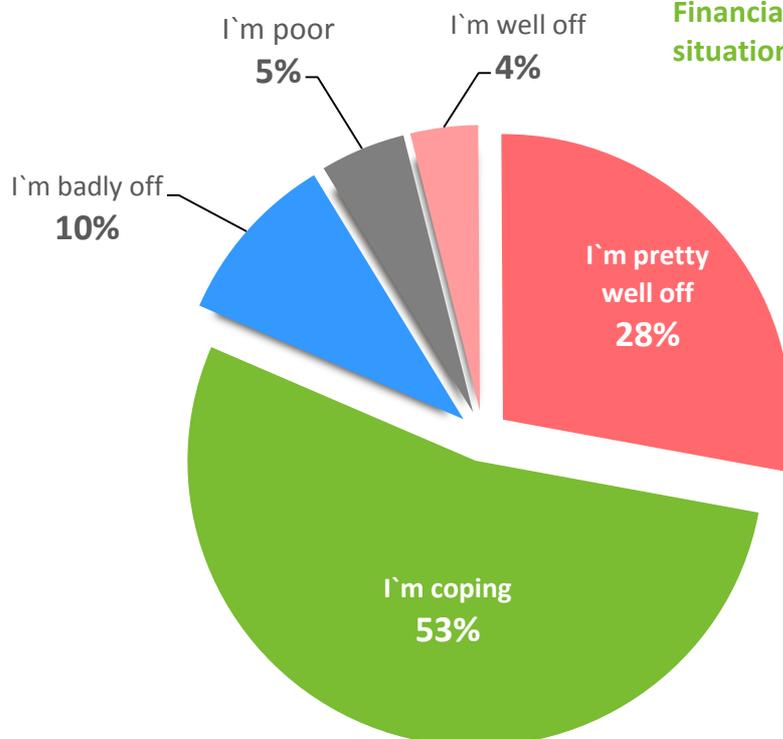




Education



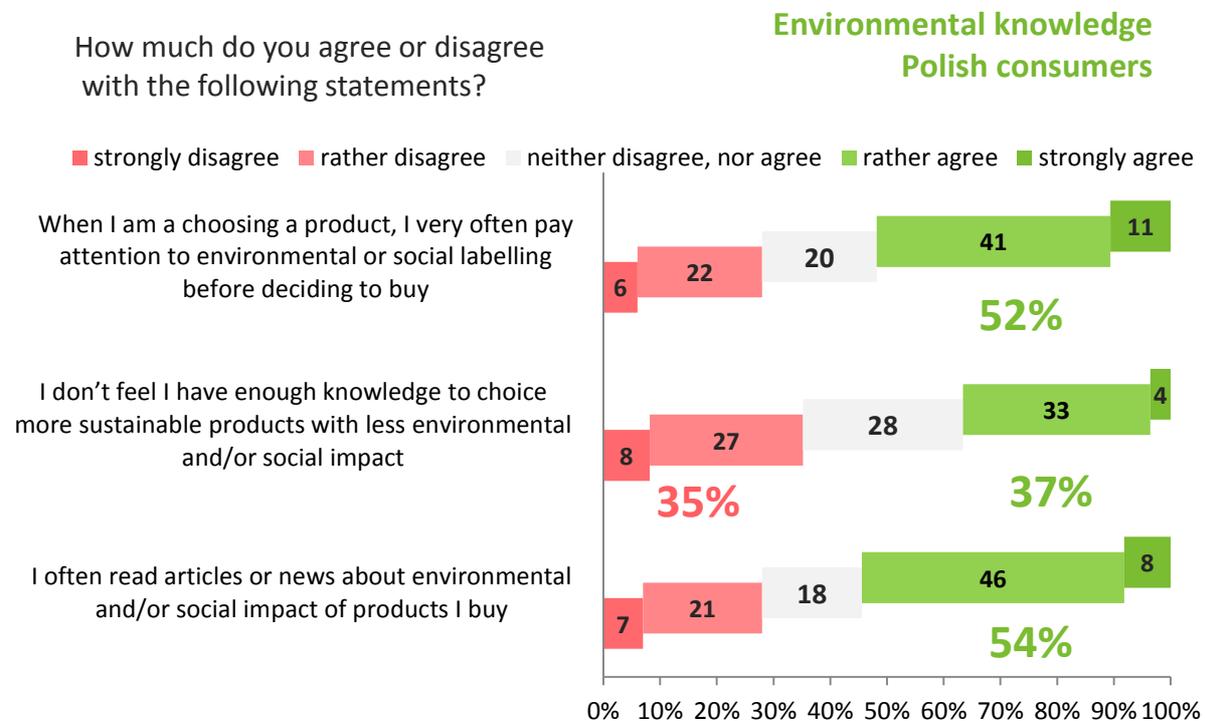
Financial situation



THE SURVEY RESULTS SUSTAINABLE CONSUMPTION IN POLAND

Environmental knowledge

In this section respondents were asked how much they agree or disagree with the three statements allowing to access the level of their environmental knowledge.

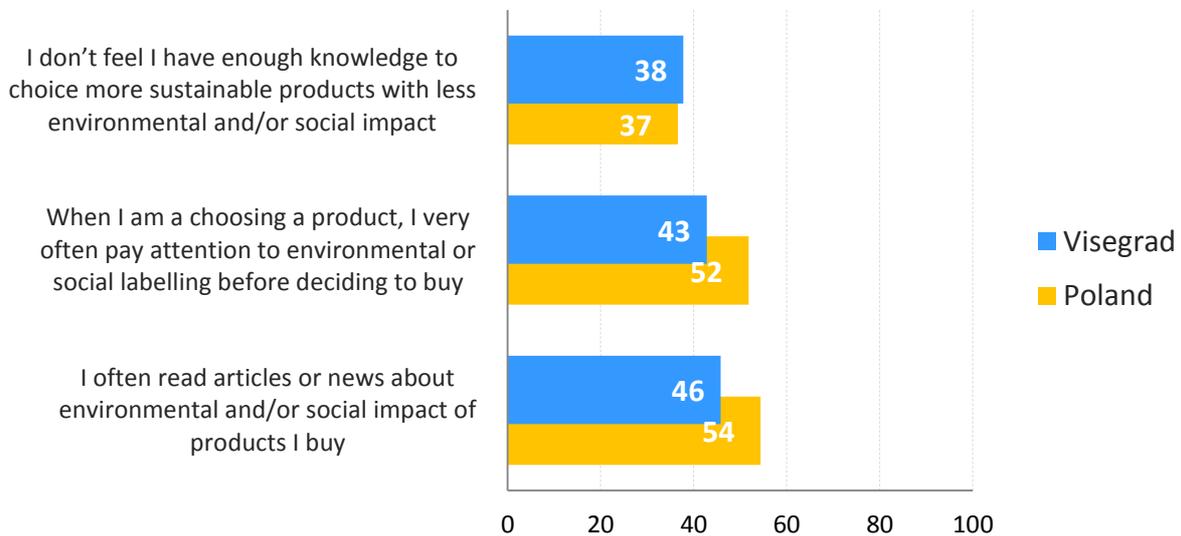


Slightly more than half of Polish respondents agreed (strongly or rather) that they often read articles or news about environmental and/or social impact of products they buy (54%) and that they very often pay attention to environmental or social labelling before deciding to buy (52%). Moreover almost two-fifths (37%) agreed that they don't feel to have enough knowledge to choose more sustainable products. Nevertheless only slightly lower proportion, thought opposite (35%).

Environmental knowledge Poland vs. V4

Respondents that strongly or rather agree
with the following statements

[%]



When we compared Polish consumers environmental knowledge with the V4 (all four countries) we could say that:

Polish interviewees slightly more frequently declared that:

- they often read articles about environmental of products they buy (54% compared to an V4 average of 46%) and that
- they very often pay attention to environmental labelling performance are of no interest to them (52% compared to an V4 average of 43%).

Highlights:

Polish consumers are characterized **by moderate ecological knowledge.**

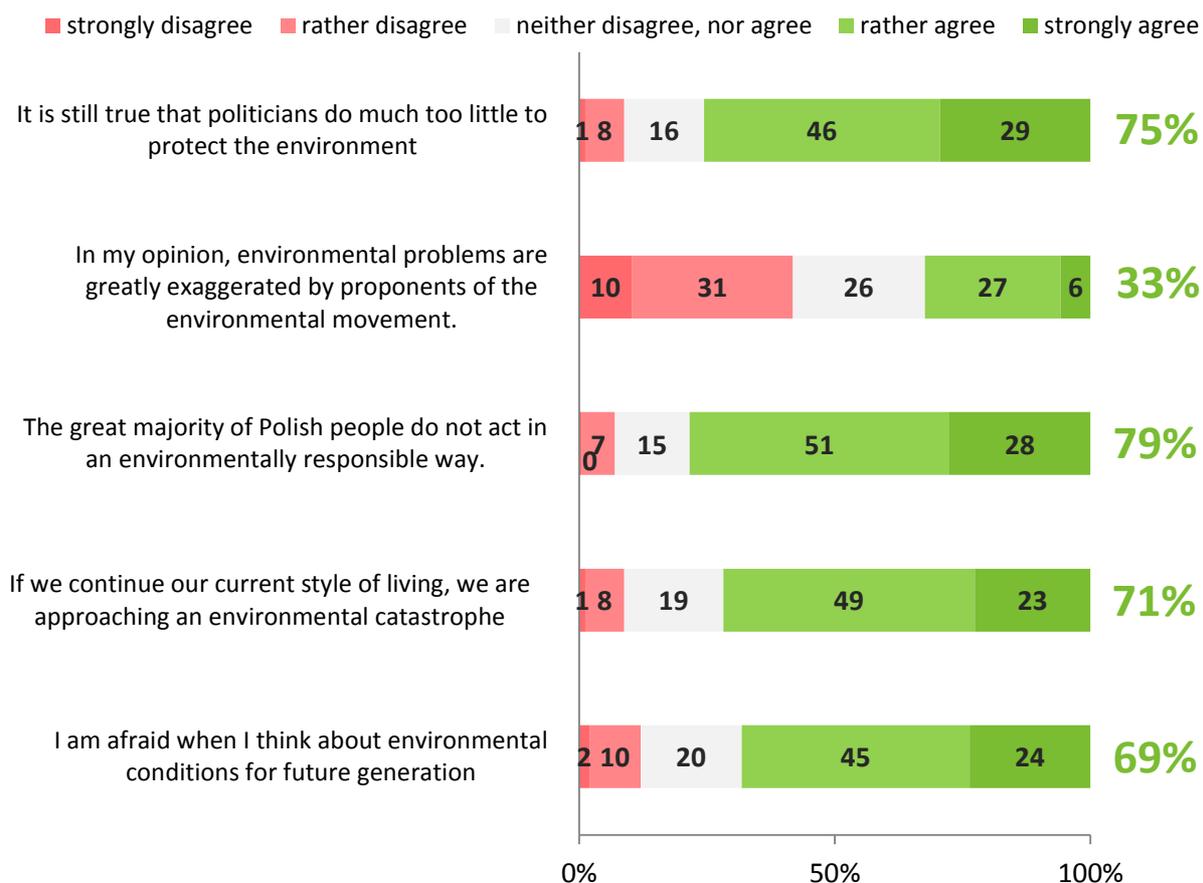
A slim majority of Polish respondents agreed either strongly or somewhat that they often read articles about environmental and/or social impact of products they buy and that they very often pay attention to environmental labelling before deciding to buy. At the same time only slightly more than a third declared to have enough knowledge to choice more sustainable products.

Environmental sensitivity

Another very important factor influencing sustainable consumption is environmental sensitivity. The knowledge itself very often is not enough. What we need is a combination of knowledge, the awareness resulting from it, and the individual predisposition of a particular person which produces a category referred to as concern [1][2][3]. Together they can lead to seeking and purchasing sustainable products.

Environmental sensitivity Polish consumers

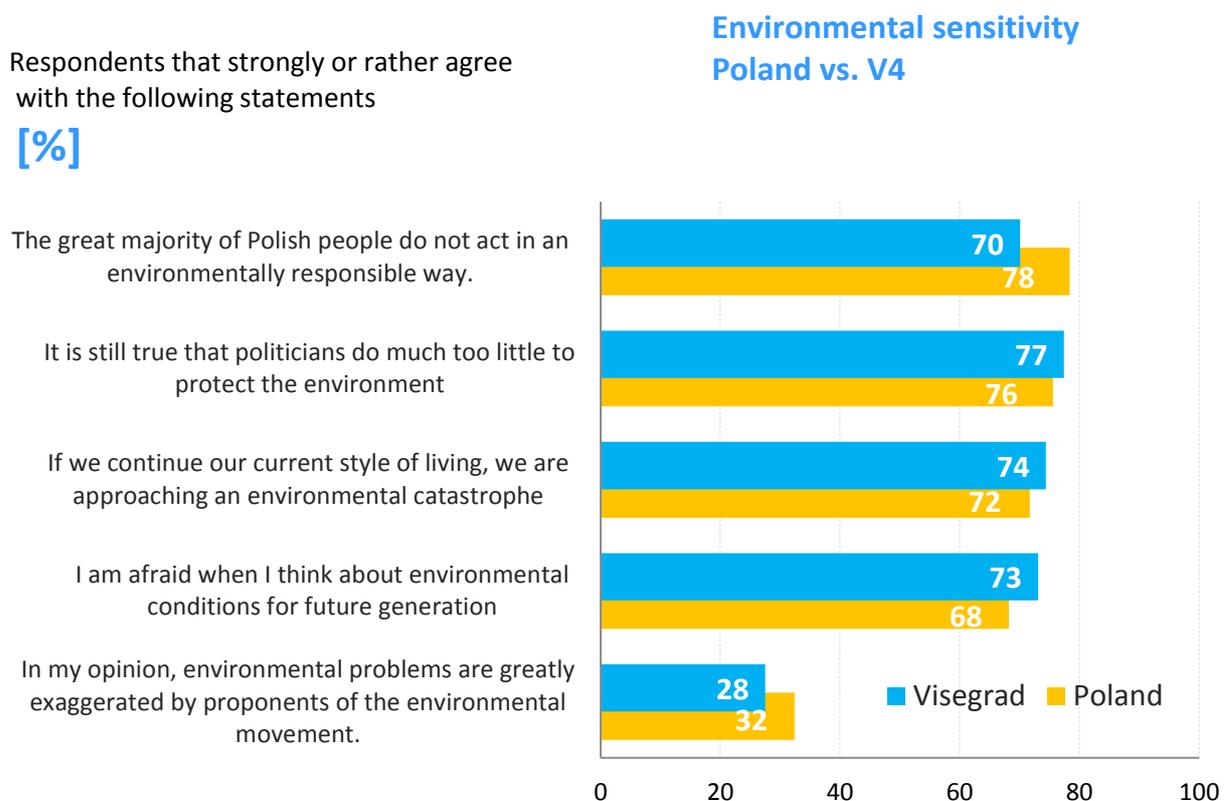
How much do you agree or disagree with the following statements?



Compared with the environmental knowledge results Polish consumers represent higher level of environmental sensitivity **as great majority strongly agreed or rather agreed** that:

- Polish people in general do not act in an environmentally responsible way **79%** - only 2 persons strongly disagreed.
- Politicians do much too little to protect the environment **75%** - only 6 persons 1% strongly disagreed with that statement.
- If we continue our current style of living, we are approaching an environmental catastrophe **71%** and again only 6 persons (1%) strongly disagreed with that statement.
- They are afraid when they think about environmental conditions for future generation **69%**.

At the same time over two-fifths strongly or rather disagreed with the opinion that environmental problems are greatly exaggerated by proponents of the environmental movement and just over a quarter neither agreed or disagreed.





When we compare Polish and V4 average sample we can observe that Polish respondents represented a slightly lower level of environmental sensitivity than the respondents in all V4 counties.

A slightly smaller percentage of Polish respondents agreed to almost all statements concerning environmental sensitivity.

There were two exceptions: the last statement “In my opinion, environmental problems are greatly exaggerated by proponents of the environmental movement” (that was opposite scored as to the environmental sensitivity), and the first statement: 8% more Poles vs. all 4V countries, believes that most of the citizens in their country do not act in an environmentally responsible way.

Highlights:

Compared with the environmental knowledge Polish consumers represent relatively higher level of environmental sensitivity .

They represented however, a slightly lower level of environmental sensitivity compared with all V4 counties.

Perceived consumer effectiveness and perceived marketplace influence

As far as sustainable products are concerned the influence of the so called perceived consumer effectiveness PCE is attributed a grave importance. The PCE is understood as a measure of the subject’s judgement in the ability of individual consumers to affect environmental resource problems [4]. A significant impact of PCE on sustainable consumption was also confirmed in the literature [5,6]. The concept of perceived marketplace influence - PMI is similar to PCE in nature, however, rather than solely looking at whether someone feels their actions are individually making a difference in environmental problems, it captures an individual's belief that their actions are actively influencing the behavior of other marketplace actors – consumers or organisations [7].

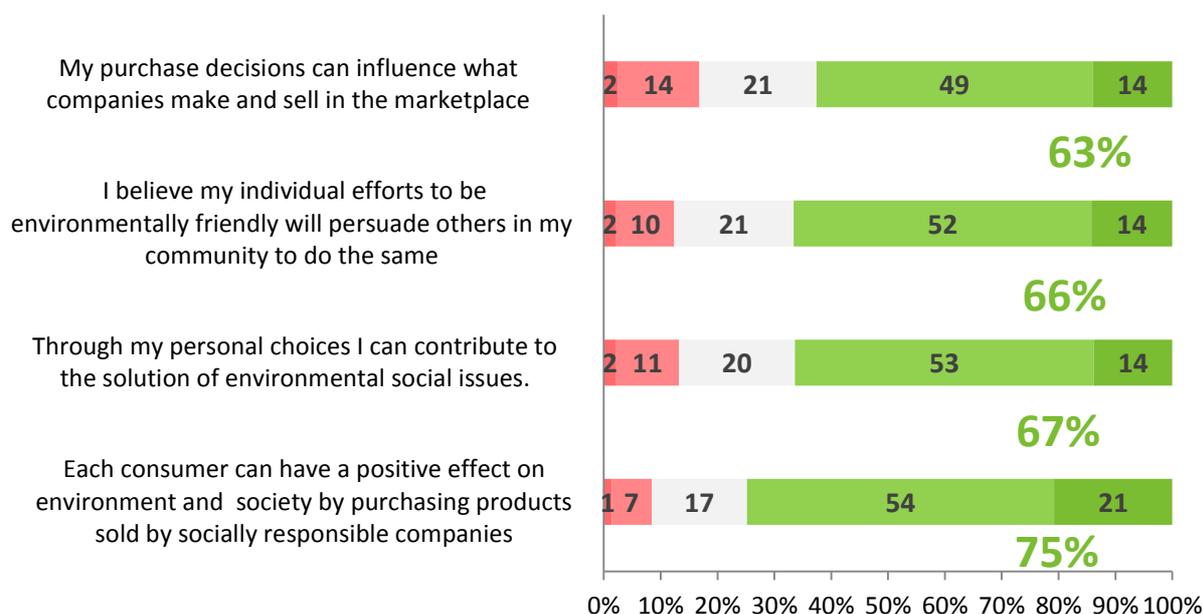
We prompted consumers with a four statements to see how much they believe the can make a difference in solving environmental problems and also influence other consumers and companies.



Perceived consumer effectiveness & Perceived marketplace influence Polish consumers

How much do you agree or disagree with the following statements

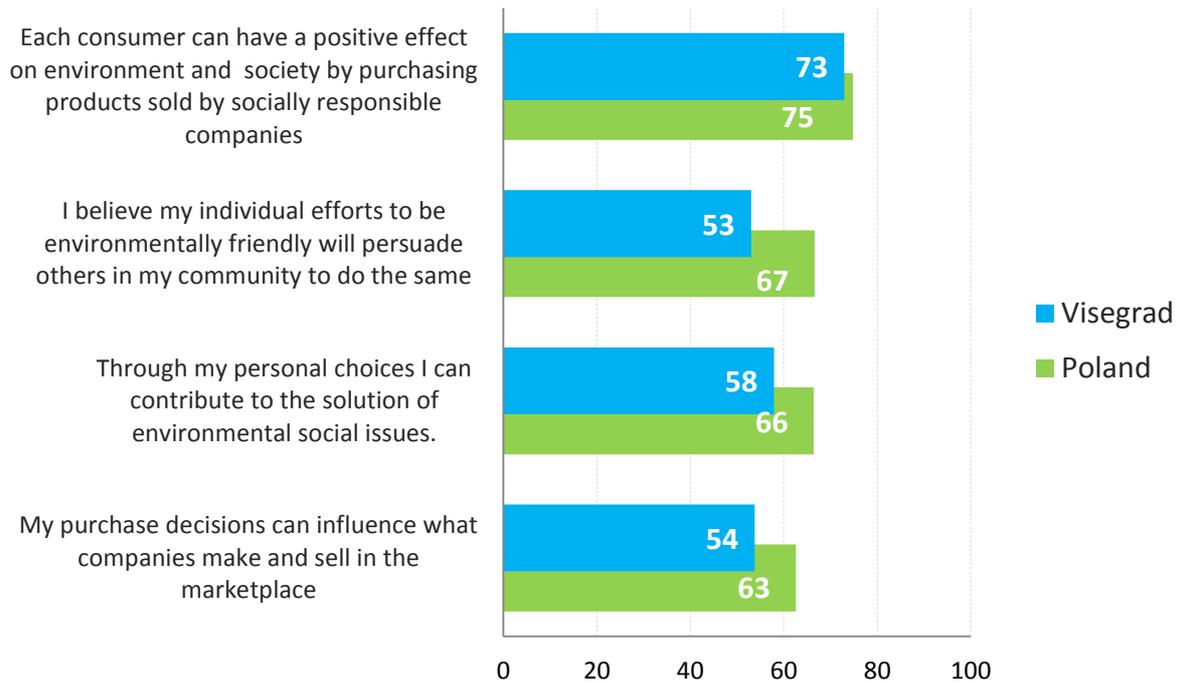
■ strongly disagree ■ rather disagree ■ neither disagree, nor agree ■ rather agree ■ strongly agree



Generally a very clear majority of Polish consumers agreed (strongly or rather) with all four statements regarding consumers influence on companies, others in their community and on solving environmental problems. However the the largest percentage of Polish respondents (75%) agreed with the most general and therefore “safe” statement referring to all consumers: “Each consumer can have a positive effect on environment and society by purchasing products sold by socially responsible companies”. Two-thirds of respondents agreed with more personal commitments like: “through my personal choices I can contribute to the solution of environmental social issues” and “I believe my individual efforts to be environmentally friendly will persuade others in my community to do the same”. Slightly fewer (63%) of Poles feel to have personal influence on companies performance (what they make and sell on the market).

Perceived consumer effectiveness & Perceived marketplace influence Poland vs. V4 countries

Respondents that **strongly or rather agree** with the following statements
[%]



Comparing Polish vs. V4 average sample, it may be noted that Polish consumers have a slightly stronger feeling that they can influence the other members of their community, companies' performance and the solution of environmental problems.

Highlights:

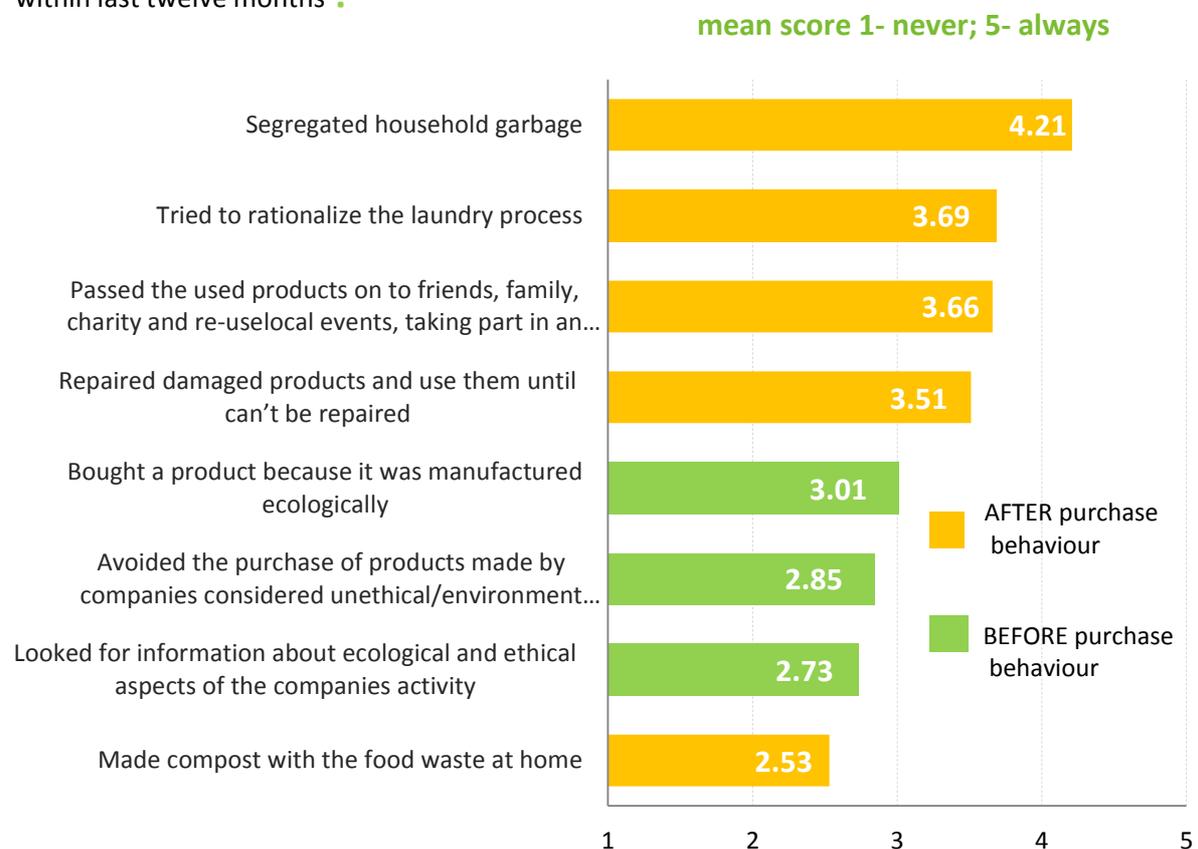
A very clear majority of Polish consumers feels they have influence on companies behaviour, other members of their community and on solving environmental problems.

Polish consumers have a slightly stronger feeling about their influence, compared with average V4 countries.

Consumers behavior in the past 12 months

We also asked the consumers how often, if at all, they undertook concrete actions. Three of the questions related to the **before purchase phrase**: looking for information, avoiding the purchase of unethical products and buying sustainable products. The remaining five questions concerned the **post purchase behaviour**: rationalization of the laundry process, and proceeding with used products: repairing them, passing and swapping, segregating and composting.

How often did you undertake any of the following actions within last twelve months ?

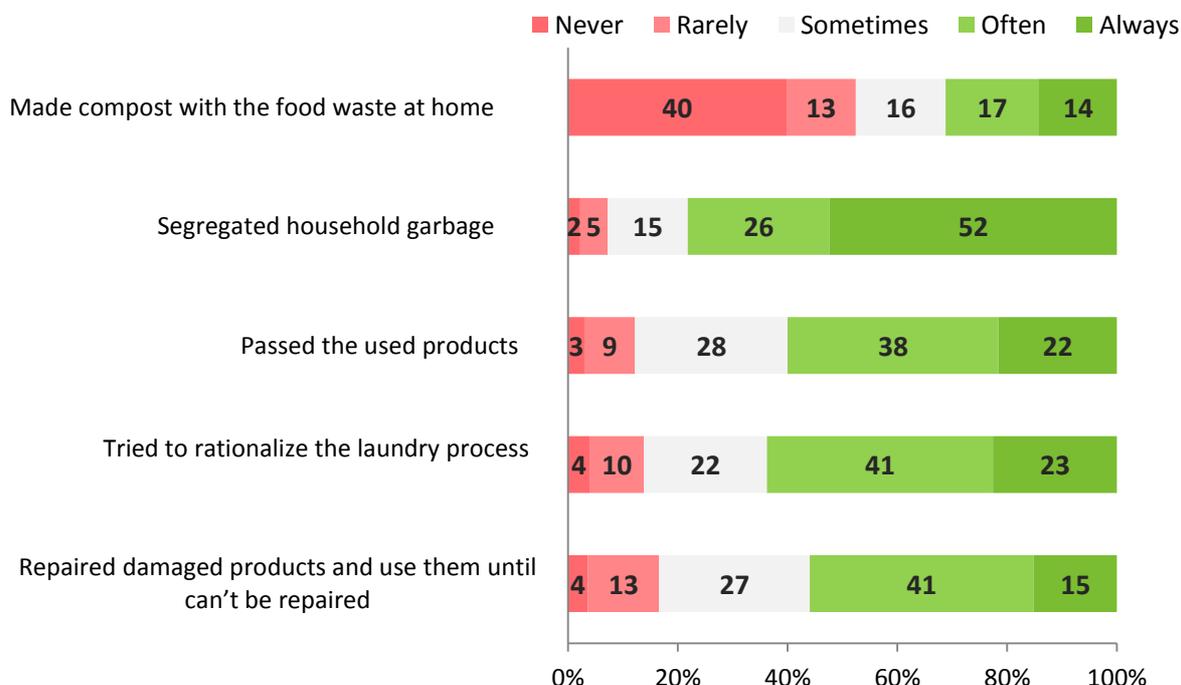


Generally we can observe that Polish consumers are much more active in the after purchase phrase and also in those activities that do not require a lot of knowledge and engagement but additionally can bring some economic reward.

Post-purchase behaviour

How often did you undertake any of the following actions within last twelve months?

[%]



Eight out of ten Polish consumers declared that they always or often segregated household garbage in the last year, only 2,2% never did it.

Almost two-thirds always or often try to rationalize the laundry process (for example by segregation according to the raw materials, washing at lower temperatures, with eco-detergents or avoiding ironing whenever possible), only 4% never did it.

Another interesting question was what the Polish consumers do with the damaged or used products. Well over half of them always or often passed the used products on to friends, family, charity or reuse local events. A slightly lower percentage always or often repaired damaged products and used them until could not be repaired. A substantial minority of 3 and 3,6% never did it, what is a very positive outcome.

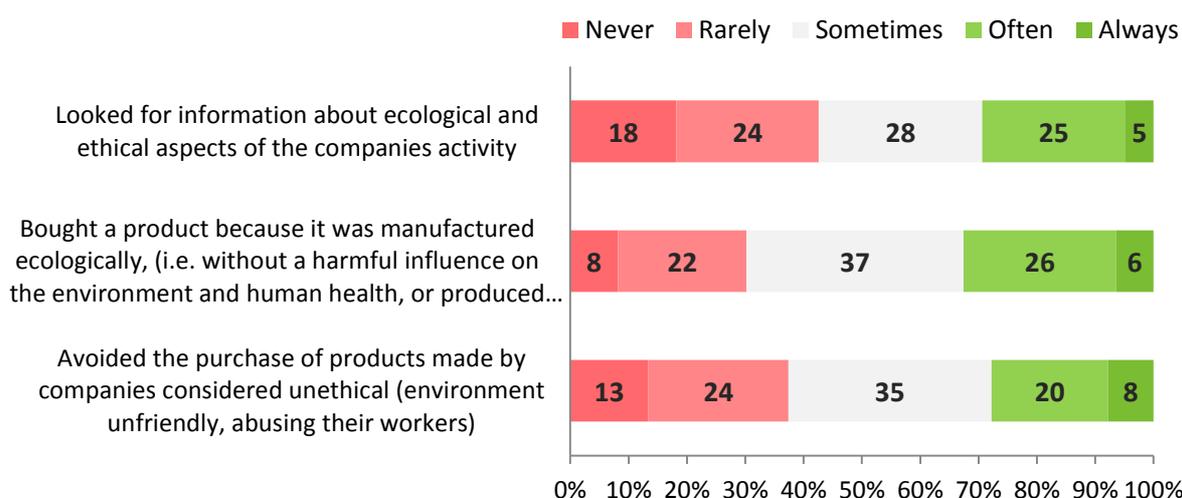
We could say that the most frequent activities, were those activities that we could call “every day practices”, that are well known, do not require additional knowledge or engagement. More engaging activities, like making compost with the food waste at home turned out to be far less popular among Poles, two-fifths never did it, while roughly a third always or often.

Polish interviewees were relatively less active in their **before purchase behaviour**. Despite the fact that in recent years in Poland have been undertaken many actions and projects aimed at increasing consumers knowledge and awareness on sustainable production, making information much more available, relatively small percentage of polish consumers made an effort to look for it.

How often did you undertake any of the following actions within last twelve months?

[%]

Before purchase behaviour



Over two-fifths of Polish consumers did not effectively look into the behavior of companies. Nearly one-in-five (18% percent) never and almost one-quarter (24%) rarely, made an effort to search information about ecological and ethical aspects of the companies' activity . At the other end of the scale, only 4,8 % did it always. However it is worth stressing, that almost one-quarter did it often. The most common response was "sometimes" (28 %).

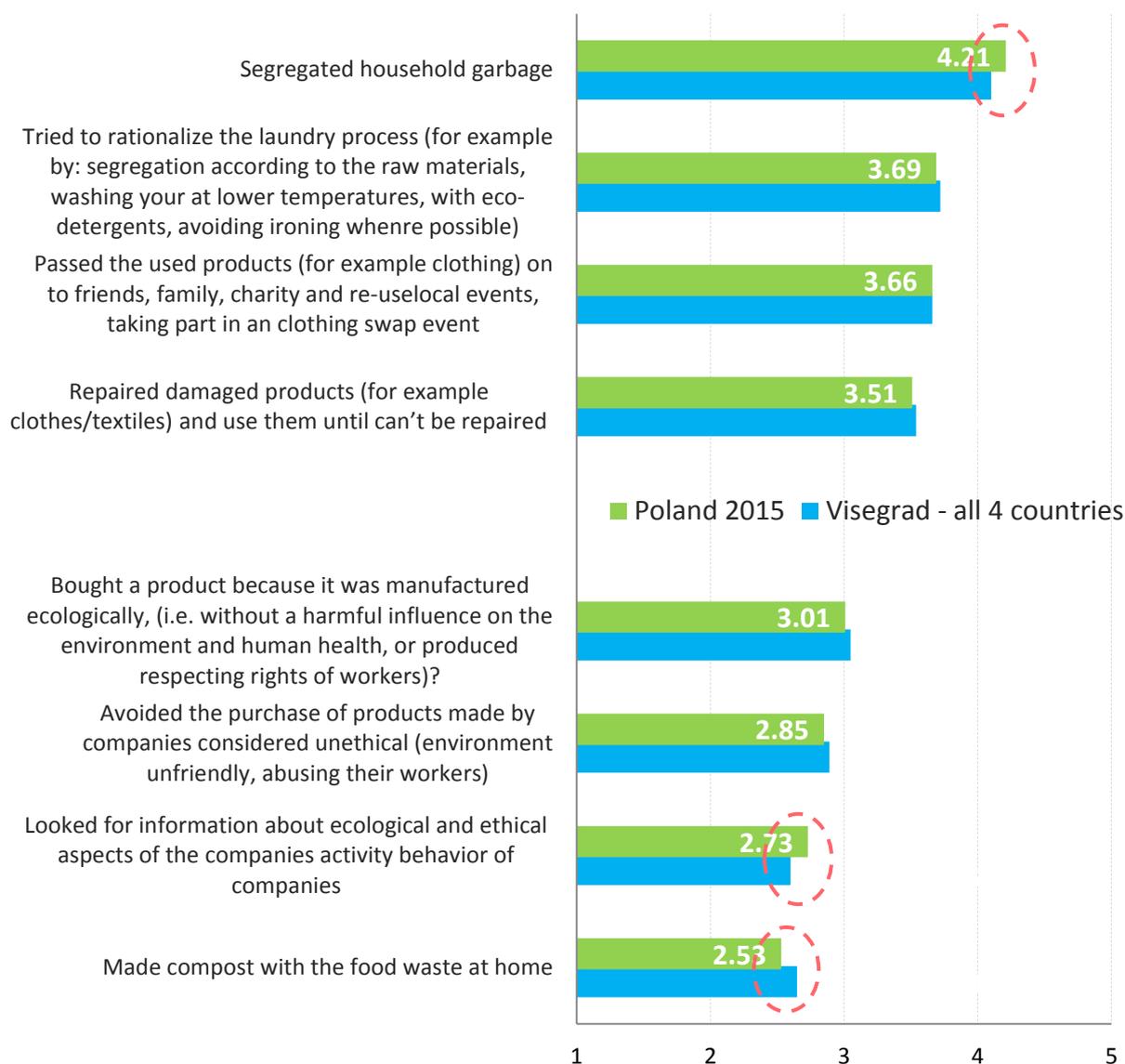
Sustainable consumption which refers to buying things that are made in a more sustainable manner (without harm to or exploitation of humans, animals or the natural environment) can take the following forms [8]:

- Positive buying — favouring more sustainable products and businesses that operate on principles based on benefit for the greater good rather than self-interest.
- Moral boycott – avoidance of particular products, services and companies that are deemed to follow unsustainable practice

Looking at the survey results we can notice that Polish consumers more frequently manifest positive buying behaviour.

In the previous 12 months, one-third of Polish respondents always (6%) or often (26%) bought one brand over another because it was more sustainable. Just 8,2% never did so and 22% did it rarely. Again the most common response was “sometimes” (37,2%).

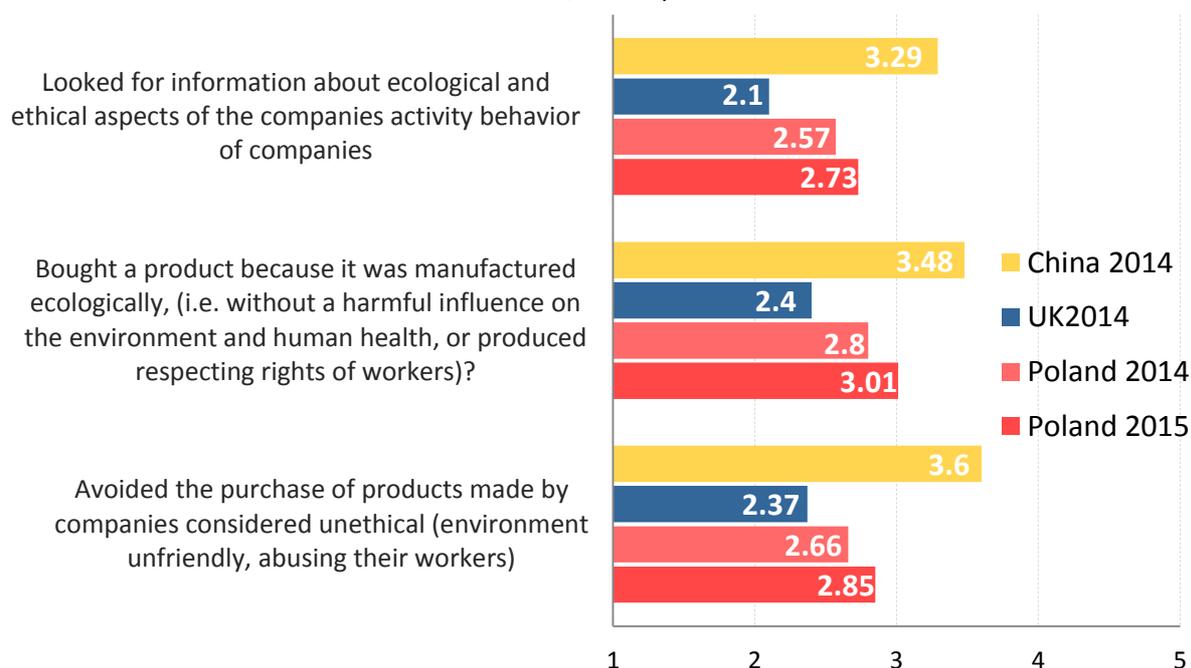
Past behaviours



Comparing the mean score of sustainable consumption in Poland vs. All 4V countries we can see no clear differentiation. Only in the case of three statements there were very slight differences. Polish consumers were a little bit more active regarding: segregation of household garbage and checking up the information about the behaviour of companies before buying their products and a little less active in making compost with the food waste at home.

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How often did you undertake any of the following actions within last twelve months?
mean score: 1- never; 5- always



We also compared our results with the 2014 survey on conscientious behaviour for several countries [9]. Surprisingly Poland is much more active in sustainable behaviour than the UK and far less than China.

Highlights:

Polish consumers are much more active in the after purchase behaviours than in the before purchase.

The most frequent activities were those that do not require a lot of knowledge and engagement, are well known but additionally can bring some economic reward. We could call them “every day practices” like for example segregating household garbage.

Polish consumers more frequently manifest positive buying behaviour - favouring more sustainable than "moral boycott - avoidance of unsustainable products

Polish interviewees are quite similar in their past behaviours to V4 citizens.

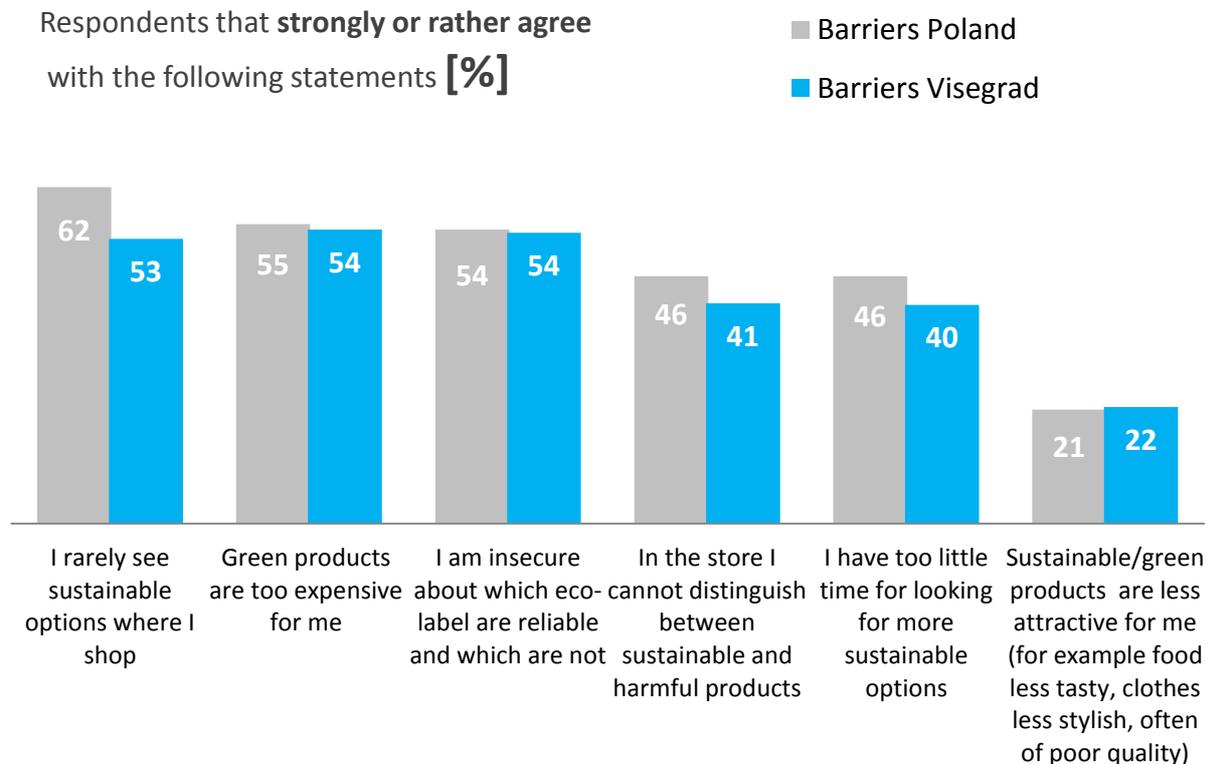
Barriers

Another important aim of the survey was to identify the main barriers to the introducing more sustainable consumption patterns and therefore development of “eco market”.

Respondents were asked how much do they agree or disagree with the statements concerning following sustainable consumption barriers:

- Difficulties to distinguish between sustainable and unsustainable products
- Lack of confidence in the eco-labels
- Higher price of sustainable products
- Lack of time for searching more sustainable options
- Insufficient availability of the sustainable products
- Unsatisfactory attractiveness of sustainable products

Respondents that **strongly or rather agree** with the following statements [%]





For Polish respondents, as opposed to the V4 average sample, the biggest barrier is insufficient availability of the sustainable products – more than 6 in 10 interviewees agree (strongly or rather) that they rarely see sustainable or green options where they shop. Next in the line, were: too high price of sustainable products and lack of confidence in the eco-labels. Well over half of Polish consumers agreed that green products are too expensive for them (55%) and that they are insecure about which eco-label are reliable and which are not (54%). The least important barrier turned out to be unsatisfactory attractiveness of sustainable products. Only one fifth of respondents agreed that sustainable/green products are less attractive for them (for example food less tasty, clothes less stylish, often of poor quality).

Highlights:

For Polish consumers the **biggest barrier** is

- **insufficient availability** of the sustainable products.

Then:

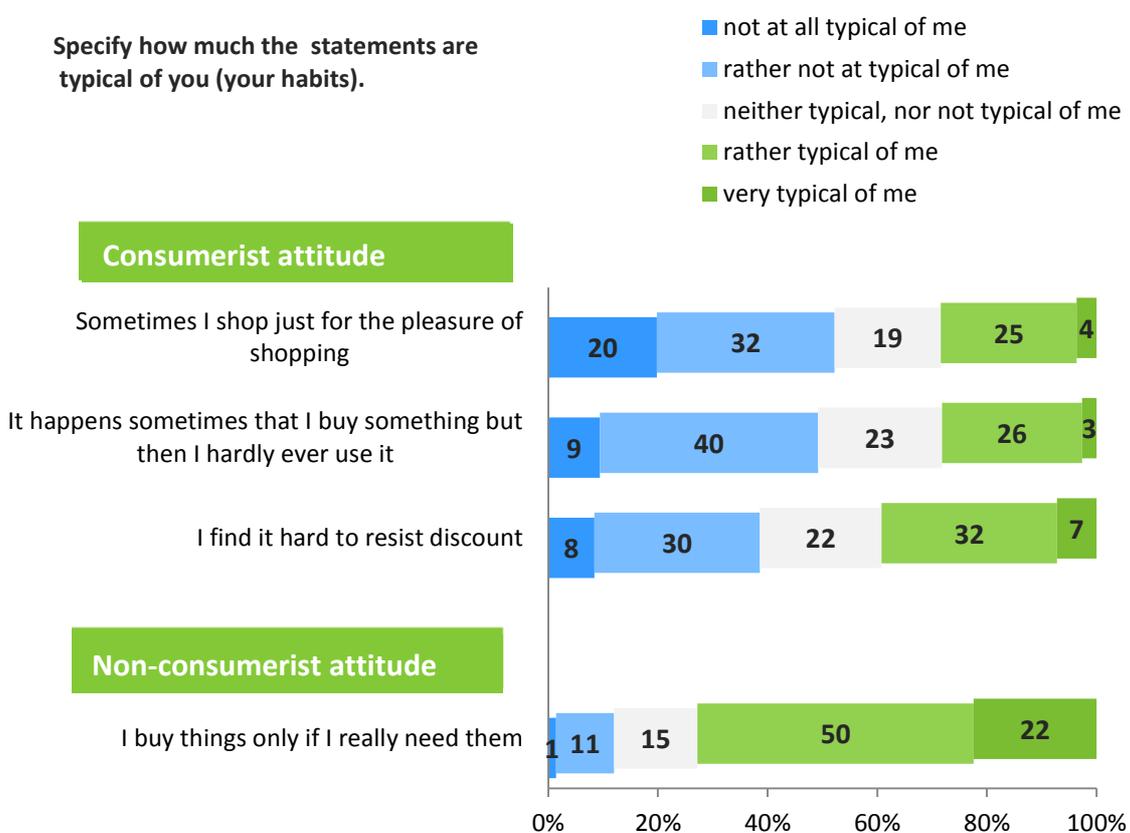
- **too high price** of sustainable products and
- **lack of confidence** in the eco-labels

The **least important barrier** turned out to be:

- **unsatisfactory attractiveness** of sustainable products

Consumerism in Poland

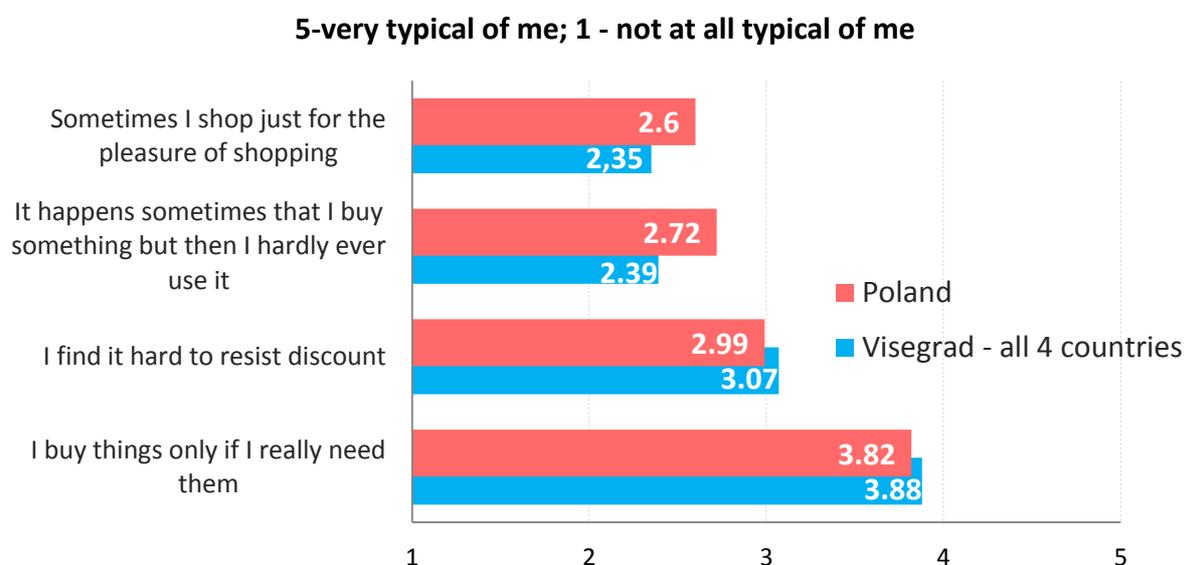
The gradual environmental degradation, the shrinking of non-renewable resources, the falling quality of life and increasingly common cases of unethical behaviour were all directly or indirectly arising from snowballing consumption [8]. It was therefore important to see to what extent Polish consumers manifest these negative behaviors expressed through unreasonably high consumption level known as consumerism.



A large majority (72%) of Polish respondents manifests rather non-consumeristic attitude, declaring, that they buy things only when they really need them. However, this may arise not so much from a conscious opposition to consumerism but rather from economic limitations.

The most typical consumeristic behaviour of Polish respondents turned out to be difficulties in resisting discounts over a third of Polish consumers admitted that they find it hard to resist discounts, however almost the same percentage was of the opposite opinion.

Roughly half of Polish consumers felt that consumeristic behaviours such as: shopping just for pleasure or buying products that are hardly ever used, are not typical of them. Just over a quarter had the opposite view.



Polish consumers do not differ substantially from V4 consumers when it comes to behaviours such as buying things only when there is a real need or finding it hard to resist a discount. However the other two, more consumerist behaviours, that is, shopping just for pleasure or buying product that is not used afterwards, seem to be more typical of Polish vs. V4 sample.

Highlights:

Polish respondents manifests **rather non-consumerist attitude**, declaring in great majority, that the buy things only when they really need them

The question is to what extent this attitude arise from a conscious opposition to consumerism and to what extent from the economic limitations.

The most typical consumeristic behaviour for Polish respondents turned out to be **difficulties in resisting discounts**.

The consumerist behaviours, that is: shopping just for pleasure or buying product that is not used afterwards, seem to be more typical of Polish vs. V4 sample.



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About the Fund

The International Visegrad Fund is an international organization based in Bratislava founded by the governments of the Visegrad Group (V4) countries—the Czech Republic, Hungary, the Republic of Poland, and the Slovak Republic—in Štiřín, Czech Republic, on June 9, 2000

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