



EVOLVING
RESEARCH
INSIGHT
STRATEGY



ESG TRENDS

2025 annual research

3819

MPS - AGMR

September 2025



ESG Trends

ESG Trends is a syndicated studies conducted by MPS Evolving Insights in partnership with other AGMR (Associated Global Market Research) partner. The study is conducted through CAWI interviews conducted by each partner representing their own country.

The study have been conducting for 3 years with the aim to investigate consumer attitudes to ESG issues and their transformation to behavioral tendencies towards products and services based on their perceived ESG related characteristics.

17 Countries

over **25.000** interviews

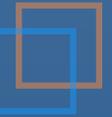
aged **18-65**

Information detail:

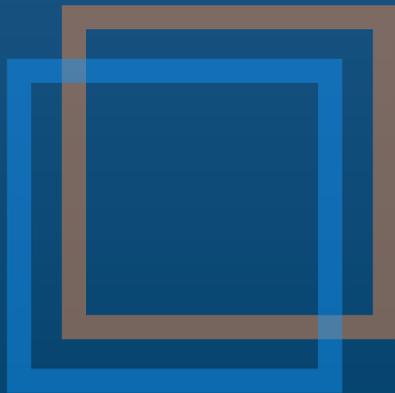
- Familiarity with ESG
- Consumer approval of setting ESG objectives for companies
- Interest in being informed about ESG for the products
- Attitudes to greenwashing, offsetting and social washing
- Impact of companies' operations on life quality
- Impact of ESG orientation on products' purchase intention
- Acceptable price premium for ESG compliant products
- Attitudes to disclosing ESG activities
- ESG compliance effect on corporate image

Partners detail:

-  Brazil
-  Canada
-  United States
-  Belgium
-  Croatia
-  France
-  Germany
-  Greece
-  Hungary
-  Italy
-  Romania
-  Sweden
-  Turkey
-  United Kingdom
-  China
-  Philippines
-  Thailand



Agenda

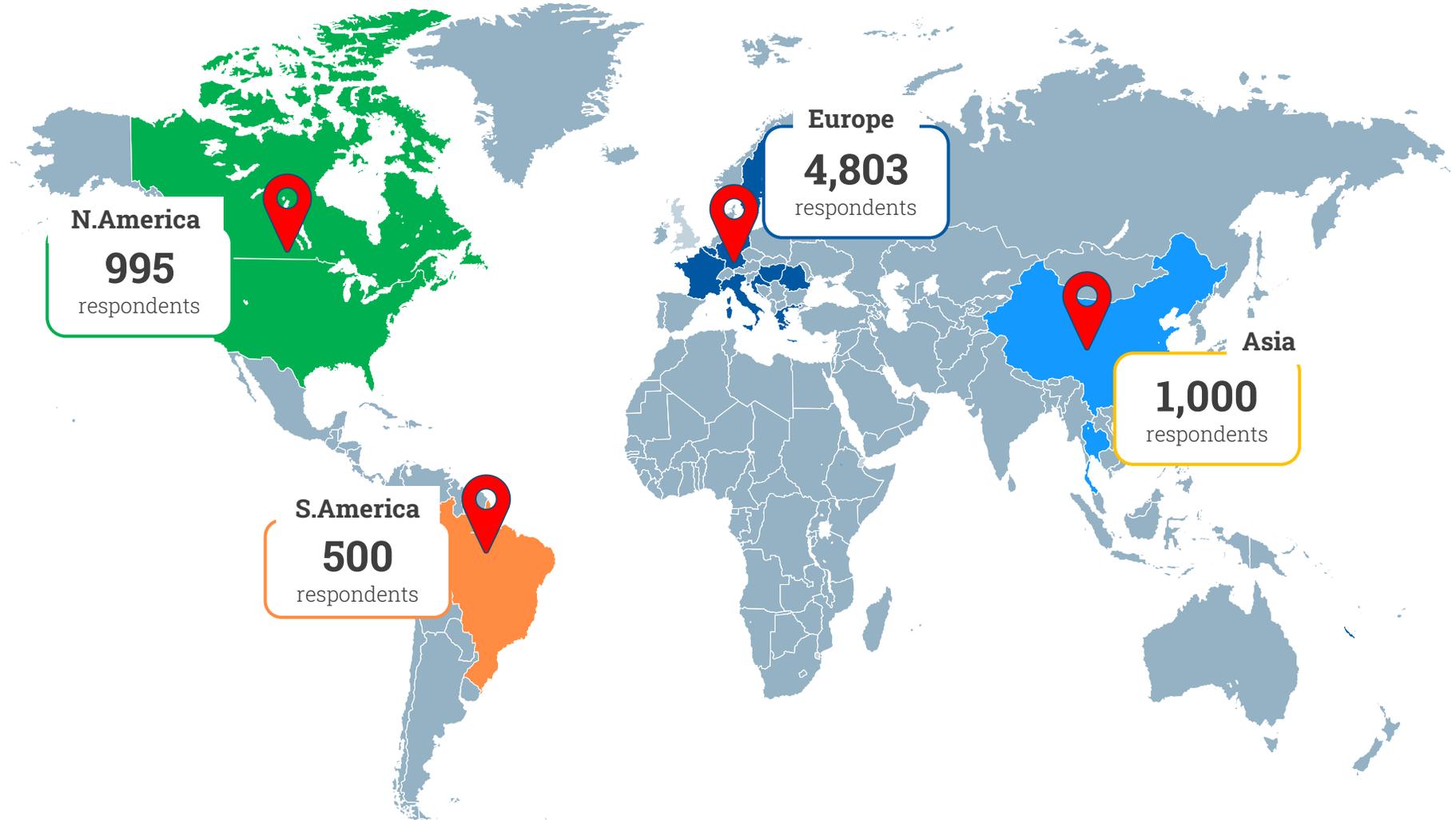


1. Main Issues
2. Familiarity with ESG
3. Impact of ESG orientation on products' purchase intention
4. Acceptable price premium for ESG compliant products
5. Interest in being informed about ESG
6. ESG lead

Syndicated study across 13 countries in 2025

Total sample **7,298**
respondents

- Nationally representative sample
- Aged 18-65
- CAWI
- July - August, 2025



S. AMERICA

N. AMERICA

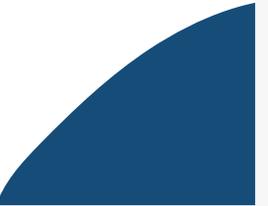
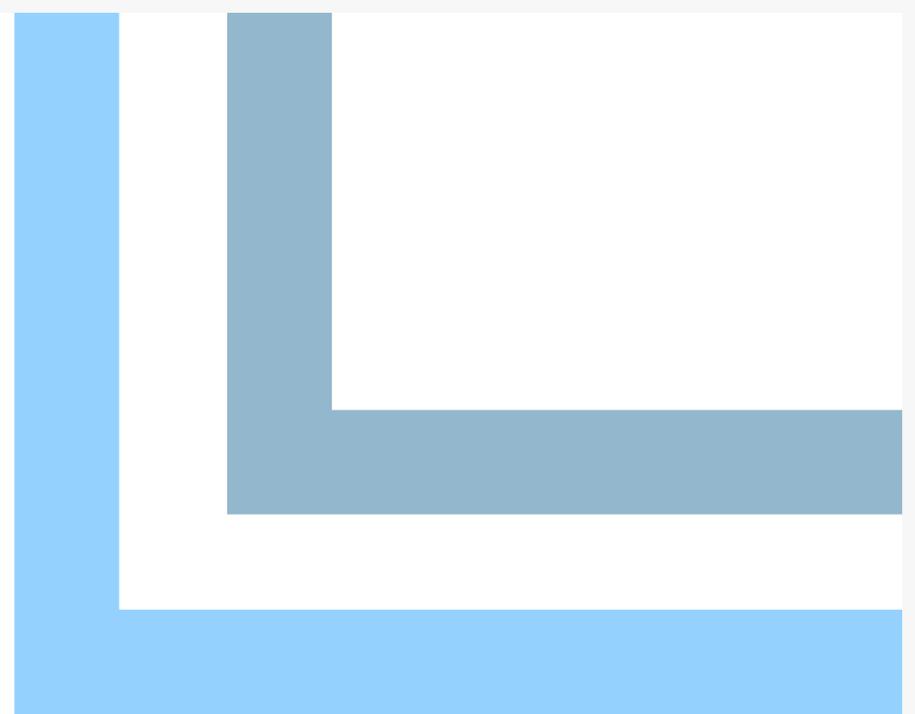
EUROPE

ASIA

1. Brasil
2. Canada
3. USA
4. Belgium
5. Croatia
6. France
7. Germany
8. Greece
9. Italy
10. Romania
11. Sweden
12. China
13. Thailand

1

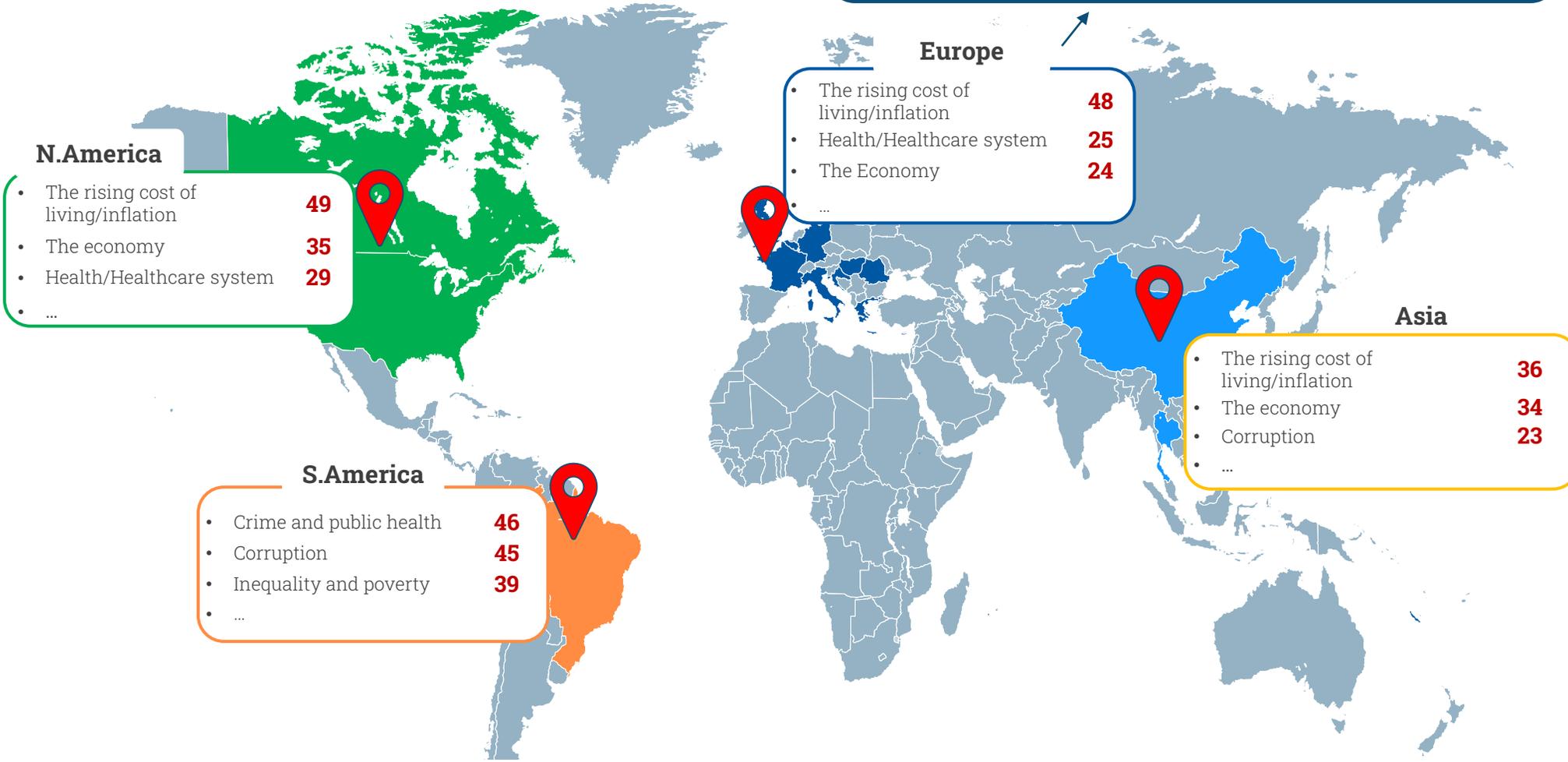
Main Issues



QA1. What do you believe are the 3 most important issues facing the country today?

% VALUES EXPOSED

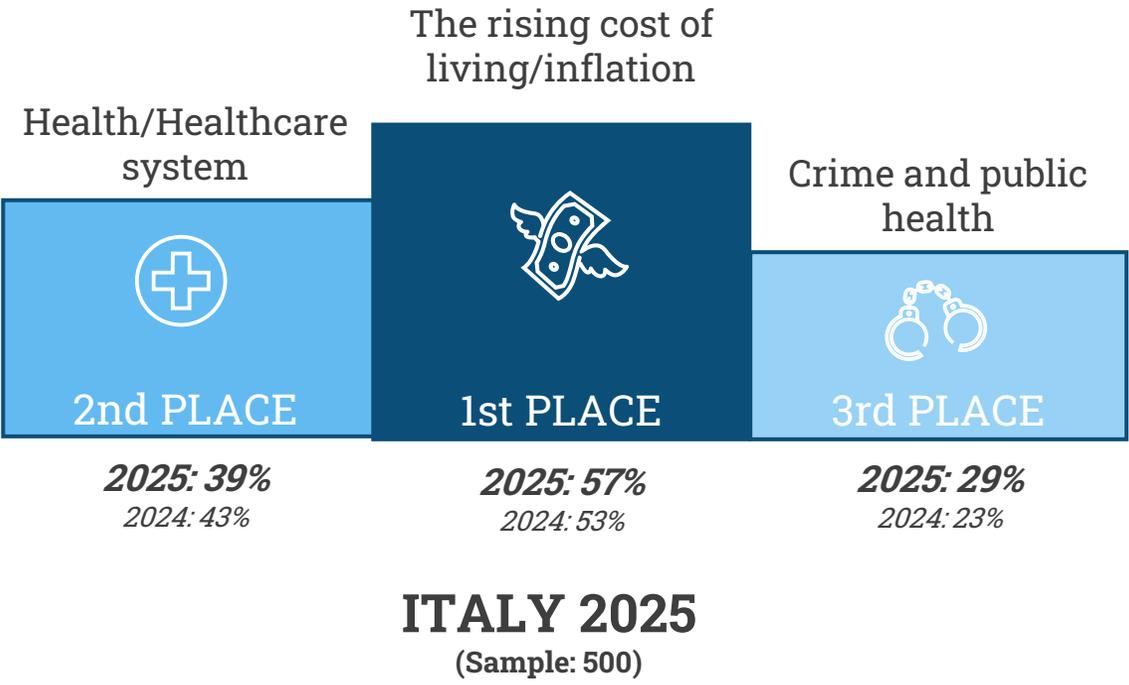
- S. AMERICA
 - N. AMERICA
 - EUROPE
 - ASIA
1. Brasil
 2. Canada
 3. USA
 4. Belgium
 5. Croatia
 6. France
 7. Germany
 8. Greece
 9. Italy
 10. Romania
 11. Sweden
 12. China
 13. Thailand



There is (still in 2025) a global issue tied to the rising cost of living and economic instability. Both Europe and North America are facing significant healthcare challenges. South America, however, is deeply affected by widespread crime, corruption and profound inequality.

Top 3 ranking issues facing the country

The main issue for the italians is the increasing cost of living, followed by healthcare system problems and crime and public health which replace the interest in «climat change» perceived in 2024.



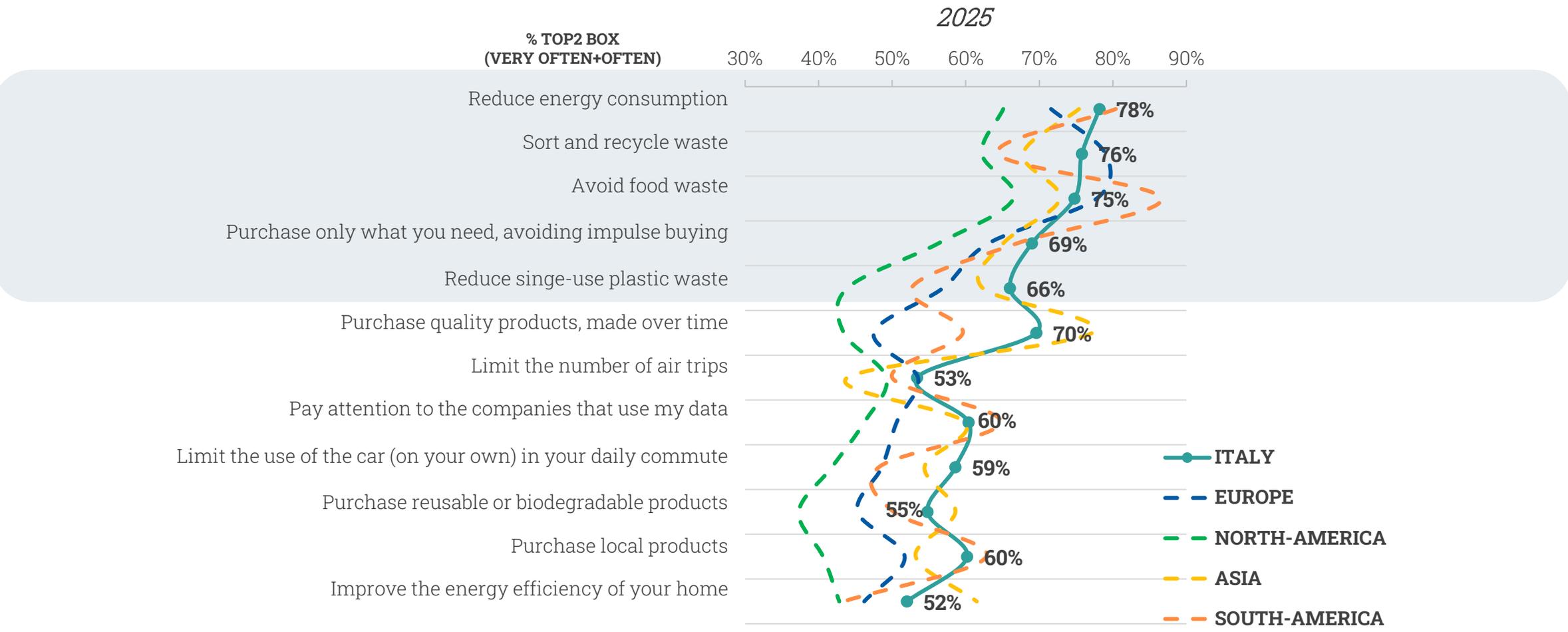
1. 2. 3.

EUROPE 2024 (Sample: 6122)	The rising cost of living/inflation	Health/Healthcare system	Climate change
EUROPE 2025 (Sample: 4803)	The rising cost of living/inflation	Health/Healthcare system	The Economy
NORTH-AMERICA 2024 (Sample: 1002)	The rising cost of living/inflation	The Economy	Health/Healthcare system
NORTH-AMERICA 2025 (Sample: 995)	The rising cost of living/inflation	The Economy	Health/Healthcare system
SOUTH-AMERICA 2024 (Sample: 500)	Corruption	Inequality and poverty	Crime and public health
SOUTH-AMERICA 2025 (Sample: 500)	Crime and public health	Corruption	Inequality and poverty
ASIA 2024 (Sample: 1009)	The rising cost of living/inflation	The Economy	Climate change
ASIA 2025 (Sample: 1000)	The rising cost of living/inflation	The Economy	Corruption

QA1. What do you believe are the 3 most important issues facing the country today?
Sample: Italy 2025 b. 500; Europe 2025 b. 4803; North-America 2025 b. 995; South-America 2025 b. 500; Asia 2025 b. 1000

Day-to-day behavior: how often do you...

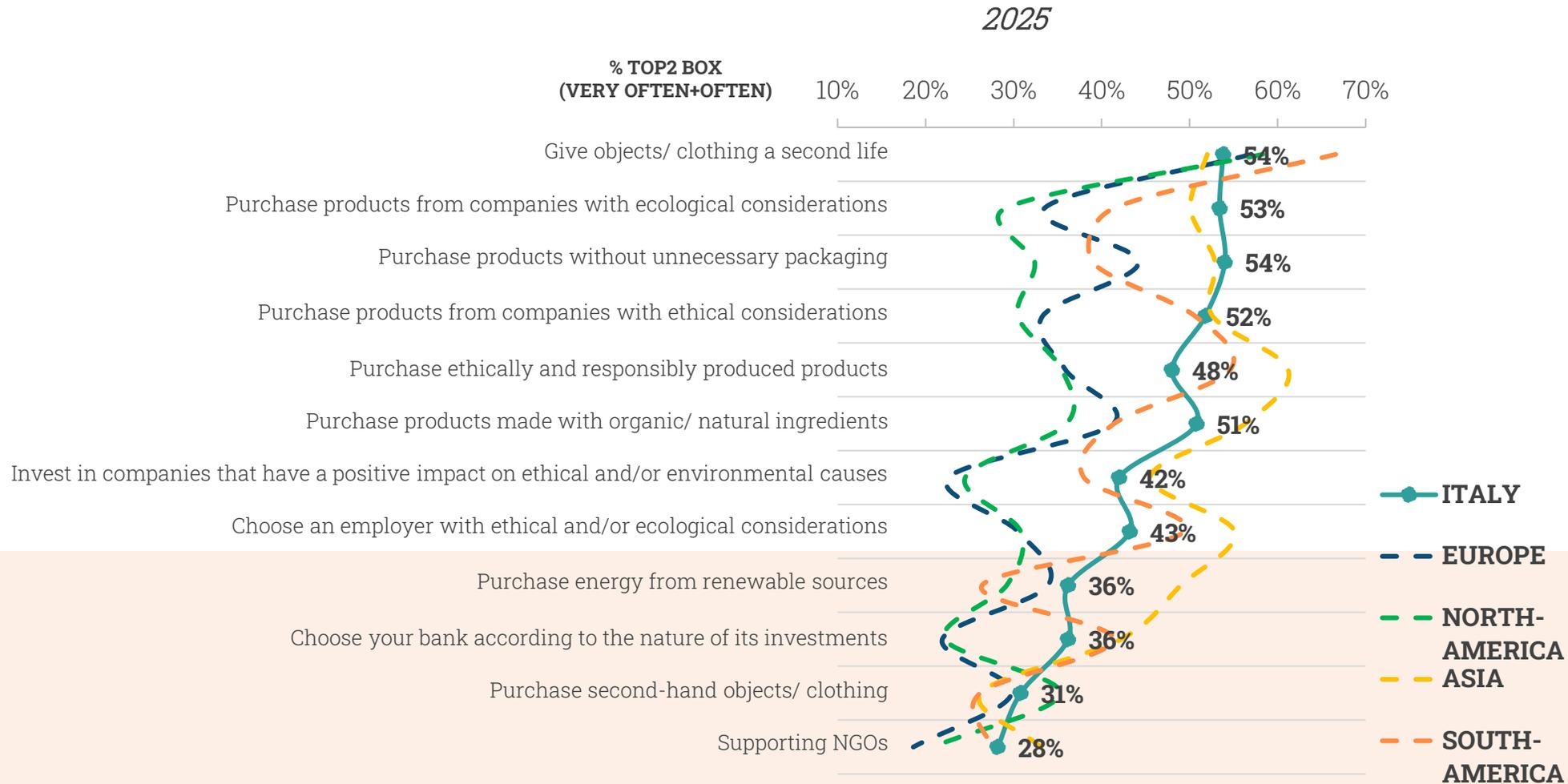
Reducing energy consumption, sort/recycle waste and avoiding food waste are the most popular activities in Italy, with a cross-sectional decrease of the % level compared to 2024.



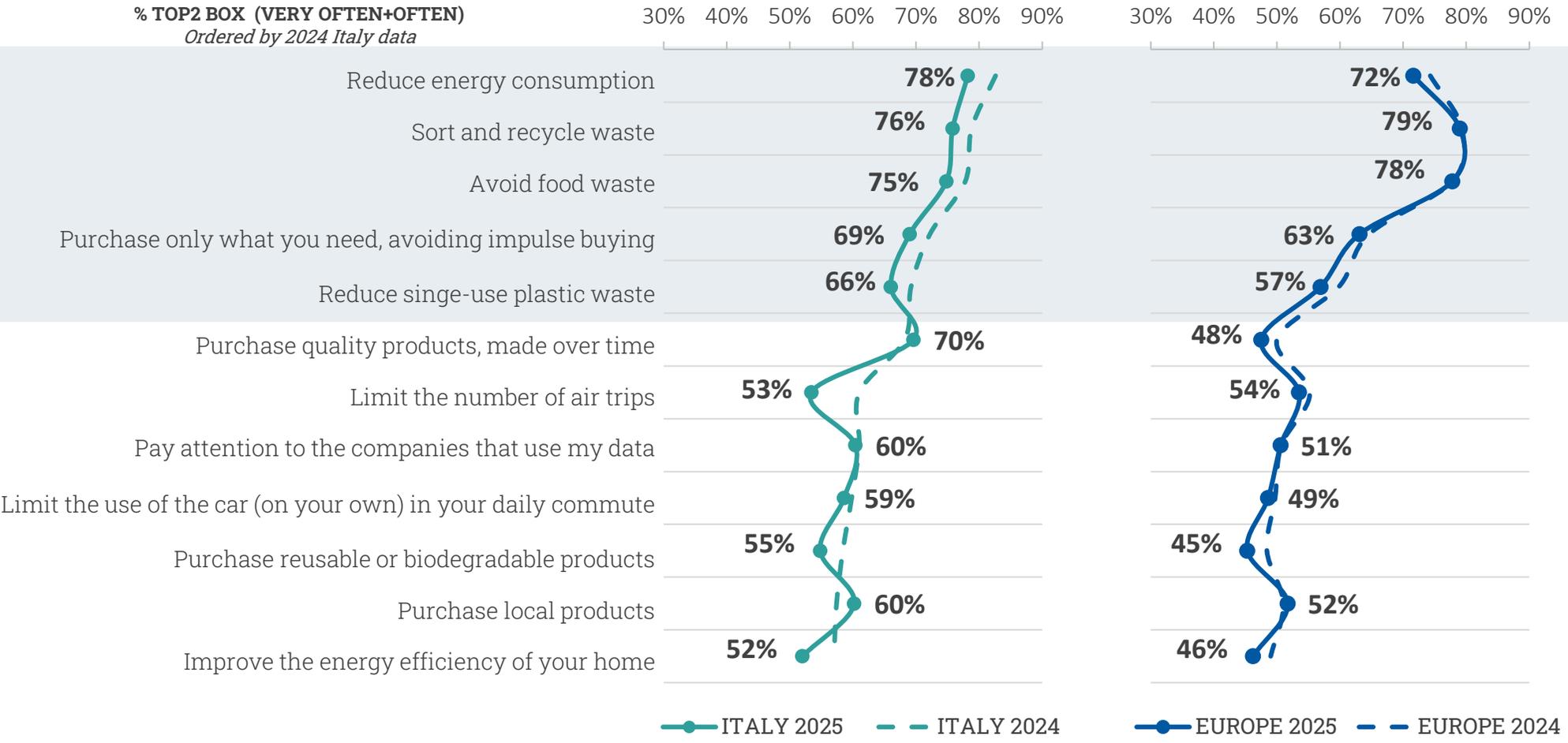
QA. Thinking about your day-to-day behavior, how often do you...
 Sample: Italy 2025 b. 500; Europe 2025 b. 4803; North-America 2025 b. 995; South-America 2025 b. 500; Asia 2025 b. 1000

Explosion of the axis for better graphic rendering

Day-to-day behavior: how often do you...



Day-to-day behavior: how often do you...

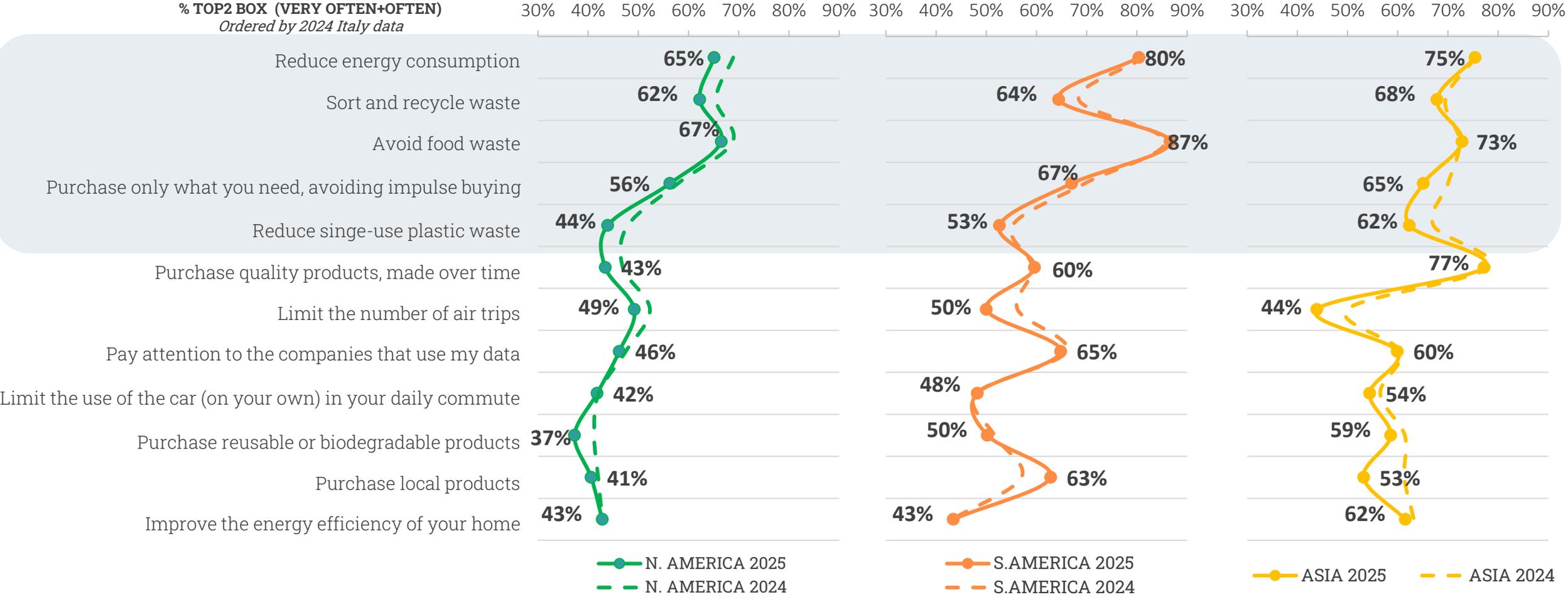


QA. Thinking about your day-to-day behavior, how often do you...
 Sample: Italy 2025 b. 500; Europe 2025 b. 4803;

Ordered by ITALY 2024 – ONLY TOP 12 EXPOSED

Day-to-day behavior: how often do you...

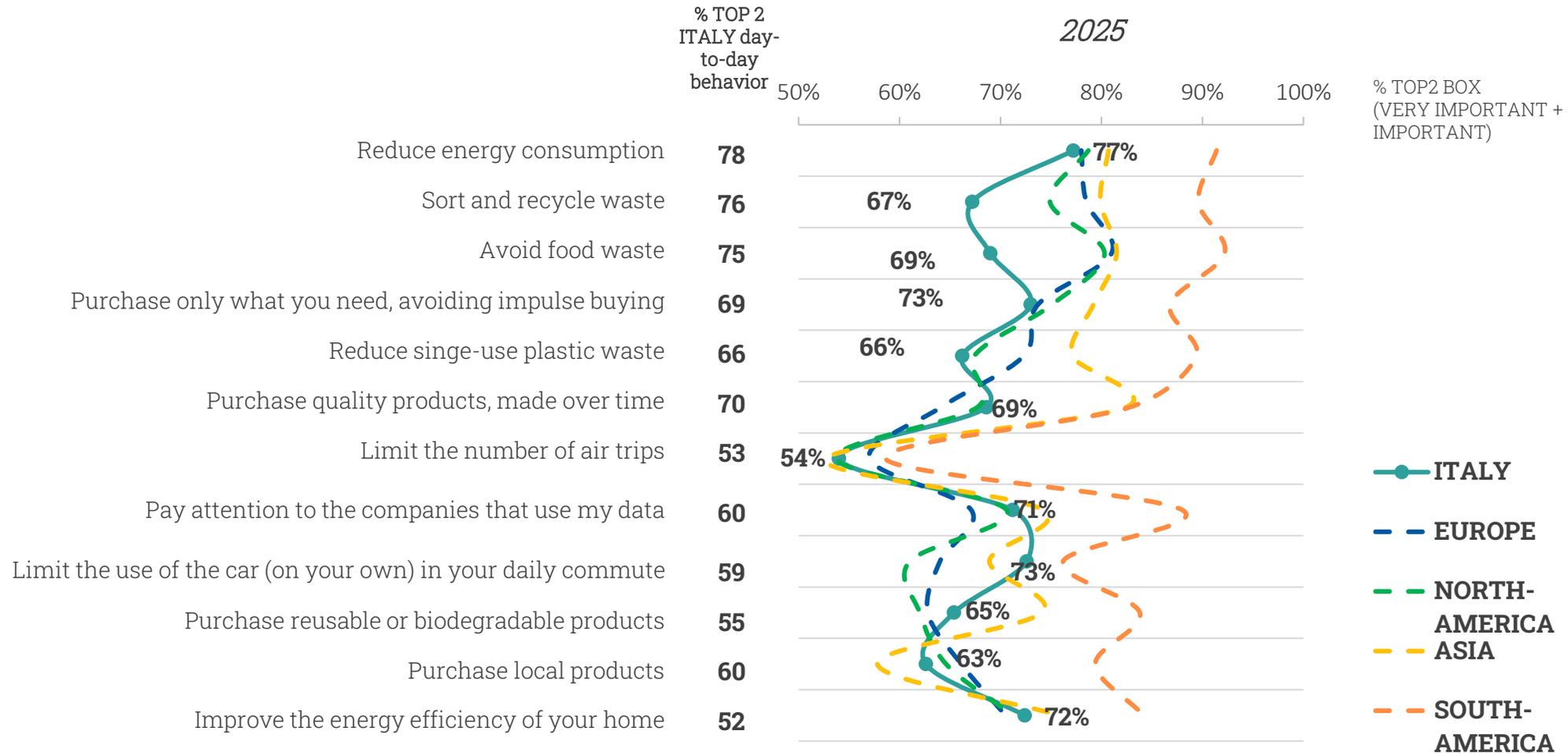
% TOP2 BOX (VERY OFTEN+OFTEN)
Ordered by 2024 Italy data



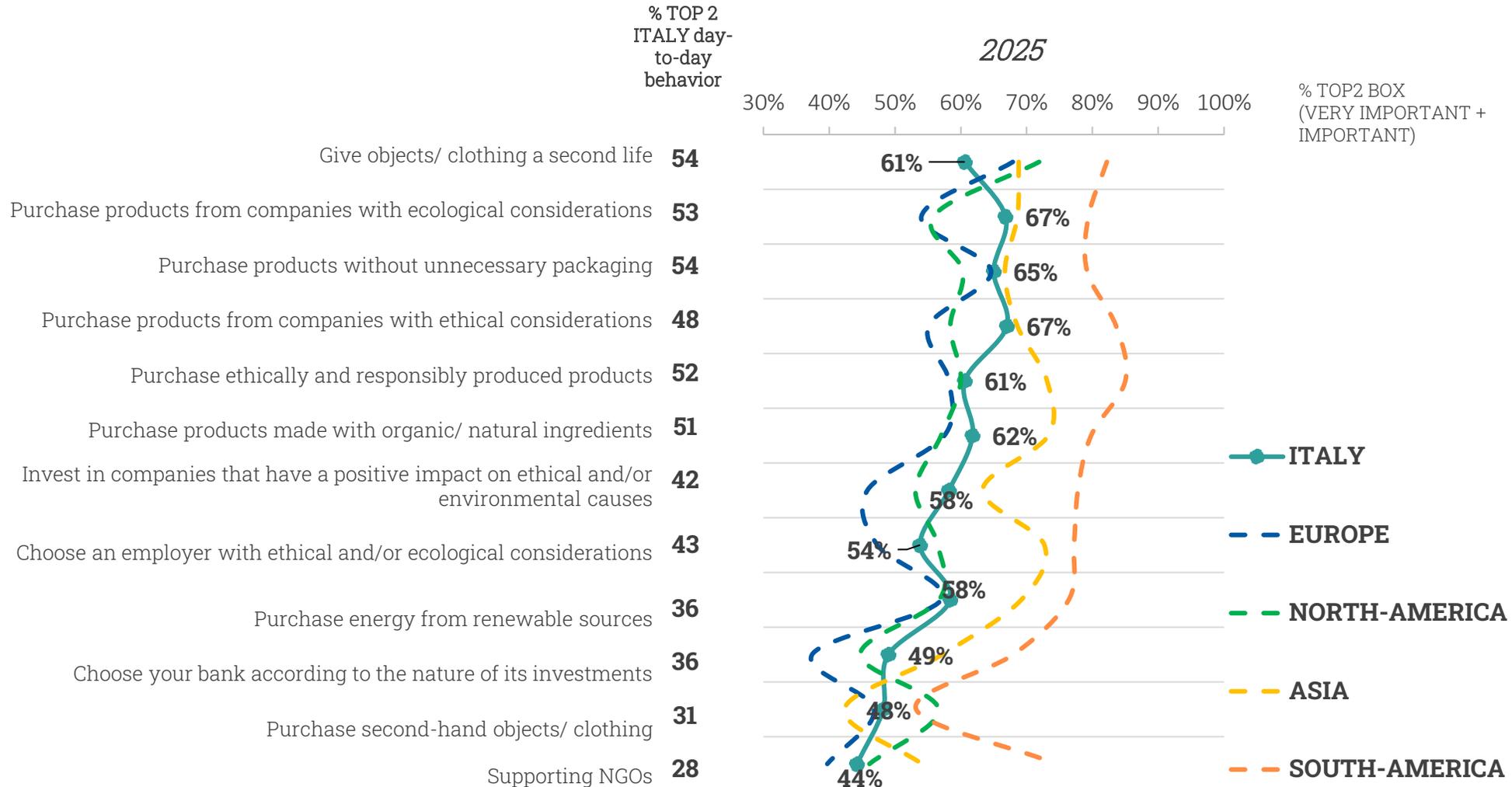
QA. Thinking about your day-to-day behavior, how often do you...
Sample: North-America 2025 b. 995; South-America 2025 b. 500; Asia 2025 b. 1000

Overall importance day-to-day behavior

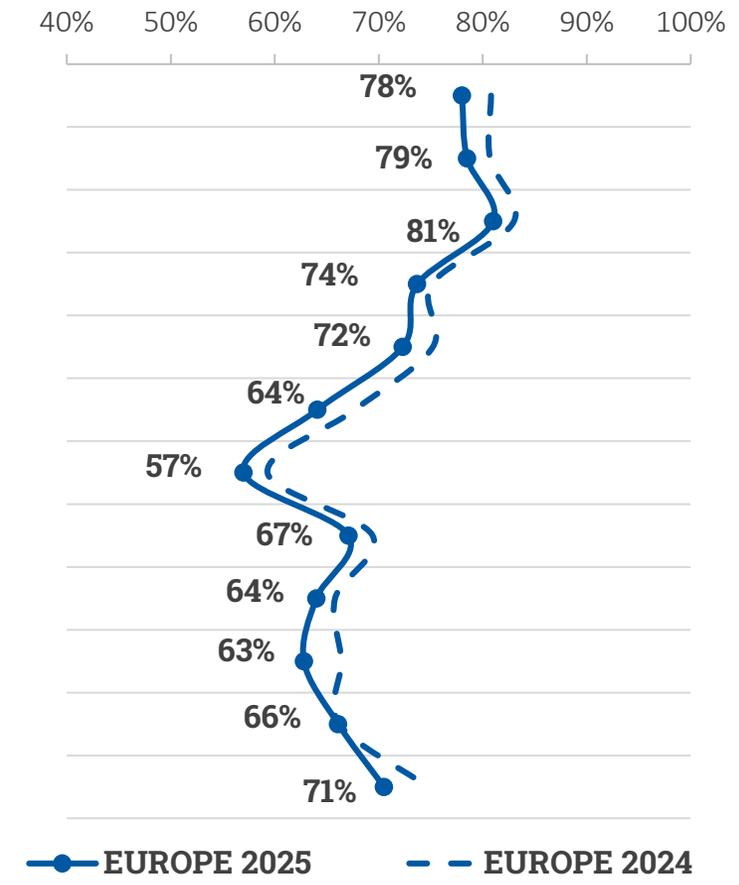
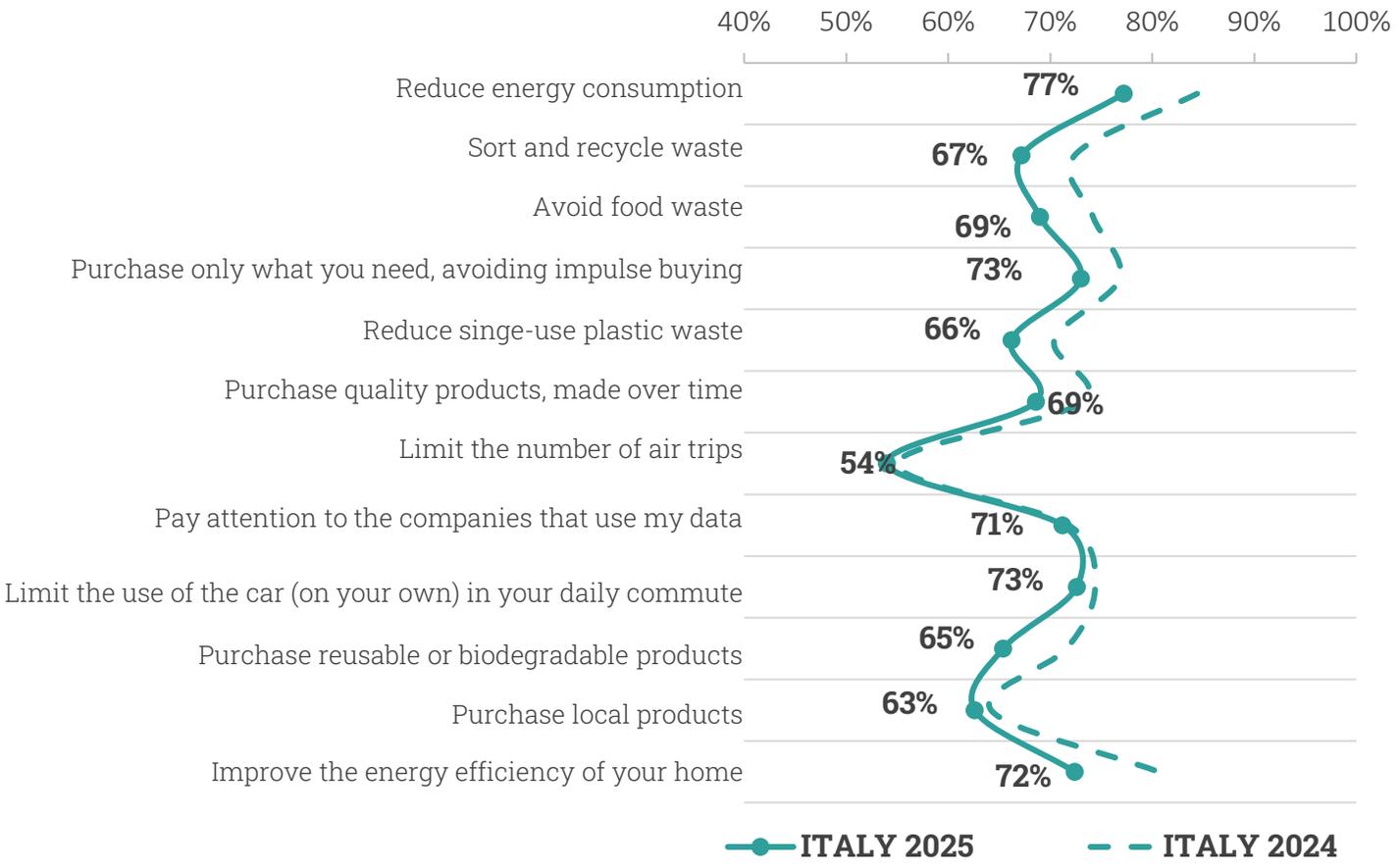
The strong importance given to the reduction of energy consumption is consistent with its application, while other behaviours are considered less important than their real proactivity.



Overall importance day-to-day behavior

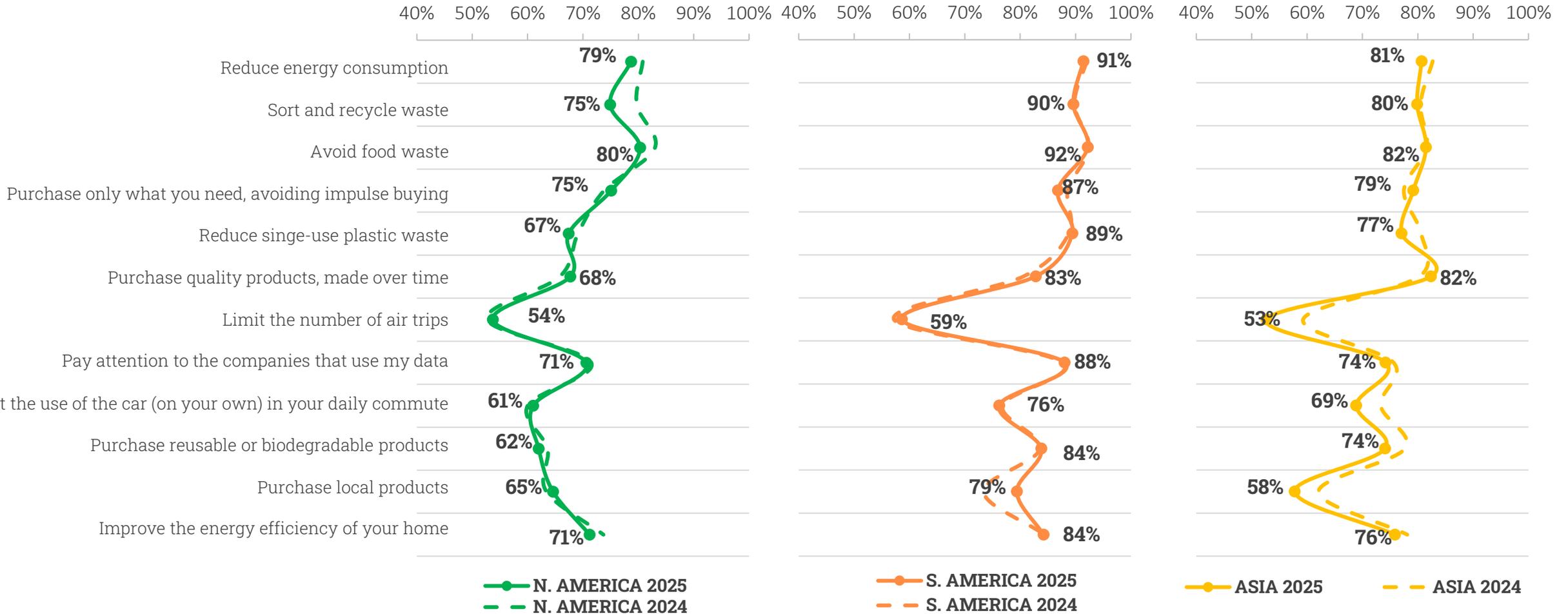


Overall importance day-to-day behavior



QB. How important is each of the following for you?
 Sample: Italy 2024 b. 500 ; Italy 2025 b. 500; Europe 2024 b. 6122; Europe 2025 b. 4803;

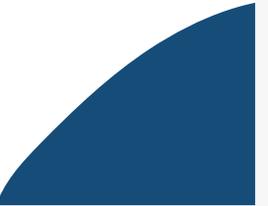
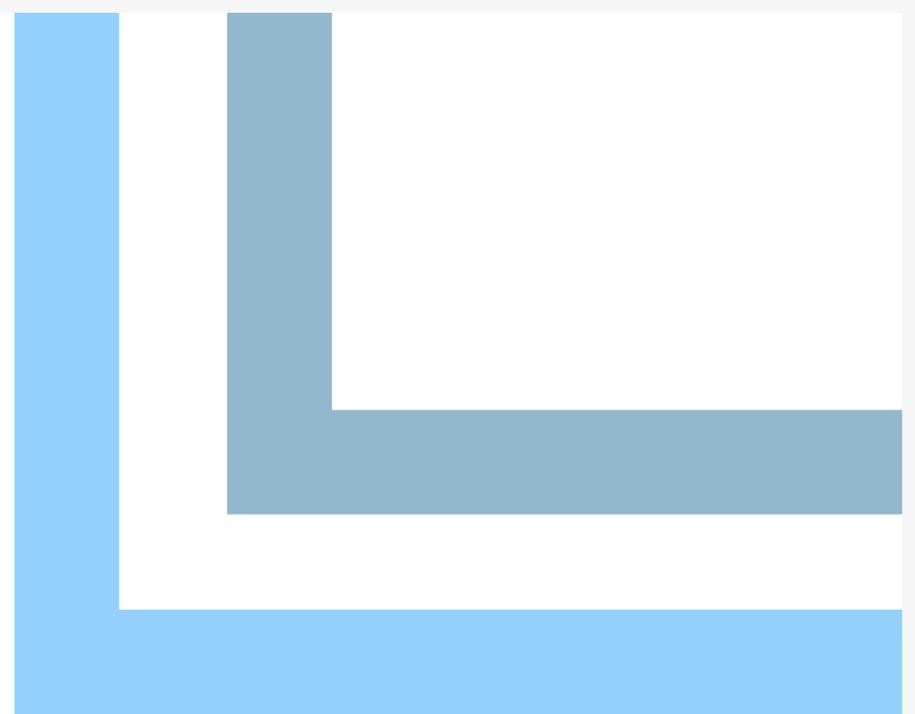
Overall importance day-to-day behavior



QB. How important is each of the following for you?
 Sample: North-America 2024 b. 1002; North-America 2025 b. 995; South-America 2024 b. 500; South-America 2025 b. 500; Asia 2024 b. 10009; Asia 2025 b. 1000

2

Familiarity with ESG



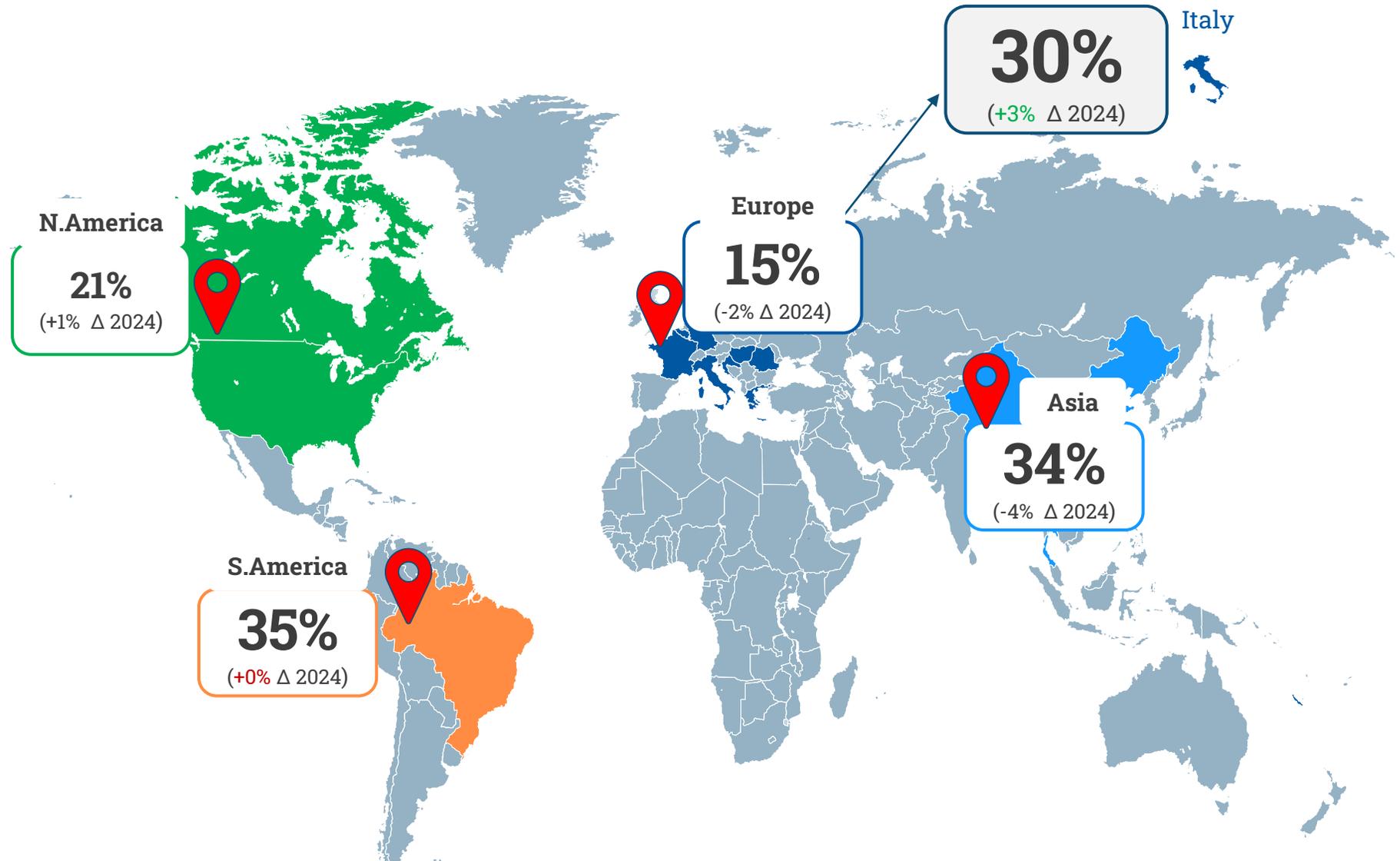
Q1a. How familiar are you with the term ESG?



TOP 2 BOXES



1. Brasil
2. Canada
3. USA
4. Belgium
5. Croatia
6. France
7. Germany
8. Greece
9. Italy
10. Romania
11. Sweden
12. China
13. Thailand

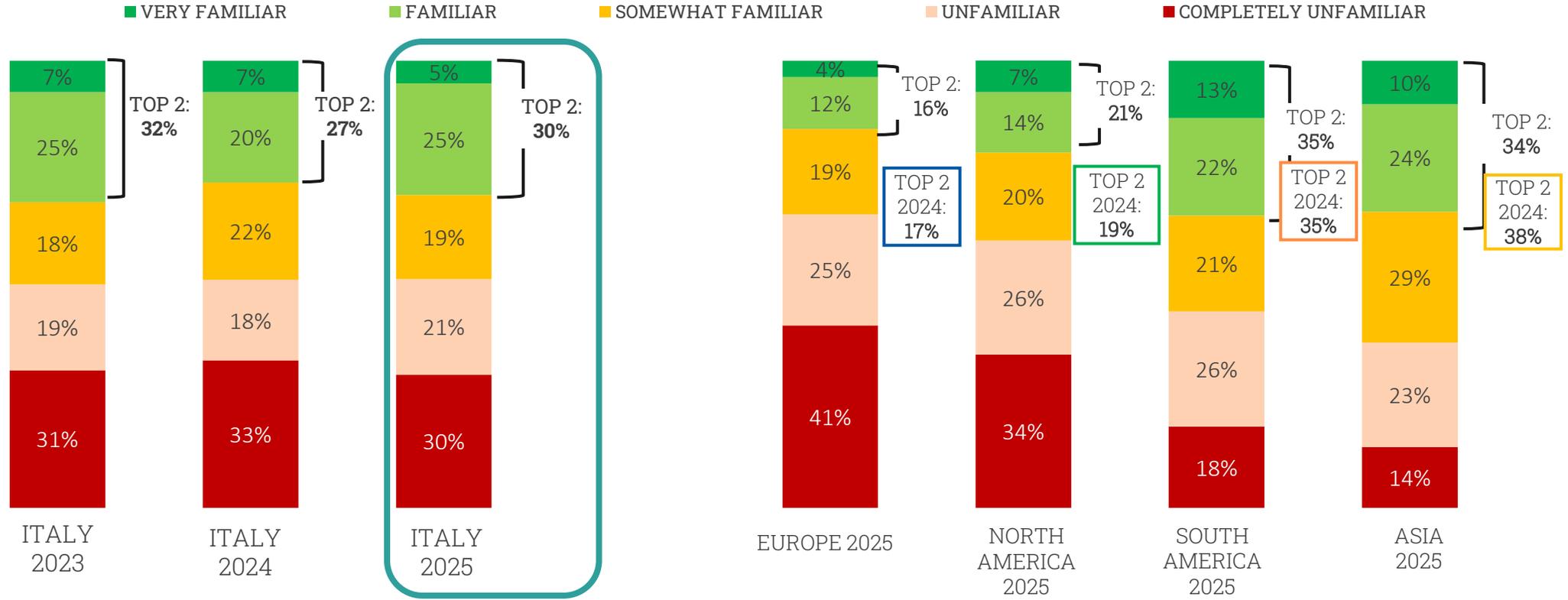


➤ The awareness of the term ESG remains relatively low. South America and Asia are the regions with the greatest familiarity with the term but less than in 2024. Italian people are getting more used to the term..

Familiarity with ESG concept

The level of familiarity is stable, with South America and Asia always leading the leaderboard.

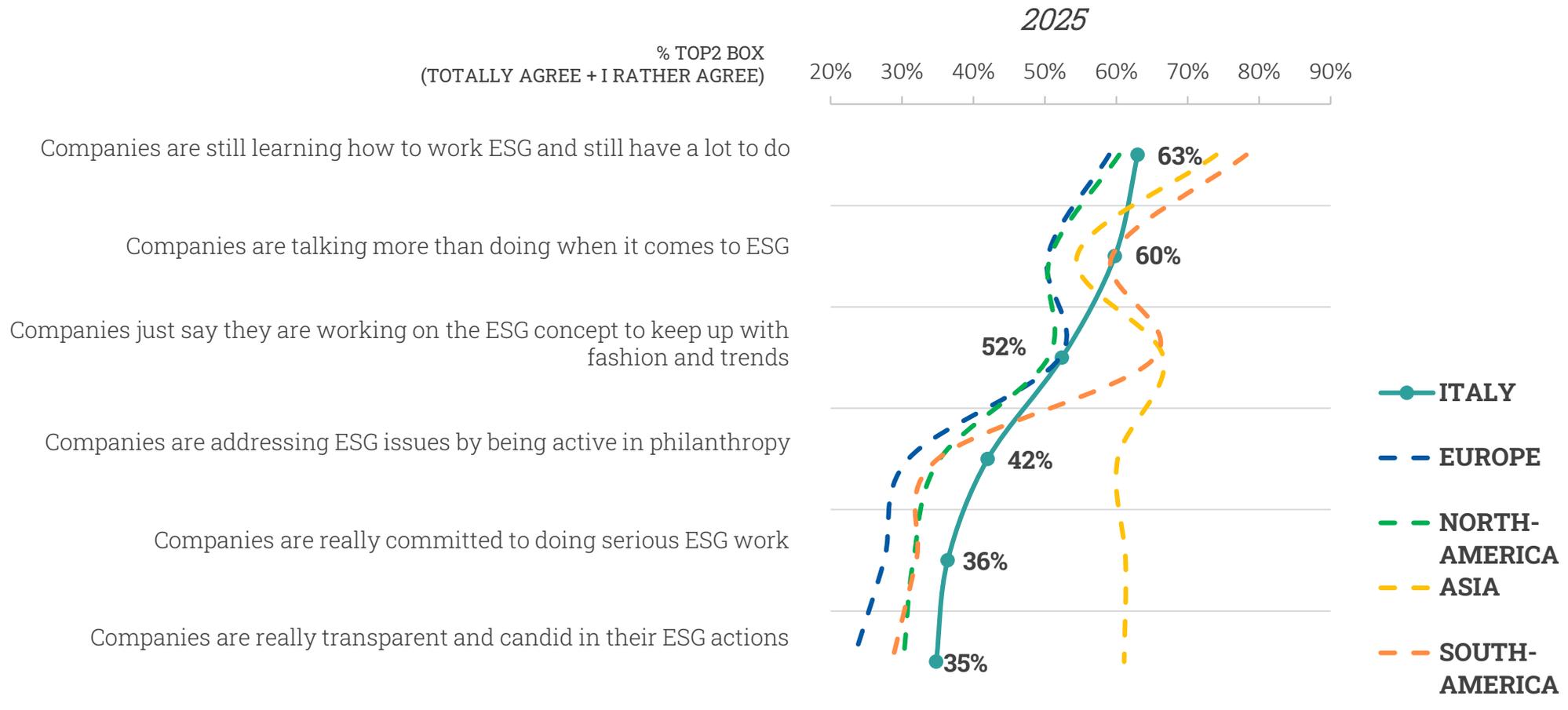
FAMILIARITY WITH ESG



Q1A - How familiar are you with the term ESG?
 Sample: Italy 2025 b. 500; Italy 2024 b. 500; Italy 2023 b. 500; Europe 2025 b. 4803; Europe 2024 b. 6122; Europe 2023 b. 6571; North-America 2025 b. 995; North-America 2024 b. 1002; North-America 2023 b.1004; South-America 2025 b.500; South-America 2024 b.500; South-America 2023 b.500; Asia 2024 b. 1000; Asia 2024 b. 1009; Asia 2023 b. 1551

Overall agreement ESG statements

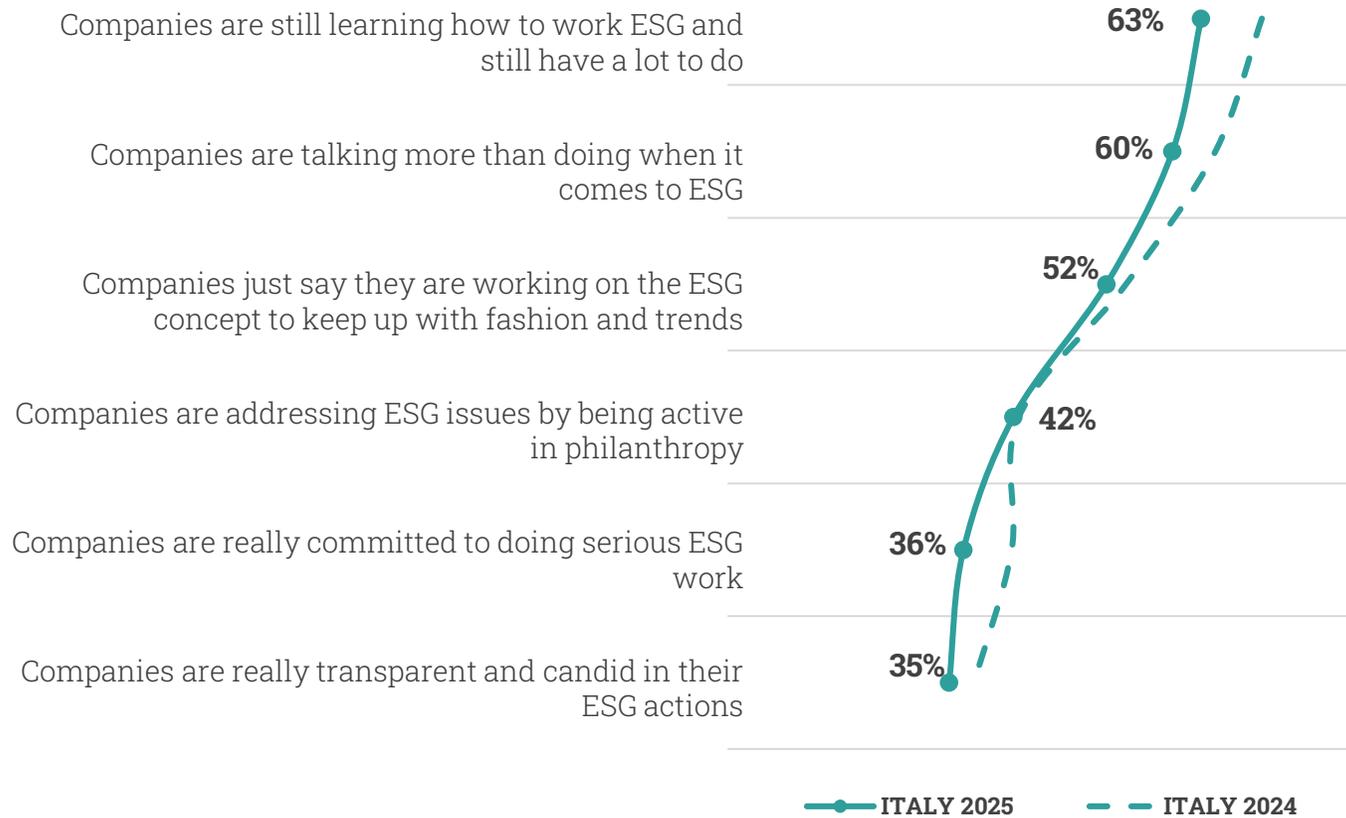
Everyone complains about the fact that companies have still a lot of work to do related to ESG (less than in 2024). West countries are not completely confident about companies' transparency.



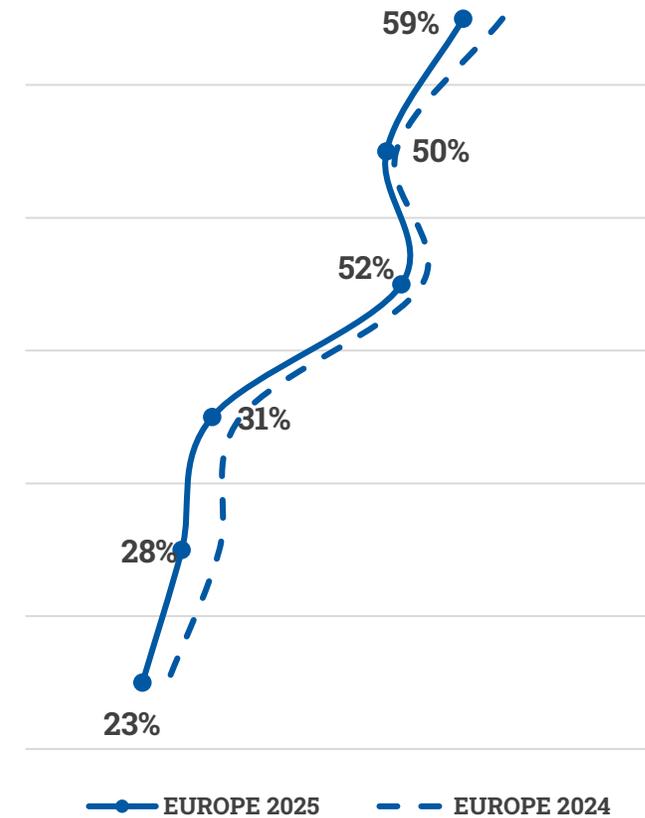
Q1b. To what extent do you agree / disagree with the following statements regarding ESG?
 Base: Italia 2025 b. 500; Italia 2024 b. 500; Europa 2025 b. 4803; Europa 2024 b. 6122; Nord-America 2025 b. 995; Nord-America 2024 b. 1002;
 Sud-America 2025 b. 500; Sud-America 2024 b. 500; Asia 2025 b. 1000; Asia 2024 b. 1009

Overall agreement ESG statements

% TOP2 BOX (TOTALLY AGREE + I RATHER AGREE)



10% 20% 30% 40% 50% 60% 70% 80%



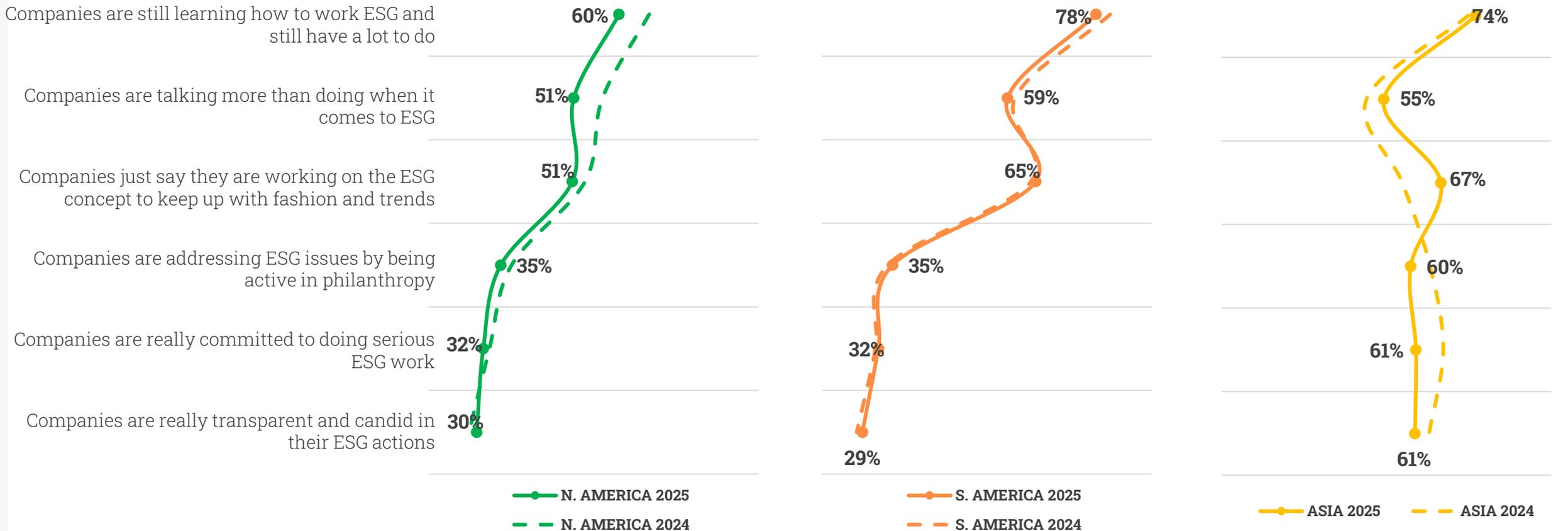
Overall agreement ESG statements

% TOP2 BOX
(TOTALLY AGREE + I RATHER AGREE)

20% 30% 40% 50% 60% 70% 80% 90%

20% 30% 40% 50% 60% 70% 80% 90%

20% 30% 40% 50% 60% 70% 80% 90%

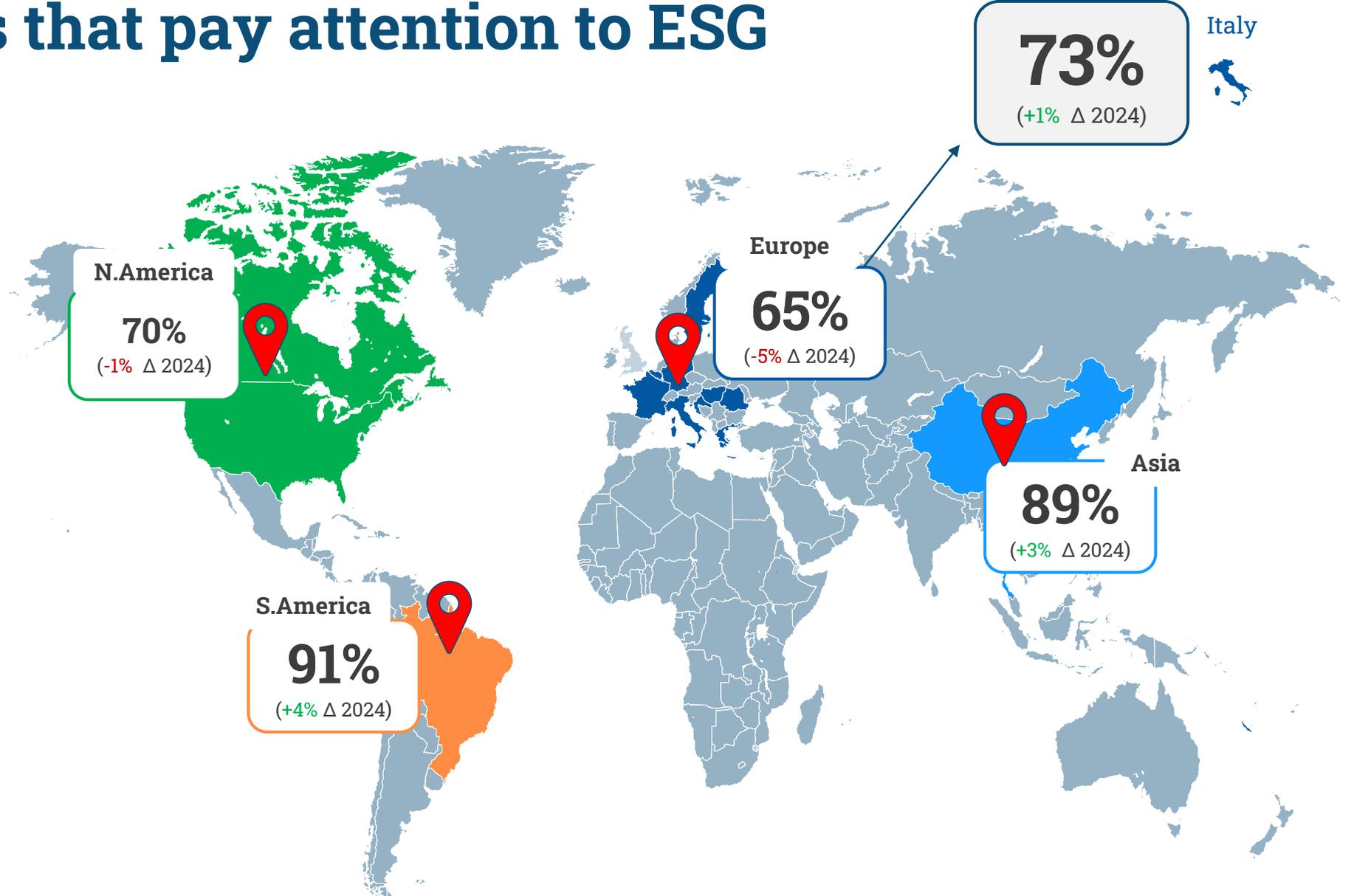


Q1b. To what extent do you agree / disagree with the following statements regarding ESG?
 Base: North-America 2024 b. 1002; North-America 2025 b. 995; South-America 2024 b. 500; South-America 2025 b. 500; Asia 2024 b. 1009; Asia 2025 b. 1000;

Q2. What is your attitude towards companies that pay attention to ESG goals?

I APPROVE
I DISAPPROVE
I DON'T CARE

- S. AMERICA
 - N. AMERICA
 - EUROPE
 - ASIA
1. Brasil
 2. Canada
 3. USA
 4. Belgium
 5. Croatia
 6. France
 7. Germany
 8. Greece
 9. Italy
 10. Romania
 11. Sweden
 12. China
 13. Thailand

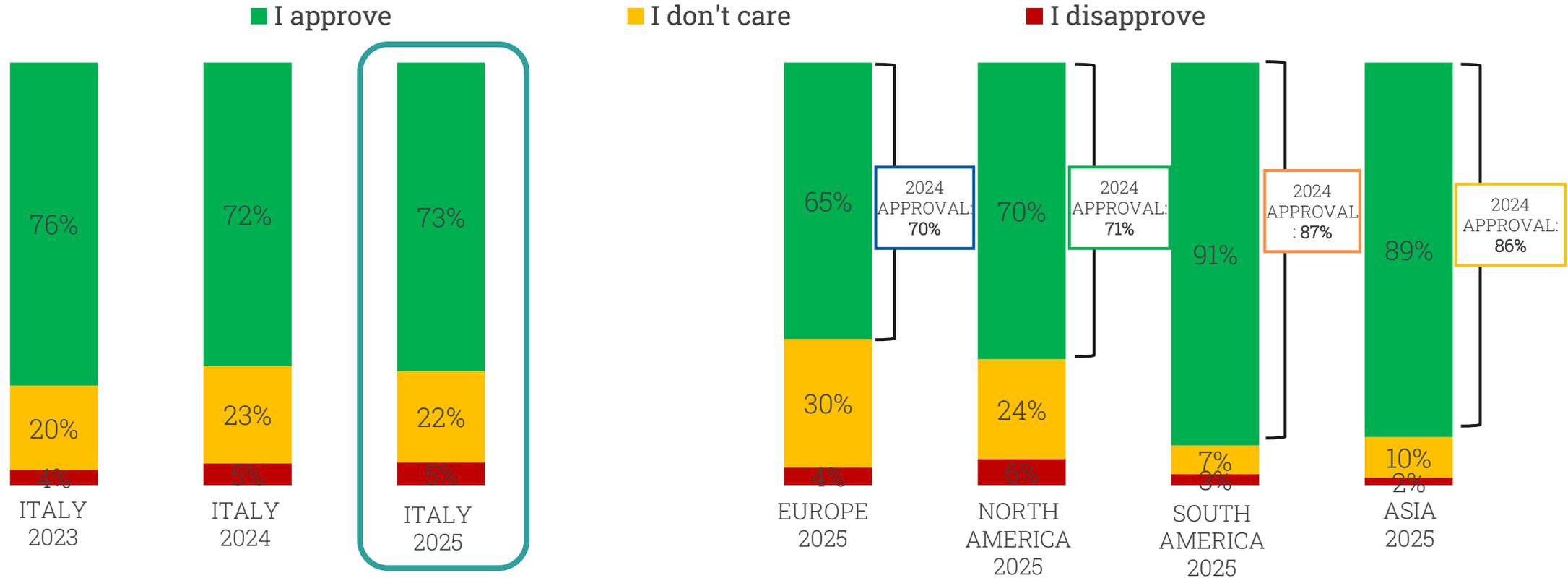


➤ Still strong approval towards ESG even with a segmented increase.

Attitude towards companies ESG compliant

Still strong approval towards ESG maintaining 2024 level, but 1/4 of people don't care about the topic.

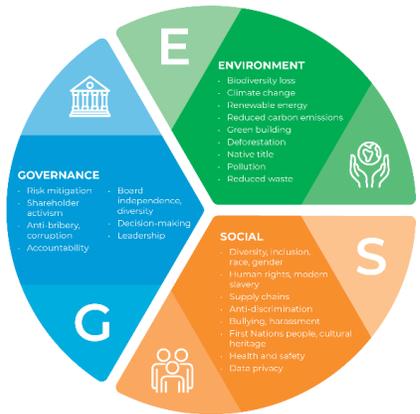
OVERALL ATTITUDE



Q2 - What is your attitude towards companies that pay attention to ESG goals?

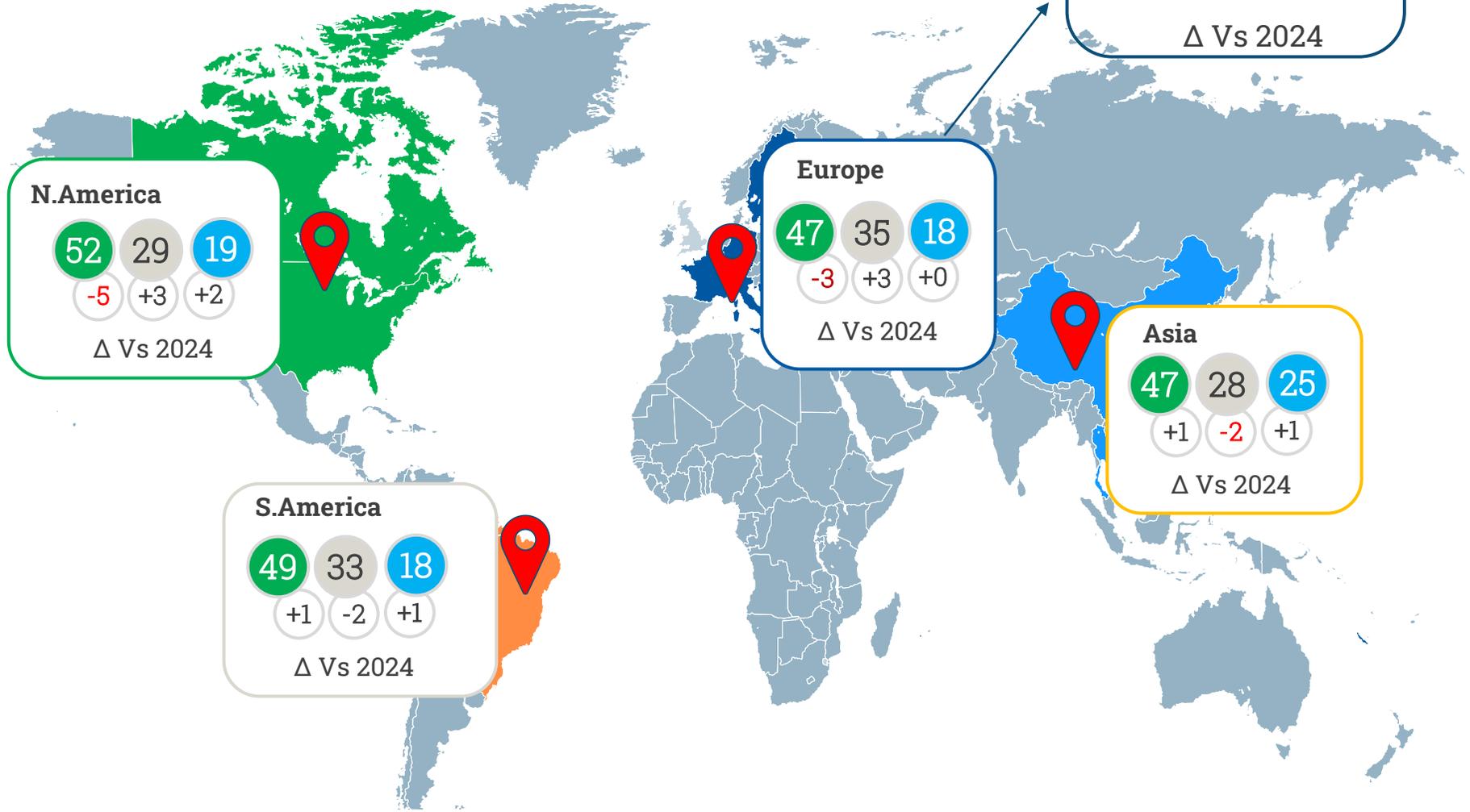
Sample: Italy 2025 b. 500; Italy 2024 b. 500; Italy 2023 b. 500; Europe 2025 b. 4803; Europe 2024 b. 6122; Europe 2023 b. 6571; North-America 2025 b. 995; North-America 2024 b. 1002; North-America 2023 b.1004; South-America 2025 b.500; South-America 2024 b.500; South-America 2023 b.500; Asia 2024 b. 1000; Asia 2024 b. 1009; Asia 2023 b. 1551

Q3a. Please rank the three ESG components in terms of their relative importance to you



- S. AMERICA
 - N. AMERICA
 - EUROPE
 - ASIA
1. Brasil
 2. Canada
 3. USA
 4. Belgium
 5. Croatia
 6. France
 7. Germany
 8. Greece
 9. Italy
 10. Romania
 11. Sweden
 12. China
 13. Thailand

Ranking – first choice

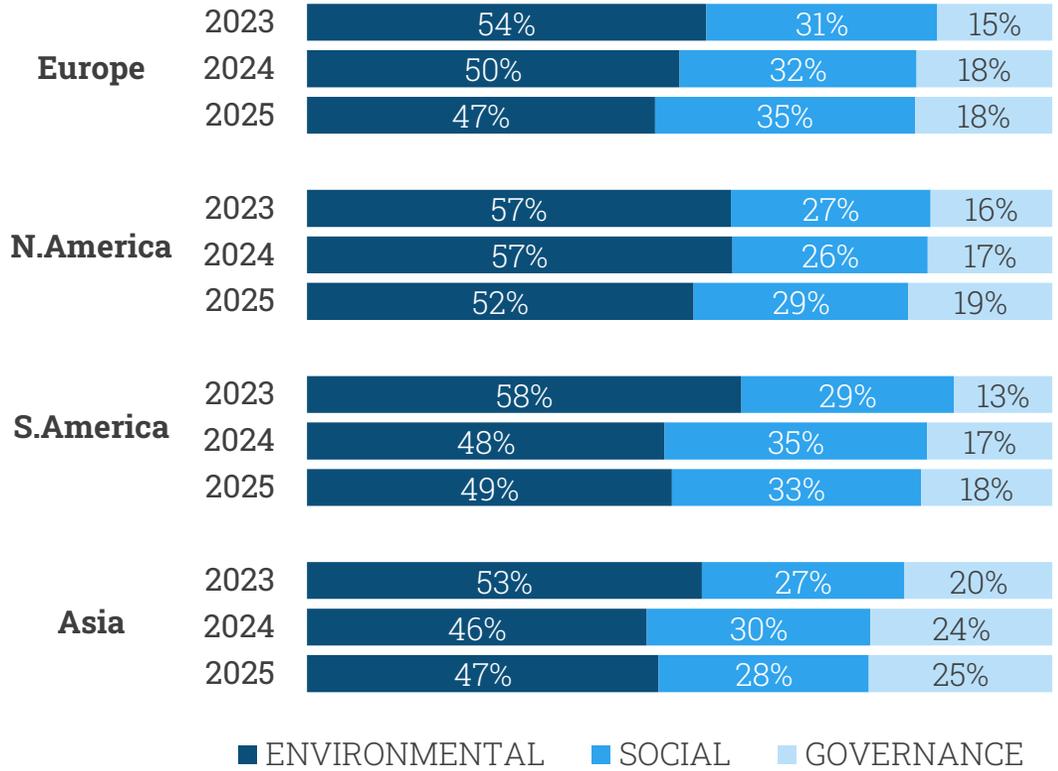


➤ Environment tops priorities in all continents although to a lesser extent than last year (confirming what happened in 2024). Europeans and S.America are more likely to pay higher attention on the social component (especially in Italy).

Importance ranking ESG components

Environments tops priorities in Italy with a great recovery of the social percentage level.

ESG COMPONENTS RANKING



Q3a. Please rank the three ESG components in terms of their relative importance to you
 Sample: Italy 2023 b. 500; Italy 2024 b. 500; Italy 2025 b. 500; Europe 2023 b. 6571; Europe 2024 b. 6122; Europe 2025 b. 4803; North-America 2023 b.1004; North-America 2024 b. 1002; North-America 2025 b. 995; South-America 2023 b.500; South-America 2024 b.500; South-America 2025 b.500; Asia 2023 b. 1551; Asia 2024 b. 1009; Asia 2025 b. 1000;

Measure for companies to enhance ESG practices

Reducing waste and implement recycling is the first priority perceived by consumers among the most important measure for the company. Following the higher association of ESG term to the «social practice», Italians desire more community engagement and local sponsorships.

MEASURES TO BE ENHANCED



Measure for companies to enhance ESG practices

Differences >3% with 2024

	EUROPE 2025	EUROPE 2024	NORTH-AMERICA 2025	NORTH-AMERICA 2024	SOUTH-AMERICA 2025	SOUTH-AMERICA 2024	ASIA 2025	ASIA 2024
Sample:	4803	6122	995	1002	500	500	1000	1009
Reduce waste and implement recycling	17	18	13	17	11	11	15	14
Implement energy efficient measures	10	10	7	8	5	4	5	5
Adopt sustainable supply chain practices	9	8	8	6	8	11	8	9
Enhance employee well-being and diversity	9	9	8	6	7	6	7	6
Foster innovation that focuses on sustainable / environmental initiatives	9	11	9	10	15	17	19	19
Encourage community engagement e.g. sponsor local events	5	6	5	6	6	3	9	7
Establish clear ethical and fair practices in the marketplace	10	10	15	13	17	15	9	8
Offer sustainable / environmentally friendly products and services	16	14	15	15	15	16	12	17
Develop ethical marketing practices	4	4	6	5	4	3	4	5
Ensure there is fair representation of racial and gender diversity within their workplaces	5	5	7	6	5	4	9	7
Invest in employee training and education	7	6	8	8	6	11	5	4

3

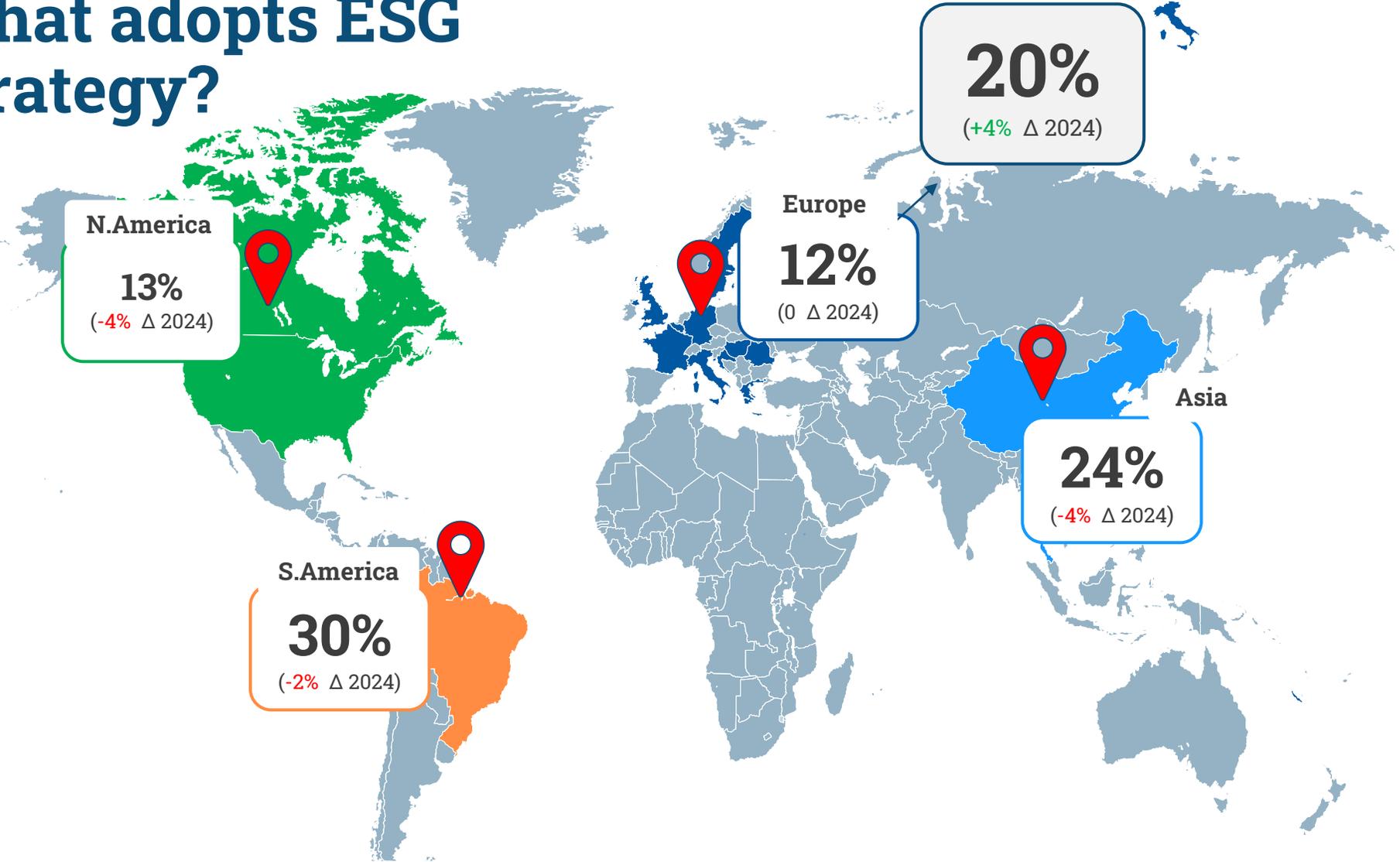
Impact of ESG orientation on products' purchase intention

Q4. How likely are you to prefer buying products/services from a company that adopts ESG policies/strategy?

VERY LIKELY
LIKELY
NO IMPACT
UNLIKELY
VERY UNLIKELY

TOP BOX

- S. AMERICA
 - N. AMERICA
 - EUROPE
 - ASIA
1. Brasil
 2. Canada
 3. USA
 4. Belgium
 5. Croatia
 6. France
 7. Germany
 8. Greece
 9. Italy
 10. Romania
 11. Sweden
 12. China
 13. Thailand

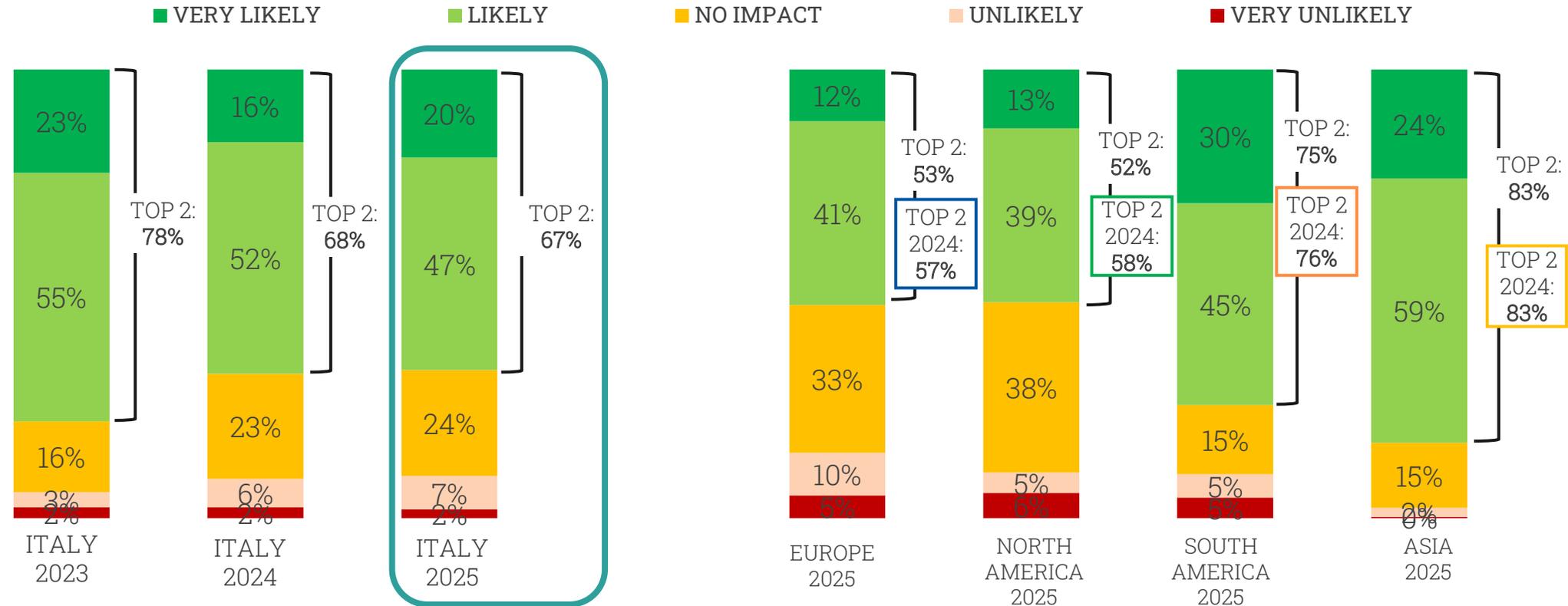


➤ Clear preference for buying from ESG compliant

Overall buying preference ESG compliant firms

Clear preference for buying from ESG compliant companies for 67% of the italians

FAMILIARITY WITH ESG



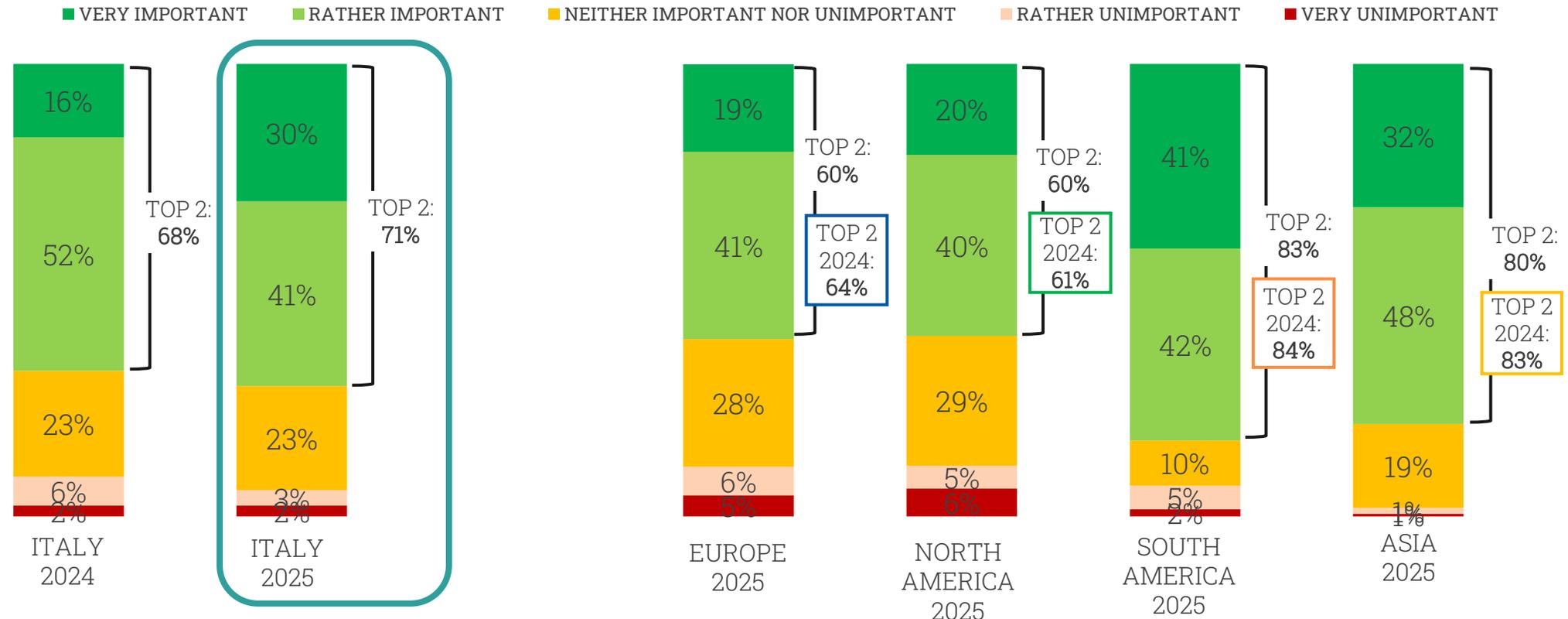
Q4. How likely are you to prefer buying products/services from a company that adopts ESG policies/strategy?

Sample: Italy 2023 b. 500; Italy 2024 b. 500; Italy 2025 b. 500; Europe 2023 b. 6571; Europe 2024 b. 6122; Europe 2025 b. 4803; North-America 2023 b.1004; North-America 2024 b. 1002; North-America 2025 b. 995; South-America 2023 b.500; South-America 2024 b.500; South-America 2025 b.500; Asia 2023 b. 1551; Asia 2024 b. 1009; Asia 2025 b. 1000;

Overall importance in purchasing: environment

Strong importance given to environmental issues while purchasing by South America and Asia, as well as for 7 italians out of 10, confirming 2024 results.

OVERALL IMPORTANCE



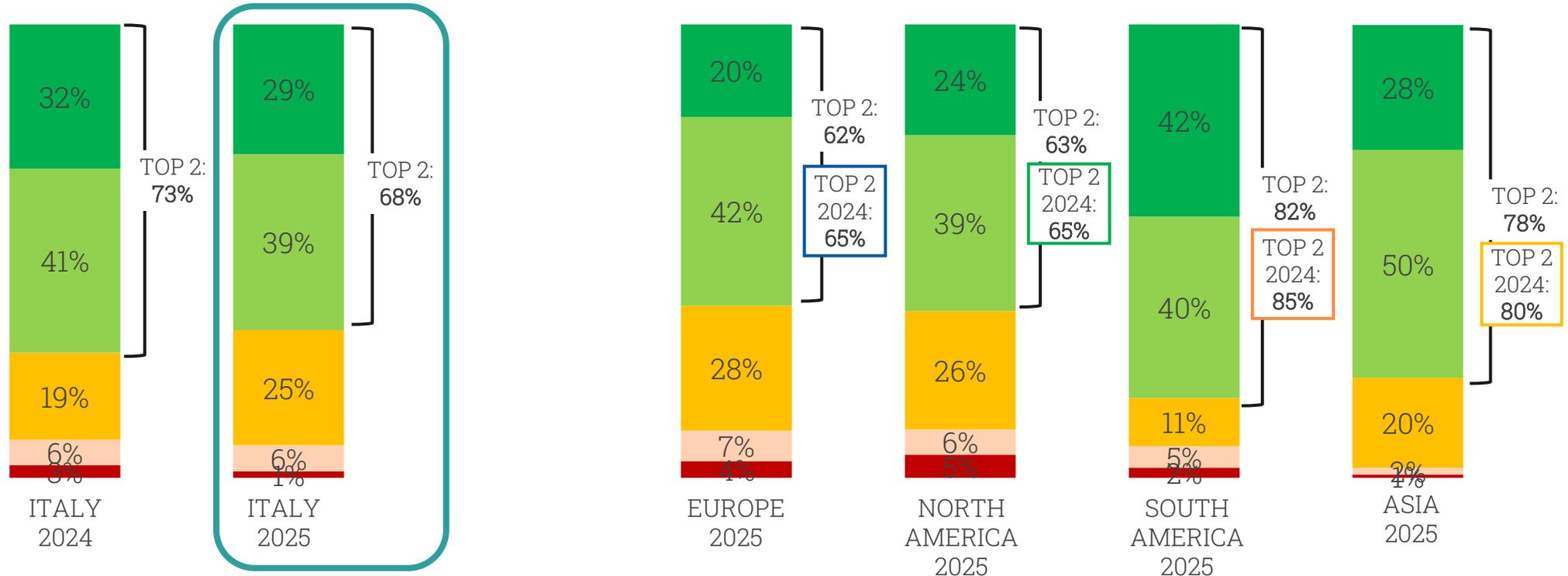
Q5a. How important are environmental issues (such as climate change, pollution, depletion of environmental resources) in your decision to purchase a product / service?
 Sample: Italy 2023 b. 500; Italy 2024 b. 500; Italy 2025 b. 500; Europe 2023 b. 6571; Europe 2024 b. 6122; Europe 2025 b. 4803; North-America 2023 b.1004; North-America 2024 b. 1002; North-America 2025 b. 995; South-America 2023 b.500; South-America 2024 b.500; South-America 2025 b.500; Asia 2023 b. 1551; Asia 2024 b. 1009; Asia 2025 b. 1000;

Overall importance in purchasing: social issues

Also social issues have great relevance on the purchasing process: 68% of Italians give strong importance to the topic while deciding to purchase..

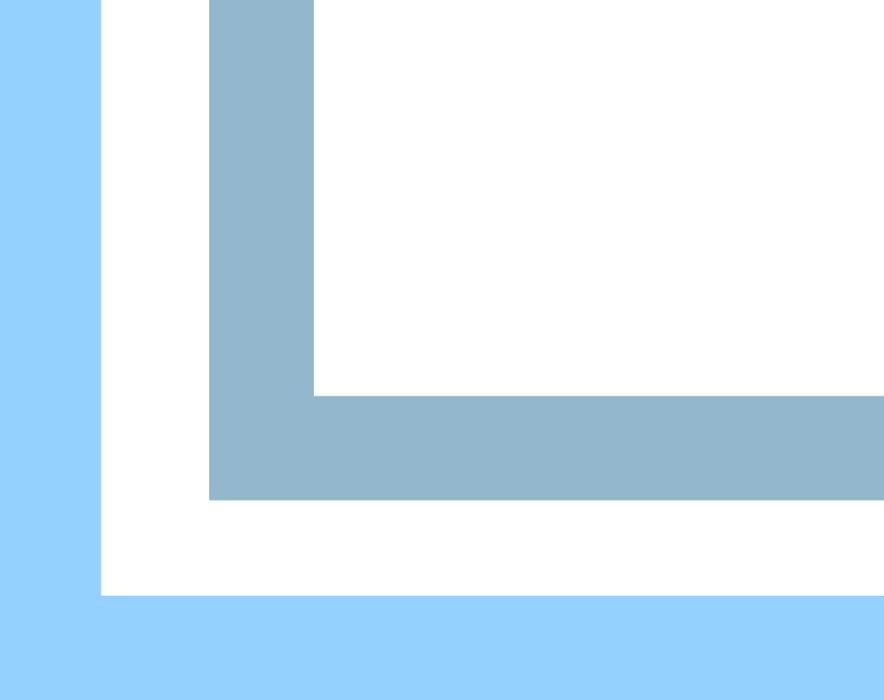
OVERALL IMPORTANCE

■ VERY IMPORTANT ■ RATHER IMPORTANT ■ NEITHER IMPORTANT NOR UNIMPORTANT ■ RATHER UNIMPORTANT ■ VERY UNIMPORTANT



Q5b. How important are social issues (such as human rights, inclusion issues, labor practices, etc.) in your decision to purchase a product / service?

Sample: Italy 2023 b. 500; Italy 2024 b. 500; Italy 2025 b. 500; Europe 2023 b. 6571; Europe 2024 b. 6122; Europe 2025 b. 4803; North-America 2023 b.1004; North-America 2024 b. 1002; North-America 2025 b. 995; South-America 2023 b.500; South-America 2024 b.500; South-America 2025 b.500; Asia 2023 b. 1551; Asia 2024 b. 1009; Asia 2025 b. 1000;

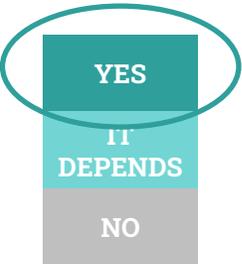


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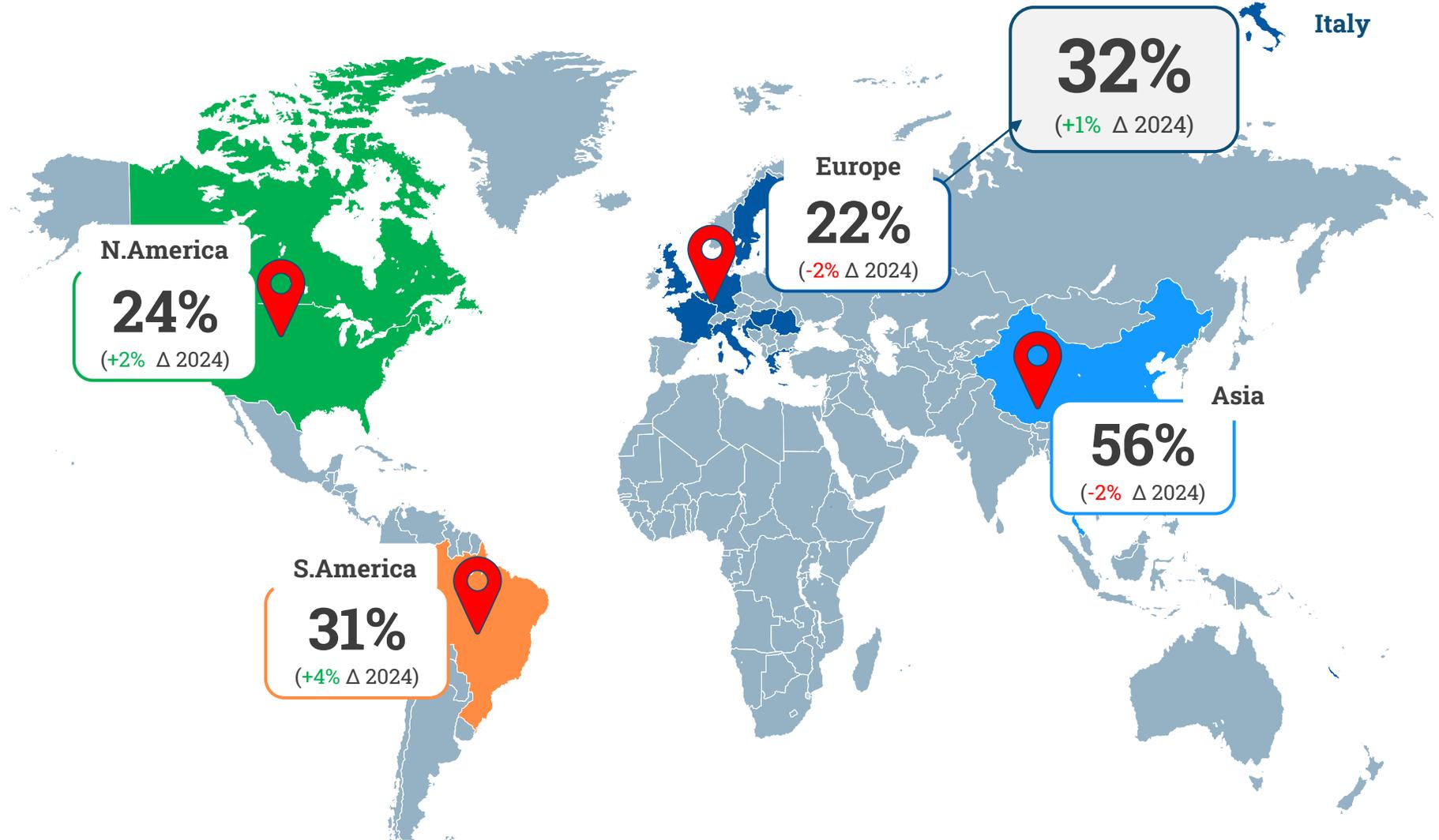
**Acceptable price premium for ESG
compliant products**



Q6a. Would you be willing to pay a price premium for a product or service that is produced by a company that is involved in ESG related activities?



- S. AMERICA
 - N. AMERICA
 - EUROPE
 - ASIA
1. Brasil
 2. Canada
 3. USA
 4. Belgium
 5. Croatia
 6. France
 7. Germany
 8. Greece
 9. Italy
 10. Romania
 11. Sweden
 12. China
 13. Thailand

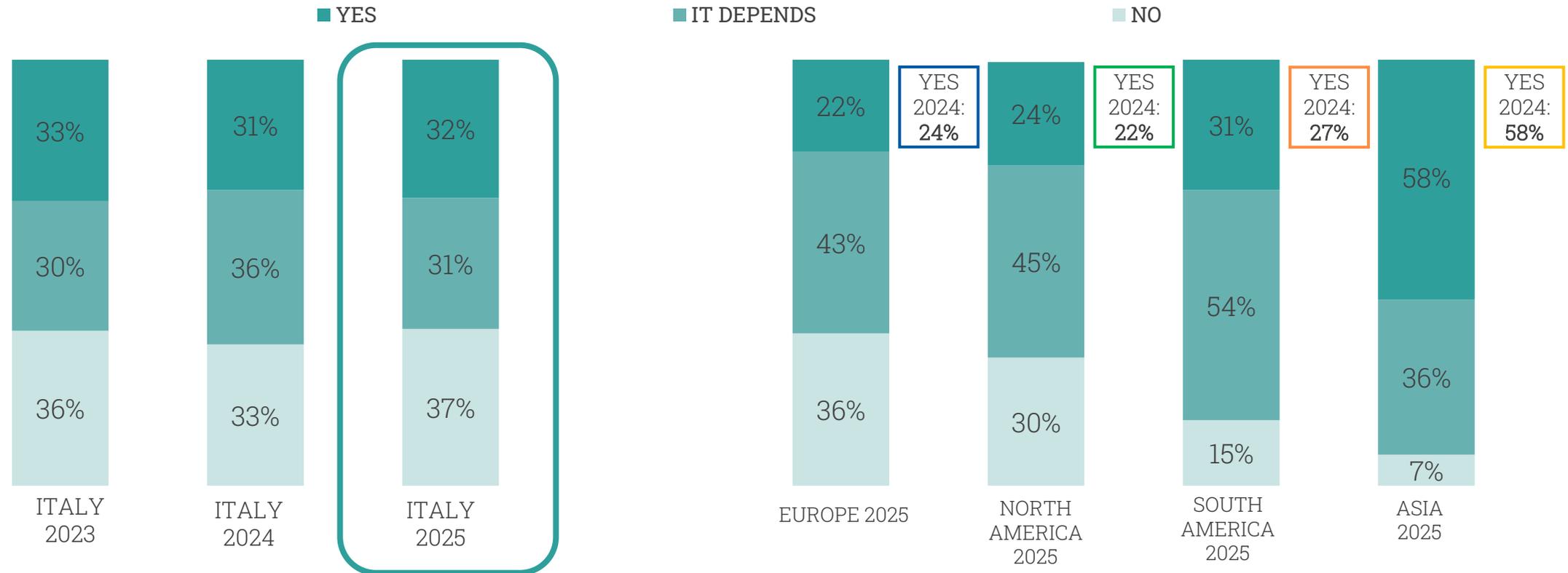


➤ Asians more likely to claim acceptance of price premium.

Companies involved in ESG: premium price

Asians more likely to claim acceptance of price premium.

WILLINGNESS TO PAY A PREMIUM PRICE

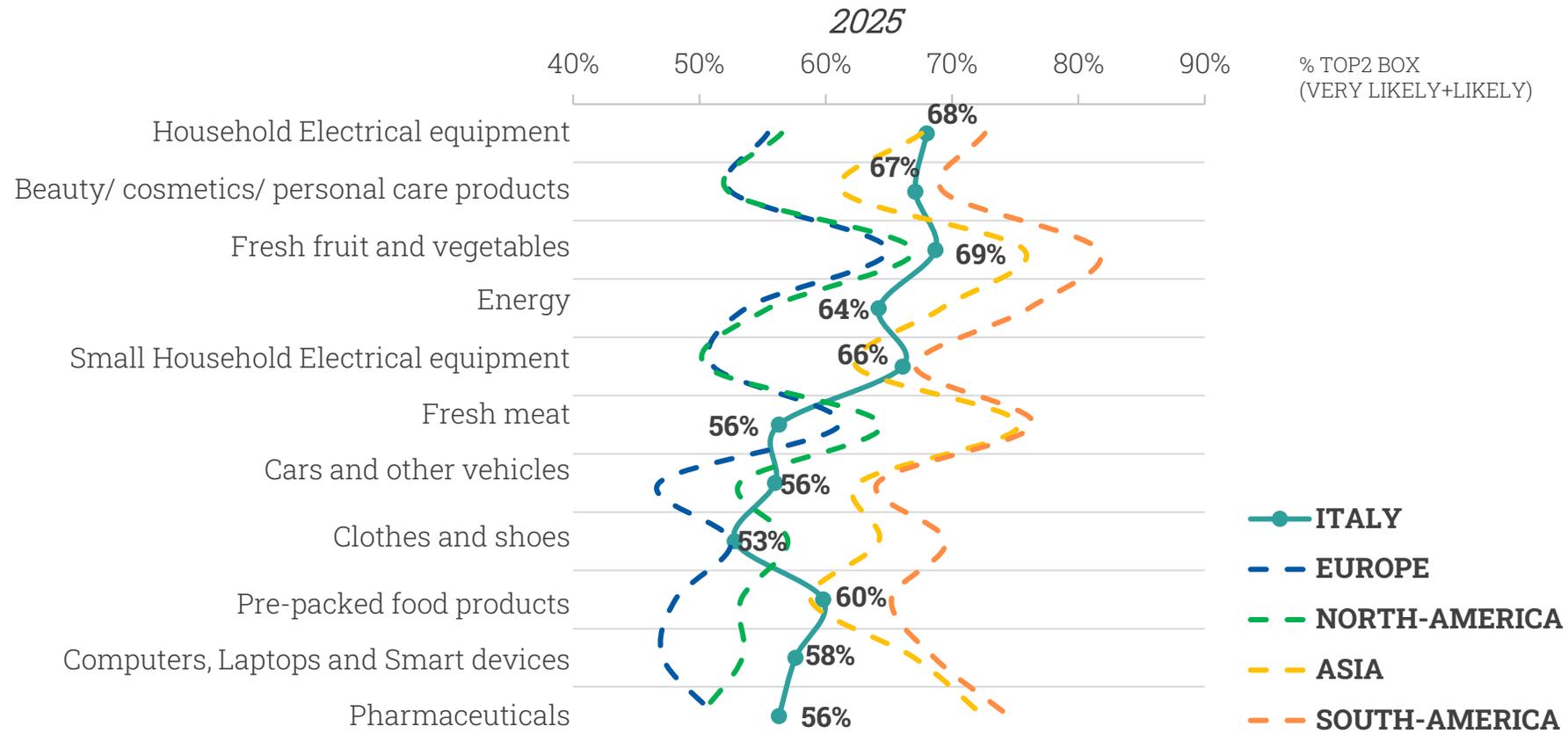


Q6a. Would you be willing to pay a price premium for a product or service that is produced by a company that is involved in ESG related activities?
 Sample: Italy 2024 b. 500; Italy 2023 b. 500; Europe 2024 b. 6122; Europe 2023 b. 6571; North-America 2024 b. 1002; North-America 2023 b.1004; South-America 2024 b.500; South-America 2023 b.500; Asia 2024 b. 1009; Asia 2023 b. 1551

ITS extra amount: detailed item

Consumers more likely to pay a price premium for household electrical equipment, personal care products and fruit and vegetables (top leaderboard in 2025).

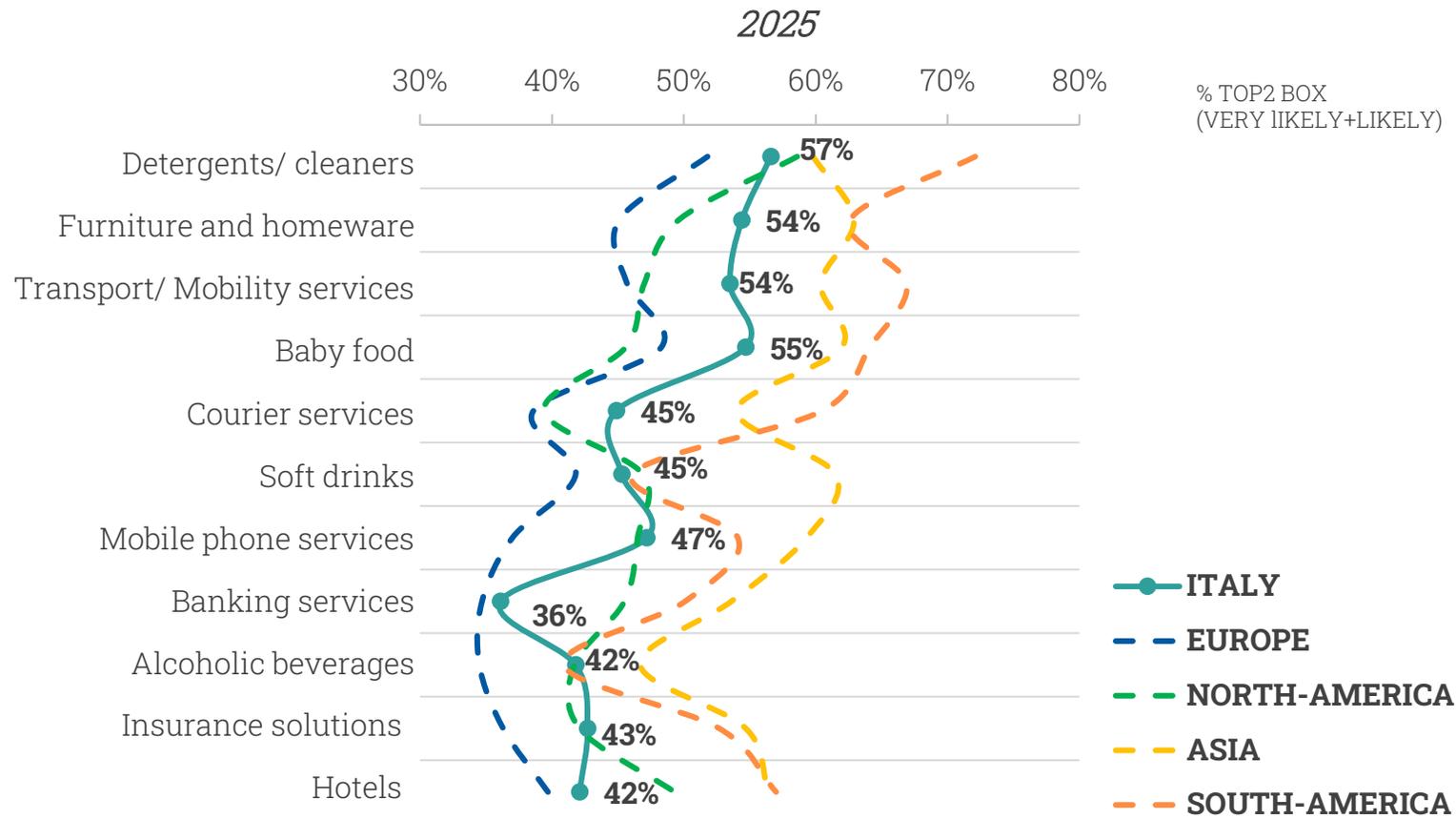
INTENTION TO SPEND EXTRA AMOUNT



ITS extra amount: detailed item

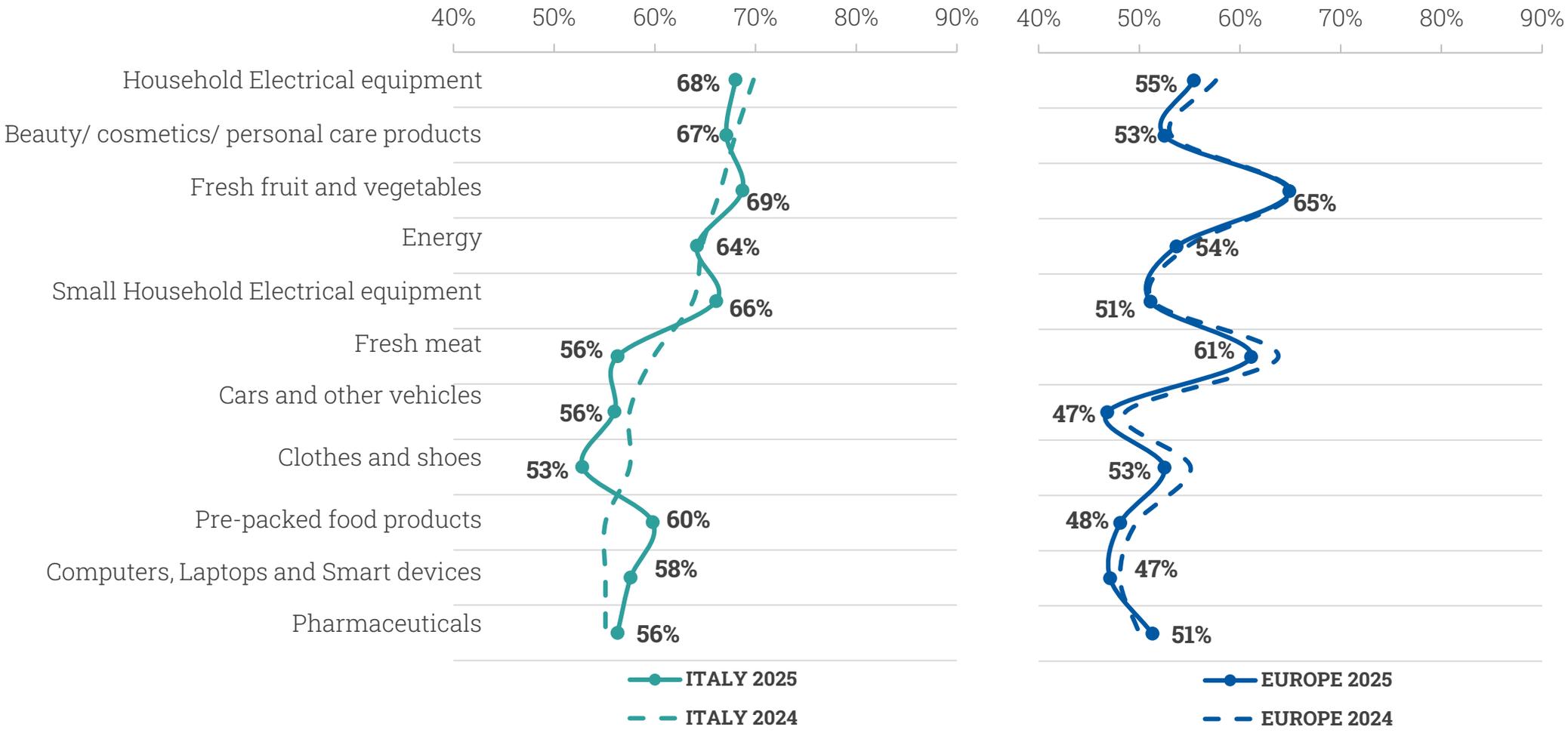
Hotels, alcoholic and banking services among the items on which people would not spend an extra amount of money.

INTENTION TO SPEND EXTRA AMOUNT



ITS extra amount: detailed item

INTENTION TO SPEND EXTRA AMOUNT



Q6b. How likely are you to pay an extra amount to purchase each of the following categories of products / services from a company involved in ESG?
 Sample: Only who declare to be willing to spend price premium (yes + it depends)

ITS extra amount: detailed item

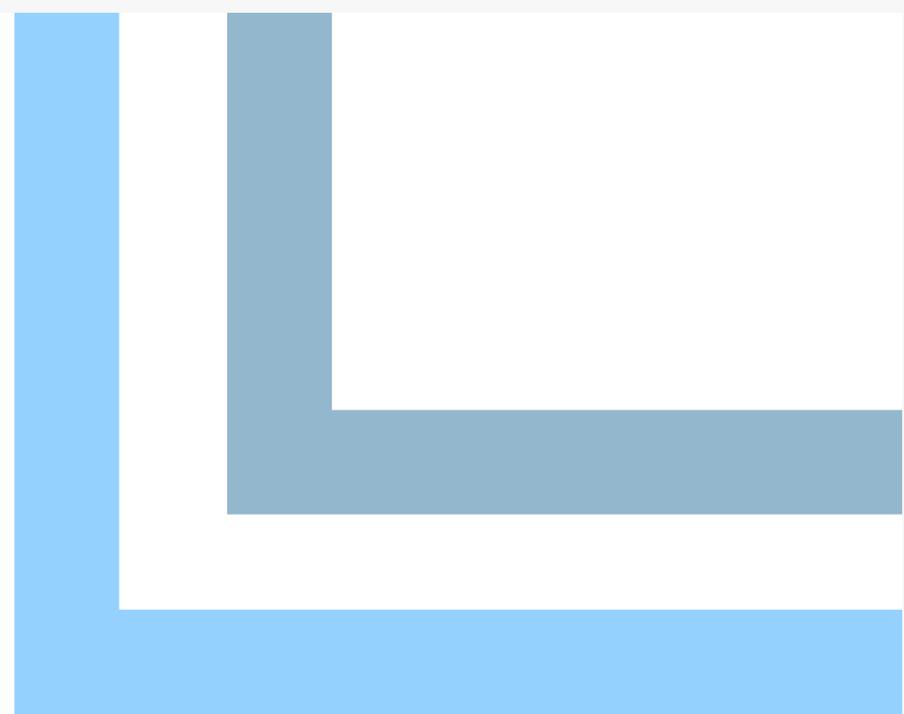
INTENTION TO SPEND EXTRA AMOUNT



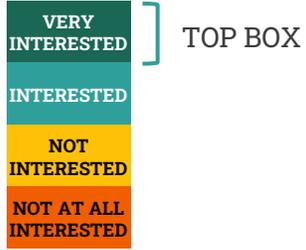
Q6b. How likely are you to pay an extra amount to purchase each of the following categories of products / services from a company involved in ESG?
 Sample: Only who declare to be willing to spend price premium (yes + it depends)

5

**Interest in being informed about ESG
for the products**



Q7. How interested are you in information on what companies are doing to meet their ESG goals?



- S. AMERICA
 - N. AMERICA
 - EUROPE
 - ASIA
1. Brasil
 2. Canada
 3. USA
 4. Belgium
 5. Croatia
 6. France
 7. Germany
 8. Greece
 9. Italy
 10. Romania
 11. Sweden
 12. China
 13. Thailand

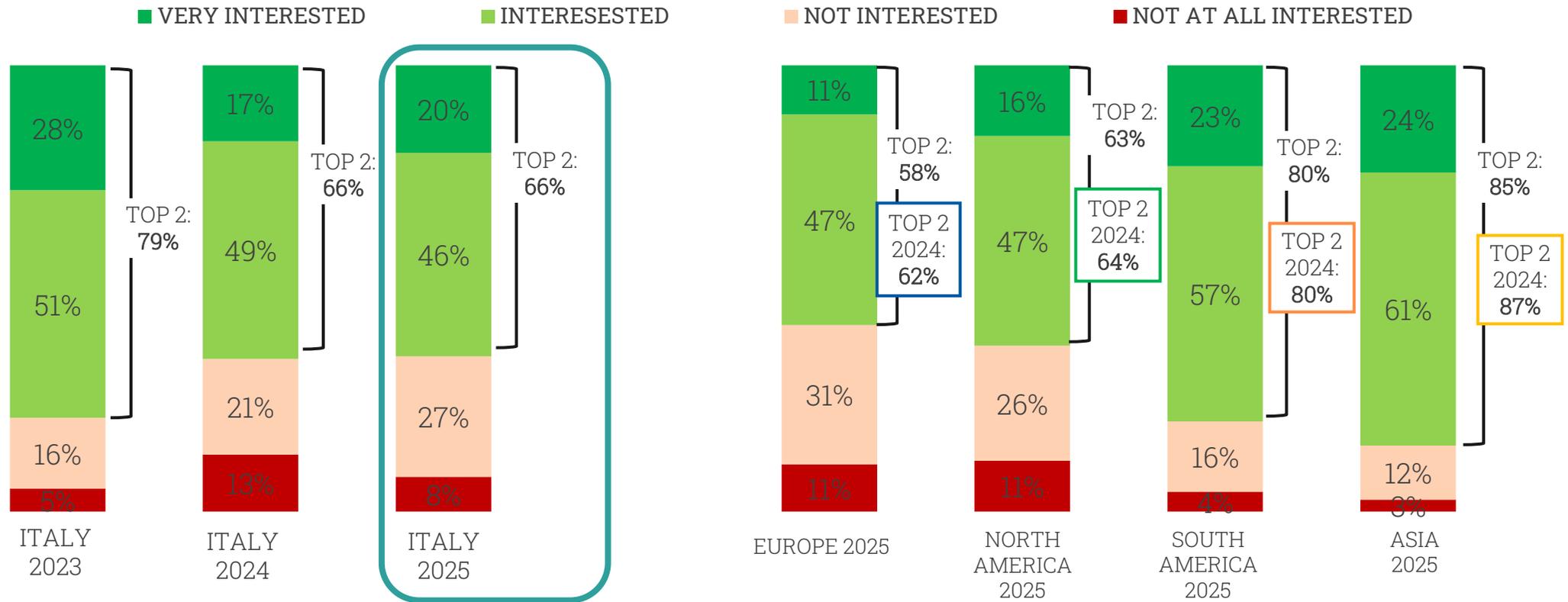


➤ Considerable interest in companies' ESG goals

Interest on companies action to meet ESG goals

Considerable interest in companies' ESG goals, even if decrease from 2023.

OVERALL INTEREST



Q7. How interested are you in information on what companies are doing to meet their ESG goals?

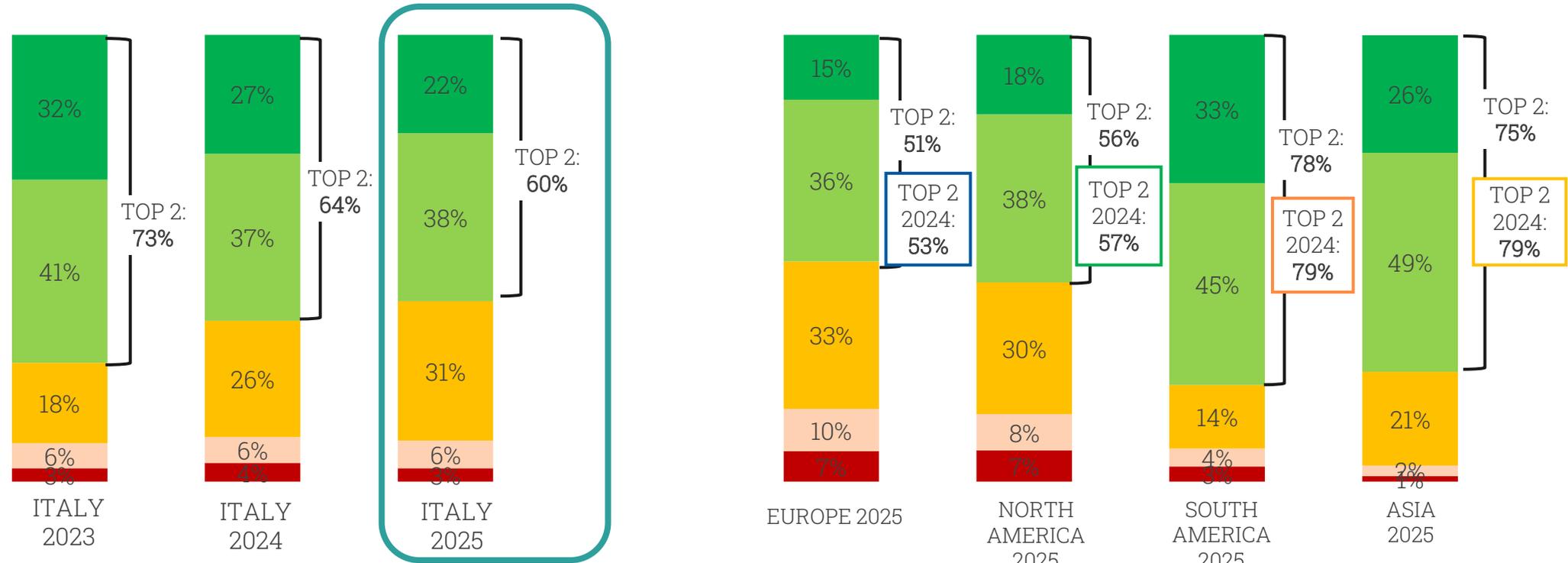
Sample: Italy 2023 b. 500; Italy 2024 b. 500; Italy 2025 b. 500; Europe 2023 b. 6571; Europe 2024 b. 6122; Europe 2025 b. 4803; North-America 2023 b.1004; North-America 2024 b. 1002; North-America 2025 b. 995; South-America 2023 b.500; South-America 2024 b.500; South-America 2025 b.500; Asia 2023 b. 1551; Asia 2024 b. 1009; Asia 2025 b. 1000;

Transparency on companies ESG achievement

Still needs of transparency especially for South Americans and Asians.

FAMILIARITY WITH ESG

■ VERY IMPORTANT
 ■ IMPORTANT
 ■ NEITHER IMPORTANT NOR UNIMPORTANT
 ■ NOT IMPORTANT
 ■ NOT AT ALL IMPORTANT



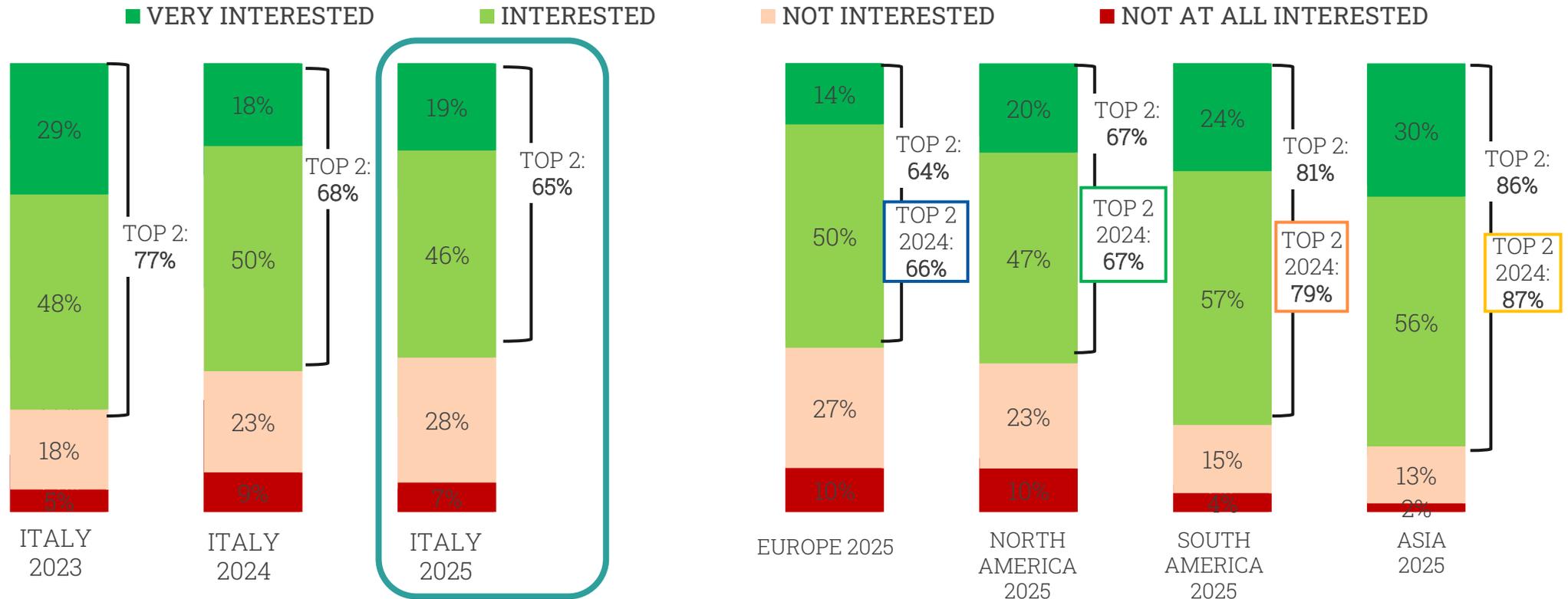
Q8. How important is it that a company you buy from is open and transparent in disclosing what it does to achieve ESG goals?

Sample: Italy 2023 b. 500; Italy 2024 b. 500; Italy 2025 b. 500; Europe 2023 b. 6571; Europe 2024 b. 6122; Europe 2025 b. 4803; North-America 2023 b.1004; North-America 2024 b. 1002; North-America 2025 b. 995; South-America 2023 b.500; South-America 2024 b.500; South-America 2025 b.500; Asia 2023 b. 1551; Asia 2024 b. 1009; Asia 2025 b. 1000;

Interest in accessing ESG reports for brands

Considerable Interest in company ESG Data especially among Asians.

OVERALL INTEREST



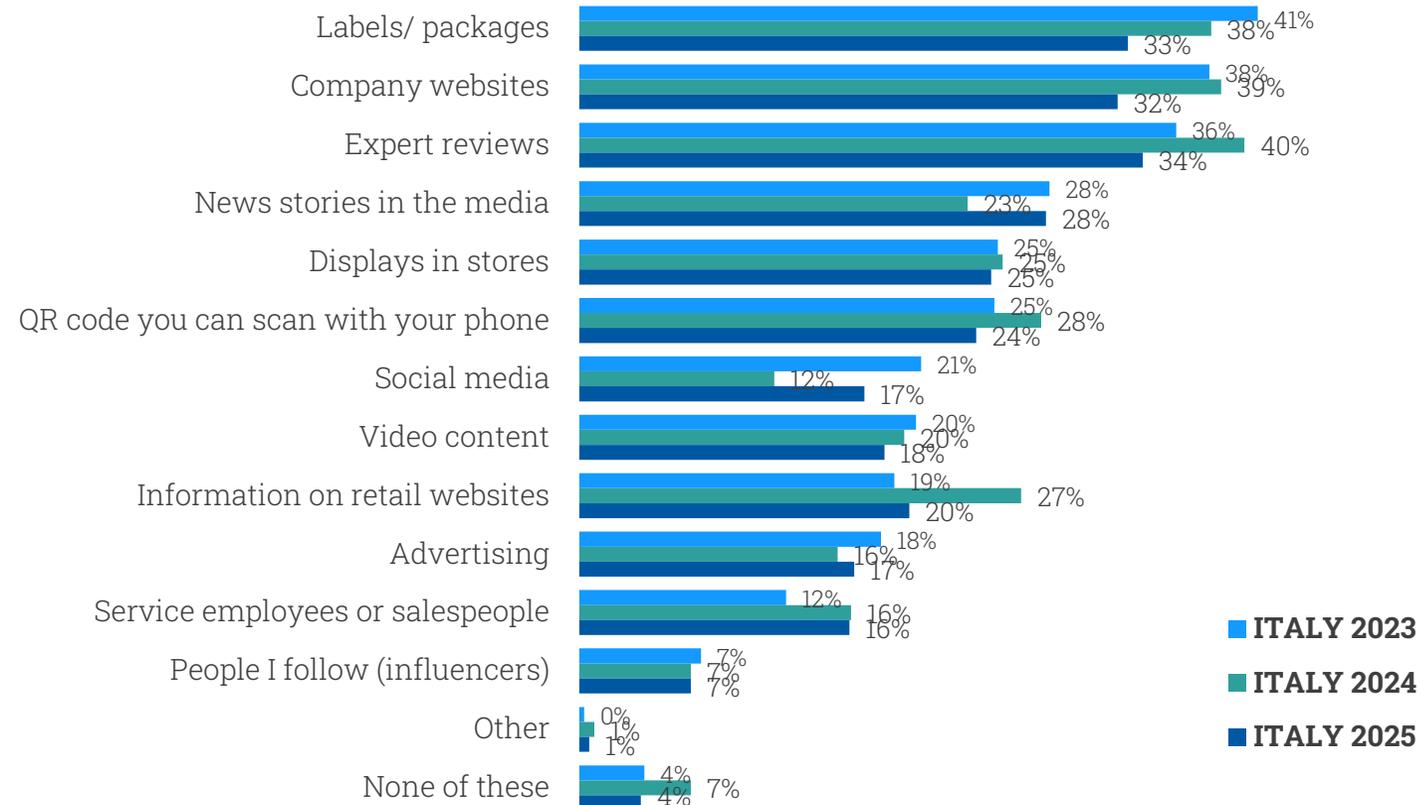
Q9. If ESG related data and reports were available for brands / companies, how interested would you be in accessing this data?

Sample: Italy 2023 b. 500; Italy 2024 b. 500; Italy 2025 b. 500; Europe 2023 b. 6571; Europe 2024 b. 6122; Europe 2025 b. 4803; North-America 2023 b.1004; North-America 2024 b. 1002; North-America 2025 b. 995; South-America 2023 b.500; South-America 2024 b.500; South-America 2025 b.500; Asia 2023 b. 1551; Asia 2024 b. 1009; Asia 2025 b. 1000;

Most reliable touchpoint for ESG companies

Expert reviews are considered the most reliable touchpoint for ESG information about companies, with labels/packages showing a huge decreasing from 2023.

ESG INFOS ABOUT COMPANIES – MOST RELIABLE TOUCHPOINT



Most reliable touchpoint for ESG companies

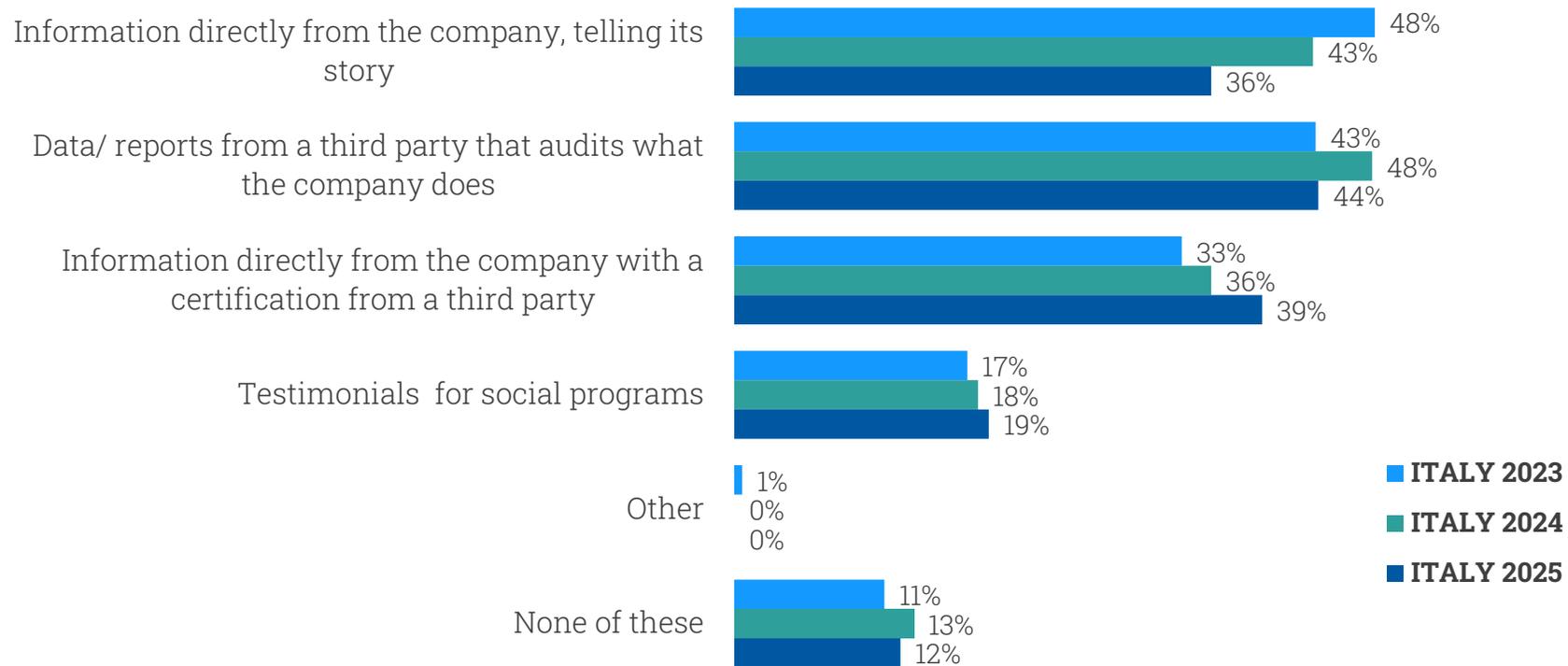
□ Differences >3% with 2024

	EUROPE			NORTH-AMERICA			SOUTH-AMERICA			ASIA		
	2025	2024	2023	2025	2024	2023	2025	2024	2023	2025	2024	2023
	3071	4040	4315	670	674	686	403	397	437	843	866	1317
Labels/ packages	34	36	37	35	34	34	47	50	55	27	32	29
Company websites	38	41	39	48	49	46	56	57	55	50	51	48
Expert reviews	41	40	39	38	40	38	46	41	52	34	33	28
News stories in the media	36	33	31	37	34	31	52	48	46	48	45	46
Displays in stores	19	19	20	21	23	21	13	16	17	25	25	27
QR code you can scan with your phone	25	25	25	23	24	18	24	24	30	25	25	28
Social media	24	26	28	32	30	28	49	46	48	48	46	51
Video content	14	16	16	23	23	18	26	28	29	31	28	21
Information on retail websites	27	30	25	38	40	36	21	23	23	30	27	26
Advertising	17	18	18	22	21	22	26	28	23	22	20	25
Service employees or salespeople	17	17	16	18	18	17	24	23	24	28	22	25
People I follow (influencers)	10	10	11	16	16	13	16	17	20	30	29	26

Most liked ESG activities to be shown by company

ESG activities should be enhanced both by companies with the support from third parties (lowered trust towards information directly from the company)

ACTIVITIES TO BE SHOWN



Most liked ESG activities to be shown by company

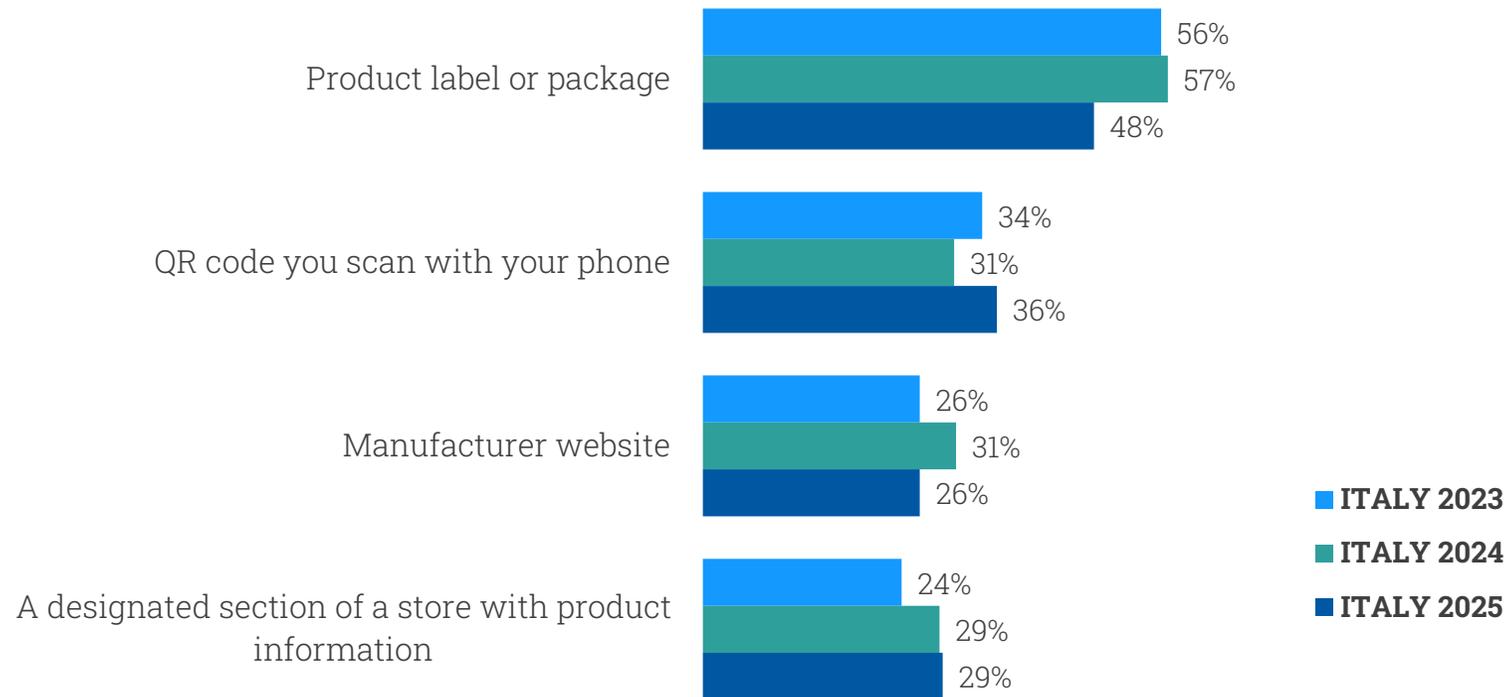
Differences >3% with 2024

	EUROPE			NORTH-AMERICA			SOUTH-AMERICA			ASIA		
	2025	2024	2023	2025	2024	2023	2025	2024	2023	2025	2024	2023
	4803	6122	6571	995	1002	1004	500	500	501	1000	1009	1551
Information directly from the company, telling its story	40	42	40	45	44	41	45	45	48	60	59	54
Data/ reports from a third party that audits what the company does	46	45	44	45	48	45	56	56	60	57	57	54
Information directly from the company with a certification from a third party	31	32	31	38	36	37	48	48	49	48	48	45
Testimonials for social programs	22	24	26	28	25	22	40	39	43	45	47	42
Other	1	1	2	1	1	1	1	2	2	0,2	0,1	0,3
None of these	20	19	17	21	21	23	8	8	4	4	5	7

Preferred way to disclose environmental impact

Product labels continue to be the preferred information source.

LIFETIME IMPACT ON ENVIRONMENT





Preferred way to disclose environmental impact

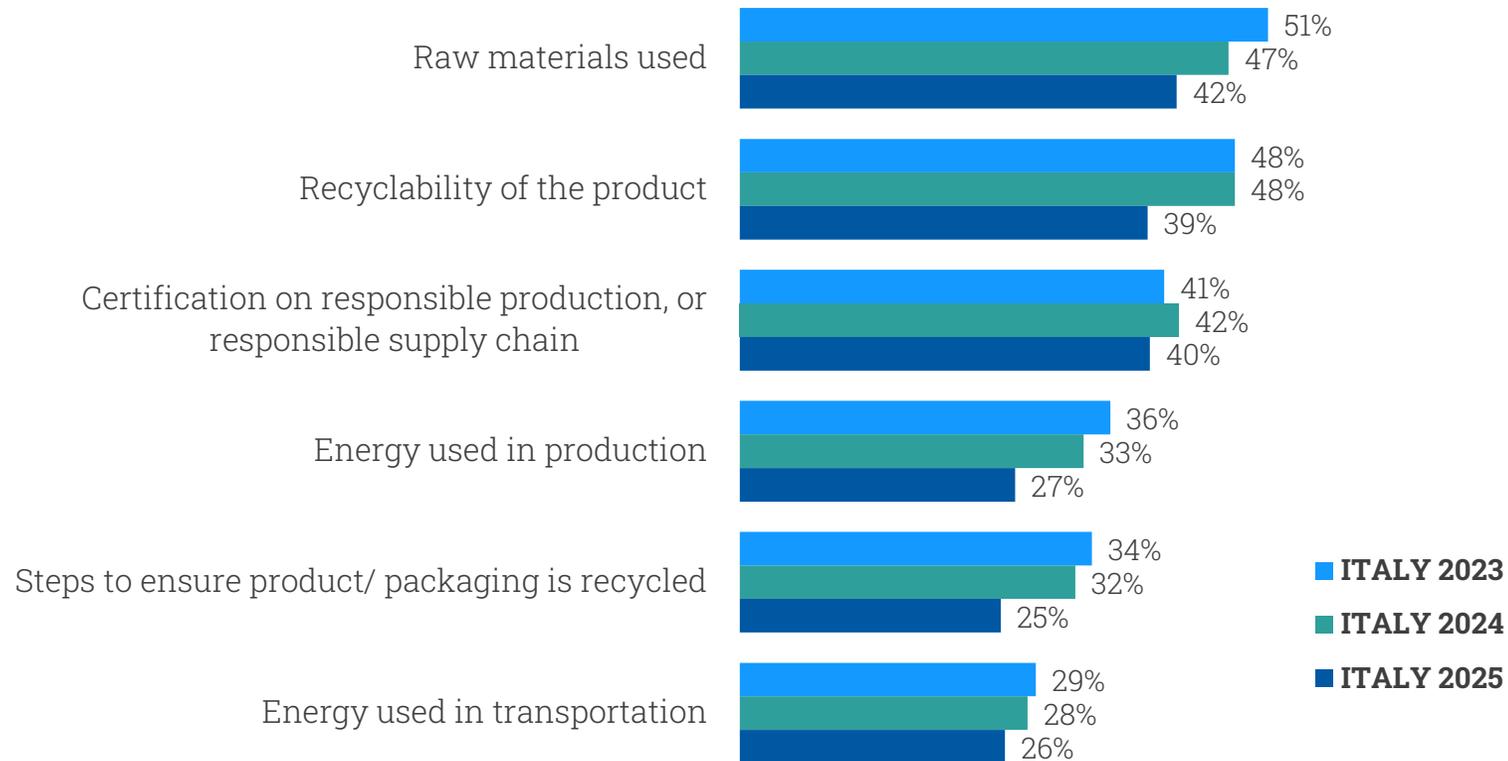
Differences >3% with 2024

	EUROPE			NORTH-AMERICA			SOUTH-AMERICA			ASIA		
	2025	2024	2023	2025	2024	2023	2025	2024	2023	2025	2024	2023
	4803	6122	6571	995	1002	1004	500	500	501	1000	1009	1551
Product label or package	54	56	56	50	53	49	66	68	71	52	62	56
QR code you scan with your phone	36	33	34	31	30	27	33	36	43	49	49	49
Manufacturer website	33	34	33	46	45	42	42	43	45	47	53	47
A designated section of a store with product information	27	27	27	30	25	26	31	38	34	58	51	53

Lifetime impact on environment: interest

Recyclability, certification on supply chain and energy used in production are the main requirement.

ACTIVITIES TO BE SHOWN



Lifetime impact on environment: interest

 Differences >3% with 2024

	EUROPE			NORTH-AMERICA			SOUTH-AMERICA			ASIA		
	2025	2024	2023	2025	2024	2023	2025	2024	2023	2025	2024	2023
	4803	6122	6571	995	1002	1004	500	500	501	1000	1009	1551
Raw materials used	48	48	48	42	44	37	58	56	57	51	53	50
Recyclability of the product	52	55	57	58	61	55	60	65	73	53	56	51
Certification on responsible production, or responsible supply chain	45	45	42	48	51	46	56	52	62	52	47	47
Energy used in production	36	38	36	40	43	40	38	36	37	47	47	48
Steps to ensure product/ packaging is recycled	37	41	41	45	46	44	53	51	56	55	52	51
Energy used in transportation	29	32	29	32	33	34	28	28	30	36	37	38

How familiar are you with the term...

GREENWASHING (%)

refers to when companies make false or exaggerated claims to create the impression they are committed to environmental sustainability.

OFFSETTING (%)

a process that involves reducing or removing, carbon dioxide or other greenhouse gas emissions from the atmosphere to compensate for emissions made elsewhere.

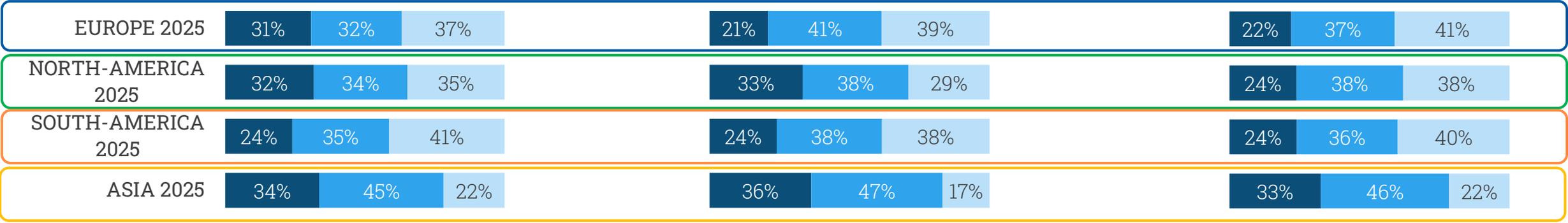
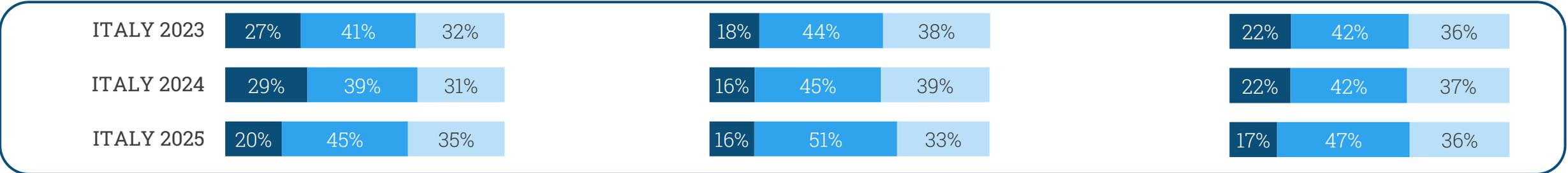
SOCIAL WASHING (%)

when companies try to cover up their negative social impacts by promoting themselves as socially responsible and ethical. This might include a grand gesture or donation draw attention away from something else they are doing.

■ FAMILIAR WITH THE CONCEPT

■ FAMILIAR WITH THE CONCEPT NOT WITH THE TERM

■ NEVER HEARD OF IT BEFORE



Q12a. Are you familiar with the following terms?
 Sample: Italy 2023 b. 500; Italy 2024 b. 500; Italy 2025 b. 500; Europe 2025 b. 4803; North-America 2025 b. 995; South-America 2025 b.500; Asia 2025 b. 1000;

Purchase decision from company that is...

GREENWASHING (%)
 refers to when companies make false or exaggerated claims to create the impression they are committed to environmental sustainability.

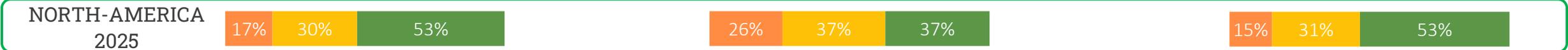
OFFSETTING (%)
 a process that involves reducing or removing, carbon dioxide or other greenhouse gas emissions from the atmosphere to compensate for emissions made elsewhere.

SOCIAL WASHING (%)
 when companies try to cover up their negative social impacts by promoting themselves as socially responsible and ethical. This might include a grand gesture or donation draw attention away from something else they are doing.

■ MORE LIKELY

■ IT WOULDN'T MATTER

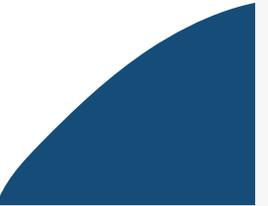
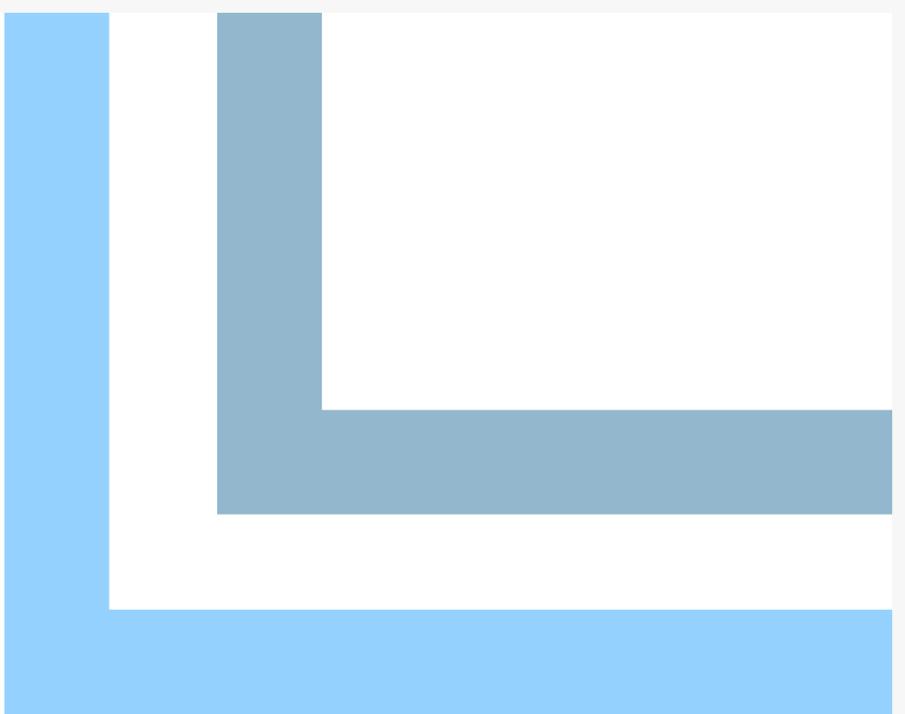
■ LESS LIKELY



Q12b. Would you be more or less likely to buy from a company that is...
 Sample: Italy 2023 b. 500; Italy 2024 b. 500; Italy 2025 b. 500; Europe 2025 b. 4803; North-America 2025 b. 995; South-America 2025 b.500; Asia 2025 b. 1000;

6

ESG Lead

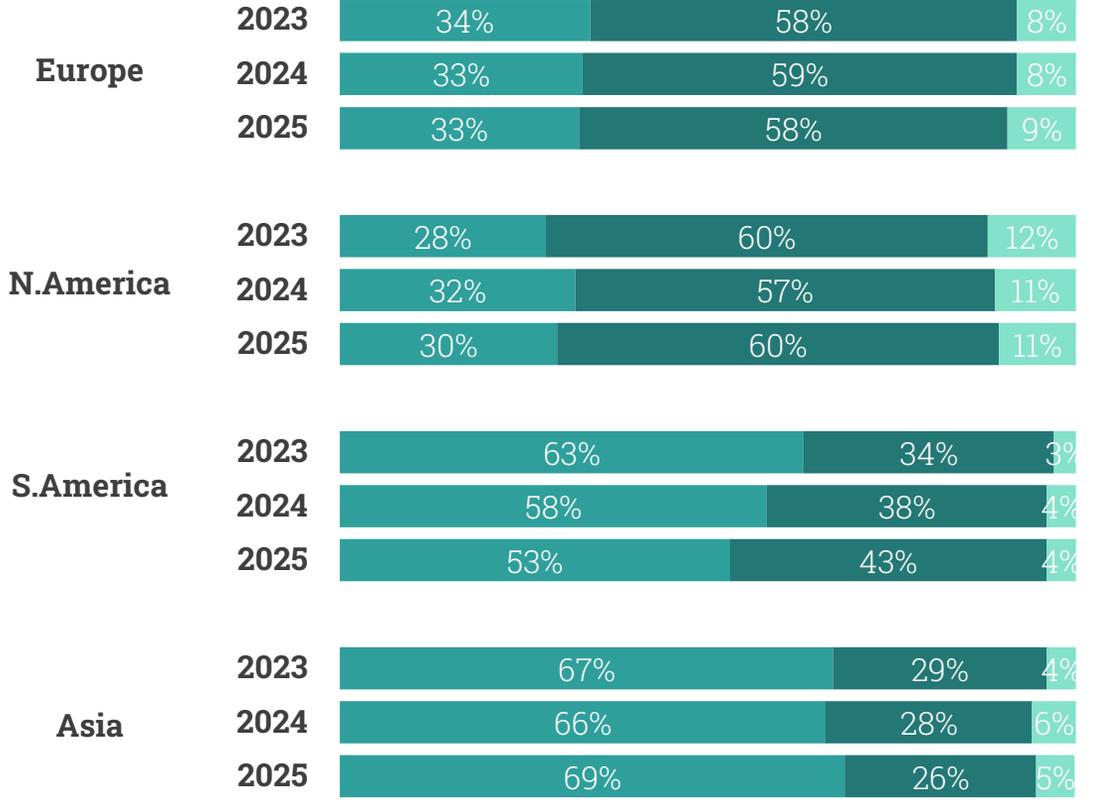
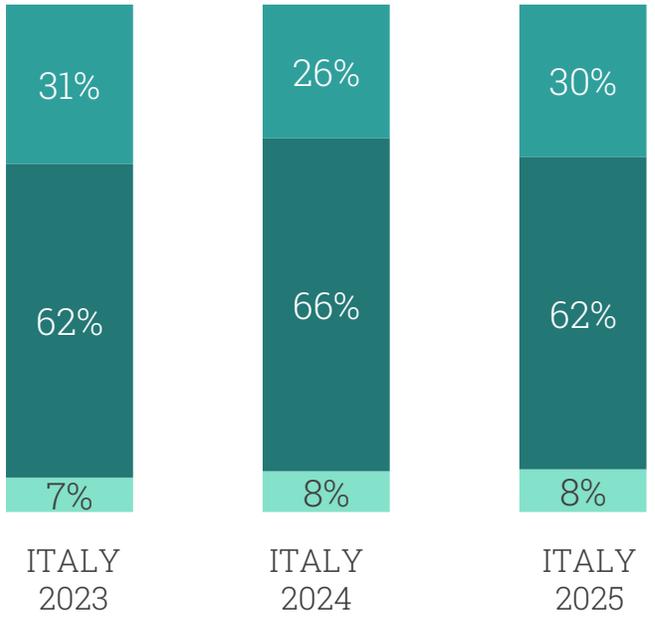


Companies responsibilities

Companies bear to a large extent responsibility for their suppliers.

RESPONSIBILITY LEVEL

■ FULLY RESPONSIBLE ■ SOMEWHAT RESPONSIBLE
■ NOT AT ALL RESPONSIBLE



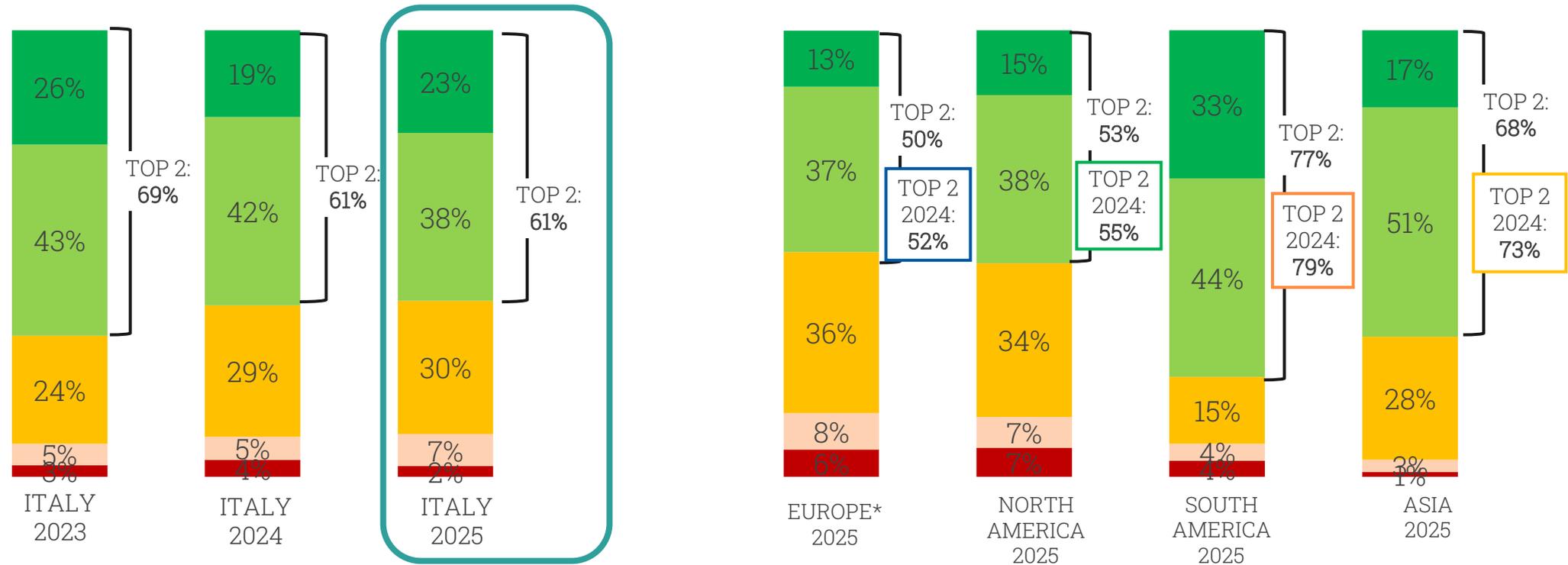
Q13. How responsible do you consider a company for the environmental and social blueprint of its suppliers?
 Sample: Italy 2024 b. 500; Italy 2023 b. 500; Europe 2024 b. 6122; Europe 2023 b. 6571; North-America 2024 b. 1002; North-America 2023 b.1004; South-America 2024 b.500; South-America 2023 b.500; Asia 2024 b. 1009; Asia 2023 b. 1551

Importance of Employer's ESG compliance

ESG compliance required to attract talented employees even if there is a small decrease compared to previous years.

FAMILIARITY WITH ESG

■ VERY IMPORTANT ■ IMPORTANT ■ NEITHER IMPORTANT NOR UNIMPORTANT ■ NOT IMPORTANT ■ NOT AT ALL IMPORTANT



Q14. How important is it that your employer or a company you should consider as a new employer is definitely sensitive to ESG issues?
 Sample: Italy 2023 b. 500; Italy 2024 b. 500; Italy 2025 b. 500; Europe 2023 b. 6571; Europe 2024 b. 6122; Europe 2025 b. 4803; North-America 2023 b.1004;
 North-America 2024 b. 1002; North-America 2025 b. 995; South-America 2023 b.500; South-America 2024 b.500; South-America 2025 b.500; Asia 2023 b.
 1551; Asia 2024 b. 1009; Asia 2025 b. 1000;

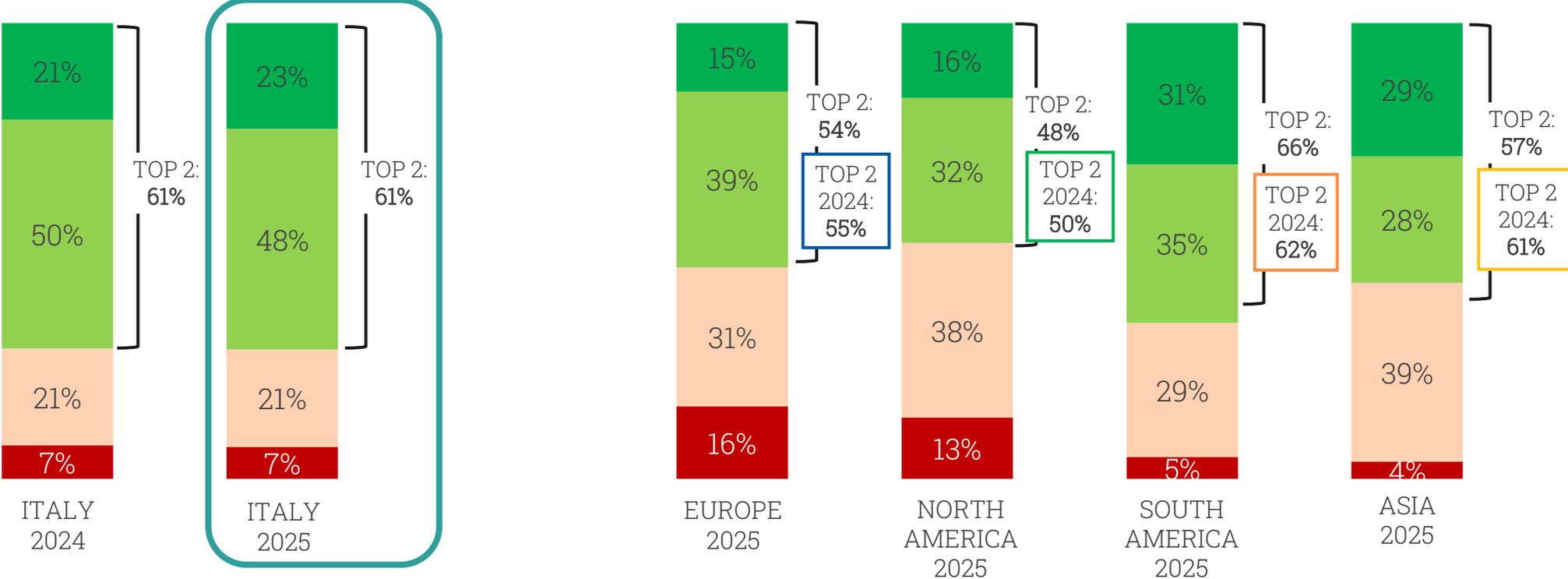
*Question asked to all European countries except of Croatia

ESG as a “job criterion choice”

More than one in two respondents consider ESG an important employer choice criterion

OVERALL INTEREST

■ IT IS AN ESSENTIAL ELEMENT
 ■ IT IS IMPORTANT BUT NOT ESSENTIAL
 ■ IT IS A "NICE TO HAVE" ELEMENT
 ■ IT IS NOT IMPORTANT AT ALL



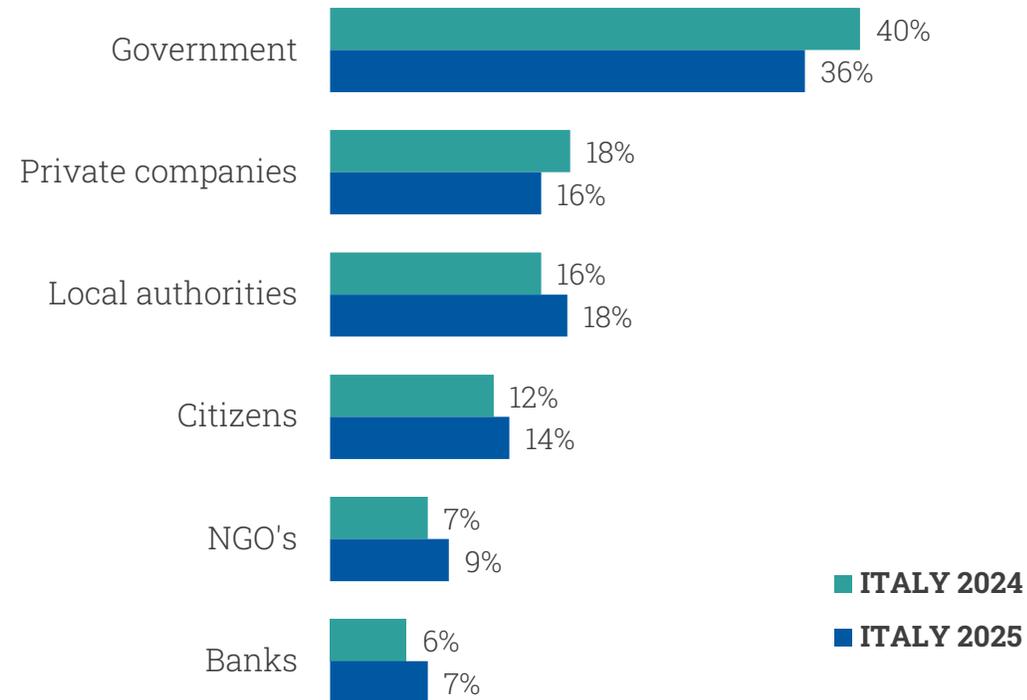
Q14b. To what extent do you consider a company's / organization's awareness of ESG issues when choosing an employer?
 Sample: Italy 2023 b. 500; Italy 2024 b. 500; Italy 2025 b. 500; Europe 2023 b. 6571; Europe 2024 b. 6122; Europe 2025 b. 4803; North-America 2023 b.1004; North-America 2024 b. 1002; North-America 2025 b. 995; South-America 2023 b.500; South-America 2024 b.500; South-America 2025 b.500; Asia 2023 b. 1551; Asia 2024 b. 1009; Asia 2025 b. 1000;

ESG and related environmental e societal issues

WHO SHOULD TAKE THE LEAD ON TACKLING ESG RELATED ISSUES?

Global belief that Government should tackle social and environmental issues, with local authorities overcoming private companies.

AUTHORITY WHO SHOULD TAKE THE LEAD



ESG and related environmental e societal issues

WHO SHOULD TAKE THE LEAD ON TACKLING ESG RELATED ISSUES?

Differences >3% with 2024

	EUROPE*		NORTH-AMERICA		SOUTH-AMERICA		ASIA	
	2025	2024	2025	2024	2025	2024	2025	2024
	4803	6122	995	1002	500	500	1000	1009
Government	42	47	39	45	49	48	47	47
Private companies	17	15	23	23	21	20	14	15
Local authorities	18	16	10	10	11	12	18	18
Citizens	10	10	17	14	8	10	10	8
NGO's	10	8	8	5	8	8	8	9
Banks	4	4	4	4	2	2	3	3

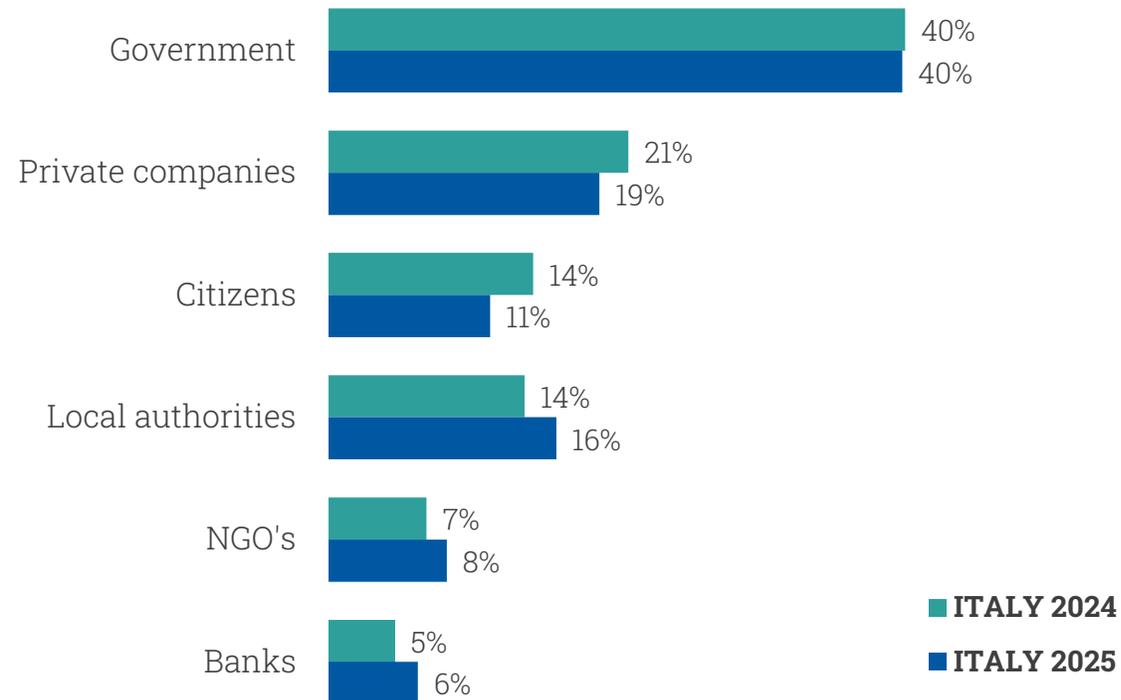
*Question asked to all European countries except of Croatia - Percentage values exposed

ESG and related environmental e societal issues

WHO SHOULD LEAD THE WAY IN INFORMING CONSUMERS?

Government continues to be considered as mainly responsible for informing consumers.

AUTHORITY WHO SHOULD TAKE THE LEAD



ESG and related environmental e societal issues

WHO SHOULD LEAD THE WAY IN INFORMING CONSUMERS?

 Differences >3% with 2024

	EUROPE		NORTH-AMERICA		SOUTH-AMERICA		ASIA	
	2025	2024	2025	2024	2025	2024	2025	2024
	4803	6122	995	1002	500	500	1000	1009
Government	39	43	36	42	43	47	49	45
Private companies	18	18	25	24	22	24	13	15
Local authorities	18	17	9	10	15	11	18	19
Citizens	11	10	15	14	7	8	9	8
NGO's	10	8	10	7	10	8	8	10
Banks	4	4	5	4	2	3	3	3

**Question asked to all European countries except of Croatia - Percentage values exposed*

Thank you.



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