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CHANGE YOUR SHOES ISSUES FOR THE EUROPEAN UNION

OVERALL RESULTS – 20 COUNTRIES



Harald Blaha /
Tanja Fink



SURVEY DESIGN SAMPLE STRUCTURE

STUDY DESIGN

- Fieldwork: June 2015
- Target group: nat. rep. population age (18-65)/gender
- Method: Online interviews
- Sample: n=10000 interviews (500 per country)
- Execution of survey: The Nielsen Company (Austria) GmbH

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SOCIODEMOGRAPHICS

																					
	TOTAL	AUSTRIA	BELGIUM	BULGARIA	CROATIA	CZECH REPUBLIC	DENMARK	ESTONIA	FINLAND	FRANCE	GERMANY	HUNGARY	ITALY	IRELAND	THE NETHERLANDS	POLAND	SLOVAKIA	SLOVENIA	SPAIN	SWEDEN	UK
SAMPLE SIZE	10,018	500	500	514	502	500	500	500	500	502	500	500	500	500	500	500	500	500	500	500	500
GENDER																					
MALE	50%	50%	50%	50%	50%	49%	50%	48%	50%	50%	50%	49%	50%	50%	50%	50%	50%	50%	50%	51%	49%
FEMALE	50%	50%	50%	50%	50%	51%	50%	52%	50%	50%	50%	51%	50%	50%	50%	50%	50%	50%	50%	49%	51%
AGE																					
18-29	24%	23%	24%	22%	24%	23%	23%	28%	23%	25%	22%	22%	20%	31%	23%	27%	24%	22%	25%	25%	25%
30-39	22%	21%	23%	22%	21%	23%	20%	22%	21%	22%	24%	24%	23%	24%	20%	22%	24%	23%	26%	20%	21%
40-49	22%	26%	24%	20%	22%	22%	23%	21%	23%	23%	24%	21%	25%	21%	24%	18%	20%	22%	23%	22%	23%
50-59	21%	20%	20%	22%	23%	20%	21%	20%	23%	22%	19%	20%	20%	17%	21%	22%	20%	23%	18%	20%	19%
60-65	11%	10%	9%	14%	10%	11%	12%	9%	10%	10%	12%	13%	11%	6%	12%	10%	11%	10%	9%	12%	11%
EDUCATION LEVEL																					
PRIMARY/BASIS SCHOOL	6%	5%	5%	0%	1%	2%	18%	8%	12%	3%	3%	6%	10%	6%	1%	3%	1%	2%	9%	18%	8%
VOCATIONAL SCHOOL	28%	40%	37%	33%	7%	28%	27%	25%	41%	28%	38%	41%	9%	14%	44%	10%	43%	28%	23%	25%	17%
HIGHER EDUCATION BELOW UNIVERSITY LEVEL	33%	41%	37%	11%	44%	37%	42%	16%	30%	25%	32%	27%	49%	43%	42%	45%	15%	42%	25%	28%	34%
UNIVERSITY	32%	13%	21%	56%	49%	32%	12%	50%	15%	44%	25%	26%	32%	37%	13%	42%	41%	29%	43%	28%	40%
NO FORMAL EDUCATION	0%	0%	1%	0%	0%	0%	1%	1%	2%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	1%	1%

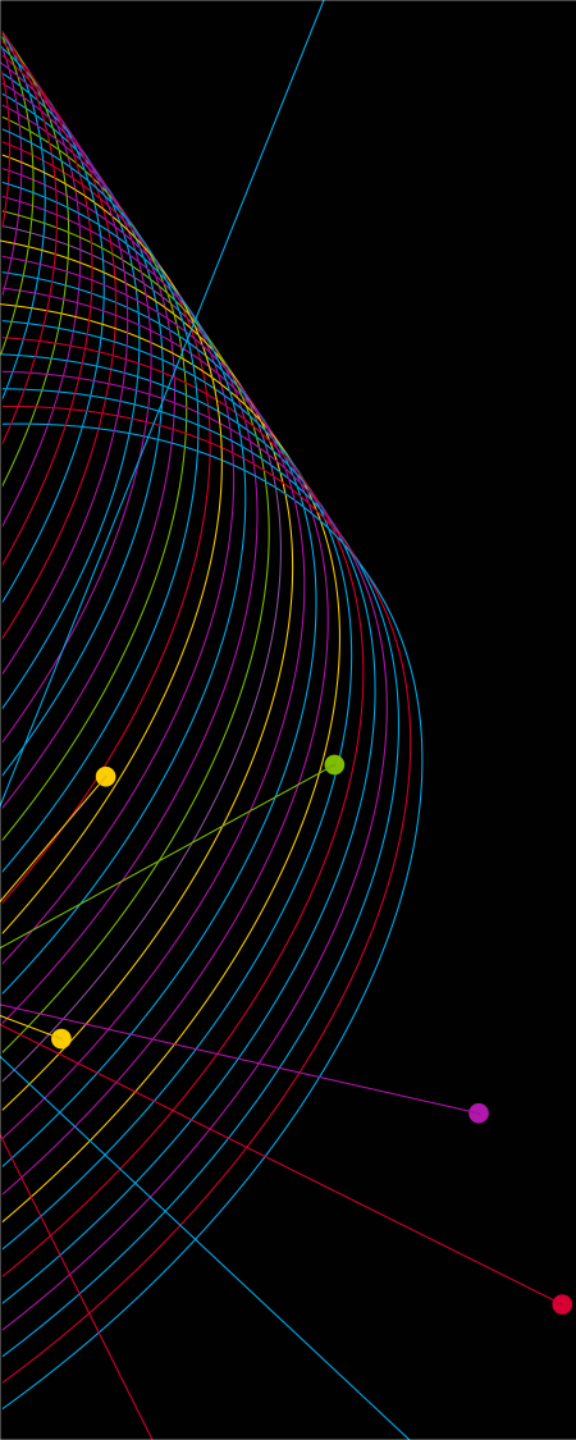
Base: Total, n=10,018

MANAGEMENT SUMMARY

MANAGEMENT SUMMARY

- The **knowledge about activities of EU institutions regarding development aid** is very limited. Only 6% claim that they are (quite) well informed about this topic. The differences across the different countries are noticeable with Italy being the best informed country while Denmark, Sweden and Estonia are clearly behind.
- **Safeguarding human and worker's rights together with protection of consumer rights** are seen as the highest priorities. **Transparency and labelling** are also important. Country results show a mixed picture, but priority on human and worker's rights and consumer rights holds for most countries except Italy where **"Guaranteeing transparency in supply chains and production"** shows up as most important topic.
- The information level on **shoe production** (regarding toxic chemicals and working conditions) is low across Europe. 50% have no or almost no information on this topic. Finland and Italy have most information on shoe production. Almost no information about this topic finds its way to the respondents in Estonia, Ireland and UK.
- The most important success factor for environmentally friendly produced shoes would be that the price stays the same. Second most important would be the availability of credible product labels. Politicians picking up this topic would only make little difference.
- 85% of the respondents would be prepared to pay at least a little more for environmentally friendly produced shoes. One quarter would pay at least 25% more. People from Bulgaria and Croatia are most willing to pay more for environmentally friendly produced shoes. In the Netherlands and Belgium this willingness is very limited.
- The average spend on shoes is closely correlated with the wealth in the respective country. Italy shows the highest average spend on shoes.

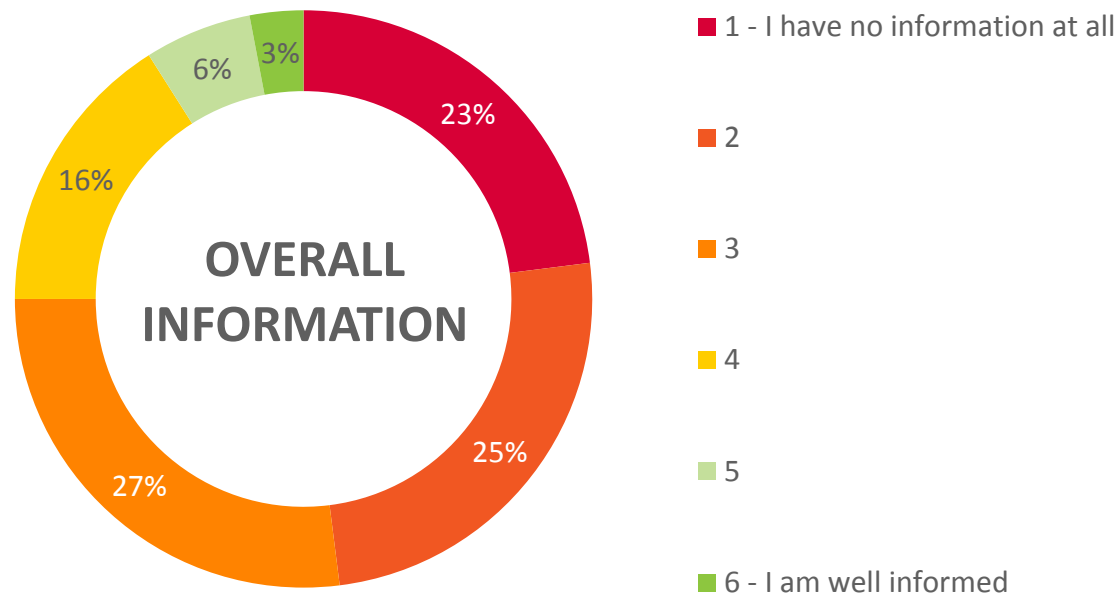
DETAILED RESULTS



INFORMATION ABOUT EU INSTITUTIONS REGARDING DEVELOPMENT AID

Three quarters of the Europeans have little to no information about the activities of the European institutions regarding development aid.

Only 3% claim, that they are well informed.



Base: Total, n=10,018

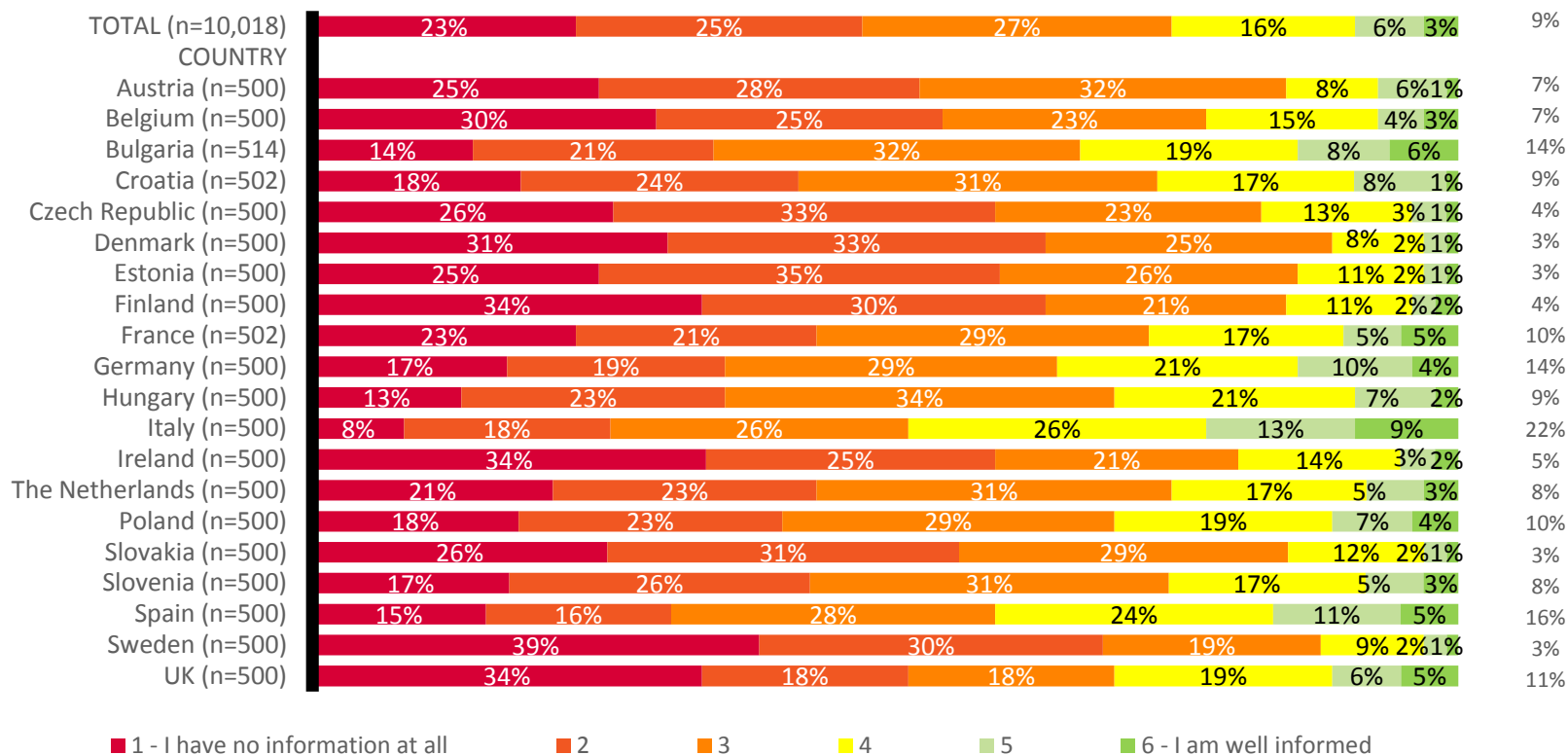
Q4. Thinking about the European institutions. Do you have information about what the EU institutions do in the areas of development aid?
Please use a scale from 1 "no information at all" to 6 "well informed".

INFORMATION OF EU INSTITUTIONS REGARDING DEVELOPMENT AID

Respondents in Italy are better informed than in any other European country.

Lowest levels of information are observed in Denmark, Sweden and Estonia.

T2B



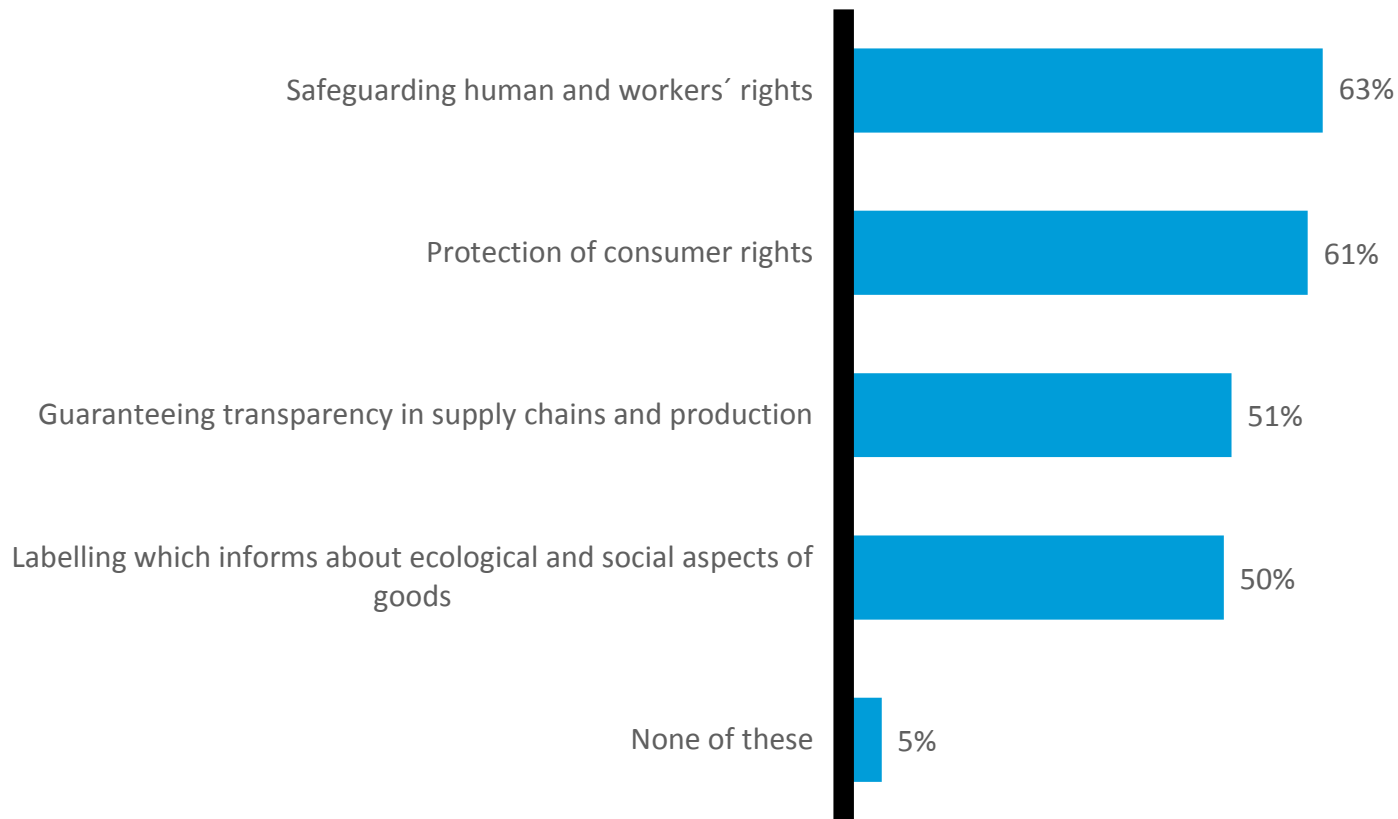
Base: Total, n=10,018

Q4. Thinking about the European institutions. Do you have information about what the EU institutions do in the areas of development aid?

Please use a scale from 1 "no information at all" to 6 "well informed".

REGULATIONS FOR GOODS ENTERING THE EUROPEAN MARKET

Safeguarding human and worker's rights together with protection of consumer rights are seen as the highest priorities. Transparency and labelling are also important.



Base: Total, n=10,018

Q5. On which of the following do you think the EU should have regulations for goods entering the European market.

REGULATIONS FOR GOODS ENTERING THE EU MARKET

Country results show a mixed picture, but priority on human and worker's rights and consumer rights holds for most countries except Italy where "Guaranteeing transparency in supply chains and production" shows up as most important topic.

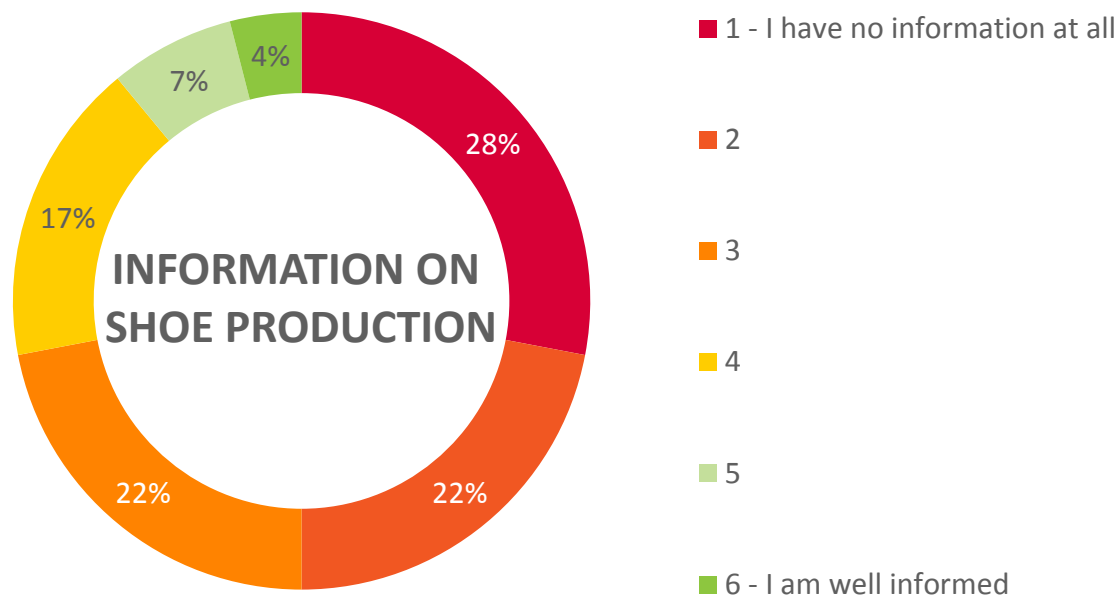
	Total	AUSTRIA	BELGIUM	BULGARIA	CROATIA	CZECH REPUBLIC	DENMARK	ESTONIA	FINLAND	FRANCE	GERMANY	HUNGARY	ITALY	IRELAND	THE NETHERLANDS	POLAND	SLOVAKIA	SLOVENIA	SPAIN	SWEDEN	UK
BASE	10,018	500	500	514	502	500	500	500	500	502	500	500	500	500	500	500	500	500	500	500	500
Safeguarding human and workers' rights	63%	76%	66%	50%	67%	52%	50%	64%	70%	61%	72%	58%	61%	75%	63%	66%	51%	65%	61%	67%	63%
Protection of consumer rights	61%	65%	49%	78%	74%	57%	47%	71%	54%	58%	69%	58%	59%	68%	52%	56%	62%	65%	61%	56%	61%
Guaranteeing transparency in supply chains and production	51%	60%	44%	53%	47%	46%	38%	48%	55%	57%	61%	54%	67%	58%	38%	38%	49%	55%	59%	50%	52%
Labelling which informs about ecological and social aspects of goods	50%	57%	41%	62%	58%	42%	51%	53%	50%	52%	56%	42%	61%	53%	32%	47%	42%	60%	55%	47%	48%
None of these	5%	3%	9%	2%	1%	5%	11%	4%	5%	9%	5%	4%	3%	2%	14%	5%	3%	1%	5%	10%	9%

Base: Total, n=10,018

Q5. On which of the following do you think the EU should have regulations for goods entering the European market.

OVERALL INFORMATION ON THE SHOE PRODUCTION

The information level on shoe production is low across Europe.
50% have no or almost no information on this topic.

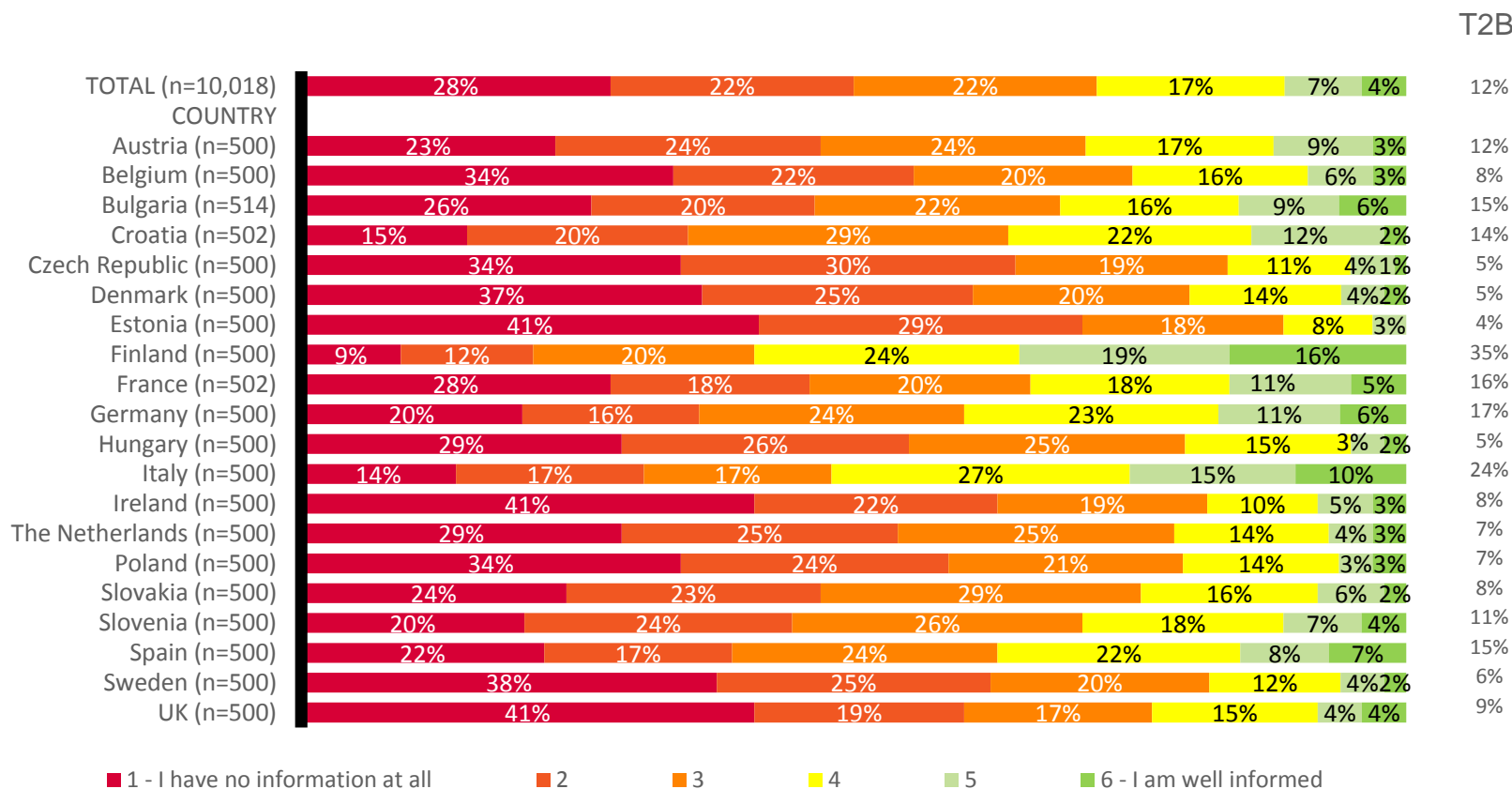


Base: Total, n=10,018

Q6. Now please think especially about the shoe production. What do you know about the toxic chemicals and poor working conditions in the shoe production?
Please use a scale from 1 "no information at all" to 6 "well informed".

INFORMATION ON THE SHOE PRODUCTION

Finland and Italy have most information on shoe production. Almost no information about this topic finds its way to the respondents in Estonia, Ireland and UK.

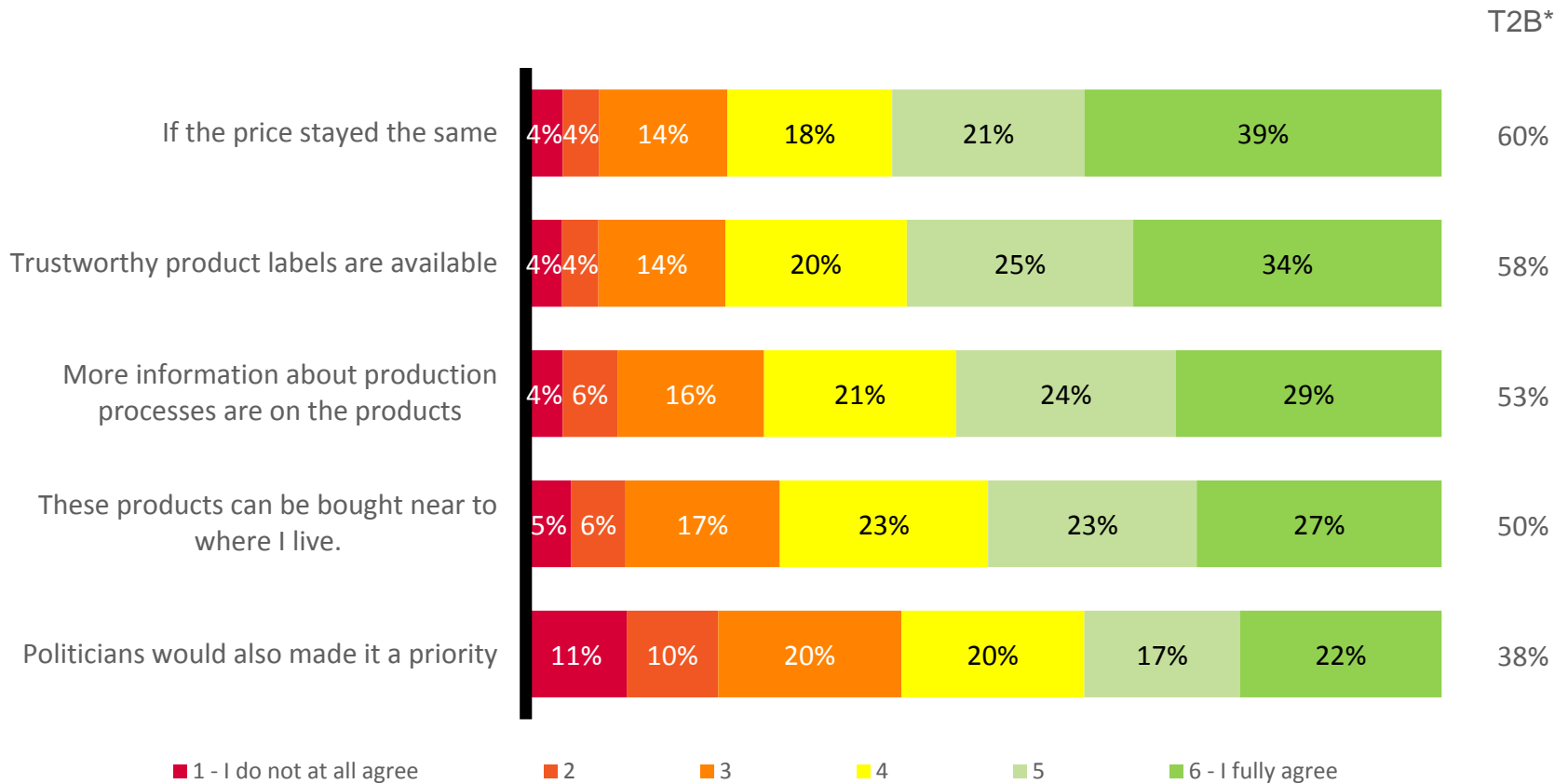


Base: Total, n=10,018

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Please use a scale from 1 "no information at all" to 6 "well informed".

STATEMENTS ABOUT ENVIRONMENTALLY FRIENDLY SHOES

The most important success factor for environmentally friendly produced shoes would be that the price stays the same. Politicians picking up this topic would only make little difference.



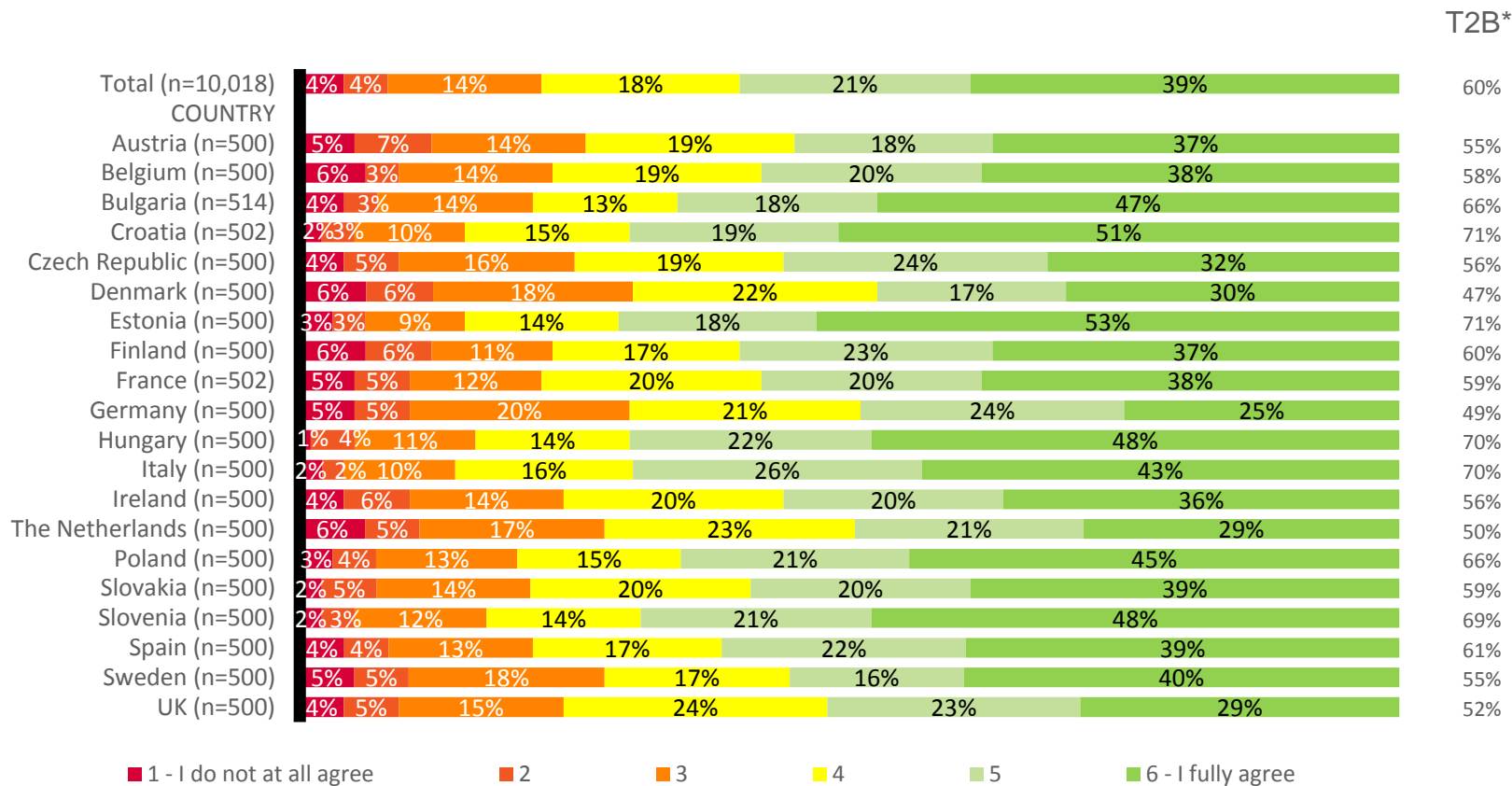
Base: Total, n=10,018

Q7. To what extent do you agree with the following statements: I would invest more time and effort in choosing shoes that were made in environmentally friendly way and with good workplace conditions if.....

* Sum of "6 = I fully agree" + "5"

STATEMENTS ABOUT ENVIRONMENTALLY FRIENDLY SHOES

(1) If the price stayed the same



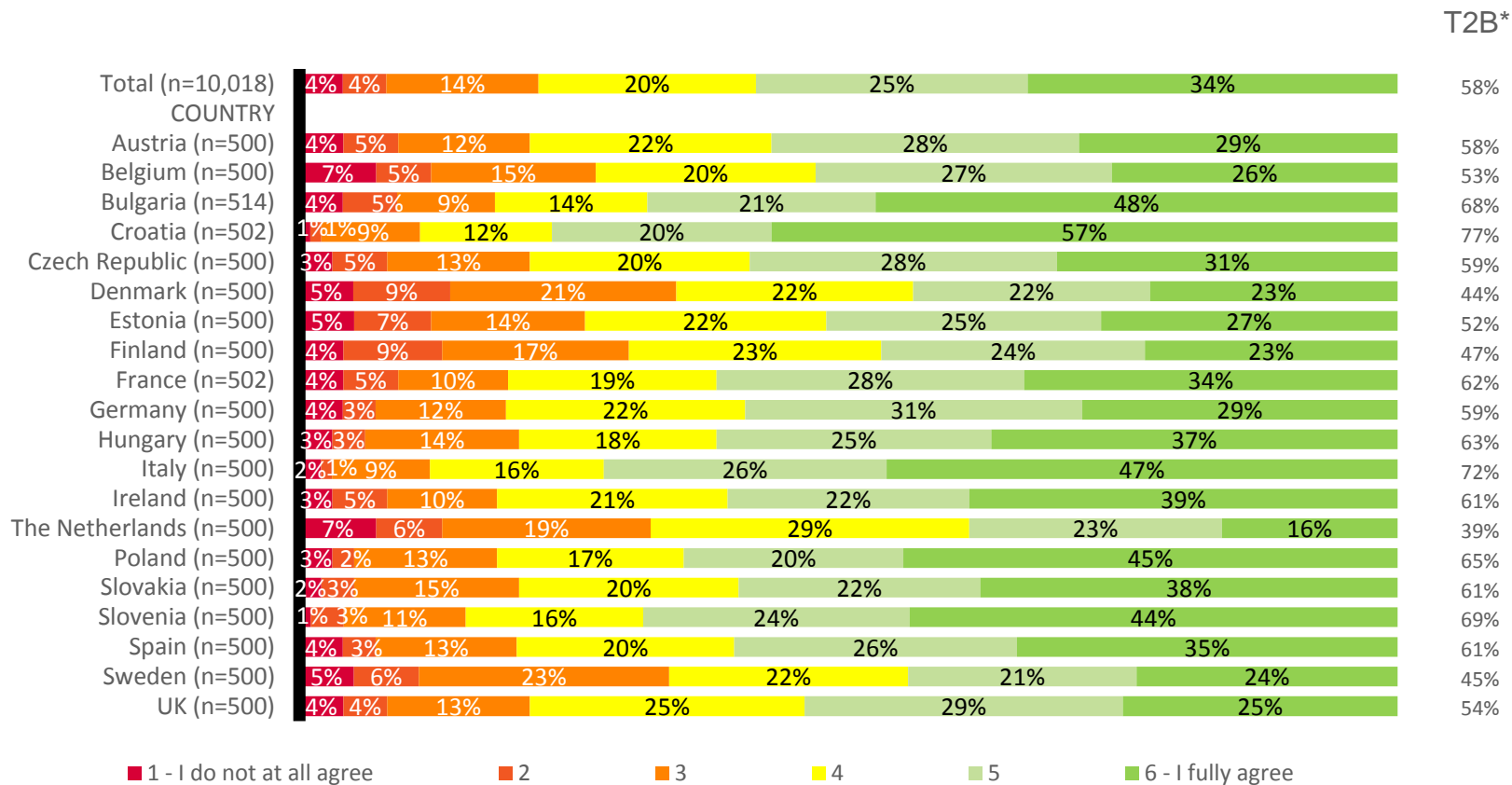
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STATEMENTS ABOUT ENVIRONMENTALLY FRIENDLY SHOES

(2) Trustworthy product labels are available



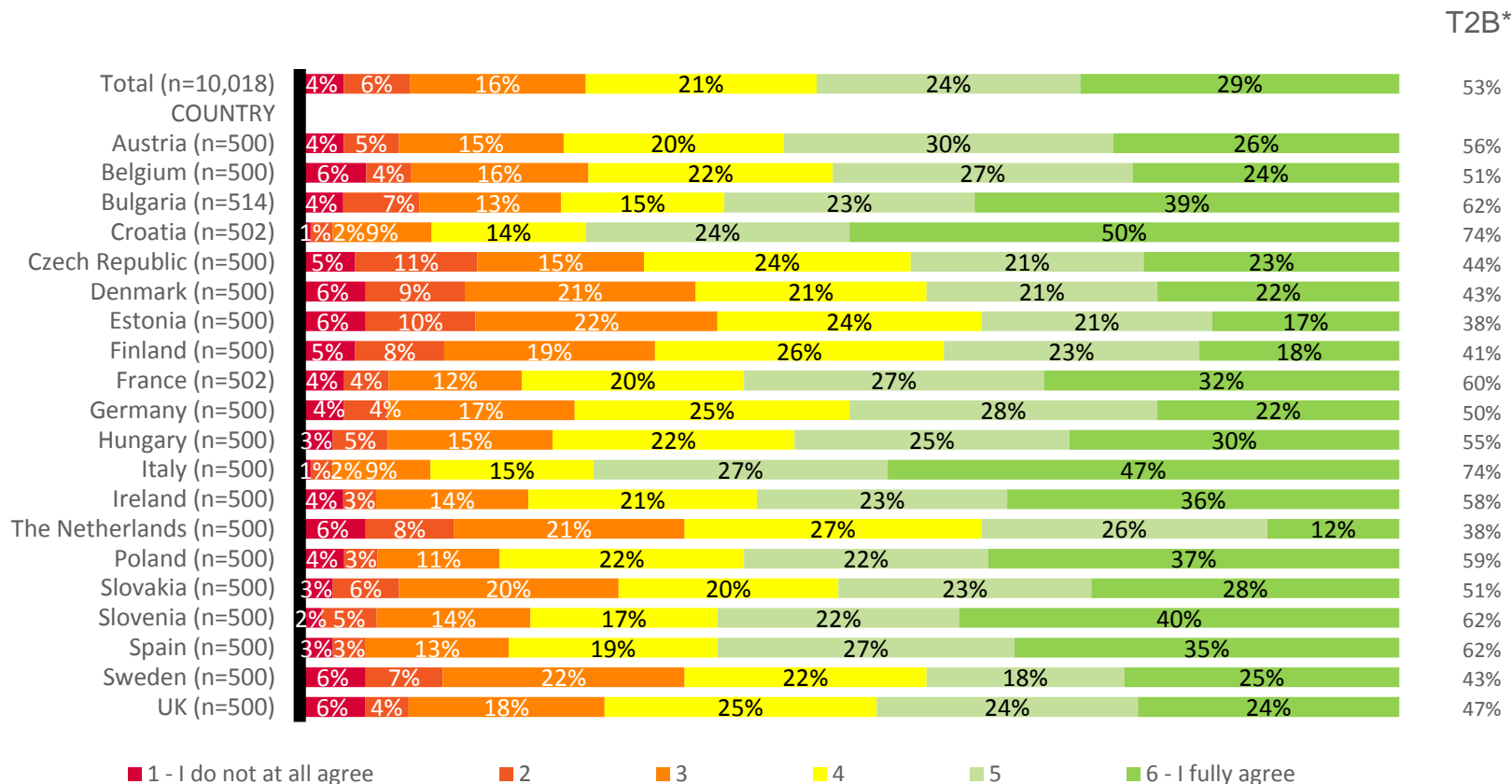
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STATEMENTS ABOUT ENVIRONMENTALLY FRIENDLY SHOES

(3) More information about production processes are on the products



Base: Total, n=10,018

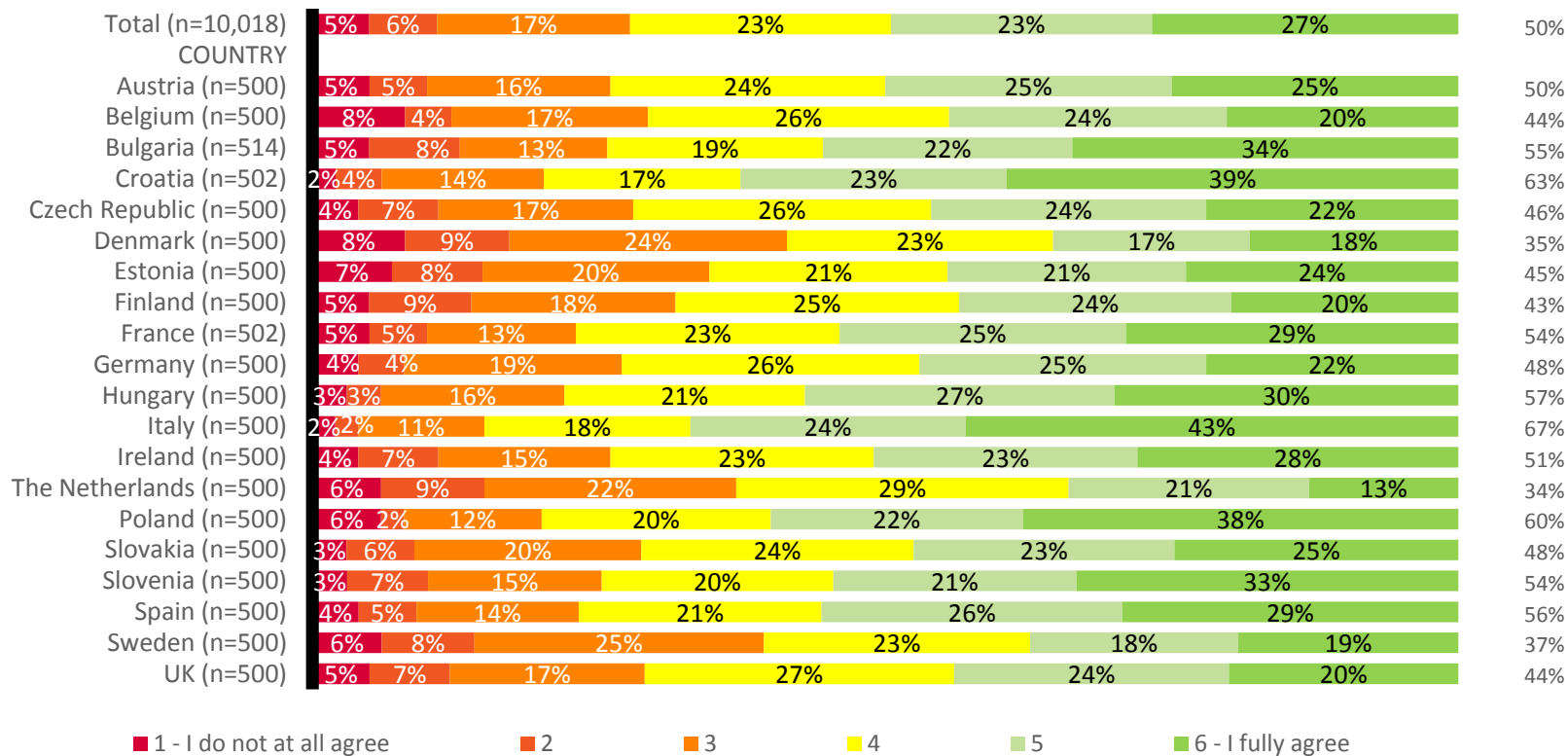
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* Sum of "6 = I fully agree" + "5"

STATEMENTS ABOUT ENVIRONMENTALLY FRIENDLY SHOES

(4) *These products can be bought near to where I live.*

T2B*



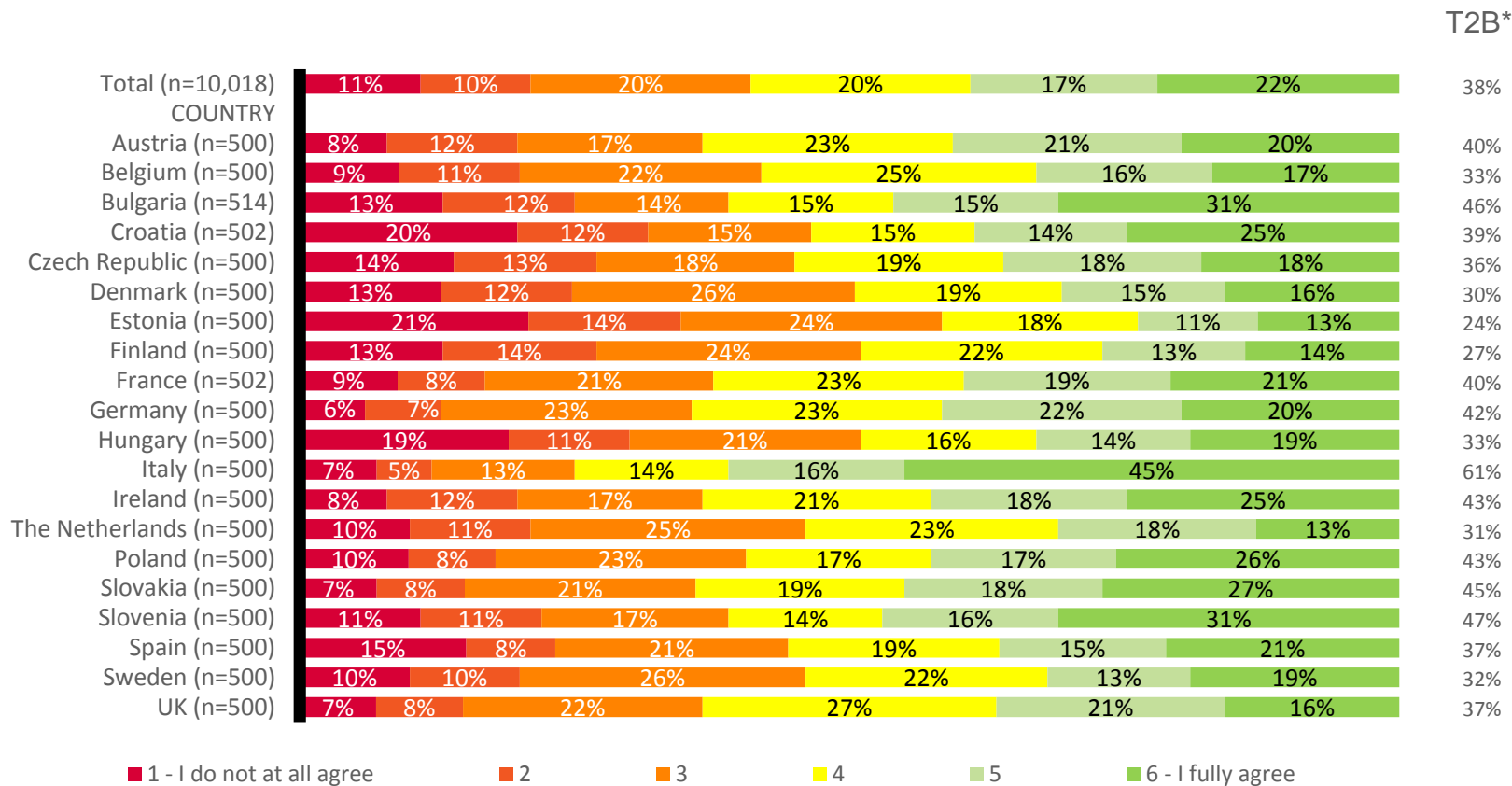
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STATEMENTS ABOUT ENVIRONMENTALLY FRIENDLY SHOES

(5) *Politicians would also made it a priority*



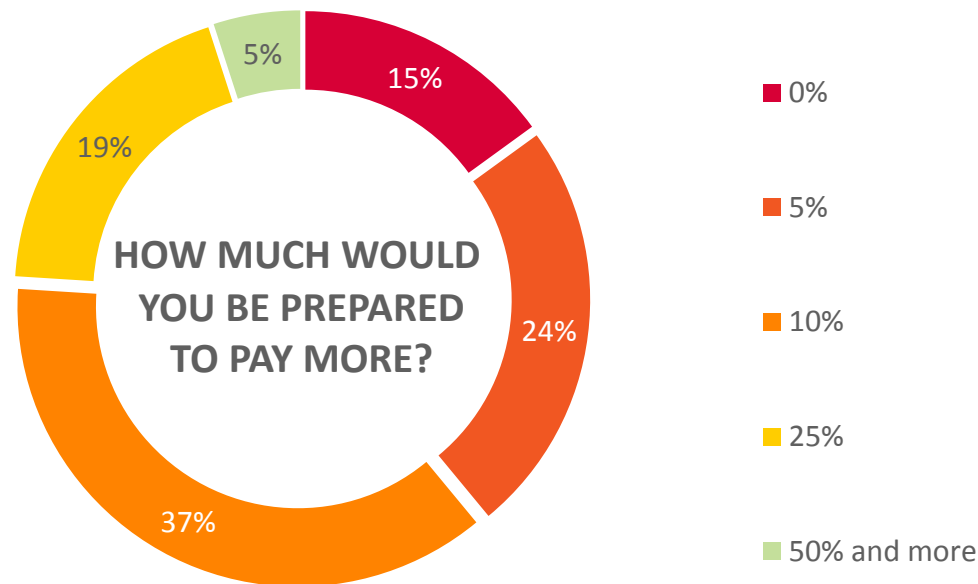
Base: Total, n=10,018

Q7. To what extent do you agree with the following statements: I would invest more time and effort in choosing shoes that were made in environmentally friendly way and with good workplace conditions if.....

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PAY MORE FOR ENVIRONMENTALLY FRIENDLY SHOES?

85% of the respondents would be prepared to pay at least a little more for environmentally friendly produced shoes. One quarter would pay at least 25% more.

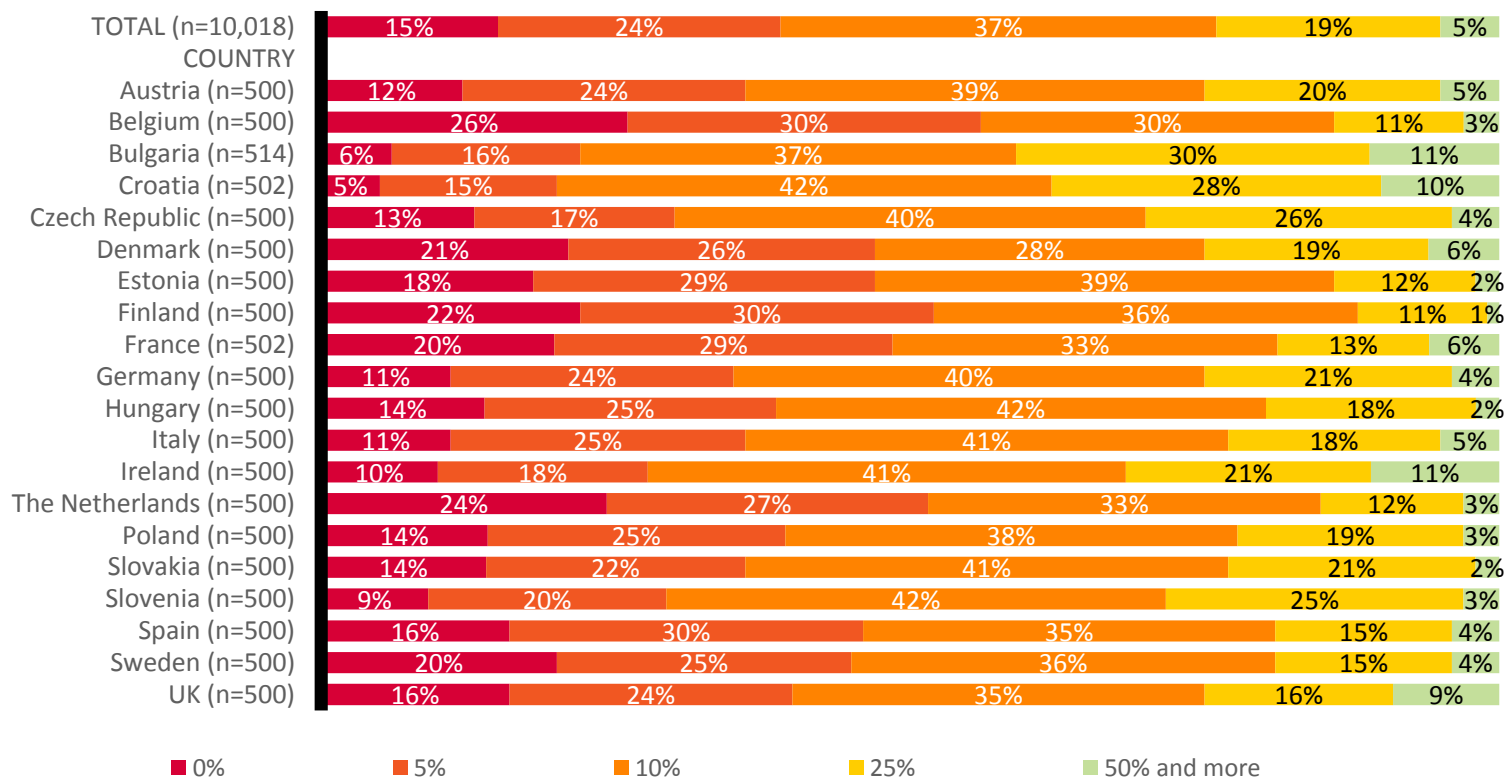


Base: Total, n=10,018

Q8. How much would you be prepared to pay more for shoes were produced in a manner that was environmentally friendly and where working conditions were good?

PAY MORE FOR ENVIRONMENTALLY FRIENDLY SHOES?

People from Bulgaria and Croatia are most willing to pay more for environmentally friendly produced shoes. In the Netherlands and Belgium this willingness is very limited.



Base: Total, n=10,018

Q8. How much would you be prepared to pay more for shoes were produced in a manner that was environmentally friendly and where working conditions were good?

AVERAGE SPENDINGS PER YEAR FOR OWN SHOES

The average spend on shoes is closely correlated with the wealth in the respective country. Italy shows the highest average (caused by high frequency in the mid-high categories and low frequencies in the lowest categories)

	TOTAL	AUSTRIA	BELGIUM	BULGARIA	CROATIA	CZECH REPUBLIC	DENMARK	ESTONIA	FINLAND	FRANCE	GERMANY	HUNGARY	ITALY	IRELAND	THE NETHERLANDS	POLAND	SLOVAKIA	SLOVENIA	SPAIN	SWEDEN	UK
BASE	10,018	500	500	514	502	500	500	500	500	502	500	500	500	500	500	500	500	500	500	500	500
MEAN	171.9	205.0	184.1	120.9	179.7	116.5	186.2	164.5	140.4	180.1	201.7	98.3	216.9	180.6	197	147.7	166.7	180.2	189.8	173.3	209.7
LESS THAN 50 EUR	17%	7%	13%	24%	12%	25%	13%	16%	21%	16%	11%	43%	10%	11%	15%	27%	14%	9%	11%	19%	17%
51-100	27%	24%	24%	37%	26%	34%	24%	29%	32%	29%	23%	33%	20%	27%	20%	29%	30%	28%	24%	29%	24%
101-200	27%	30%	31%	26%	32%	29%	27%	29%	28%	26%	27%	17%	28%	29%	30%	23%	27%	33%	30%	26%	22%
201-300	15%	21%	16%	7%	18%	7%	18%	14%	12%	15%	22%	4%	19%	19%	16%	11%	16%	15%	21%	12%	14%
301-400	7%	8%	10%	3%	4%	2%	10%	7%	4%	6%	10%	3%	11%	6%	7%	3%	7%	8%	7%	6%	8%
401-500	3%	4%	3%	2%	2%	1%	4%	2%	2%	3%	3%	0%	5%	3%	4%	1%	3%	3%	3%	3%	5%
501-600	2%	4%	2%	0%	2%	1%	2%	1%	1%	1%	2%	0%	3%	2%	4%	2%	1%	1%	2%	3%	2%
601-700	1%	1%	1%	0%	2%	0%	1%	1%	0%	2%	1%	0%	2%	0%	1%	1%	0%	0%	2%	1%	3%
701-800	1%	1%	0%	0%	1%	0%	0%	0%	0%	1%	1%	0%	1%	1%	1%	0%	0%	0%	1%	1%	2%
801-900	0%	0%	0%	0%	1%	0%	0%	0%	0%	1%	1%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%
901-1.000	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%
MORE THAN 1.000 EUR	0%	1%	0%	0%	0%	0%	1%	0%	0%	1%	1%	0%	0%	0%	0%	1%	1%	0%	0%	1%	2%

Base: Total, n=10,018

Q9. How much do you spend on average per year for your own shoes?...

nielsen
.....

AN UNCOMMON SENSE
OF THE CONSUMER™

