

Study on **Sustainability** in Spain

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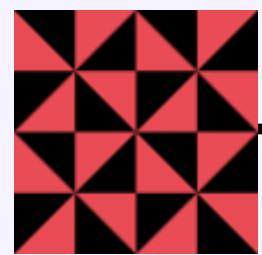
April
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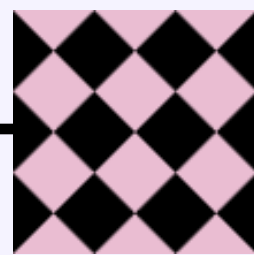
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01



Background

02



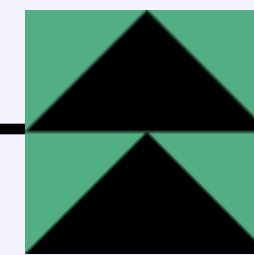
Objectives

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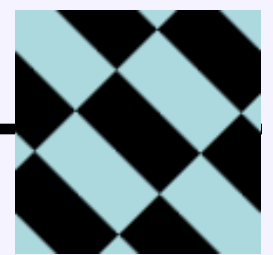
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Conclusions

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Background

Background



01

Sustainability has become one of the central topics in social and business debate in Spain, driven by growing public concern about climate change, responsible consumption and the environmental impact of brands.

02

In this context, we have carried out a study to analyse Spaniards' attitudes towards brand sustainability, their level of trust in sustainable communications and their real willingness to change their purchasing behaviour

03

The study gathers information on boycotting brands for environmental or social reasons, the credibility of sustainable actions, willingness to pay a premium, and the most convincing channels and messages for communicating sustainable commitment.

04

The results are presented below in response to the objectives set out, with particular attention to differences by generation.



Objectives

Objectives

01

To understand the extent to which Spaniards have changed their purchasing behaviour for environmental or social reasons over the past year.

02

To identify which brand actions generate the greatest trust in sustainability and which are most credible for Spanish consumers.

03

To measure the level of scepticism among Spaniards regarding brands' sustainability claims and their perception of greenwashing.

04

To analyse willingness to pay a premium for sustainable products or services and identify the main barriers among those who are unwilling to do so.

05

To explore the degree of trust Spaniards have that brands tell the truth about sustainability, and the channels they find most convincing for demonstrating it

06

To assess Spaniards' tolerance of brands' sustainability mistakes and identify what a company should prioritise in order to be considered truly sustainable.

Methodology



Technical Details

Universe

Spanish population aged 18 to 75

Sample

1,000 interviews

Scope

National (Spain)

Technique

Online self-administered interview - CAWI

Fieldwork dates

February 2026

Questionnaire

Semi-structured, lasting approximately 7 minutes

Sampling Error

With a sample size of 1,000 interviews, the sampling error is estimated at +/- 3.16% for overall data, p=q=50, with a 95% confidence level

Anonymity and confidentiality

The complete anonymity of respondents' answers is guaranteed. Responses will be used solely for the preparation of statistical tables

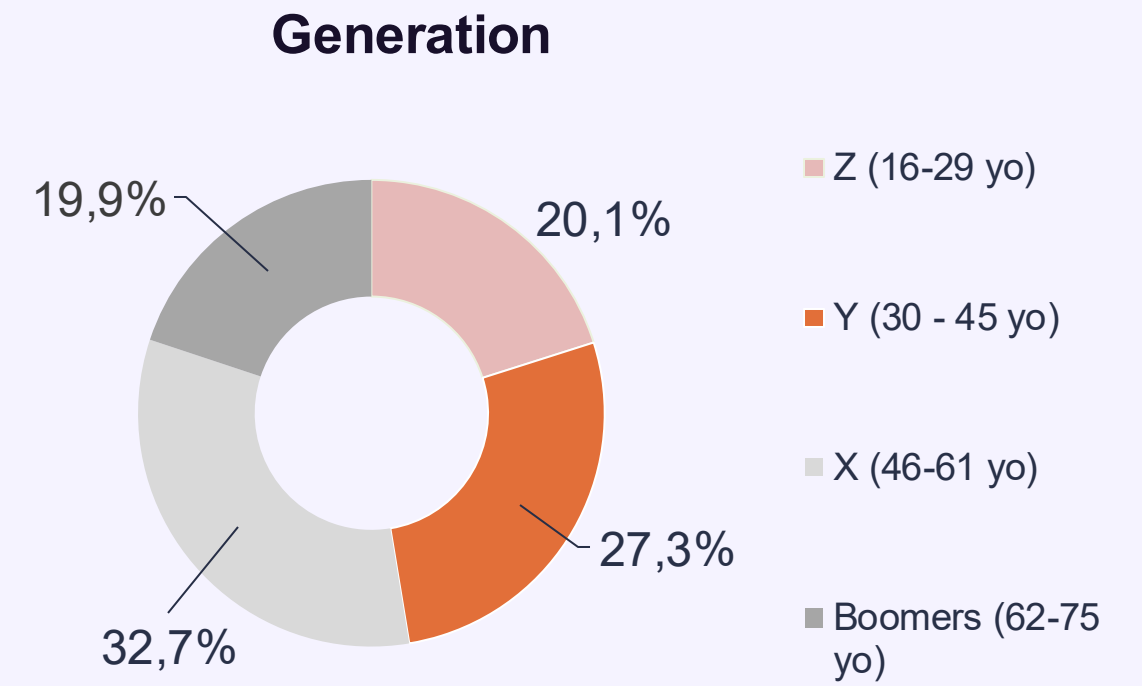
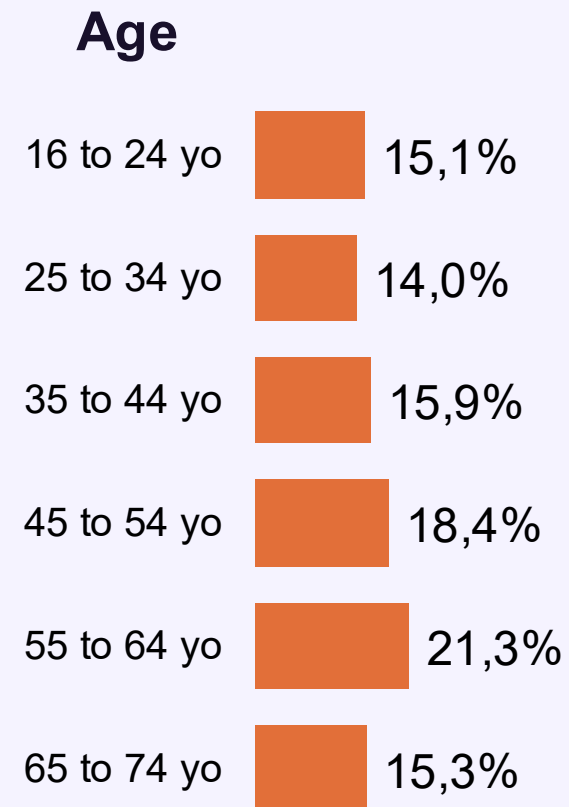
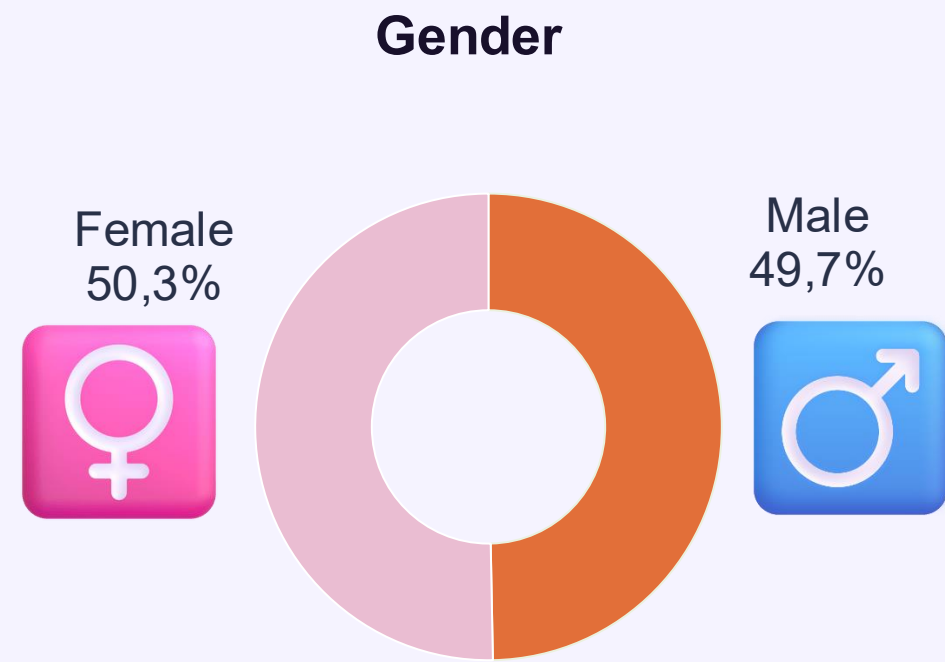
Quality Control

In accordance with ISO 20252 and the ICC/ESOMAR Code of Conduct.

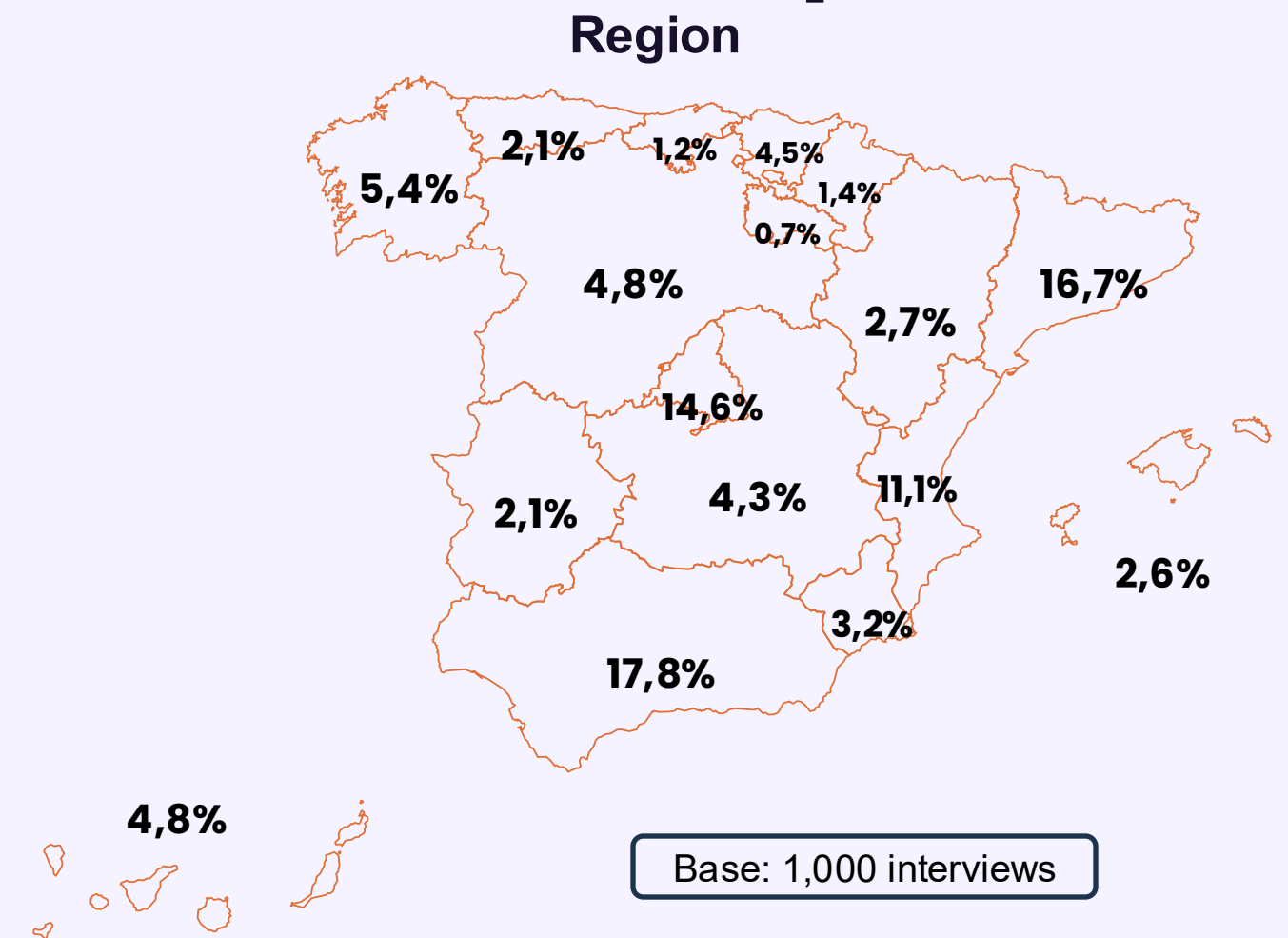
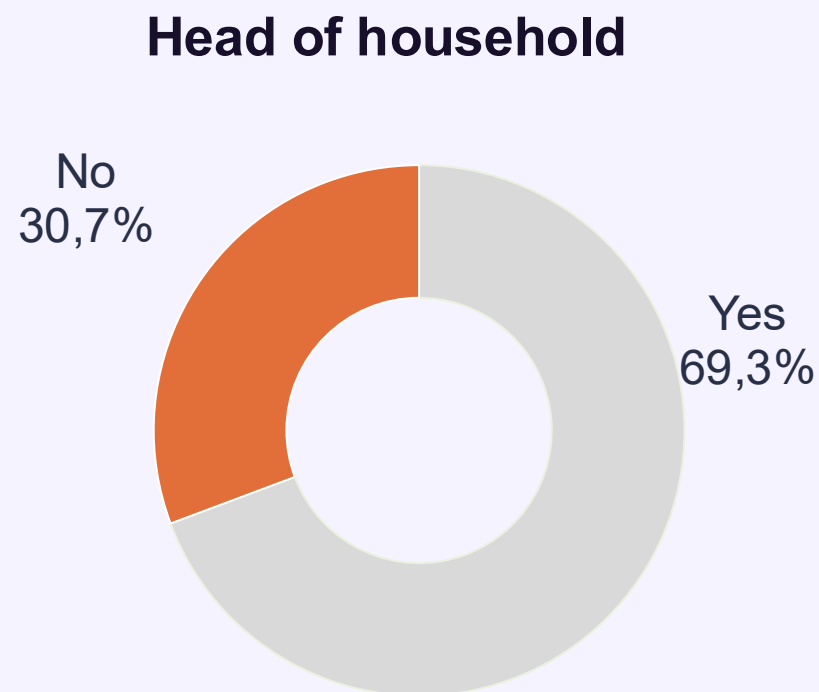
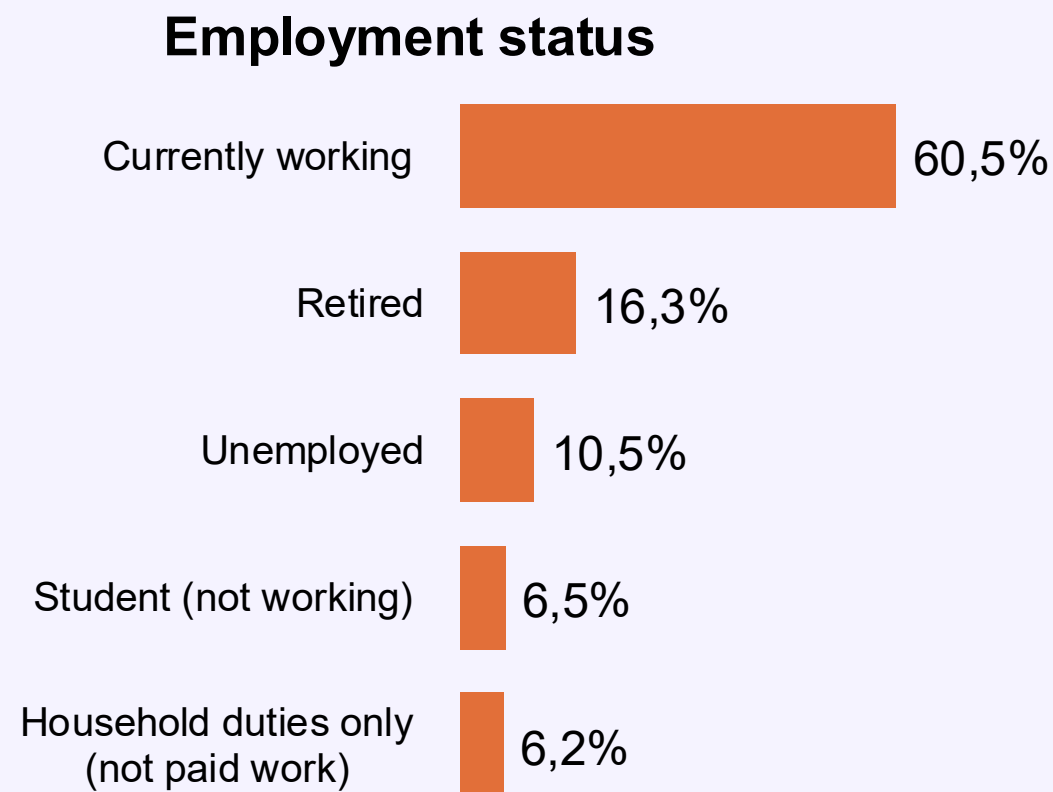


Results

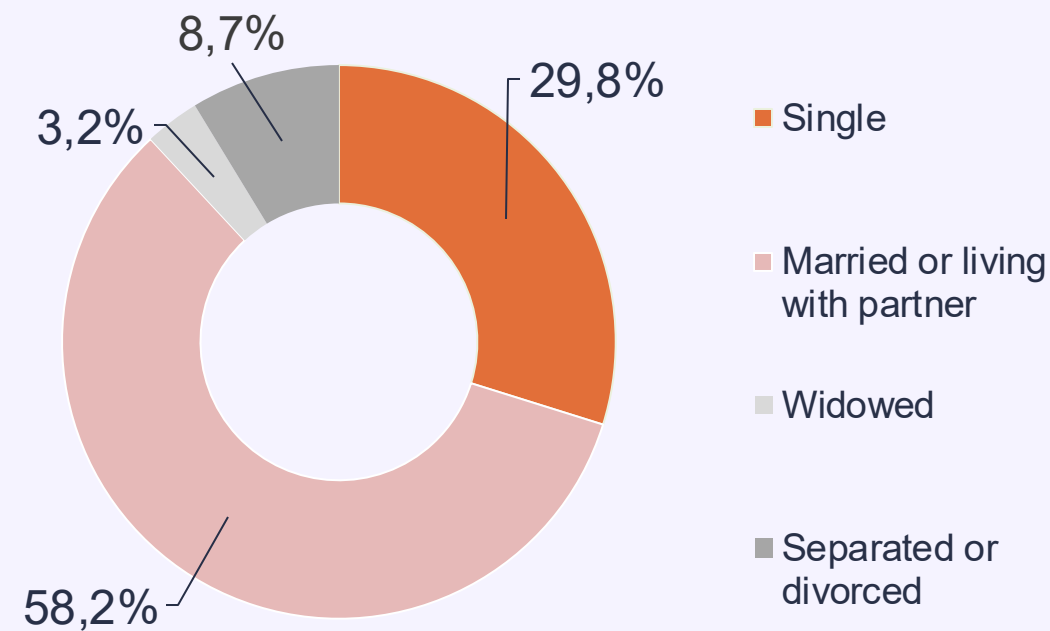




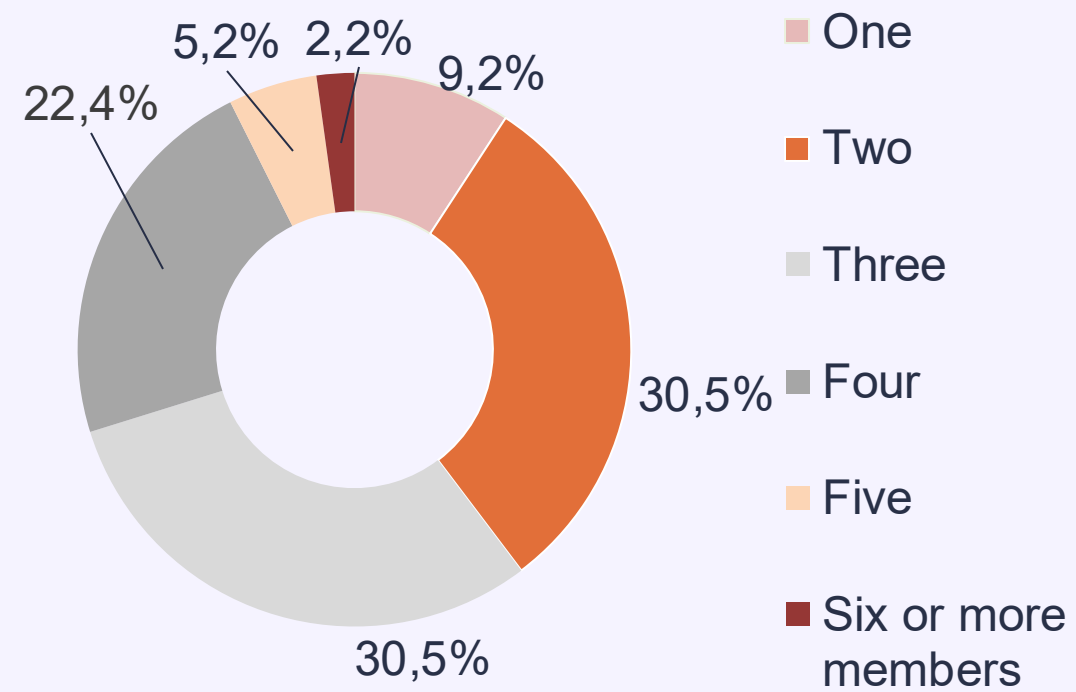
Sample composition



Marital Status

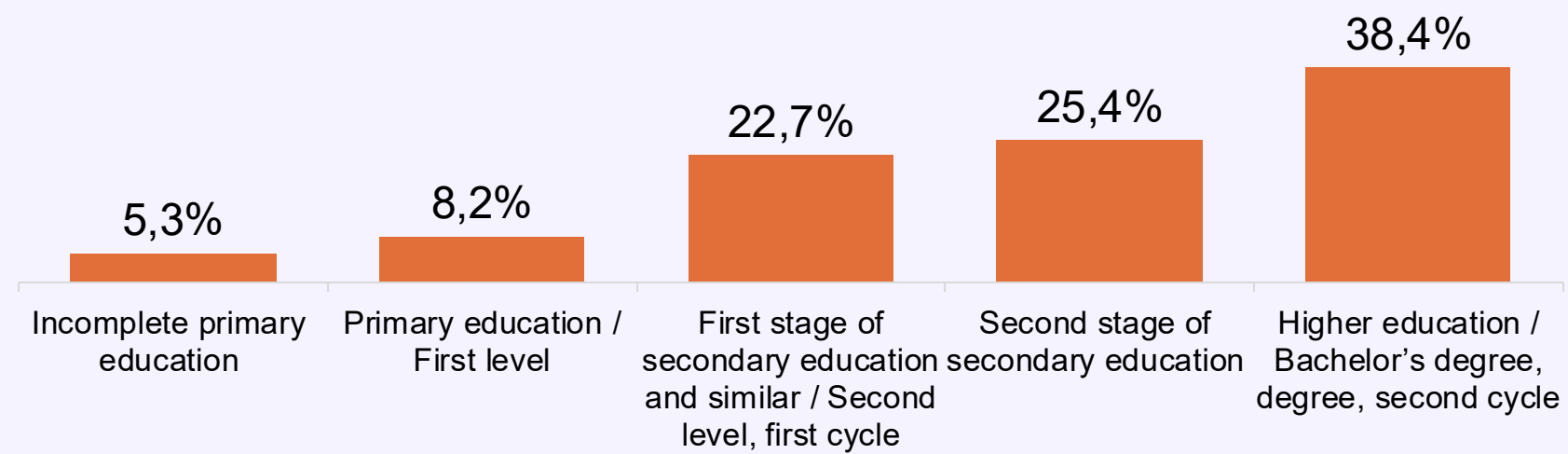


Number of people living in the household

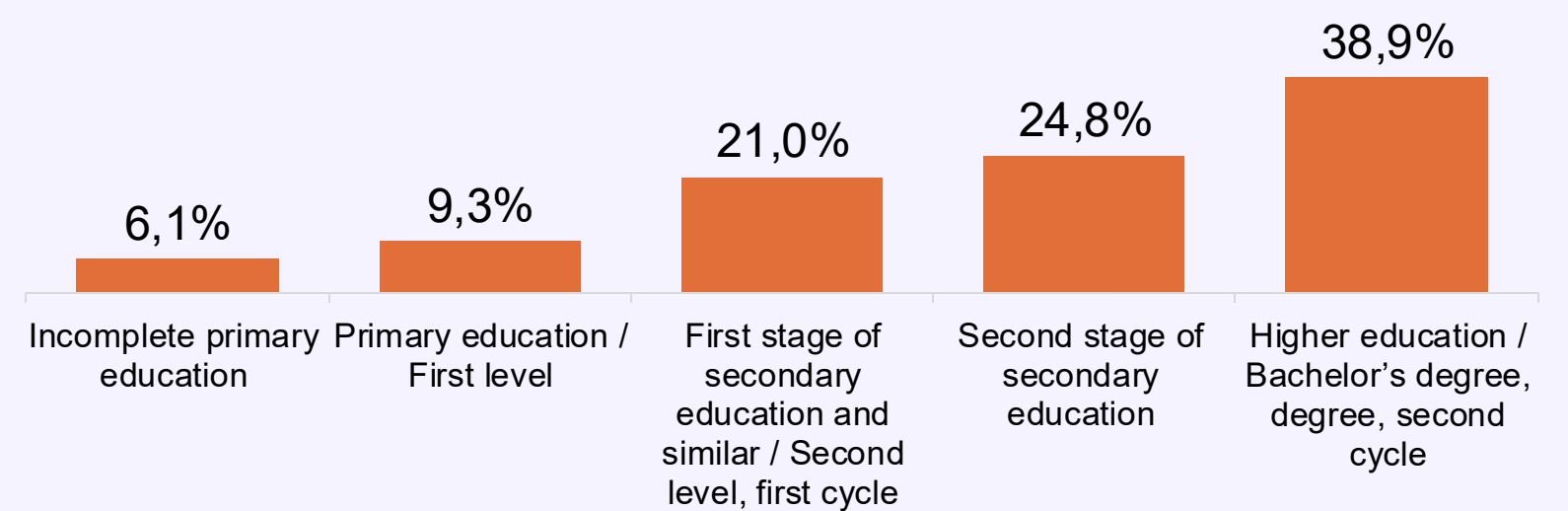


Sample composition

Respondent's education level



Head of household's education level



Base: 1,000 interviews

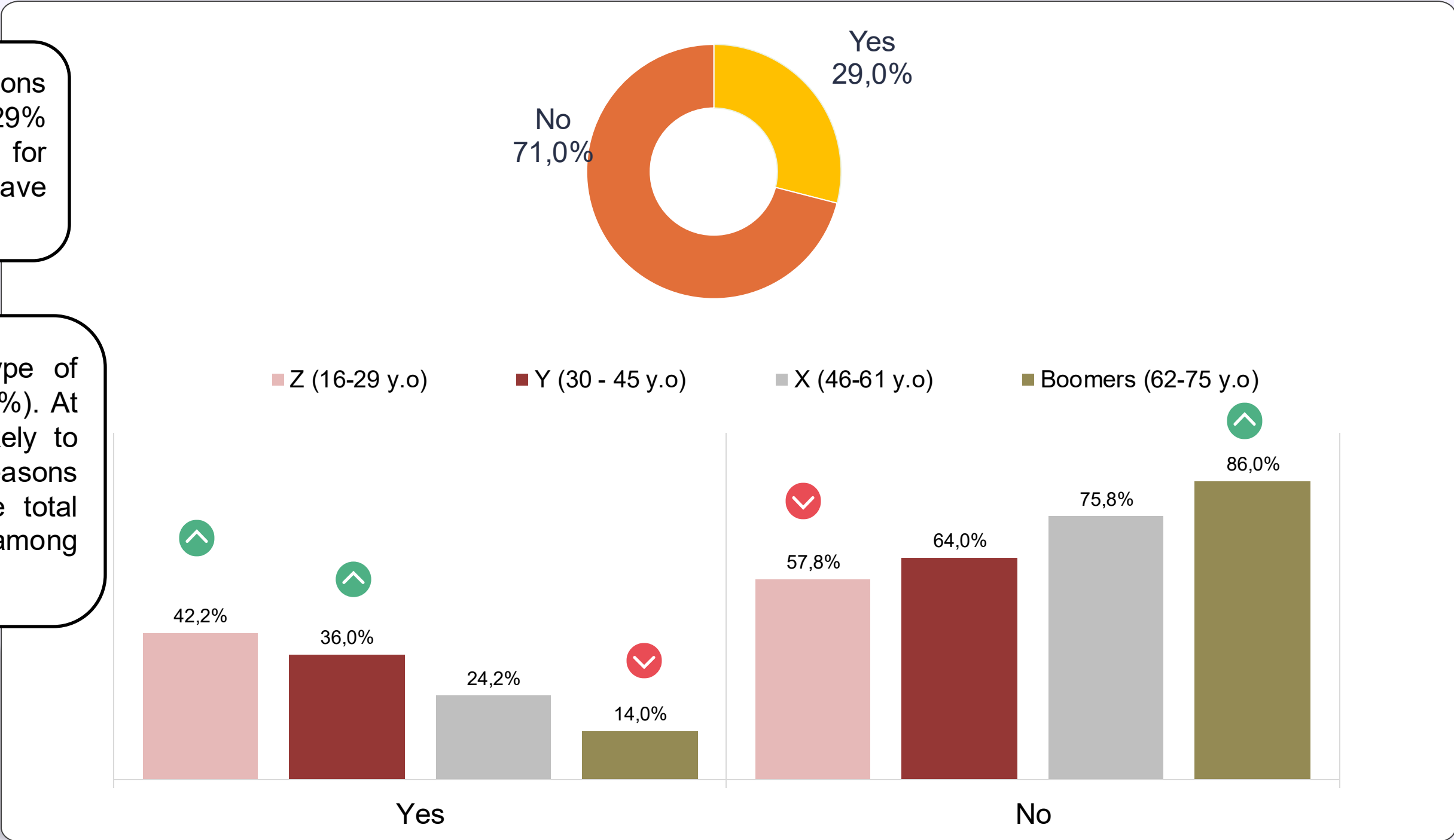
Stopped buying a brand for environmental/social reasons in the past year



Boycotting for environmental or social reasons remains a minority practice in Spain: only 29% of Spaniards have stopped buying a brand for these reasons in the past year, while 71% have not.

Generation Z is the most active in this type of behaviour (42.2%), followed by Millennials (36%). At the opposite end, Boomers are the least likely to boycott brands for environmental or social reasons (14%), and Generation X is also below the total (24.2%), reflecting greater awareness among younger Spaniards

Base: 1,000 interviews



C51. Have you stopped buying any brand for environmental/social reasons in the past year?

▲ Significantly higher differences are compared with the total sample
▼ Significantly /lower differences are compared with the total sample

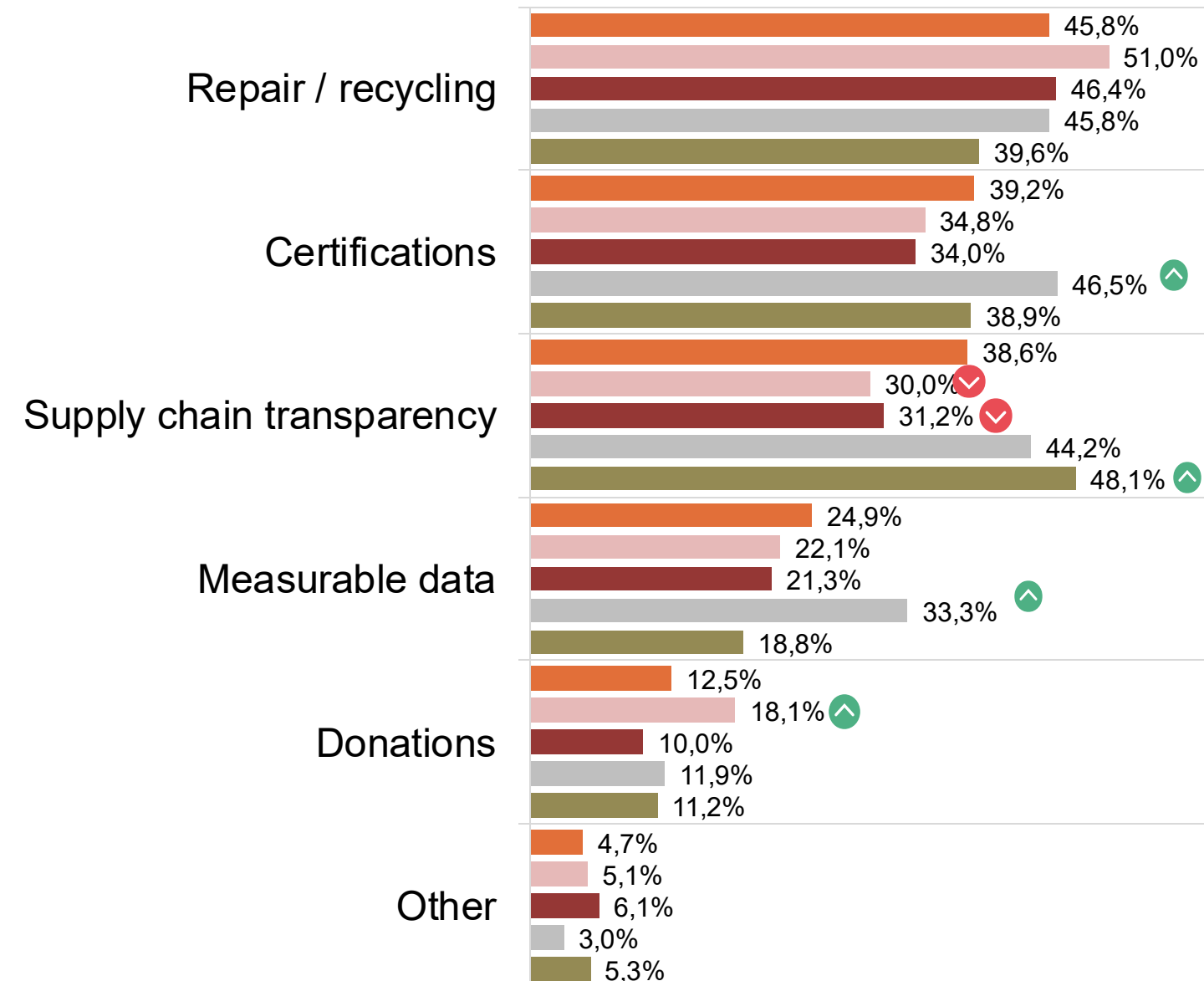
Actions that generate greater trust in a sustainable brand

The action that generates the greatest trust among Spaniards in a sustainable brand is repair and recycling (45.8%), followed by recognised certifications (39.2%) and supply chain transparency (38.6%).

Generation X and Boomers stand out especially in certifications. Generation Z, by contrast, stands out for donations. Measurable data and certifications generate more trust among Generation X than among the other generations.

Base: 1,000 interviews

■ Total ■ Z (16-29 y.o) ■ Y (30 - 45 y.o) ■ X (46-61 y.o) ■ Boomers (62-75 y.o)

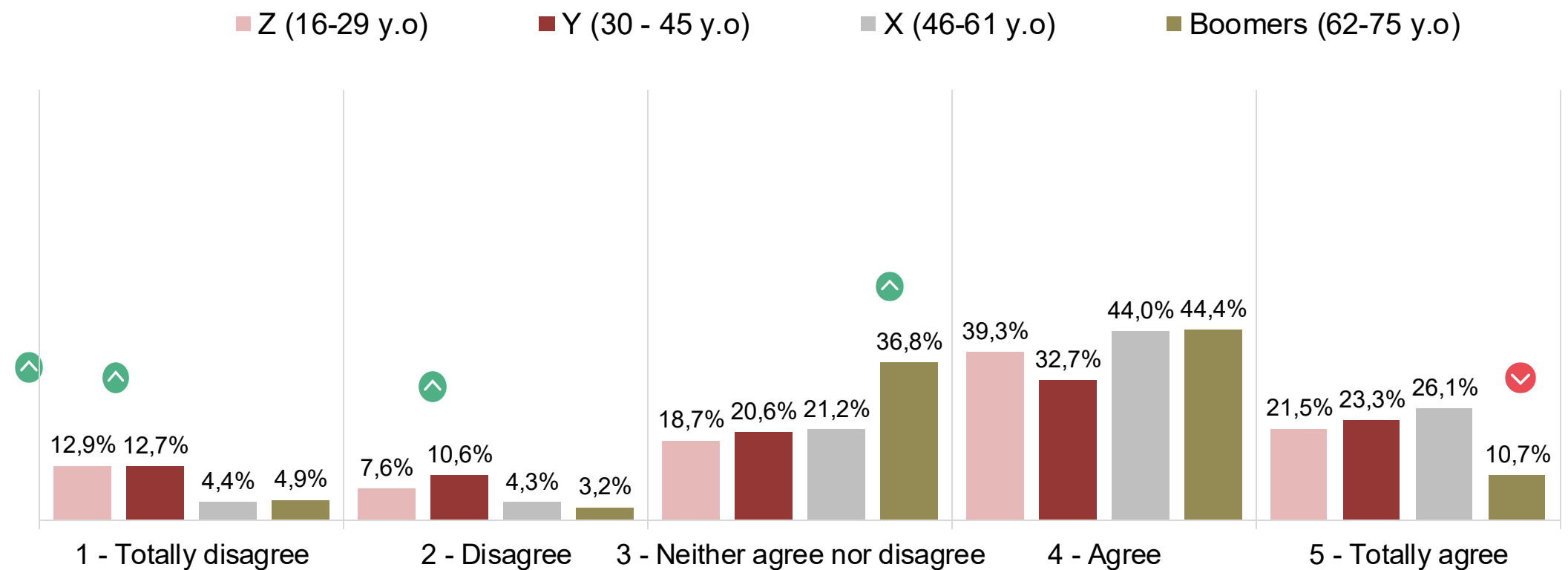
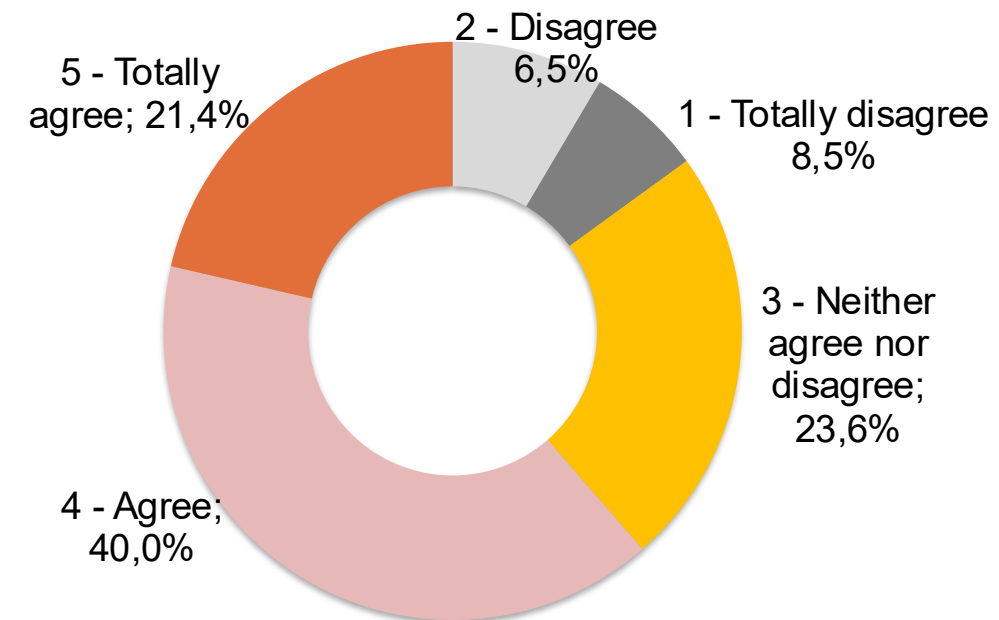


↑ Significantly higher differences are compared with the total sample
 ↓ Significantly /lower differences are compared with the total sample

Many brands exaggerate their sustainability to sell more

Greenwashing is a widely held perception among Spaniards: 61.4% agree or totally agree that brands exaggerate their sustainability to sell more. Only 14.9% disagree or totally disagree.

Generation X is the most critical (70.1% top 2 box), followed by Boomers (55.1% top 2 box). By contrast, both Generation Z and Millennials show greater disagreement with this statement (20.5% and 23.4% bottom 2 box, respectively)



Top 2 Box: percentage who answered “Agree” or “Totally agree”

Bottom 2 Box: percentage who answered “Disagree” or “Totally disagree”.

Base: 1,000 interviews

P3. Level of agreement: Many brands exaggerate their sustainability to sell more

⬆️ Significantly higher differences are compared with the total sample
 ⬇️ Significantly /lower differences are compared with the total sample

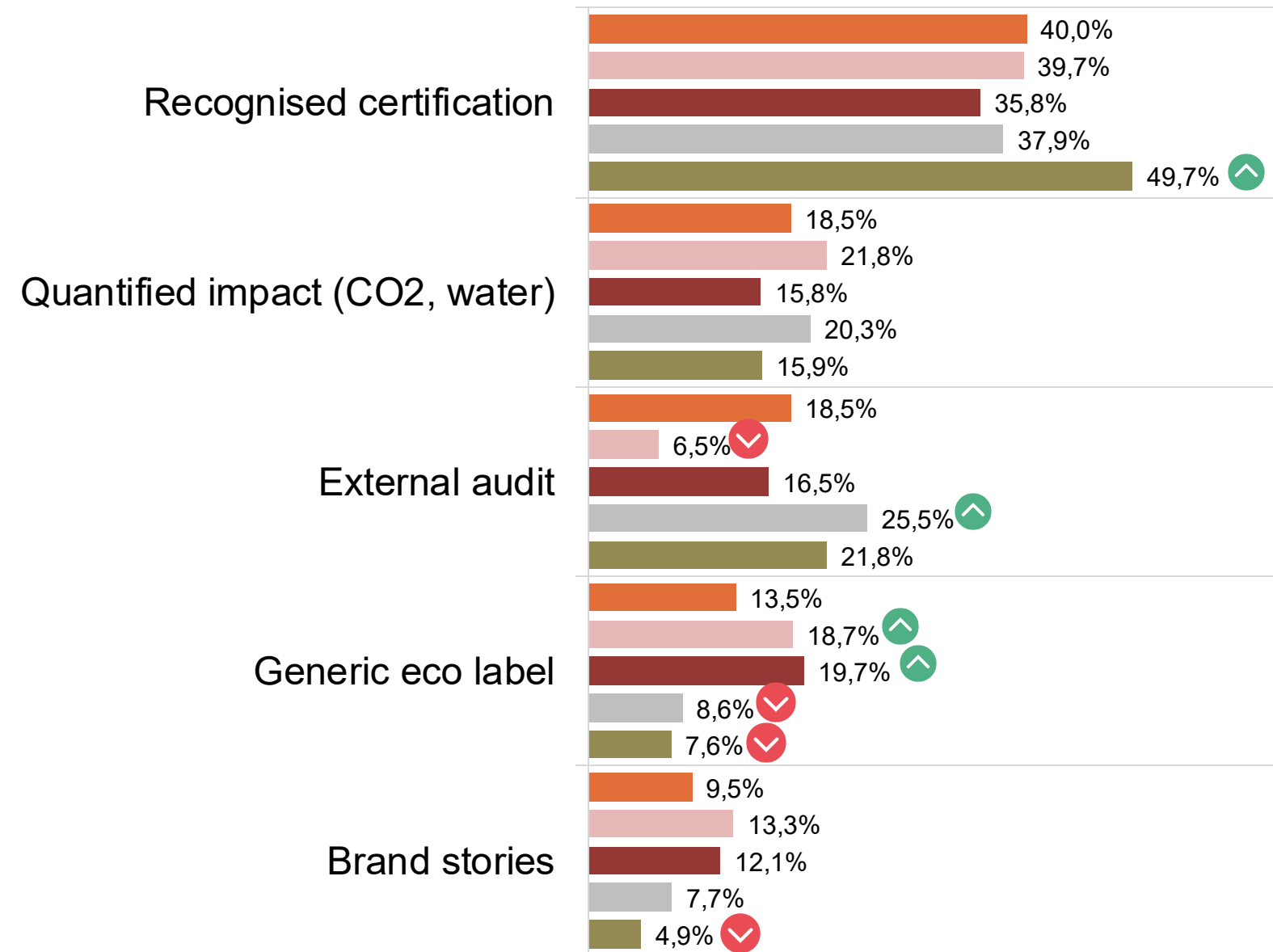
Credibility

For Spaniards, the most credible source of a brand's sustainability is a recognised certification (40%), followed by quantified impact in CO2 or water (18.5%) and an external audit (18.5%).

Boomers trust recognised certifications significantly more (49.7%), while Generation Z gives significantly greater credibility to generic eco labels (18.7%). External audits are more credible for Generation X than for the rest.

Base: 1,000 interviews

■ Total ■ Z (16-29 y.o) ■ Y (30 - 45 y.o) ■ X (46-61 y.o) ■ Boomers (62-75 y.o)



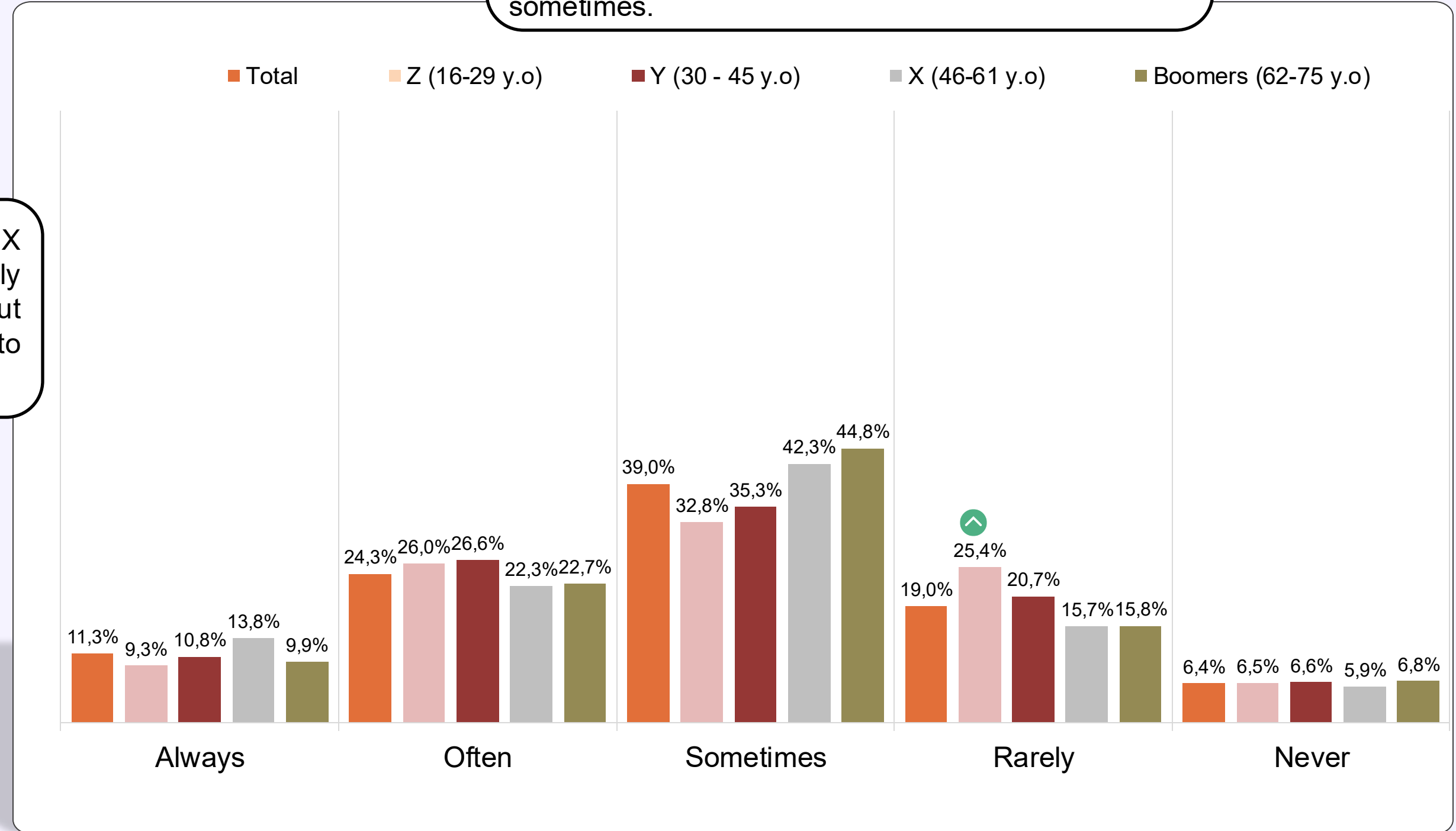
↑ Significantly higher differences are compared with the total sample
 ↓ Significantly /lower differences are compared with the total sample

Frequency of checking sustainable labels/seals

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Checking sustainable labels and seals at the point of purchase is not a well-established habit among Spaniards: only 11.3% always check them and 24.3% do so often, while 19% rarely do so and 6.4% never do. The largest group (39%) checks them only sometimes.

At generational level, Generation X checks sustainable labels most frequently (36.1%), while Generation Z stands out significantly as the group most likely to rarely check them (25.4%).



Base: 1,000 interviews

P5. How often do you check sustainable labels/seals when shopping?

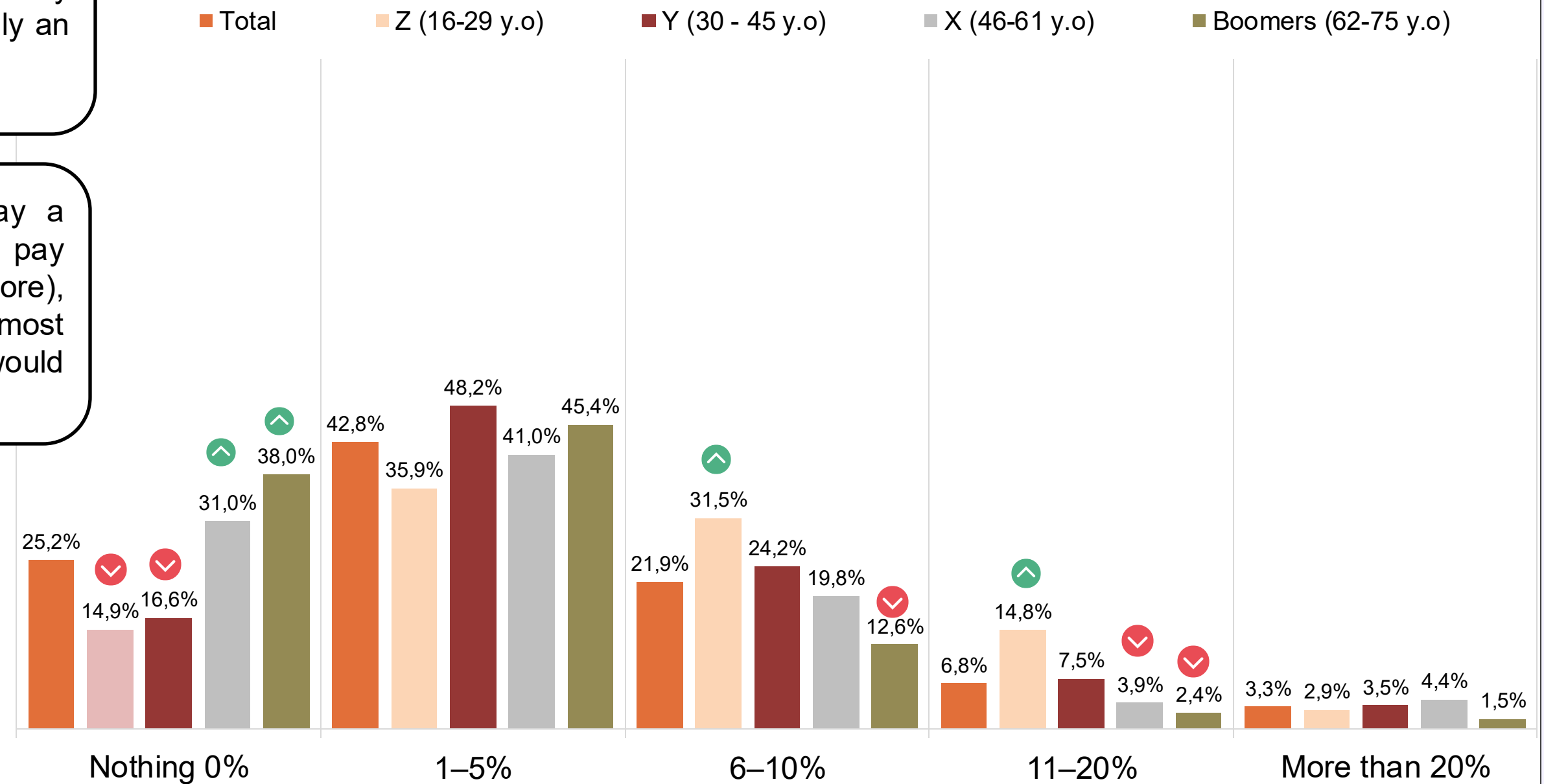
▲ Significantly higher differences are compared with the total sample
▼ Significantly /lower differences are compared with the total sample

How much more would consumers pay for a sustainable product?



Most Spaniards show low willingness to pay more for sustainable products: one in four says they would not pay more, and 43% would pay only an additional 1-5%..

Generation Z is the most willing to pay a premium from 6% upwards (31.5% would pay 6-10% more; 14.8% would pay 11-20% more), while Boomers and Generation X are the most reluctant (38% and 31%, respectively, would pay nothing extra).



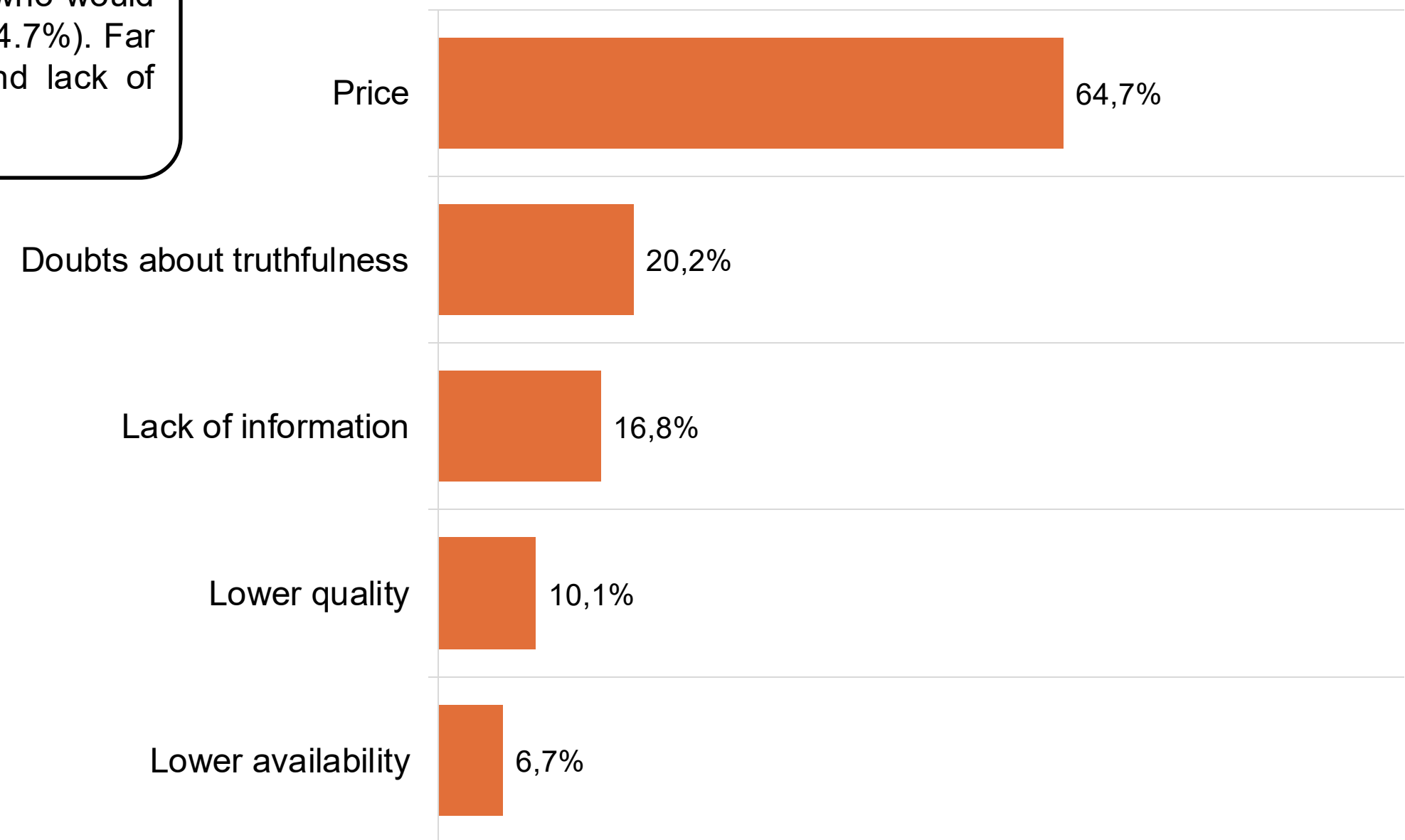
Base: 1,000 interviews

P6. How much more would you be willing to pay for a service or product that was a truly sustainable option?

▲ Significantly higher differences are compared with the total sample
▼ Significantly /lower differences are compared with the total sample

Barriers to paying more

Price is by far the main barrier among Spaniards who would not pay anything extra for a sustainable product (64.7%). Far behind are doubts about truthfulness (20.2%) and lack of information (16.8%).



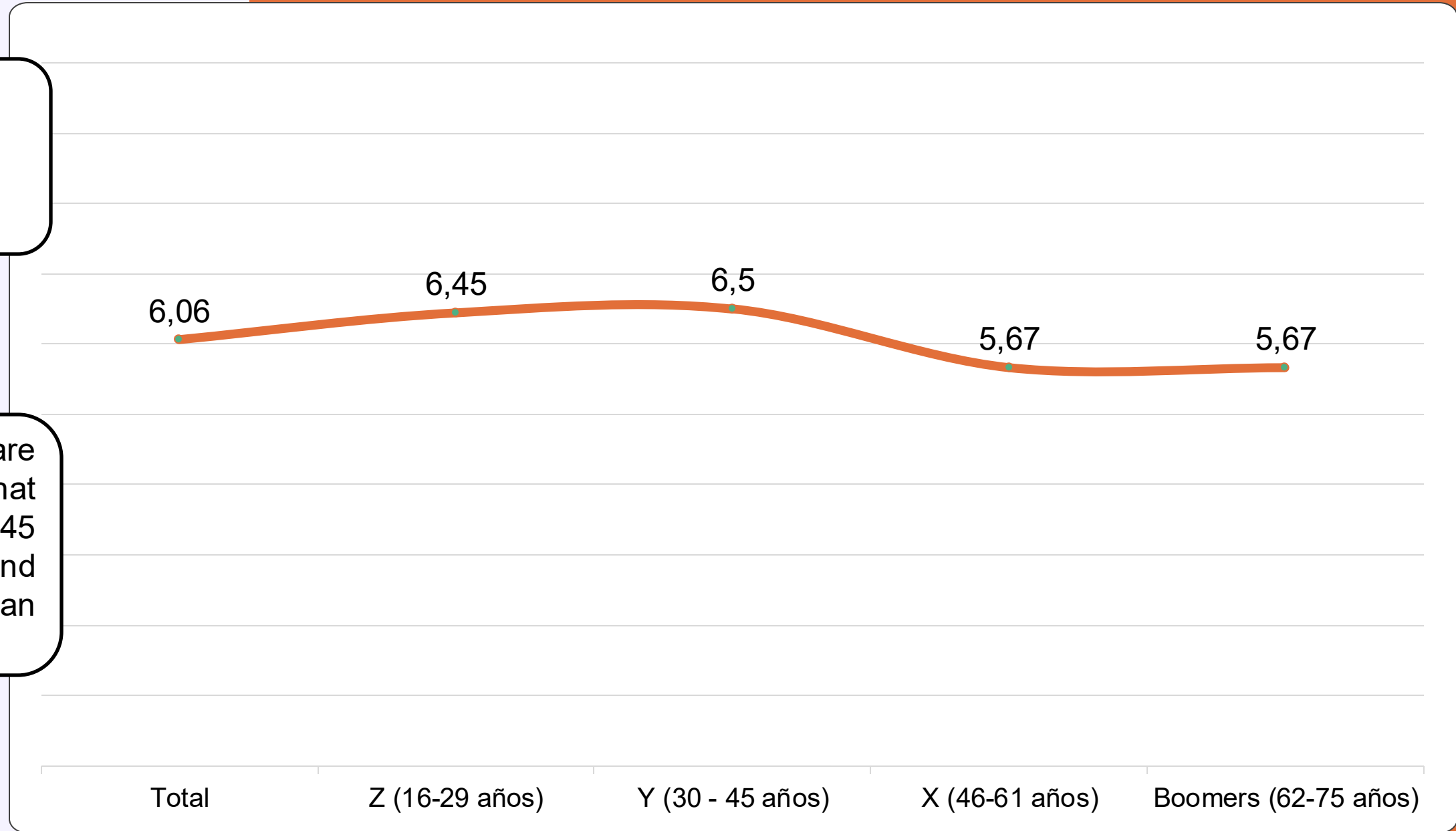
Base: those who would not pay anything extra: 252 interviews

Trust that brands tell the truth about sustainability



Spaniards' trust that brands tell the truth about sustainability is moderate, with an average score of 6.06 out of 10 and only 12.1% in the highest scores (top 2 box).

By generation, Generation Z and Millennials are the most trusting regarding the truthfulness of what brands say about sustainability (averages of 6.45 and 6.5, respectively), while Generation X and Boomers show lower levels of trust, both below an average of 6 (5.67 in both cases)



Top 2 Box: percentage who answered “Agree” or “Totally agree”
Bottom 2 Box: percentage who answered “Disagree” or “Totally disagree”.

Base: 1,000 interviews

P8. How much would you say you trust that brands tell the truth about sustainability?

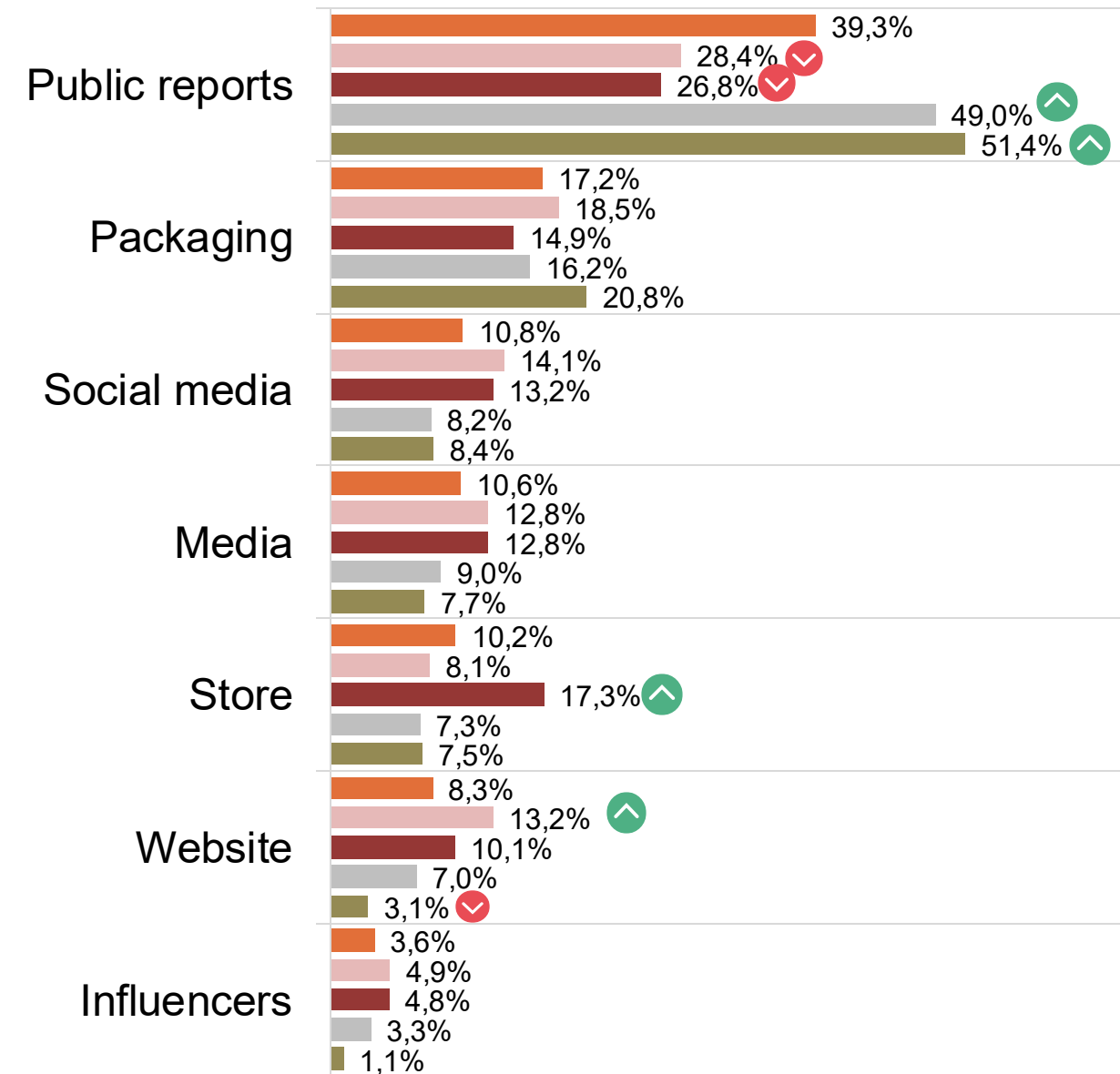
Most convincing channel

When demonstrating a brand's sustainability, Spaniards rely mainly on public reports (39.3%). Aspects such as information on the packaging (17.2%), social media (10.8%) and the media (10.6%) have less influence on the population.

Generation X and Boomers trust public reports significantly more than the total (49% and 51.4%, respectively). Generation Z trusts the brand website significantly more than the other generations (13.2%), while Millennials stand out for the physical store (17.3%).

Base: 1,000 interviews

■ Total ■ Z (16-29 y.o) ■ Y (30 - 45 y.o) ■ X (46-61 y.o) ■ Boomers (62-75 y.o)



▲ Significantly higher differences are compared with the total sample
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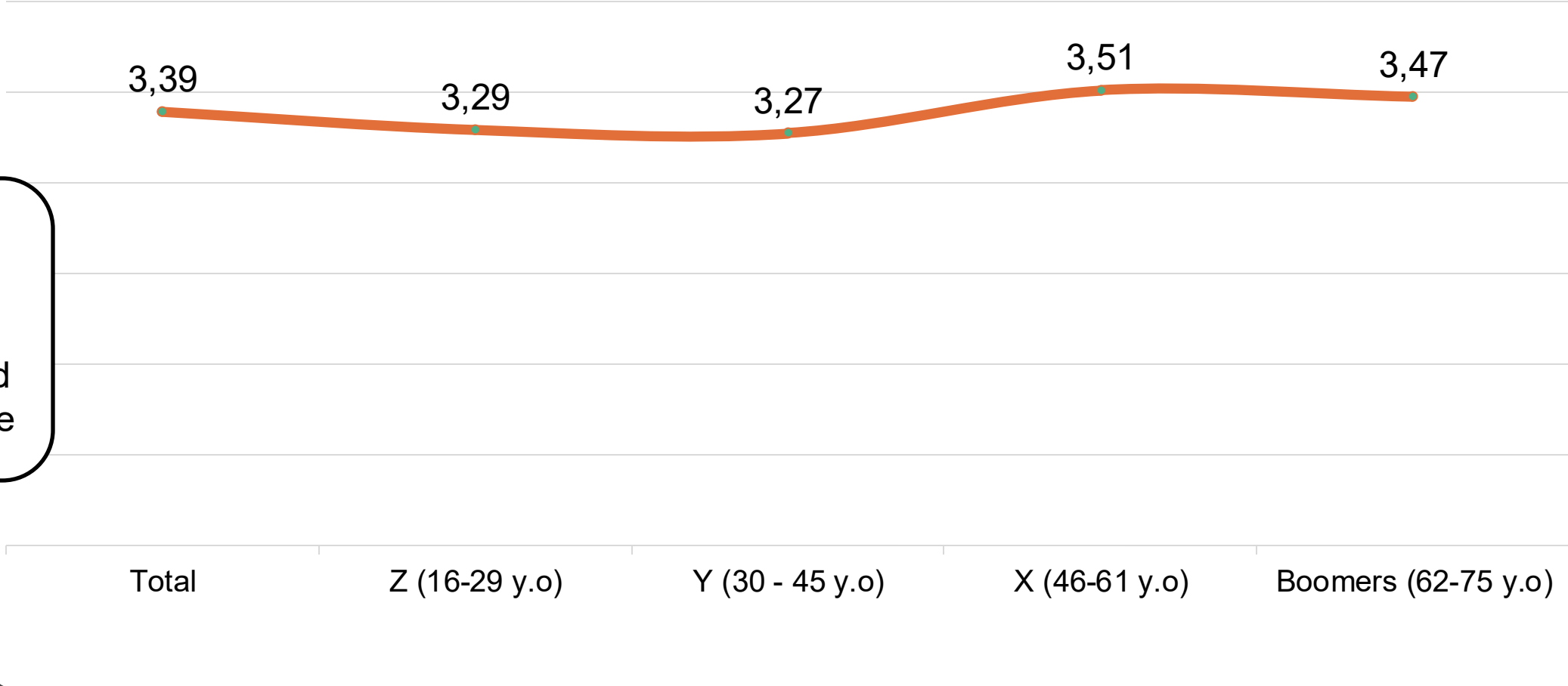
Is a brand forgiven if it makes a mistake?



More than half of Spaniards (51.1% top 2 box) would forgive a brand that makes a sustainability-related mistake if it acknowledges and corrects it, with an average score of 3.39 out of 5

Generation X is the most understanding (average 3.51), followed by Boomers (average 3.47). By contrast, Generation Z and Millennials are the most demanding and least tolerant of brand mistakes on this issue

If a brand makes a mistake, I forgive it if it acknowledges it and puts it right (scale 1-5)



Top 2 Box: percentage who answered "Agree" or "Totally agree"
Bottom 2 Box: percentage who answered "Disagree" or "Totally disagree".

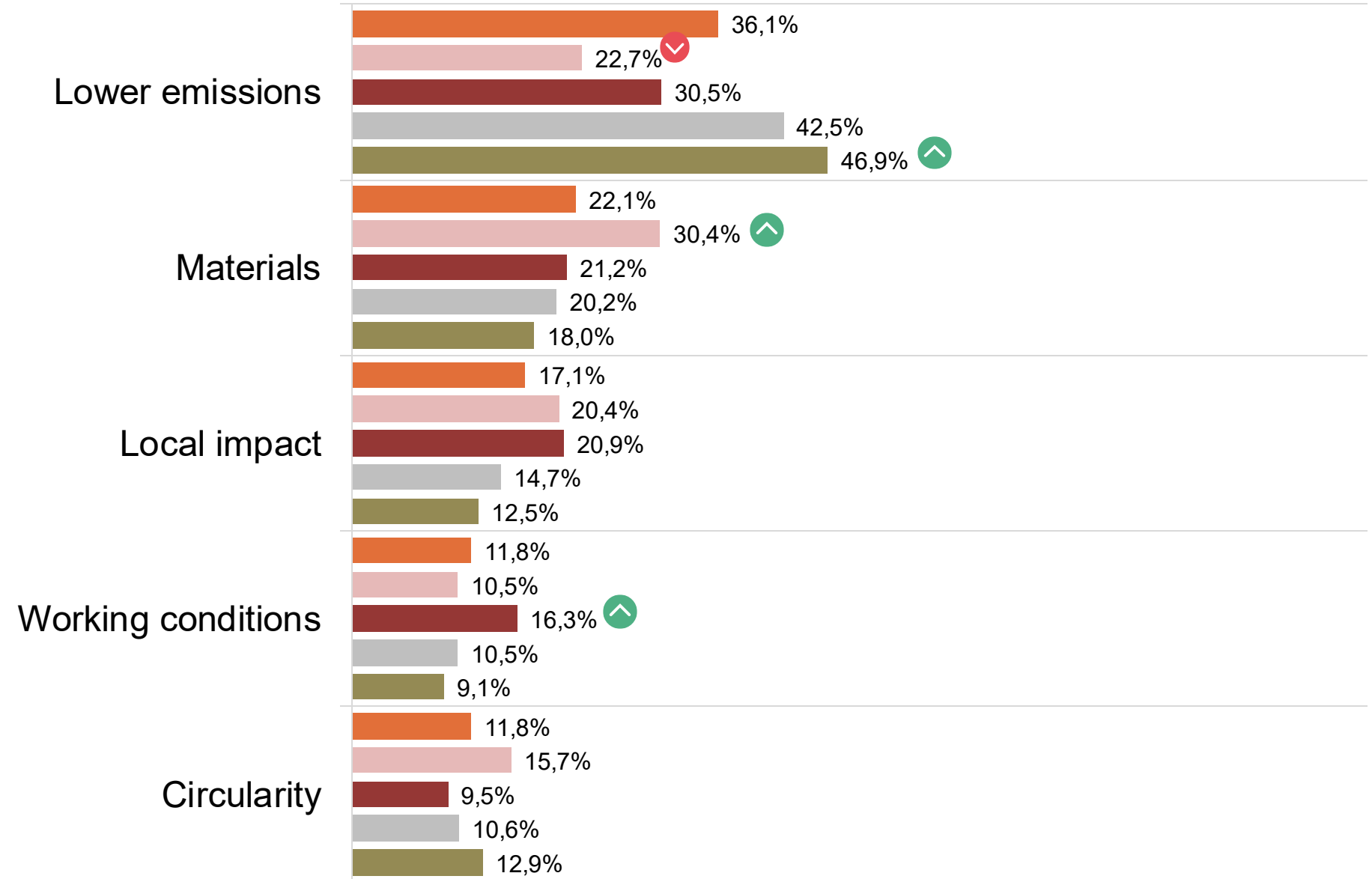
What a company should prioritise to be sustainable

For Spaniards, the number one priority is reducing emissions (36.1%), followed by the use of sustainable materials (22.1%) and seeing the local and community impact generated by sustainability (17.1%).

Boomers particularly prioritise reducing emissions (46.9%). Generation Z, by contrast, gives more importance to sustainable materials (30.4%).

Base: 1,000 interviews

■ Total ■ Z (16-29 y.o) ■ Y (30 - 45 y.o) ■ X (46-61 y.o) ■ Boomers (62-75 y.o)



⬆️ Significantly higher differences are compared with the total sample
 ⬆️ Significantly /lower differences are compared with the total sample

Conclusions



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Conclusiones

Key Data



Spanish people believe in brand sustainability “with reservations”

61.4% (top 2 box) of Spaniards believe that brands exaggerate their sustainability to sell more, and trust that they tell the truth on this topic obtains an average score of 6.06 out of 10. Despite this scepticism, only 29% have actually boycotted a brand for environmental or social reasons in the past year, with Generation Z (42.2% top 2 box) and Millennials (36%) well above the average. Boomers are the most sceptical about greenwashing (55.1% top 2 box), but the least likely to act accordingly (14% boycott).

Sustainable credibility is earned through facts, not words

The actions that generate the greatest trust among Spaniards are repair and recycling (45.8%), recognised certifications (39.2%) and supply chain transparency (38.6%). When choosing the most credible format, 40% opt for a recognised certification and 39.3% for public reports. Digital channels such as social media (10.8%) or influencers (3.6%) carry very little weight

Willingness to pay a little more is low and highly price-sensitive

One in four Spaniards would not be willing to pay anything extra for a sustainable product, with Generation Z being the segment most willing to pay a moderate-to-high premium (17.7% in the high range vs. 10% total), while Boomers are the most resistant (38% would pay nothing extra).

Spaniards forgive if there is transparency, and demand that companies genuinely act

More than half (51.1%) of Spaniards would forgive a brand that makes a sustainability-related mistake as long as it acknowledges and corrects it. In this regard, Generation X and Boomers are the most tolerant. Reducing emissions is the number one priority Spaniards demand from a company in order for it to be truly sustainable (36.1%), followed by the use of sustainable materials (22.1%) and local impact (17.1%). The message is clear: Spaniards are willing to give a second chance, but in exchange for real action and consistency

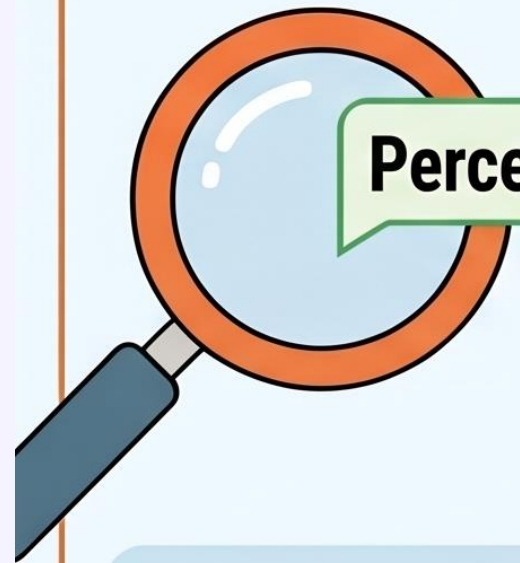
Infographic

2026 Sustainability Snapshot in Spain: Between Activism and Skepticism

Based on a study of 1,000 Spaniards in 2026, this data explores a “moderate” trust level (6.06/10) in corporate sustainability. While greenwashing is a majority perception, younger generations (Gen Z) are actively leading a shift in consumption through brand boycotts.



CONSUMER PERCEPTION & GENERATIONAL ACTIVISM



Perceive Greenwashing

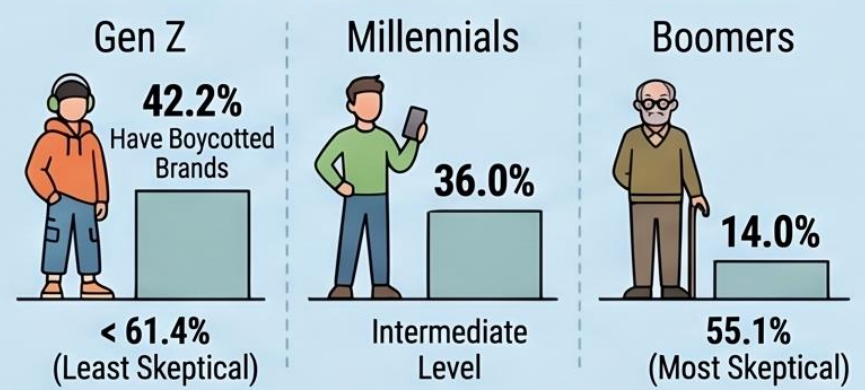
Most Spaniards believe brands exaggerate their sustainability efforts just to increase sales.



Gen Z Leads the Boycott

Many young consumers have stopped buying brands for social or environmental reasons.

Active Boycotting vs. Skepticism by Generation



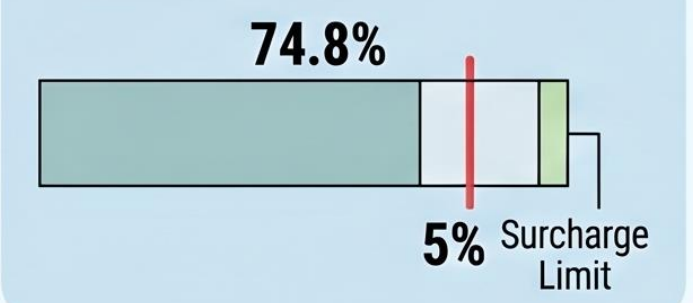
Trust Decreases with Age: While youth are more active, older generations show the highest levels of skepticism.

BARRIERS, CREDIBILITY, AND REAL ACTION

The 5% Price Barrier



While many would pay more, the majority will not exceed a 5% surcharge.



Official Seals vs. Influencers



Consumers prioritize official certifications over sustainability influencers for credibility.



40% Trust



3.6% Credible

Transparency Earns Forgiveness



51.1% of consumers will forgive brand errors if they are acknowledged and corrected.

Top 3 Factors for Real Trust



Thank you



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