Suma Impact Foundation

Suma Net Zero Index

2nd edition

November 2026

IN COLLABORATION WITH

SALVETTI LLOMBART
INSPIRING CHANGES

pwc

Suma Impact Foundation

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Participants and acknowledgements

Suma Impact Foundation was established in 2025 by Suma Capital to channel its institutional contribution to the impact ecosystem beyond its purely investment activity. The Foundation is committed to contributing to a just transition that creates lasting value for the people and territories of the Mediterranean, strengthening their resilience and their economic and social fabric.

SALVETTI&LLOMBART was founded 30 years ago and has since established itself as a benchmark for quality and excellence in market and social research. Its positioning between agency and consultancy sets it apart and makes it a valued partner in the strategy and transformation of large and medium-sized organisations, both nationally and internationally.

Fundación PwC has been generating social impact for more than 20 years through the commitment and capabilities of the professionals at PwC Spain, part of a global network whose purpose is to build trust in society and solve important problems. In this study, they reviewed the methodology and technical aspects of the Net Zero index to strengthen the robustness, traceability and consistency of its measurement framework.

We would like to thank everyone who has contributed to the preparation of this report, supporting its development, review and improvement. Our thanks go to Marga de Rosselló, Ferran Álvarez and Yael Alfon (PwC); Cristina Pérez, Jessica Fonfría and Julen Blanco (Salvetti & Llombart); and Marc Miralles, Núria Vinaixa and Jose Luis Ruiz de Munain (Suma Impact Foundation). We would also especially like to thank the sector experts who generously shared their views and knowledge: Carlos Mateo (EMT Madrid), Cinta Bosch (AECOC), Lara Lázaro (Elcano Royal Institute), Pablo Álvarez (ACCIONA Energía), Sophie Pagnon (Veritas) and Timo Buetefisch (Cooltra).

Introducing the SNZI 2026

Suma Impact Foundation, in collaboration with Fundación PwC and Salvetti & Llombart, presents in this document the results of the second edition of the 'Suma Net Zero Index (SNZI)' study. With this study, Suma Impact Foundation approaches the understanding of sustainability and climate change from a distinctive and pioneering angle: the demand for decarbonisation from citizens and, specifically, from the individual. It offers a new perspective on the role that companies, investors and public bodies can play in the ecological transition.

WHAT IS THE SNZI

An indicator that measures citizens' willingness to reduce their carbon footprint based on their current habits and intentions to change.

STUDY SCOPE

5 areas

Mobility, purchase of goods, food, home energy and waste.

STUDY SAMPLE

2,061 people

Representative survey of the Spanish population, including attitudinal profiles (Believers, Hopeless and Skepticals) and generations: Gen Z, Millennials, Gen X and Baby Boomers.

INDEX HORIZON

12 months

Period covered by the intentions to change captured in the index.

HOW TO INTERPRET THE INDEX

The result estimates a potential footprint reduction based on stated responses. Whether it materialises depends on intentions being fulfilled and on the alternatives available.

WHAT THE STUDY CONTRIBUTES

It pursues a dual objective

01 Understanding citizens

To identify citizens' habits and intentions to change in five areas (mobility, purchase of goods, food, home energy and waste management), exploring the barriers and support needed to move towards more sustainable habits in three of them: food, energy and mobility.

02 Quantifying willingness

To measure, using the SNZI, citizens' willingness to reduce their carbon footprint over the next 12 months.

A citizen-based reading of decarbonisation to inform public policies and business strategies.

Suma Impact Foundation, in collaboration with Salvetti & Llombart and with technical advice from PwC on the design of the questionnaire and the index methodology.

Key findings of the 2026 edition

01 5.1% potential footprint reduction

The SNZI estimates this potential for the next twelve months if the stated intentions to change materialise.

02 Perception and actual footprint share do not match

Energy and waste are overestimated, while mobility, food and the purchase of goods are underestimated. In waste: 20% perceived versus 4.4% of the reference footprint.

03 Sustainability: expensive, difficult and not very effective

42% of society sees it as costly and 39% believe their actions have little impact. Waste and the purchase of goods are perceived as easier than energy, food and mobility.

04 Between conviction and resignation

The challenge is to activate those who recognise the seriousness of the problem but doubt that progress is possible.

OTHER KEY DATA

71% consider climate change very serious. Compatibility between growth and decarbonisation: **64%** among Baby Boomers versus **51%** among Gen Z.

What needs to change for citizens' intention to become an actual reduction in emissions?

PRIORITIES FOR ACTION

≈7 out of 10

say incentives would make more sustainable habits easier.

62%

ask for clear, relatable information on their impact and contribution.

Reorder the mental map

Explain where to act and make individual and collective contributions visible.

Design low-friction changes

Simplify purchase, sign-up and use so that they fit into people's routines.

Combine savings and support

Affordable options, financing where needed, and practical, useful guidance.

Key findings by vertical

What are the implications of the results?

THREE LEVELS OF RESPONSIBILITY AND DECARBONISATION

01 **Personal decisions**

Changes that depend mainly on the individual citizen's will and habits.

02 **Better alternatives**

Changes that require more accessible, competitive and available options before they can be adopted

03 **Investment and collective agreements**

Changes that call for financial investment, agreements between neighbours or institutional drive to become effective

FOOD

Democratising and simplifying sustainable food

DIAGNOSIS

People aspire to eat healthily and sustainably, but perceive an extra financial and practical cost.

72% point to the cost of organic or local products.

58% mention difficulties with time, shopping or preparation.

PRIORITY FOR ACTION

Build it into everyday shopping with more affordable prices, greater availability and better signage at the point of sale.

ENERGY

The home energy transition faces simultaneous obstacles

DIAGNOSIS

42% point to structural and housing barriers.

33% mention financial and return-on-investment barriers.

Difficulties with understanding and trusting the available options add to this.

PRIORITY FOR ACTION

Financing, collective solutions and practical support to make it viable. Clear information on options, procedures and savings conditions.

MOBILITY

Sustainable mobility competes on convenience

DIAGNOSIS

82% mention structural public transport barriers.

76% call for financial measures for public transport or cycling.

Coverage, frequency, reliability and adaptation to everyday needs are key.

PRIORITY FOR ACTION

Combine savings, connectivity and alternatives to the car, with services that suit real journeys and are easy to use.

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Three citizen profiles

Based on questions about attitudes to climate change, **three citizen profiles are identified.** Compared with the 2024 edition, the weight of these profiles remains relatively stable.

The key point is not only the size of each segment, but that **56.6% of citizens fall into segments that still require additional activation effort**, whether because of their low engagement or their limited confidence in the possibility of moving towards a more sustainable future.

BELIEVERS

43.4%

(43.0%)

Believers, aware of the problem of climate change, firmly believe it is possible to act successfully against it

HOPELESS

42.3%

(41.9%)

Hopeless citizens, despite being aware of the seriousness of the situation, experience it with a degree of despair

SKEPTICALS

14.3%

(15.1%)

Skepticals question climate change, are not overly concerned by it and do not believe a sustainable future is possible

% 2024 edition data.

Attitudes to climate change by profile

Concern about climate change remains the majority view: 71% of the population consider it a very serious problem and 53% are worried by it.

Among Believers, the proportion who say they worry about climate change and think about it daily rises from 42% to 67%. However, the proportion who consider economic growth and decarbonisation compatible falls from 90% to 75%.

Among the Hopeless, the proportion who consider economic growth and decarbonisation compatible rises from 33% to 53%. At the same time, the proportion who experience climate change with resignation and avoid thinking about it rises from 20% to 42%.

'Skepticals' show a very stable position with barely any variation over two years.

	Believers		Hopeless		Skepticals		Grouped results	
	Year 2026	Year 2024	**Year 2026**	Year 2024	**Year 2026**	Year 2024	**Year 2026**	Year 2024
Climate change is a reality and a very serious problem	**84%**	91%	**94%**	82%	**0%**	0%	**71%**	74%
Climate change is questionable and less serious than we are led to believe	**16%**	9%	**6%**	18%	**100%**	100%	**29%**	26%
It is possible to achieve economic growth and advance decarbonisation at the same time; they are compatible	**75%**	90%	**53%**	33%	**32%**	25%	**58%**	56%
Currently in Spain, economic growth or stability is a higher priority than advancing decarbonisation	**25%**	10%	**47%**	67%	**68%**	75%	**42%**	44%
Climate change is something that personally worries and frightens me; I think about it every day	**67%**	42%	**58%**	80%	**0%**	0%	**53%**	52%
I am aware of climate change, but I experience it with resignation and avoid thinking about it	**33%**	58%	**42%**	20%	**100%**	100%	**47%**	48%

Q50. Below are some opinions that people like you have shared on sustainability and, specifically, on decarbonisation, i.e. reducing CO_2 emissions. Choose which of the two options best reflects your personal opinion.

Compatibility of sustainability and economic development by generation

Although most citizens (58%) believe it is possible to advance decarbonisation without compromising economic growth, **a large share of the population (42%) still sees a tension between the two objectives, prioritising economic growth.**

This balance shows a generational gradient. The youngest segments (Z and Millennials) are more divided, which may point to an unstable perception of the compatibility between the economy and sustainability. By contrast, as age increases, so does the conviction that both objectives can advance together (up to 64% among Boomers).

This pattern shows greater **disaffection among younger generations**, which could be explained by the significant difficulties they face in getting started in life (buying a home, precarious salaries, etc.), **while older citizens**, probably in a more settled situation, **take a more integrated view**.

TOTAL

ECONOMIC GROWTH + DECARBONISATION ARE COMPATIBLE

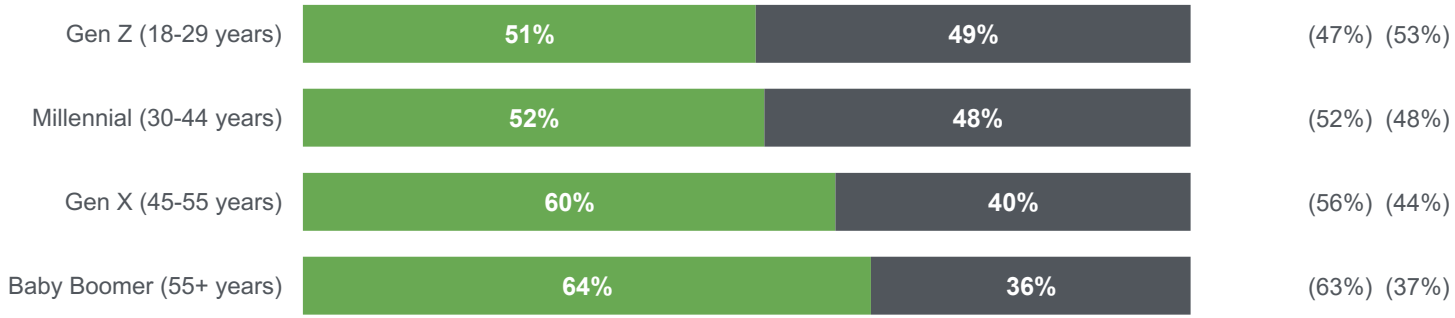
58% (56%)

Citizens who believe it is possible to **achieve economic growth and advance decarbonisation at the same time**; they are compatible

ECONOMIC GROWTH IS THE PRIORITY

42% (44%)

Citizens who believe that, currently in Spain, **economic growth or stability is a higher priority** than advancing decarbonisation



64% of Baby Boomers believe economic progress and decarbonisation are compatible

(xx%) Figures in brackets correspond to the 2024 edition.
Q52. Below are some opinions that people like you have shared on sustainability and, specifically, on decarbonisation, i.e. reducing CO_2 emissions. Choose which of the two options best reflects your personal opinion.

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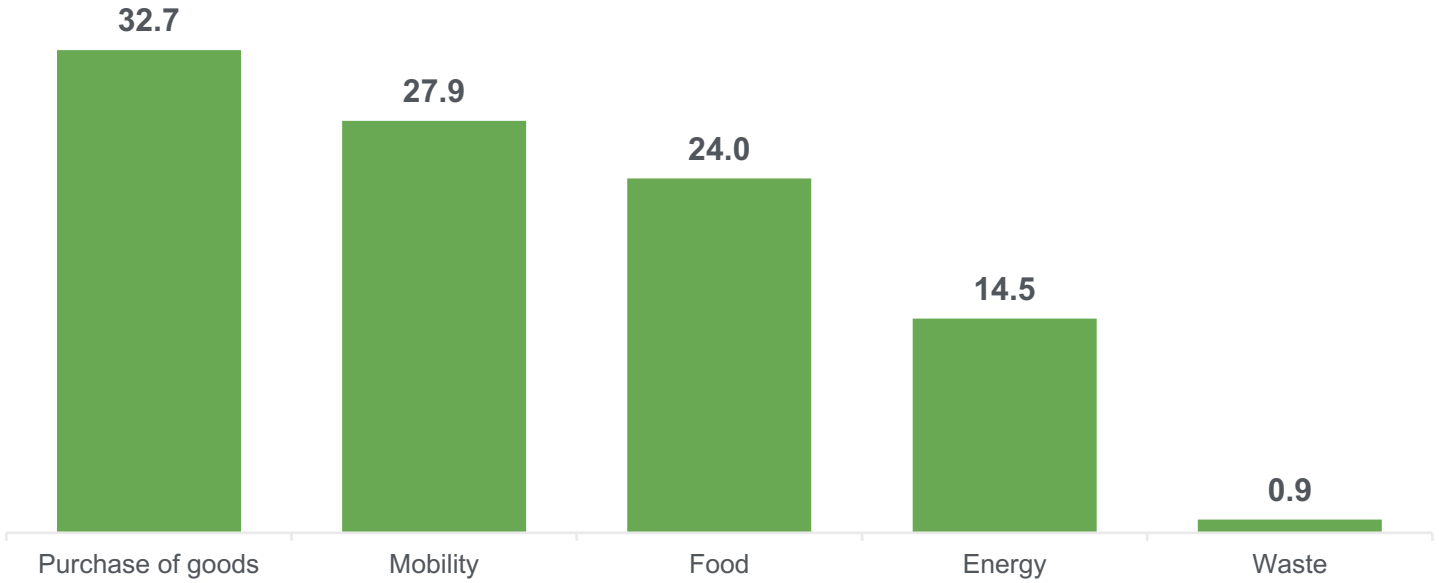
Contribution of each vertical to the indicator (Base=100)

The overall decarbonisation index stood at −3.5% two years ago and reaches −5.1% in this edition.

The index measures overall citizen commitment and identifies the levers with the greatest potential to accelerate decarbonisation in the short and medium term. **The purchase of goods, mobility and food account for the greatest impact**, so behavioural changes in these areas have the greatest estimated potential to improve the overall individual footprint index.



Suma Net Zero Index
Citizen's intended carbon footprint reduction over 12 months

−3.5% → −5.1%

2024 2026

Citizen perception: contribution of each vertical vs. actual weight

KEY FINDINGS

Self-perception holds steady

Despite changes in the economic and geopolitical context, citizens' perception of the weight of each area in their carbon footprint has barely changed since 2024. This stability suggests that the way people understand the impact of everyday habits is relatively settled.

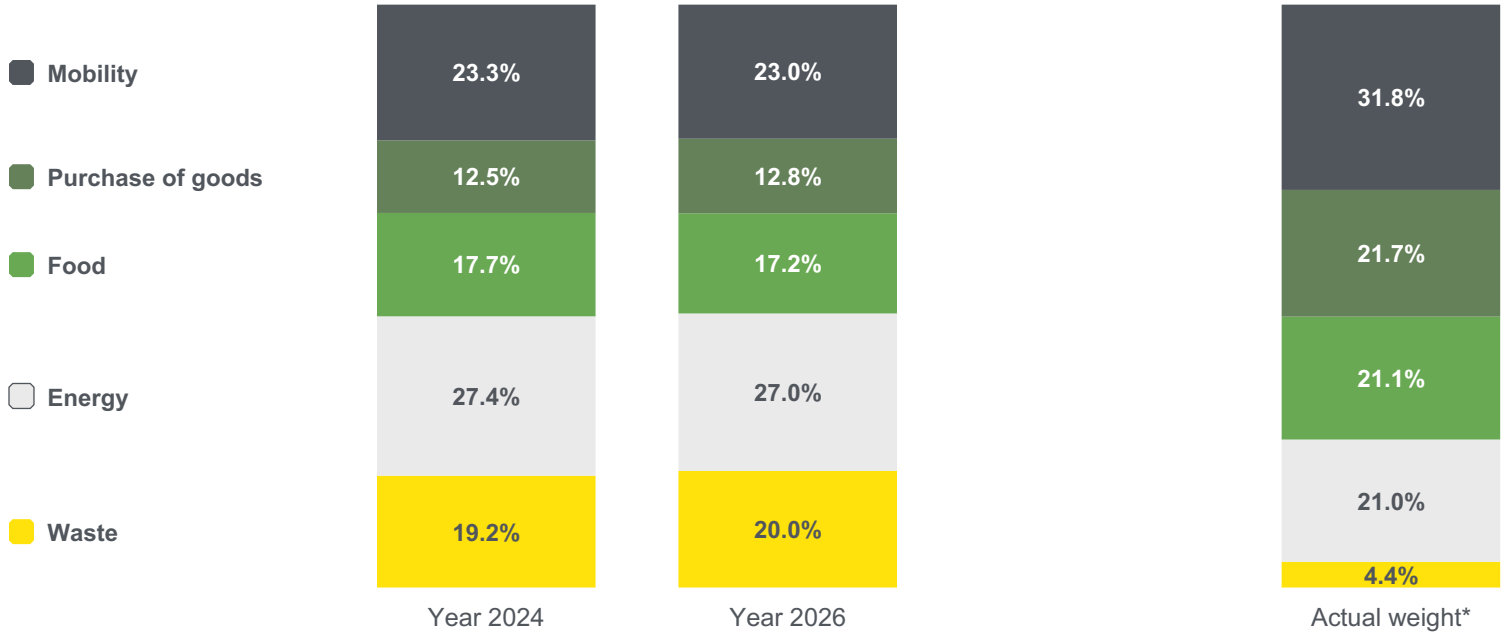
Perception and estimated footprint do not match

Citizens continue to overestimate the impact of waste (20% perceived versus 4.4% estimated), while underestimating the weight of mobility (23% versus 31.8%) and the purchase of goods (12.8% versus 21.7%). Food also has a significant weight in the estimated footprint (21.1%), higher than citizens attribute to it (17.2%).

This gap shows that **citizens' perception does not adequately reflect where the carbon footprint is concentrated**. Aligning perception with reality would make it possible to identify the highest-impact activities in each area and direct efforts towards the changes with the greatest decarbonisation potential.

Self-perception
of the population regarding their individual footprint (Base=100)

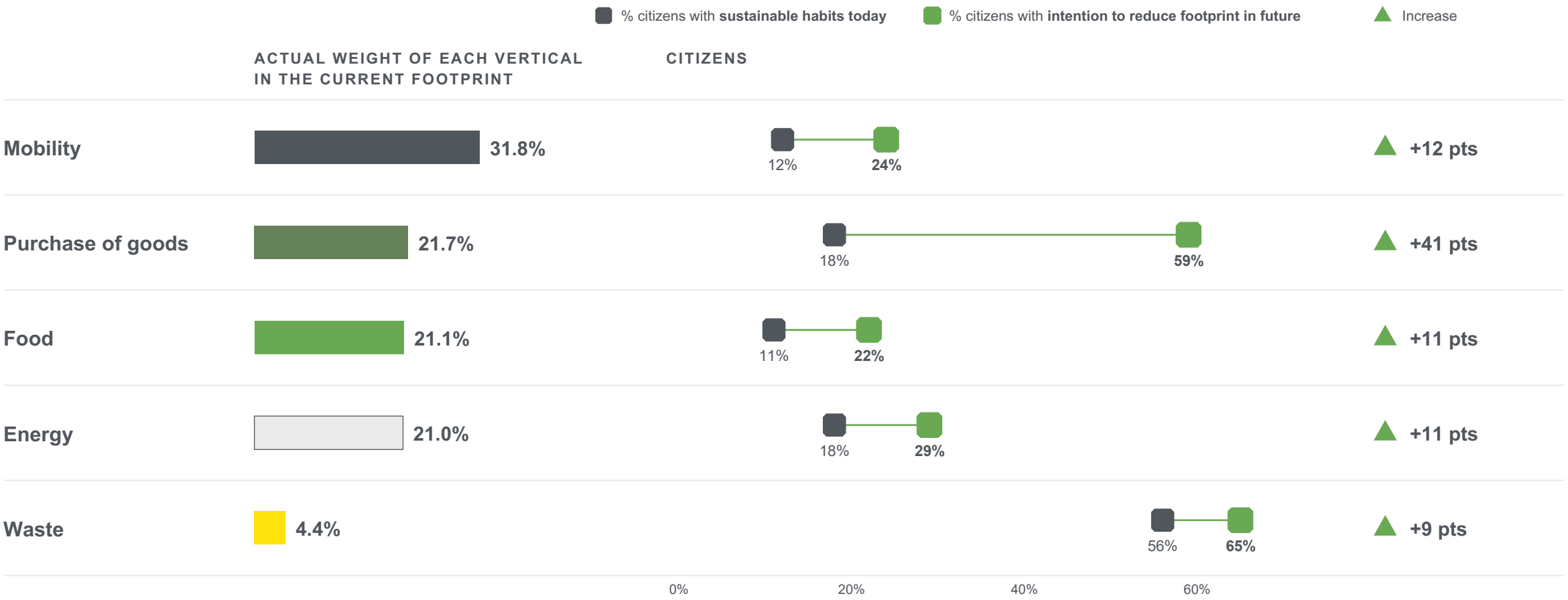
Actual weight
of each vertical in citizens' current footprint* (Base=100)



On average, citizens attribute 23% of their individual footprint to their mobility habits. However, mobility actually accounts for 32% of the emissions generated by citizens.

* Data from the BBVA Households-Carbon-Footprint-Watch study, 2022 source
Q48. Imagine your personal individual carbon footprint is currently 100. What % of this footprint do you think is generated by your ...?

In which areas can we expect the greatest growth in demand for decarbonisation?



Mobility: the car accounts for most intentions to change

MOBILITY

% Weight in CO_2 footprint today

31.8%

% Citizens with sustainable mobility habits today

11.6%

% Estimated reduction in mobility footprint based on stated intentions

–4.5%

Priority block

Cars and flights are the main components of the mobility footprint, at 17.2% and 12.7% of the total footprint respectively. However, intentions to change are concentrated on the car: 22.4% of citizens, compared with 6.5% for flights. The two major sources of emissions in this vertical feature to differing degrees in the changes citizens plan to make.

	% Weight in mobility CO_2 footprint TODAY	% Citizens intending to reduce their mobility footprint in FUTURE
Total mobility	**31.8%**	**24.4%**
Car kilometres	17.2%	22.4%
Flights	12.7%	6.5%
Motorbike kilometres	0.3%	2.2%
Public transport kilometres	1.6%	--

DIAGNOSIS

Habits today

Everyday mobility remains **organised around the car and individual convenience**. The highest-impact journeys are embedded in routines and personal decisions.

Reduction intention

There is **a willingness to moderate some journeys** and **optimise current use** of one's own vehicle, but not a radical change in the mobility model.

Recommendation

Make **alternatives simple, reliable and visible**: active mobility and shared options.

Purchase of goods: intentions stand out in clothing, while technology weighs more in the footprint

PURCHASE OF GOODS

% Weight in CO_2 footprint today

21.7%

% Citizens with sustainable habits in the purchase of goods today

18.4%

% Estimated reduction in the purchase-of-goods footprint based on stated intentions

−7.7%

The purchase of goods has the highest percentage of citizens intending to change among the five areas: 59.5%. Within this vertical, clothing and footwear account for most mentions, at 42.4%, compared with 20% for technology. The order changes when looking at current emissions: technology has the greatest weight. The breadth of intention to change therefore coexists with significant differences between categories.

	% Weight in purchase-of-goods CO_2 footprint TODAY	% Citizens intending to reduce their purchase-of-goods footprint in FUTURE
Total purchase of goods	**21.7%**	**59.5%**
Clothing and footwear	6.8%	42.4%
Household appliances	5.6%	9.6%
Technology	8.0%	20.0%
Furniture	1.3%	9.9%

DIAGNOSIS

Habits today

A purchasing logic linked to renewal or comfort predominates. **Repair and second-hand still do not work as default options** in all categories.

Reduction intention

There is greater willingness to curb frequent purchases, although for certain goods the scope for action is more limited because of dependence on **useful life**.

Recommendation

Make **circularity the easiest option**: repair, maintain, rent, share and buy refurbished.

Food: more intention to change for packaged meals than for red meat

FOOD

% Weight in CO_2 footprint today

21.1%

% Citizens with sustainable food habits today

10.6%

% Estimated reduction in food footprint based on stated intentions

−5.8%

Priority block

Red meat generates half of food emissions, but only 4.5% of citizens plan to change their consumption habits for this product. For packaged meals, that percentage reaches 14.8%, although their contribution to emissions is much lower. In other words, more people are willing to change their consumption of packaged meals than of red meat, even though the latter has a far greater climate impact.

	% Weight in food CO_2 footprint TODAY	% Citizens intending to reduce their food footprint in FUTURE
Total food	**21.1%**	**22.4%**
Packaged meals	1.7%	14.8%
Prepared food	0.5%	8.8%
Home-delivered food	1.6%	5.5%
White meat	2.5%	5.6%
Red meat	12.1%	4.5%
Fish	2.8%	3.0%

DIAGNOSIS

Habits today

Diets retain a significant share of animal products and **convenience-based solutions**. Habits are closely tied to taste, family routine and availability.

Reduction intention

Openness to change exists, but it is selective and gradual: people consider reducing certain foods and including alternatives when they suit them on price and convenience.

Recommendation

Promote specific substitutions at competitive prices, avoiding all-or-nothing approaches, and improve their identification and comparison with clear in-store information.

Energy: similar footprint for electricity and gas, with different intentions to change

ENERGY

% Weight in CO_2 footprint today

21.0%

% Citizens with sustainable energy habits today

18.0%

% Estimated reduction in energy footprint based on stated intentions

−3.5%

Priority block

Electricity and gas have a similar weight in the total footprint: 10% and 9.2% respectively. However, electricity has a clearly higher percentage of citizens intending to change: 28.1%, compared with 12.3% for gas. This difference indicates that gas receives less attention in planned changes, despite having an almost equivalent weight in the footprint.

	% Weight in energy CO_2 footprint TODAY	% Citizens intending to reduce their energy footprint in FUTURE
Total energy	**21.0%**	**29.2%**
Heating oil/propane	0.8%	0.4%
Electricity*	10%	28.1%
Gas	9.2%	12.3%
Pellets	1%	0.7%

** Calculation approach: market-based.*

DIAGNOSIS

Habits today

Household consumption is conditioned by **housing characteristics, heating and cooling needs and the available energy source**.

Reduction intention

Receptiveness to efficiency and renewable energy is growing, although many intentions depend on investment, information and decision-making capacity.

Recommendation

Prioritise low-friction actions with visible returns, backed by advice and financial support where investment is required.

Waste: most widespread sustainable habits, lowest footprint weight

WASTE

% Weight in CO_2 footprint today

4.4%

% Citizens with sustainable waste habits today

56.3%

% Estimated reduction in waste footprint based on stated intentions

−1.0%

Waste has the highest percentage of citizens with current sustainable habits and the lowest weight in the total footprint among the five areas. Within this vertical, emissions are concentrated mainly in non-recycled waste. Future intentions show similar percentages across the different recycling streams, with no category clearly standing out from the others.

	% Weight in waste CO_2 footprint TODAY	% Citizens intending to reduce their waste footprint in FUTURE
Total waste	**4.4%**	**8.4%**
Glass recycling	<0.5%	4.9%
Plastic recycling	<0.5%	4.8%
Paper recycling	<0.5%	4.9%
Organic waste recycling	<0.5%	5.0%
Oil recycling	<0.5%	4.8%
Non-recycled waste	4.2%	-

DIAGNOSIS

Habits today

Recycling remains the **most widespread sustainable habit** among citizens and consolidates this vertical as the most mature in adopting sustainable behaviours.

Reduction intention

The trend points to **incremental improvements in waste separation**, not a profound transformation.

Recommendation

Shift the focus from recycling more to intentional purchasing that generates less waste, reusing and reducing residual waste.

Suma Net Zero Index indicator vs benchmark targets

The Suma Net Zero Index estimates a **potential reduction in citizens' individual footprint of 5.1% over the next twelve months,** linked to stated intentions to change.

Business and economic benchmarks provide context on the progress of decarbonisation. Although they use different metrics, periods and scopes, they offer a comparable order of magnitude that helps to highlight the potential impact of citizens' intentions to change.

Suma Net Zero Index of intended individual footprint reduction over the next twelve months, estimated from stated habits	**−5.1%**
Indicative reference threshold, with limitations, comparable to a scenario compatible with the 1.5 °C goal	**−4.2%** SCIENCE BASED TARGETS DRIVING AMBITIOUS CORPORATE CLIMATE ACTION
Average annual linear reduction of companies with an SBTi commitment*	**−5.9%** SCIENCE BASED TARGETS DRIVING AMBITIOUS CORPORATE CLIMATE ACTION
Spanish economy - PwC Net Zero Economy Index 2024. Reduction in Spain's carbon intensity in 2023: CO_2 emissions per unit of GDP	**-7.4%** pwc

Notes: The applicable SBTi rate is adjusted according to the base year and target horizon. These benchmarks are not directly comparable and cannot be used to demonstrate the SNZI's alignment with a 1.5 °C scenario.
See: SBTi Corporate Net-Zero Standard v1.3.1, April 2026. PwC Net Zero Economy Index 2024, 2023 data.
PwC. 2023 marks the slowest decline in carbon intensity worldwide in more than a decade. Source: https://www.pwc.es/es/sala-prensa/notas-prensa/2024/2023-marca-disminucion-intensidad-carbono.html

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Key challenges for citizens in decarbonisation

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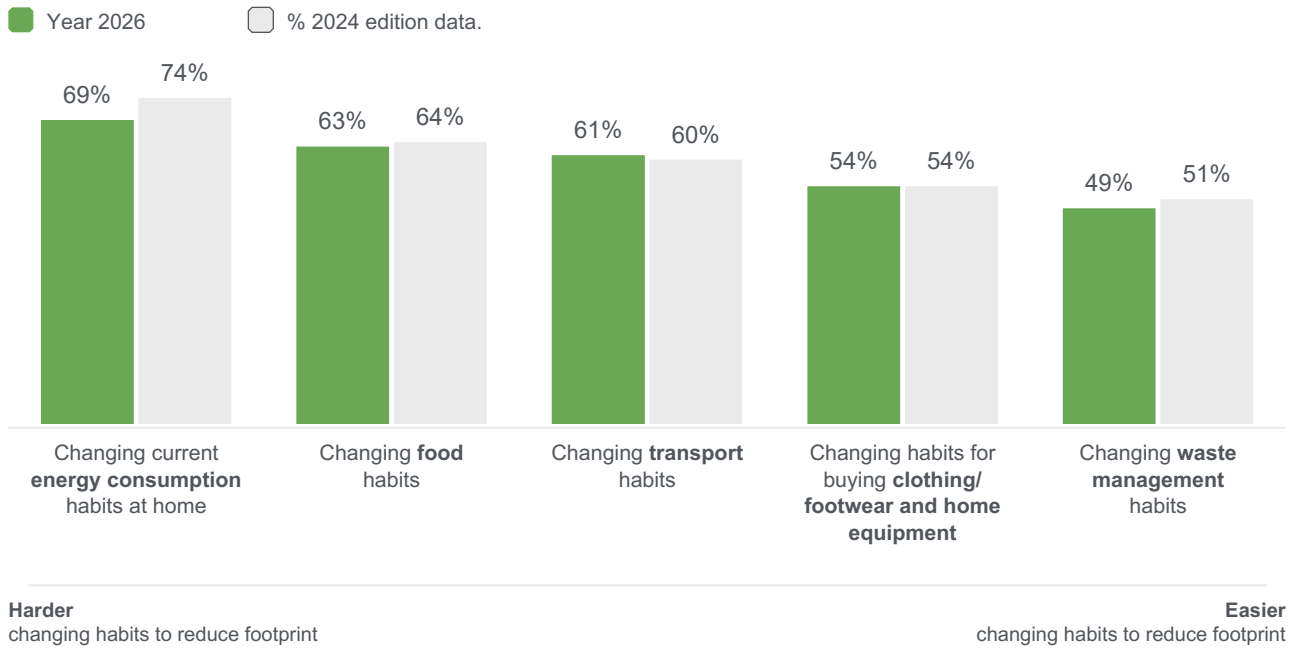
% Citizens who say it is very, quite or somewhat difficult to adopt sustainable habits in each area

The gap between attitudinal profiles is especially wide in food and mobility. Believers differentiate more between areas that are hard and easy to change, whereas Skepticals perceive greater difficulties across the board.

The gap between Believers and Skepticals reaches 27 points in food and mobility, compared with 19 points in energy, 20 in the purchase of goods and 25 in waste. This points to especially marked differences between profiles in two areas closely linked to everyday habits.

Among Believers, perceived difficulty ranges from 61% in home energy to 39% in waste: a difference of 22 points. Among Skepticals, the range narrows to 17 points, from 81% in energy to 64% in waste, although they maintain higher levels of difficulty in all areas.



Believers	61%	54%	50%	48%	39%
Hopeless	74%	64%	65%	53%	50%
Skepticals	80%	81%	77%	68%	64%

Q49. Thinking about your needs and situation, looking ahead to next year, how easy or difficult would it be for you to change your current habits in each of the following areas to reduce your carbon footprint?

Citizens' barriers to progress on individual decarbonisation

42% **Lack of financial resources:** only people with greater purchasing power can lead a sustainable lifestyle

41% Beyond recycling and monitoring water and electricity use, **I don't know what I can do** to be more sustainable

39% **My individual actions have little impact:** it is governments or companies that should and can act

Citizens say that, for them, being more sustainable is:

1. **A costly effort (42%)**, so the ecological transition will need to be approached from a perspective of accessibility and equity to prevent sustainability being seen as a minority option.
2. **Difficult to always put into practice day to day (41%):** it is not always clear which specific actions can be taken beyond everyday habits that are already established or unconscious, such as monitoring water, electricity, etc.
3. **Of limited individual effectiveness (39%):** there is a low perception of individual capacity for impact.

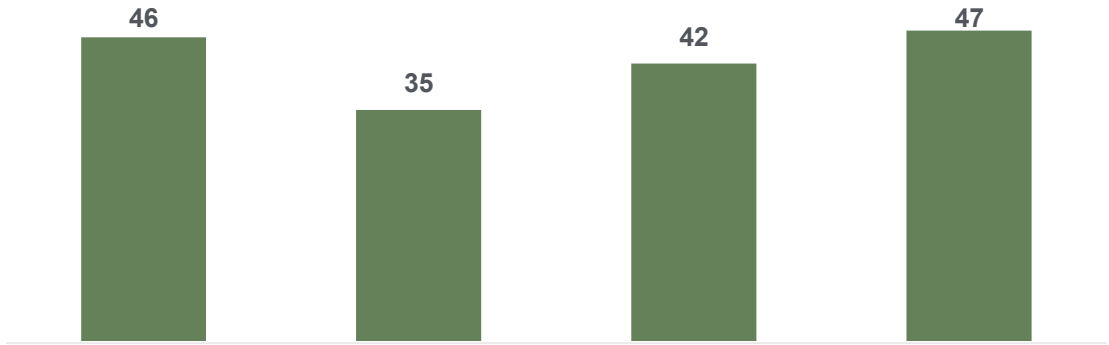
ADDITIONAL PERCEPTION BARRIERS

23% At present I don't think the effects of climate change are noticeable yet; they will be felt more in the long term

22% I don't know how climate change affects my daily life in practice; I would like to see concrete evidence

21% In the area where I live **we do not notice the effects of climate change;** I think they occur in other, distant geographical areas

Main barrier by generation



% Individuals

Q51. Thinking about yourself, what are the three main reasons why you are not always fully aware of climate change and the need to adopt more sustainable habits in your daily life? Select up to a maximum of 3 options.

Citizens' solutions to progress on individual decarbonisation

69% Receiving **financial incentives for adopting sustainable habits** (e.g. money back for returning containers)

62% Seeing clear, relatable information (with examples from my city/my daily life) on **how climate change already affects us** and how my individual actions make a difference

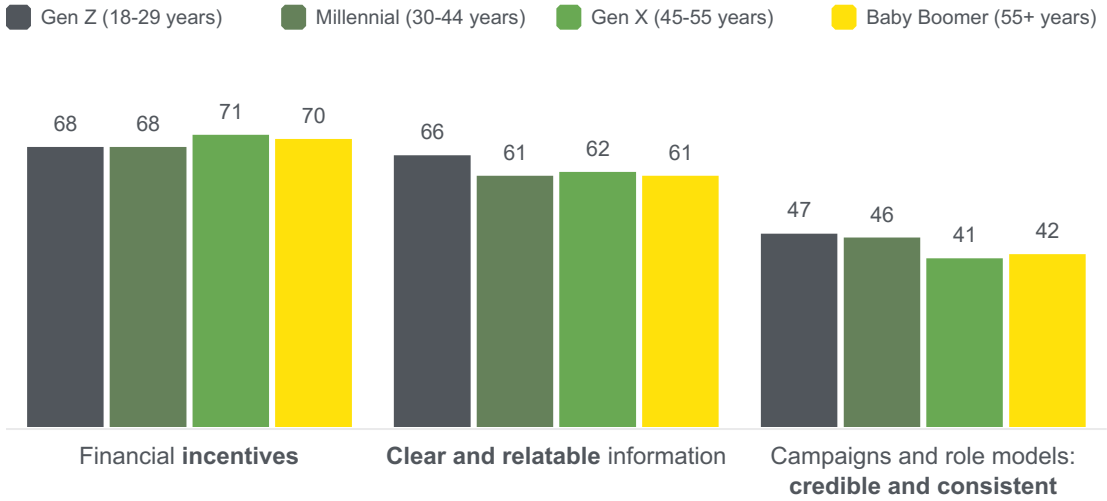
44% Seeing campaigns or content from **role models who are credible and consistent** (who really live sustainably)

The main lever for activation is financial: 7 out of 10 citizens say a monetary benefit or visible saving would help them adopt sustainable habits.

Having clear, relatable information applied to daily life is also key, helping people understand how climate change affects their surroundings and how individual actions can create real impact (62%).

Credible and consistent attitudes (44%) through campaigns, content or role models able to show with clear examples that, regardless of their financial capacity, people can make a positive impact.

Main solutions by generation



% Individuals

Q53. Which of these actions would make you more aware and adopt more sustainable habits? Choose 3 options in order of importance.

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A look at the future of mobility, food and energy.

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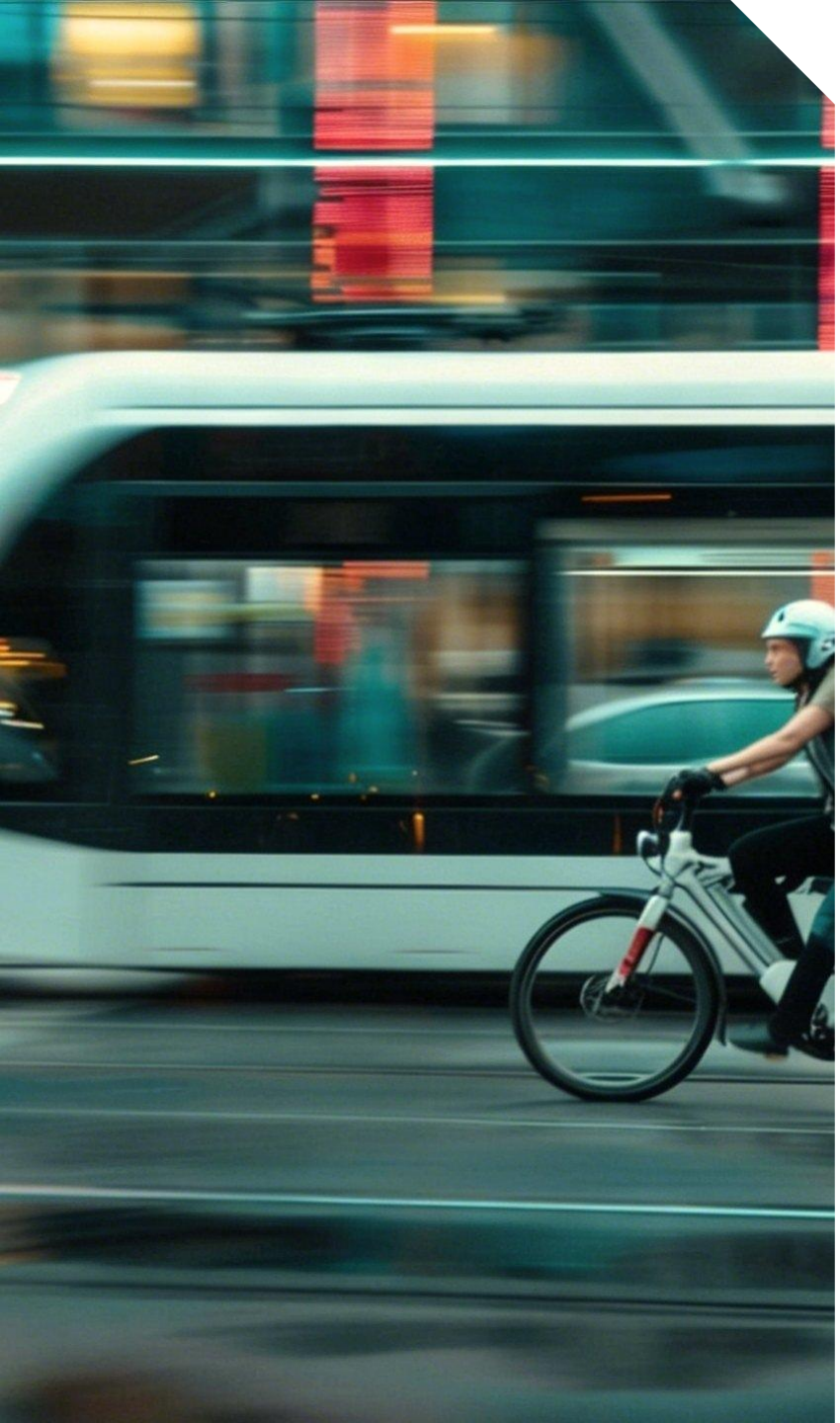


Mobility: alternatives adapted to real journeys

Intentions to reduce the mobility footprint are concentrated mainly in car use. These intentions coexist with everyday needs such as making several stops or travelling as a family, situations in which the private vehicle is seen as a more flexible and comfortable option.

Public transport struggles to meet these needs: routes that do not cover usual destinations, timetables that do not fit and delays. The testimonies collected show how interest in using more sustainable alternatives coexists with falling back on the car because of journey conditions.

Citizens are calling for financial incentives and adapted fares, along with better connections and solutions for the last leg of the journey. They also demand conditions that make shared mobility, cycling and electric vehicles easier.

31.8%

Weight of mobility in the CO_2 footprint today

11.6%

Citizens with sustainable mobility habits today

24.4%

Citizens intending to reduce their mobility footprint in future

−4.5%

Intended future reduction in mobility CO_2

The challenge is to provide alternatives that cover the whole journey and fit citizens' budgets and routines.

Note: future reduction is an estimate based on stated intentions. The carbon footprint associated with mobility includes flights, whereas the barriers and support focus mainly on land mobility.

Citizens' barriers to adopting more sustainable mobility solutions

Sustainable mobility faces barriers relating to service, comfort and personal habits.

Public transport limitations are the main group of barriers. 82% mention obstacles related to coverage, frequency and timetables, delays, distance to stops or accessibility.

The comparison with the car includes flexibility, comfort and cost. 59% point to difficulties in making several stops or travelling with other family members. On these journeys, public transport may be seen as less comfortable or more expensive than the car.

Safety and inertia add personal barriers. 47% mention concerns about safety on public transport or when walking, the risk of a cycling accident or difficulty changing their habits.

Convenience must be central to the alternatives: suitable coverage and timetables, useful connections and conditions that meet everyday needs.

The generational pattern is less clear in mobility. The differences observed do not allow clearly differentiated profiles to be defined by age.

Q55. Thinking about yourself, what are the three main reasons why you do not always choose sustainable means of transport, such as walking, cycling or using public transport? Select up to a maximum of 3 options.
Q56. Which of these actions would make you more aware and adopt more sustainable habits in your mobility when you travel? Choose 3 options in order of importance.

Citizens' solutions for adopting sustainable mobility habits

Financial incentives are the most requested support, although the main barriers are structural. 76% ask for discounts, adapted fares or bicycle subsidies. 47% call for public transport incentives and 21% cite the higher cost of public transport compared with the car when travelling as a family. How can support be combined with improvements in coverage, timetables and reliability? Asking for incentives does not prove they offset resistance to change: the questions cover different issues.

Connectivity must make the whole journey easier. 72% ask for affordable car parks connected to public transport, last-mile connections and apps for planning car journeys. Among Baby Boomers, it reaches 76%.

The push for other options combines services and infrastructure. 59% ask for comfortable, safe shared mobility, more charging for electric vehicles and continuous, safe cycle lanes on their usual routes. Specifically, **Gen Z, Millennials and Gen X are more receptive to alternative models that broaden the sustainable mobility ecosystem**, such as shared mobility (car sharing), better cycling infrastructure or facilities for using electric vehicles. In these segments, the transition is not only about strengthening public transport, but also about offering a more flexible range of solutions adapted to more dynamic, multimodal lifestyles.

76%

PUBLIC TRANSPORT FINANCIAL STIMULUS

Financial incentives to use public transport, e.g. discounts (47%), more **fares adapted to frequency and traveller profile**, e.g. daily trips, several days a week, weekends, etc. **(38%).**

72%

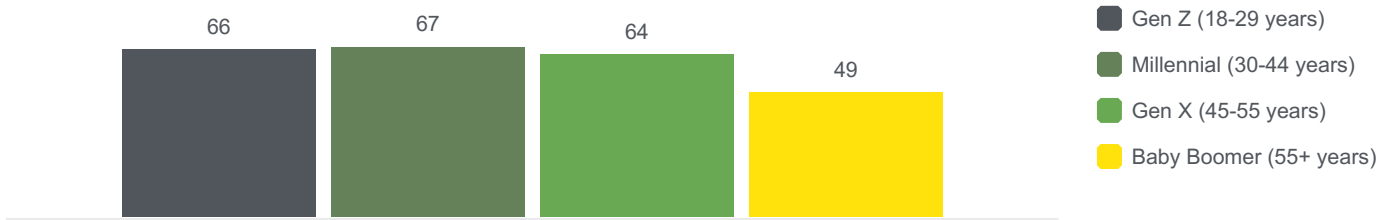
TRANSPORT SYSTEM CONNECTIVITY MEASURES

Better **connectivity between car parks and public transport** (34%), better **"last mile" connection** (33%), **apps** to choose the best car-free option, showing routes, alerts or incidents (25%).

59%

MEASURES TO PROMOTE ALTERNATIVE MODES

Promotion of easy, safe **shared mobility** (31%), more **charging points and companies facilitating electric vehicles** (22%), more continuous, safe cycle lanes (20%)



Measures to promote alternative modes
(shared mobility (car sharing…); more charging points and easier electric vehicle use; more continuous, safe cycle lanes)

Q56. Which of these actions would make you more aware and adopt more sustainable habits in your mobility when you travel? Choose 3 options in order of importance.

Mobility: the experts' view

Below are the main points from interviews with two mobility sector experts. The selection combines the public-sector view with that of the private sector and innovation. Both perspectives validate the barriers identified in the study (cost, time and infrastructure) and agree on three main lines for advancing the transition: gradual change, greater public-private collaboration and the development of integrated digital solutions.

Carlos Mateo - Director of Mobility, EMT Madrid

- Mobility is a fundamental lever, being closely linked to air quality and urban well-being. There is a very strong shift towards decarbonising urban transport through public transport and shared systems. The strategy is to widen the range of available alternatives to encourage the gradual abandonment of the private vehicle.
- Cost and time carry more weight than sustainability. Alternatives to private vehicle use must compete on both to attract users, so financial incentives and the proper design of public policies remain relevant.
- Urban planning defines essential services and subsidy limits, and can be integrated into the public network. Regulatory stability and support for public-private collaboration favour a gradual transition away from private transport.
- Solutions should be aimed at multimodal, digital and integrated networks with time and cost advantages over the private car, and platforms that facilitate access and show their real cost.

Timo Buetefisch - CEO and co-founder, Cooltra.

- E-bikes are expanding urban micromobility options and are becoming the dominant trend. Car electrification is advancing more slowly owing to factors such as purchasing power, the lack of mature charging solutions, the absence of common standards and other operational complexities.
- Public-private collaboration models, through public support mechanisms, regulatory stability and integration with public transport, encourage the adoption of solutions with great potential for social utility.
- Pay-per-use makes it possible to get around without bearing all the costs of maintaining a car. Occasional hire and shared services widen the choice.
- The future points to greater electrification and pay-per-use, with public-private collaboration and aggregator platforms combining public and private transport to facilitate access.

Food: making access and changes to everyday habits easier

Sustainable food is still seen as an expensive, hard-to-access option by a significant proportion of citizens. In addition to financial barriers, lack of time and the search for convenience make it difficult to transform everyday habits.

Although citizens seek healthier food, in practice packaged and prepared products remain present. The intention to cook more and limit processed foods coexists with strong everyday constraints.

Citizens are calling for solutions that help democratise access to healthier, more sustainable food: more affordable prices, greater availability, and practical information and tools to build these habits into their daily lives.

21.1%

Weight of food in the CO_2 footprint today

10.6%

Citizens with sustainable food habits today

22.4%

Citizens intending to reduce their food footprint in future

−5.8%

Intended future reduction in food CO_2

The challenge is to make sustainable food a preferred option, more accessible and better integrated into everyday shopping.

Note: future reduction is an estimate based on stated intentions.

Citizens' barriers to adopting sustainable food habits

Cost and everyday difficulties hold back more sustainable food choices.

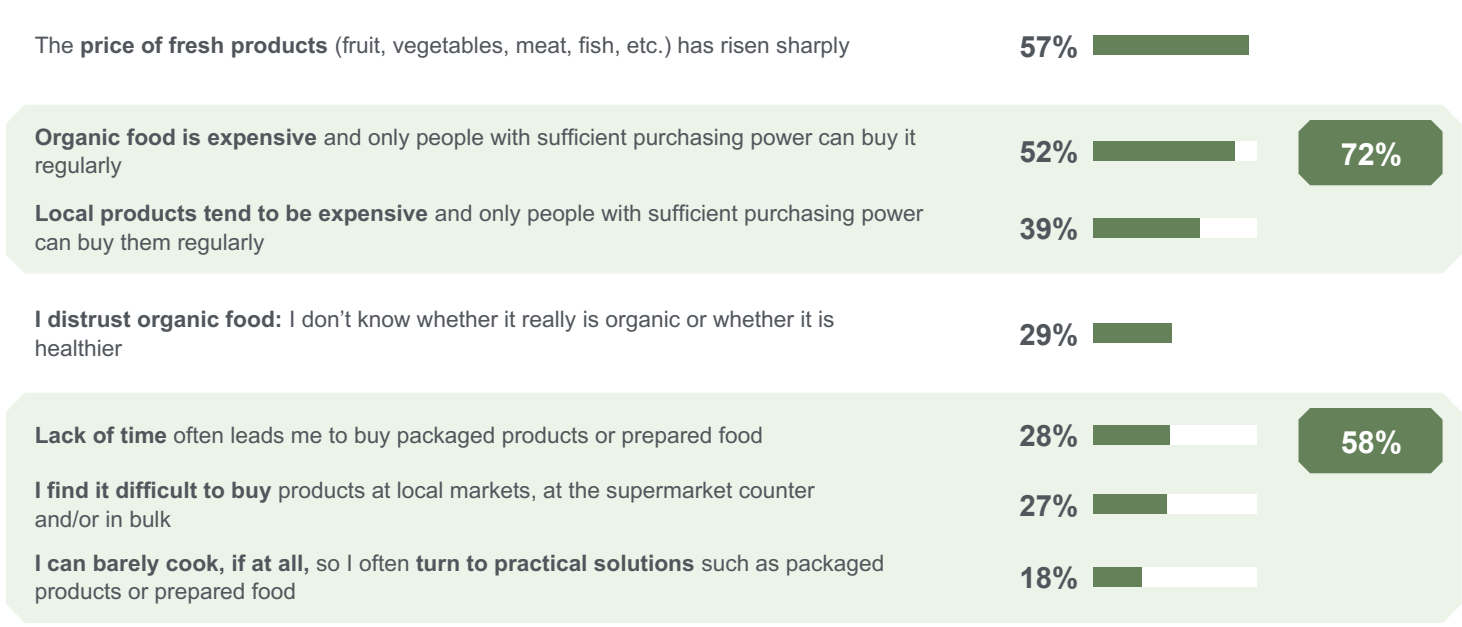
Price is the main barrier. 72% point to the cost of organic or local food as an obstacle to buying it regularly. 57% perceive a sharp rise in the price of fresh food, a pressure on everyday food that increases with age and reaches 63% among Boomers.

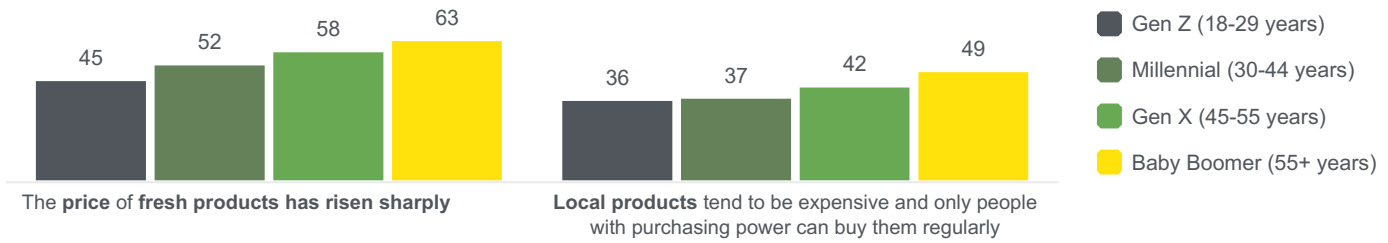
Rising prices may reinforce barriers to change. They may make it harder to keep buying fresh food regularly and leave less room to adopt habits that are also considered costly.

Shopping and preparation also make change harder. 58% mention lack of time, difficulties buying certain products or little practice in the kitchen.

Trust needs attention. 29% doubt whether foods are really organic or healthier.

The challenge is to democratise access to sustainable food. Make fresh products and affordable options easier to obtain, simplify shopping and build trust, so that changing habits does not require additional financial effort.





Q53. Thinking about yourself, what are the three main reasons why you do not always choose healthy, sustainable food?

Citizens' solutions for adopting sustainable food habits

Citizens propose support to make more sustainable eating easier.

Affordability is the most requested support. 83% ask for more affordable prices for organic and local products, promotions or incentives for returning containers.

Access also requires changes in what is on offer. 57% ask for more organic and local products and fewer packaged products.

Information must help in everyday life. 42% ask for guidance on eating healthily and sustainably, saving money and making the most of food to reduce waste.

Making the choice easier while shopping complements this guidance. 40% ask for in-store signage, environmental information on labels and identification of options in each category.

83%

AFFORDABILITY

Includes **more affordable prices** for **local** and **organic** products (38% and 35%), as well as **incentives** such as container-return schemes (34%) or **promotions in loyalty programmes** (27%).

57%

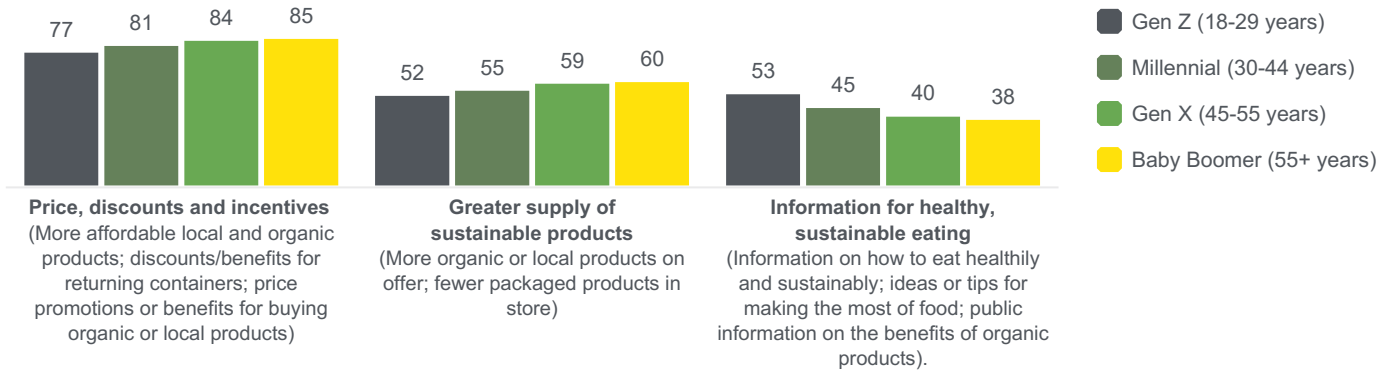
SUPPLY

Availability of **local and organic products** (26% and 21%) and a reduced presence of **packaged products** at the point of sale (21%).

42%

INFORMATION

People ask for **more practical information** on how to eat healthily and sustainably while saving money (18%), ideas for reducing **food waste** (18%), and more public information about **organic products and their benefits** (15%).



Q54. Which of these actions would make you more aware and adopt more sustainable habits in relation to food?

Food: the experts' view

Below are the main points from interviews with two food sector experts. The selection combines the perspective of sustainable, certified products with that of retail and fast-moving consumer goods. Both perspectives agree that price, health and convenience carry more weight in purchasing decisions than the carbon footprint. They also converge on the need to differentiate concepts such as organic, sustainable, local and carbon footprint; promote a realistic flexitarian model; and ensure that any sustainability lever is compatible with convenience.

Sophie Pagnon - Director of Communications, Marketing and Impact, Veritas.

- Health carries more weight than a product's carbon footprint in food purchases, and established habits, brands and preferences make change difficult.
- Organic, sustainable and local food are different purchase drivers, which helps to understand the value of certification, providing a differentiating factor according to consumer preferences.
- Plant and animal protein can coexist in a flexible diet. Plant protein consumption tends to have a lower carbon footprint and lower cost, and fits the trend towards convenient, ready-to-eat products.
- Knowing the differences between conventional and organic production can change perceptions of value for money.
- Any lever relating to packaging, ingredients, origin or composition must be compatible with convenience, as the observable trend is the search for immediacy.

Cinta Bosch - Sustainability Manager, AECOC.

- Price remains decisive: all things being equal, consumers choose the sustainable option, but in many cases they are not willing to pay more.
- Convenience in many cases requires the use of packaging. Changes in households and lifestyles are driving this trend towards convenience.
- 80% of consumers are annoyed by unnecessary packaging, but 67% believe that products must be well protected to guarantee food safety
- There is trust in labels, but this does not always translate into willingness to pay more. Conveying value requires education and clear communication indicating what each label certifies, and a distinction between organic certification, local origin and carbon footprint.

Energy: affordability and the capacity to act

The adoption of more sustainable energy solutions is shaped by a combination of barriers. For many citizens it represents an investment that is difficult to afford, especially when doubts persist about its return and the savings it may generate.

On top of this come housing limitations, such as age, lack of space or the need for renovation work. In residential buildings, progress also depends on reaching collective agreements within residents' associations. The complexity of the system, the lack of clear information and distrust of what is on offer and of financial support reinforce uncertainty.

Citizens' main demand is for grants, subsidies and financing formulas. Collective solutions also feature, as does the need for practical guidance to help people understand the alternatives and decide with greater confidence.

21.0%

Weight of energy in the CO_2 footprint today

18.0%

Percentage of citizens with sustainable energy habits today

29.2%

Citizens intending to reduce their energy footprint in future

−3.5%

Intended future reduction in energy CO_2

The key will be to combine financial support, solutions adapted to housing realities and clear guidance for more confident decisions.

Note: future reduction is an estimate based on stated intentions.

Citizens' barriers to adopting more sustainable energy solutions

The barriers are diverse and no single response dominates: the most mentioned reaches 29%.

Investment and doubts about returns make change difficult. 27% lack the resources to install solar panels and 19% believe the investment is only recouped in the long term. The cost of efficient equipment and difficulties paying energy bills add to this.

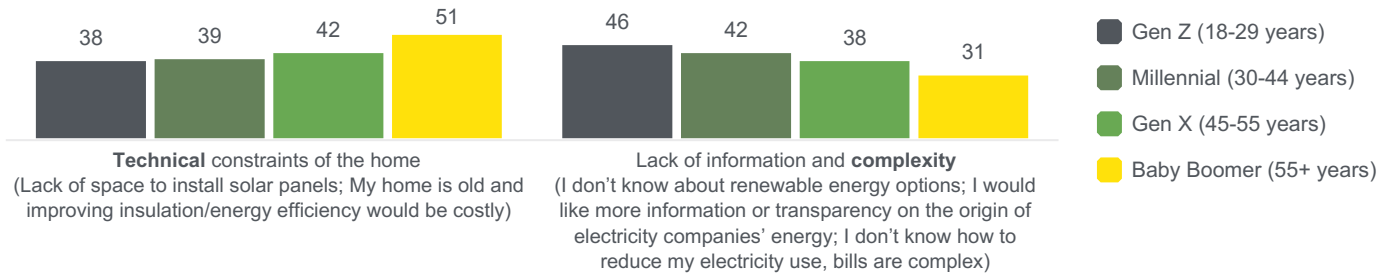
Housing conditions and decision-making capacity limit the alternatives. 23% say their home is old and improving its efficiency is costly. 29% have difficulty reaching agreements in their residents' association. Lack of space and rental restrictions add to this. Technical constraints and doubts about returns are more significant among Baby Boomers.

Lack of information and complex procedures add difficulty. 15% are unaware of or confused by energy companies' renewable options and 16% point to the complexity and time involved in the procedures for installing solar panels. Distrust of public support adds to this. Information and complexity weigh more heavily among young people.

Responses must address investment, housing conditions and the capacity to decide on and manage change.

THREE MAIN BLOCKS

Difficulty reaching agreement to install solar panels (or similar measures) in the residents' association	29%	**Structural housing conditions**
Lack of space to install solar panels	24%	
Old home and high cost of insulation/installing efficiency measures	23%	
Low availability of financial resources or low willingness to invest in the **installation of solar panels**	27%	**Financial limitations and affordability**
Perception that investment in solar panels pays off **only in the long term**	19%	
Perception that **renewable energy is more expensive** than non-renewable energy	15%	
Lack of trust in public support or complex administrative procedures for installing energy efficiency measures / solar panels	16%	**Lack of information and complexity**
Confusion about renewable options offered by energy companies	15%	
Lack of transparency about the origin of the energy sold by electricity companies	15%	



Technical constraints of the home
(Lack of space to install solar panels; My home is old and improving insulation/energy efficiency would be costly)

Lack of information and **complexity**
(I don't know about renewable energy options; I would like more information or transparency on the origin of electricity companies' energy; I don't know how to reduce my electricity use, bills are complex)

Q57. Thinking about your personal situation at home, what are the three main reasons why you do not use 100% renewable energy sources in your home?

Citizens' solutions for adopting sustainable energy habits

Citizens ask for support that makes the home energy shift easier.

Financial support and regulation account for the greatest demand. 75% mention grants, subsidies and financing for efficient renovations (42%) and solar panels (37%). The block includes public regulation of supply (26%).

Collective solutions respond to obstacles that go beyond individual decisions. 48% ask for solutions for residents' associations or access to energy communities.

Practical information must make home savings and efficiency easier. 42% ask for advice on reducing consumption and spending, and choosing efficient equipment.

Guidance must help people understand the alternatives and how to access them. 42% ask for information on installing solar panels and other options. 41% ask for energy alternatives and guides on tariffs and the origin of energy.

By generation, **Baby Boomers show greater willingness towards collective solutions (50%)**, while **Generation Z and Millennials** are asking to be supported, guided and mentored throughout the process, from what they need to do to achieve greater energy efficiency at home to what they need to do to install more sustainable energy such as solar.

75%

GRANTS, SUBSIDIES AND FINANCING

Grants, subsidies or financing for energy renovations (42%) such as insulation, glazing, efficient appliances, or installing **solar panels** (37%).

48%

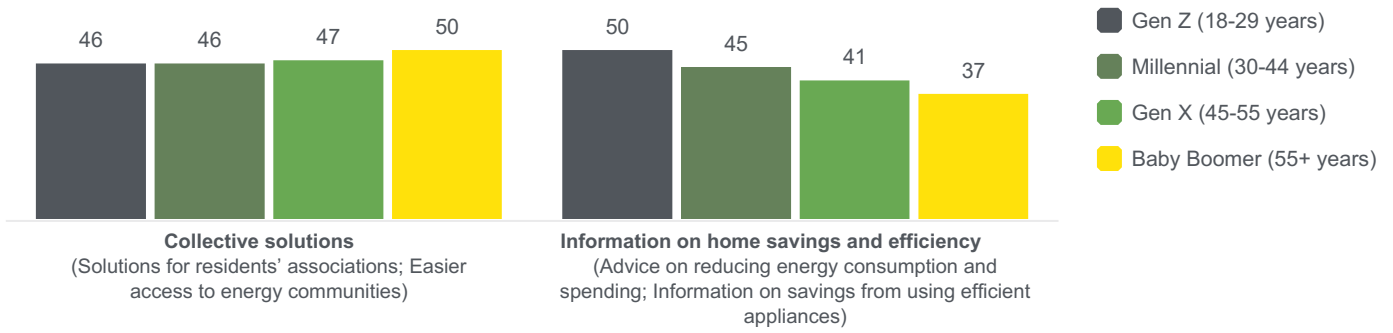
COLLECTIVE SOLUTIONS

Solutions aimed at **residents' associations** (32%) and access to **energy communities (23%).**

42%

INFORMATION

On solar panels and alternatives (23%), home savings and efficiency (25%), and guides for better understanding of companies' tariffs and energy origin (22%).



Collective solutions
(Solutions for residents' associations; Easier access to energy communities)

Information on home savings and efficiency
(Advice on reducing energy consumption and spending; Information on savings from using efficient appliances)

Q58. Which of these actions would make you more aware and adopt more sustainable habits in relation to energy?

Energy: the experts' view

Below are the main points from interviews with two energy sector experts. They highlight the gap between citizens' intention and action: behavioural changes respond mainly to financial and practical factors, and uncertainty about financial returns remains the main barrier. The interviews stress the need to reduce perceived risk through financing mechanisms and predictable policies, as well as to promote electrification, especially air-source heat pumps, and to strengthen electricity grids to facilitate the transition.

Lara Lázaro Touza - Senior Analyst, Elcano Royal Institute.

- Citizen support for electricity from renewable sources remains high, even if it involves large infrastructure (wind farms or large solar installations).
- The likelihood of accepting decarbonisation measures and policies increases when there are regulatory frameworks for decarbonisation, when there is peer pressure, when citizens talk about climate action with those around them, when there is high perceived self-efficacy (e.g. when people feel able to save energy) and when measures are perceived as progressive.
- The climate disinformation most prevalent today creates doubts among citizens about renewable energy and decarbonisation policies, potentially delaying purchase decisions and changes in habits. Developing specific protocols to combat it is a priority.
- Decarbonisation policies must be complemented by market instruments and just transition frameworks, so that the costs of decarbonisation do not fall on the most vulnerable groups and territories.
- Spain has an advanced climate governance framework, but must strengthen energy interconnections, speed up permitting while preserving the environmental integrity of the territory, make progress on adaptation policies and open the debate on climate loss and damage.

Pablo Álvarez Álvarez - Director of Energy Services, ACCIONA Energía

- Awareness of energy efficiency has increased considerably, partly thanks to public support and the information work carried out by suppliers and energy companies.
- Uncertainty about financial returns is the main barrier, and energy companies reduce uncertainty by taking on the initial investment and the return risk and clearly communicating the expected savings.
- Air-source heat pumps are emerging as a solution with great potential to replace fossil fuel-based systems in homes. Making gas consumption visible helps identify savings opportunities.
- In owners' associations, simplifying management, facilitating agreements between neighbours and providing support with paperwork is as important as the technology itself in accelerating self-consumption and energy retrofitting.
- Public support has been decisive for progress in residential energy efficiency. There is room for improvement in disseminating information on available support and access mechanisms.
- Progress on electrification in Spanish homes requires strengthening transmission and distribution grids so that their capacity does not limit progress.

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06

Conclusions

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02 Citizen profiles and decarbonisation

03 Introducing the Suma Net Zero Index

04 Key challenges for citizens in decarbonisation

05 A look at the future of mobility, food and energy.

06 **Conclusions**

Conclusions

The transition to a decarbonised economy requires understanding how citizens think, decide and act. Identifying their habits, motivations and barriers helps guide corporate and institutional strategies to facilitate real changes in everyday life.

1. **The intention to change exists, but turning it into action remains the great challenge.** The SNZI estimates a potential 5.1% reduction in citizens' carbon footprint over the next twelve months. However, making this willingness a reality requires overcoming financial, practical and structural barriers that shape everyday decisions.

2. **Mobility, food and energy account for the major transformation challenges.** In mobility, alternatives must compete with the private vehicle on cost, time and flexibility. In food, healthy and sustainable options must become more accessible, reconciling price and convenience. In energy, uncertainty about investment and savings must be reduced, financing made easier and electrification and the necessary infrastructure promoted.

3. **Transforming consumption patterns is essential to reducing the footprint.** The purchase of goods offers significant reduction potential through more conscious consumption, repair, reuse and extending the useful life of products. In waste, the challenge is to move from a culture focused on recycling to one that also prioritises prevention and reduction.

4. **Price, convenience and trust determine the adoption of sustainable habits.** Sustainability must be built into everyday decisions without demanding extra costs or disproportionate effort. This calls for affordable alternatives, clear information on the benefits, incentives and reduced uncertainty, especially for decisions that require investment.

5. **Companies and institutions have a decisive role as facilitators of change.** The transition requires innovation, investment and public-private collaboration. Companies must listen to and better understand citizens' needs in order to adapt their products, services and business models, while public authorities help create the conditions, infrastructure and stable frameworks that make change possible.

"The challenge is not only to get citizens to want to change, but to build an environment in which sustainable alternatives are also the most accessible, convenient and attractive."

Suma Impact Foundation

SALVETTI LLOMBART
INSPIRING CHANGES

pwc

SUMA NET ZERO INDEX