

ATTITUDES TOWARDS EVERYDAY SUSTAINABILITY – GERMANY – 2022

In times of high inflation, brands can demonstrate their value by combining financial and environmental benefits (eg with the help of reuse options) and communicate the cost savings of such services.



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Attitudes Towards Everyday Sustainability – Germany – 2022

This report looks at the following areas:

- How consumers perceive the environmental-friendliness of their own lifestyles
- Changes in environmentally friendly living compared to a year ago
- Drivers for leading a more environmentally friendly lifestyle
- Frequency of eco-friendly behaviours/eco-friendly shopping behaviours
- Consumer attitudes towards sustainable living
- Eco-consumer typologies

Overview

83% of Germans think they are leading a very/somewhat environmentally friendly lifestyle, and 26% say their lifestyle is more environmentally friendly compared to a year ago. This stands in stark contrast to high levels of air pollution and household waste, suggesting that **carbon footprints are not declining in the way they need to. Thus, Germans seem to be overly confident when it comes to self-reporting of eco behaviours**; 63% of German consumers actually agree that people are always less environmentally friendly than they think they are.



In times of high inflation, brands can demonstrate their value by combining financial and environmental benefits (eg with the help of reuse options) and communicate the cost savings of such services.

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There is space for **clearer education of consumers on what sustainable living actually looks like**, specifically focusing on their everyday behaviours that they may be getting wrong, such as incorrect recycling and avoidable food waste.

While **65% of German consumers** say that humanitarian crises make concerns about the environment take a backseat, **living in times of multiple crises will further test Germans' eco-ambitions**. As high inflation puts pressure on household consumption, many consumers could opt to ignore sustainability as their focus shifts in an attempt to adjust their budgets. Hence, **reconciliation of financial pressure and a sustainable lifestyle** is a key challenge for brands.

Brands operating in the German market now need to cater to more price-sensitive consumers and address the growing demands in terms of sustainability. This provides chances for reuse options like buyback schemes and new mobility concepts (eg MaaS), and brands should communicate the cost benefits of such services.

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Report Content

EXECUTIVE SUMMARY

Key issues covered in this Report

- Overview
- The five year outlook for everyday sustainability

Market context

- High inflation challenges eco behaviours
- Climate change coming to the fore

Opportunities

- Communicate savings potential of living more eco-friendly
- Help consumers reduce their carbon footprint
- Tap into refillables as the next generation of eco-friendly packaging
- Quick download resources

MARKET DRIVERS

German economy

- Strong post-COVID-19 bounceback followed by a period of slower growth
 - Graph 1: key economic data, in real terms, 2019-23
- Economic slowdown fueled by conflict in Ukraine
- Inflation is the key concern in 2022 for consumers, brands and the economy...
- ...impacting financial wellbeing and consumer expenditure

Impact of the economy on sustainable living

- The impact of the economy on sustainable living
 - Graph 2: household and lifestyle issues faced over the last two months, 2022
- High inflation causes changes in consumption behaviour
 - Graph 3: expected changes in behaviour due to rising prices, 2022

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- Germany's greenhouse gas emissions are rising again
 - Graph 4: greenhouse gas emissions, 2011-2021
- Germans place high expectations on companies to take sustainable measures

Household waste and plastic pollution

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- The changing role of packaging

Transformations in the German mobility sector

- Questionable success of Germany's e-car purchasing support
- Germany hesitates to support the 2035 combustion engine ban in EU
- The German government is keen to push public transport

Sharing economy

- Sharing economy as a chance for sustainability, but Germans are reluctant

WHAT CONSUMERS WANT AND WHY

Perception of own environmentally friendly lifestyle

- The majority of Germans think they act environmentally friendly...
- ...but over-confidence proves a challenge for brands
- Be aware of Gen Zers' more self-critical perception of their eco behaviours
- Address consumers who feel they cannot afford to be green

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 - Graph 6: changes in sustainable living compared to a year ago, by generation, 2022
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- Combine forces to push e-mobility
- Make consumers aware of their carbon footprint
- Get inspired by CHOOOSE to help German consumers shrink their carbon footprint

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- Help consumers up frequency of more impactful eco-habits
 - Graph 8: frequency of environmentally friendly habits, 2022

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 - Graph 9: proportion of adults who do the selected eco habits all the time, by generation, 2022
- IKEA's Sustainable Living Shops help customers live more eco-friendly lives at home
- A sweet spot for smart food waste composters
- Be inspired by Electrolux GRO to make sustainable eating easier
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 - Graph 13: consumer eco groups, by age, 2022
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- Group 2: The Engaged Eco Consumer (30%)
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 - Graph 17: food launches with selected ethical and sustainable claims, 2016-17 vs 2021-22
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- Bosch celebrates its carbon-neutrality
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APPENDIX

Appendix – products covered, abbreviations, consumer research methodology and language usage

- Products covered in this Report
- Abbreviations
- Consumer research methodology
- CHAID analysis – methodology
- CHAID analysis
- A note on language

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