

# 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

### Climate change

- 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

- The pandemic fueled waste production of private households
- 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

### Changes in sustainable living

- One in four Germans acts more environmentally friendly than a year ago
  - Graph 5: changes in sustainable living, 2022
- Support Gen Zers in creating a more sustainable future
  - Graph 6: changes in sustainable living compared to a year ago, by generation, 2022
- Get consumers enthusiastic about repairing

### Drivers for leading a more environmentally friendly lifestyle

- Consumers call for support to make a difference
  - Graph 7: drivers for leading a more environmentally friendly lifestyle, 2022
- Cater to consumer demands for affordable, green alternatives
- Take German start-up Glasbote as a prime example for plastic-free deliveries
- A chance for mobility as a service solution
- 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

### Environmentally friendly habits

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

# Attitudes towards Everyday Sustainability – Germany – 2022

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- Support city dwellers in their recycling efforts
- Guide Gen Zers to improve their eco habits at home
  - 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
- The majority of Germans act eco-friendly in various ways, but students are lagging behind

## Sustainable shopping behaviours

- Respond to Germans' ambitions towards plastic free-habits
  - Graph 10: frequency of environmentally friendly shopping behaviours, 2022
- Learn from The Body Shop to push refills
- Partner with local brands to strengthen identity bonds
- Rental models coming to the fore
- Young parents are keen to shop second hand

## Attitudes towards leading a sustainable lifestyle

- Consumers are looking to businesses to play their part
  - Graph 11: attitudes towards environmentally friendly issues and lifestyles, 2022
- Persuade consumers who lead a less eco-friendly lifestyle
  - Graph 12: selected attitudes towards leading a sustainable lifestyle, % agree (net), by how environmentally friendly they perceive their lifestyle, 2022
- Get inspired by Garnier's "One Green Step" campaign

## Eco typologies

- German consumer eco typologies
- Group 1: The Unconcerned Eco Consumer (30%)
  - Graph 13: consumer eco groups, by age, 2022
- Educate Unconcerned Eco Consumers about eco-issues
- Group 2: The Engaged Eco Consumer (30%)
  - Graph 14: consumer eco groups, by age, 2022
- Appeal to Engaged Eco Consumers with outstanding initiative towards sustainability
- Group 3: The Eco Realist (27%)
  - Graph 15: consumer eco groups, by age, 2022
- Meet Eco Realists' expectations on brands to play their part in saving the environment
- Group 4: The Hopeless Eco Consumer (14%)
  - Graph 16: consumer eco groups, by age, 2022
- Convince Hopeless Eco Consumers by communicating savings potential

## LAUNCH ACTIVITY AND INNOVATION

### Food and drink

- Environmentally friendly packaging claims see the greatest increase
  - Graph 17: food launches with selected ethical and sustainable claims, 2016-17 vs 2021-22
- Examples of environmentally friendly packaging claims in food and drink

### Beauty & personal care products

- Eco claims are on the rise
  - Graph 18: BPC launches with selected ethical and sustainable claims, 2016-17 vs 2021-22
- Examples of eco claims in BPC

### Household care products

- Brands focus on environmentally friendly packaging and higher recyclability
  - Graph 19: household launches with selected ethical and sustainable claims, 2016-17 vs 2021-22
- Examples of eco-friendly packaging and recycling claims in household care

### Advertising and marketing activity

- IKEA Germany promotes eco habits
- Burger King: "Normal or with meat?"
- Bosch celebrates its carbon-neutrality
- Netto promotes affordable and sustainable food

## 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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