Exclusive Statista survey on sustainable consumption among 1,032 consumers in Germany

Study design

This report is based on the representative survey “Sustainable Consumption 2021” by Statista. In addition to this report, Statista provides statistics, survey data tables, and an interactive version of the study for individual analysis as part of the Global Consumer Survey. This study provides insights into attitudes, consumer behavior, and brand perception regarding sustainability in the categories Food & Beverages, Fashion, and Beauty & Personal Care. It addresses sustainable eCommerce and the drivers and barriers of sustainable consumption.

Method          Online survey
Language        German
Sources         Statista
Region          Germany
Number of respondents 1,032
Age of respondents 16 years and older
Type of respondents Residential online population
Panel provider   PureSpectrum
Survey time period February 15th to 22nd, 2021

This exclusive Statista survey is also published as a Content Special within the Global Consumer Survey and can be evaluated individually. You can find more information at:

Consumers feel they influence environmental issues and many are willing to adapt their buying habits

Key Insights (1/3)

**Sustainability is seen as a decision-forming purchase criterion and as a topic that is meant to stay**

Only a 15% minority thinks that sustainability is a buzzword and will lose importance in the future. A somewhat larger group feels skeptical about sustainability: one in five states that sustainability claims are exploited by brands for the benefit of selling products more expensively. Nevertheless, many regard sustainability as an important purchase criterion: Approximately 30% of those surveyed name sustainability as an important factor for purchasing decisions in the category Food & Beverages, and in the Beauty & Personal Care category, this opinion is held by 27% of respondents. In the category Fashion, 25% of those surveyed hold this view. However, price is especially prioritized across all categories.

**Consumers see an own influence on tackling environmental problems**

Only 10% of German consumers doubt that climate change is caused by humans. More than 50% agree that their daily behaviors can help to resolve environmental issues. However, older consumers also feel that companies should be held accountable.

**Consumers habits change due to sustainability**

One in two consumers states that they have changed or adapted their consumption behavior due to sustainability reasons. This includes trying out new products and stores as well as showing a willingness to spend more money on sustainable products. Also, consumers are ready to forgo products that do not meet sustainability standards: over 25% of respondents stopped buying certain products. In the food category, 26% avoided products such as exotic fruits, in beauty care, 26% banned products such as disposable razors from their shopping lists, and 28% canceled fashion items such as leather fabrics.

**Brands with a negative sustainability policy are at risk of being canceled**

Brands and stores with poor sustainability policies tend to experience consumer avoidance or even boycotting: 24% of respondents say that a lack of sustainability led them to stop buying a certain brand in the beauty & personal care sector. Younger consumers, in particular, are willing to go even further: 26% of respondents aged 16-29 years boycotted a brand or store due to its negative sustainability policy.

Sources: Statista Global Consumer Survey “Sustainable Consumption 2021”; Survey period February 2021
A good effect on nature and a good conscience speak for buying sustainably; money is the biggest barrier

Key Insights (2/3)

Main drivers for sustainable purchases are environment, conscience, regional support, and health

The good impact on the environment and a good conscience drive sustainable purchases across all categories. When it comes to food, 53% of respondents are in favor of supporting regional suppliers. Within the category Beauty & Personal Care, health factors (whether for oneself or for the family) provide the impetus for buying sustainable products (41%). In the Fashion category, 35% of consumers purchase eco-friendly clothing to support social justice.

Price, lack of credibility, and habits are the main barriers for sustainable purchases

Consumers are put off by the expense of sustainable products: across all categories, this factor was the main reason for not buying sustainable alternatives. The concern that some products are marketed as sustainable but in reality are not, and the tendency among purchasers to stick with known products and stores were the second and third most common reasons for not buying sustainable products.

Good prospects for sustainable eCommerce

Around 60% of online shoppers have not returned a single package in the past year. In addition, 65% say they would be willing to pay more for delivery, if CO₂-neutral shipping were guaranteed in return. Sustainable aspects certainly play a role in eCommerce: almost one in two indicates little packaging waste as an important delivery criterion. However, free, fast, and safe shipping is a much more important priority.

Sources: Statista Global Consumer Survey *Sustainable Consumption 2021*; Survey period February 2021
With few exceptions, large and well-known brands seem to struggle with creating a sustainable image

Key Insights (3/3)

Large supermarket chains are doing well; discounters lag behind

Regarding sustainability and food products, discounters perform quite poorly across the board. Supermarkets such as EDEKA and REWE are above average: more than one in three consumers considers them sustainable. The situation is even better for their own organic private brands: here, EDEKA Bio and REWE Bio are on par with the private labels of exclusively organic supermarkets such as Denn’s. When it comes to sustainable brands excluding private brands, the best known and most purchased sustainable food brand is Alnatura.

Successful beauty and personal care brands have vastly different sustainability images

Within the beauty and personal care market, Nivea is a clear winner by being above average along the dimensions of awareness, buyer share and sustainable image, while The Body Shop is the lesser-known sustainability champion. Although Axe is very well known and often purchased, its sustainability performance is the lowest compared to other brands in the list. The most recognized and purchased sustainable beauty and personal care brand is Kneipp and is closely followed by Weleda.

Fashion has a hard time with sustainability

Looking at fashion, big players such as H&M, Otto, and Zalando are consistently seen as not credibly sustainable (only 15 to 22% of consumers agree that these brands are sustainable or very sustainable). Smaller niche retailers are the ones with a good eco-friendly image with hessnatur leading the way. The trifecta of being well known, frequently purchased, and convincingly sustainable has not yet been attained by any retailer.

Sources: Statista Global Consumer Survey *Sustainable Consumption 2021*; Survey period February 2021
THE STATUS OF SUSTAINABILITY
**Germans see packaging and animal welfare as the most important aspects of sustainable consumption**

The status of sustainability: personal importance

### Important aspects of sustainable consumption

<table>
<thead>
<tr>
<th>Aspect</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Environmentally friendly packaging (e.g., recyclable, plastic avoidance)</td>
<td>56%</td>
</tr>
<tr>
<td>Animal welfare</td>
<td>55%</td>
</tr>
<tr>
<td>Fairly traded and produced (e.g., fair wages, no child labor)</td>
<td>49%</td>
</tr>
<tr>
<td>No use of environmentally harmful raw materials (e.g., palm oil, chemicals, artificial fragrances)</td>
<td>45%</td>
</tr>
<tr>
<td>Regionality (e.g., avoid long shipping routes)</td>
<td>45%</td>
</tr>
<tr>
<td>CO₂ avoidance</td>
<td>41%</td>
</tr>
<tr>
<td>Conscious consumption</td>
<td>41%</td>
</tr>
<tr>
<td>Use of renewable raw materials</td>
<td>40%</td>
</tr>
<tr>
<td>Resource-saving production (e.g., water consumption)</td>
<td>34%</td>
</tr>
<tr>
<td>Seasonality</td>
<td>29%</td>
</tr>
<tr>
<td>Eco-classification (e.g., organic)</td>
<td>20%</td>
</tr>
<tr>
<td>None of the above</td>
<td>8%</td>
</tr>
</tbody>
</table>

*"When it comes to products and services, which of the following aspects of sustainable/eco-friendly consumption are important to you personally?"; Multi Pick; Base: n=1,032, all respondents; Sources: Statista Global Consumer Survey "Sustainable Consumption 2021"; Survey period February 2021*
Microplastics and (food) waste are the most frequently researched topics by consumers

The status of sustainability: researched topics

**Active information seeking, by topic**

- Dealing with waste (e.g., plastic/packaging waste): 30%
- Food waste: 30%
- Microplastics: 29%
- Deforestation: 21%
- Future energy sources and supply: 21%
- CO₂ footprint: 21%
- Water scarcity / poor drinking water quality: 17%
- Fridays for Future: 16%
- Future food sources (e.g., insects or lab-grown meat): 12%
- Fast fashion / slow fashion: 9%
- None of the above: 34%

"Which of the following topics have you actively searched for information about in the last 12 months? Via documentaries, internet research, magazine articles, etc.?"; Multi Pick; Base: n=1,032 all respondents
"How old are you?"; Single Pick; Base: n=1,032 all respondents
Sources: Statista Global Consumer Survey; "Sustainable Consumption 2021"; Survey period February 2021
One out of five consumers is suspicious about companies’ eco-friendliness claims

The status of sustainability: attitudes (1/2)

**Attitudes towards sustainability**

- 20%: “Sustainable/eco-friendly” is just a term that companies use to sell their products at a higher price
- 15%: “Sustainability/eco-friendliness” is a buzzword and will lose its meaning again
- 10%: I don't believe that climate change is caused by humans

*Which of the following statements do you agree with?*; Multi Pick; Base: n=1,032 all respondents
Sources: Statista Global Consumer Survey; “Sustainable Consumption 2021”; Survey period February 2021
More than half of consumers believe changing their behavior could tackle climate change

The status of sustainability: attitudes (2/2)

Attitudes towards sustainability

I can contribute to tackling environmental problems through my daily behavior

Companies are responsible for solving global environmental problems

The government is responsible for solving global environmental problems

*Which of the following statements do you agree with?*; Multi Pick; “How old are you?”; Single Pick; Base: n=1,032 all respondents

Sources: Statista Global Consumer Survey, “Sustainable Consumption 2021”; Survey period February 2021
FOOD & BEVERAGES
## Top 10 sustainable food and beverage purchases by category

<table>
<thead>
<tr>
<th>Category</th>
<th>Sustainable buyer</th>
<th>Non-sustainable buyer</th>
<th>Non-buyer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fruits and vegetables</td>
<td>37%</td>
<td>47%</td>
<td>16%</td>
</tr>
<tr>
<td>Dairy products</td>
<td>25%</td>
<td>55%</td>
<td>20%</td>
</tr>
<tr>
<td>Potatoes</td>
<td>21%</td>
<td>56%</td>
<td>23%</td>
</tr>
<tr>
<td>Coffee</td>
<td>20%</td>
<td>56%</td>
<td>24%</td>
</tr>
<tr>
<td>Meat and sausages</td>
<td>20%</td>
<td>53%</td>
<td>27%</td>
</tr>
<tr>
<td>Fish</td>
<td>18%</td>
<td>41%</td>
<td>41%</td>
</tr>
<tr>
<td>Bread and bakery goods</td>
<td>16%</td>
<td>65%</td>
<td>19%</td>
</tr>
<tr>
<td>Tea</td>
<td>14%</td>
<td>45%</td>
<td>41%</td>
</tr>
<tr>
<td>Rice</td>
<td>11%</td>
<td>50%</td>
<td>39%</td>
</tr>
<tr>
<td>Sweets and chocolate</td>
<td>10%</td>
<td>62%</td>
<td>28%</td>
</tr>
</tbody>
</table>

Source: Statista Global Consumer Survey "Sustainable Consumption 2021"; Survey period February 2021
Sustainability is an important food purchase criterion for one third of consumers, but nothing beats taste

Food & beverages: important purchase criteria

Food purchase criteria

- Taste: 67%
- Quality: 65%
- Price: 64%
- Ingredients: 46%
- Animal welfare: 44%
- Shelf life: 42%
- Origin: 39%
- Package size: 33%
- Sustainability/eco-friendliness: 32%
- Compatibility: 30%
- Quality seal / organic certification: 23%
- Brand/manufacturer: 22%
- Appearance: 15%
- None of the above: 3%

"Which of the following criteria are particularly important to you when buying food or drinks?"; Base: n=1,032 all respondents
Sources: Statista Global Consumer Survey "Sustainable Consumption 2021"; Survey period February 2021
Every second sustainable food buyer states that supporting regional suppliers is a purchase driver

Food & beverages: drivers and barriers

**Main reasons for buying sustainable food**

- Better for the nature/environment: 65%
- To support regional suppliers: 51%
- Better for my own health/my family’s health: 41%
- For my own conscience: 38%
- Better quality: 38%
- To support social justice: 29%
- To support projects for a good cause: 28%
- Other/Don’t know: 7%

**Main reasons against buying sustainable food**

- Too expensive: 40%
- Often a scam: 19%
- Preference of familiar products: 19%
- No sustainable option for familiar products: 12%
- Don’t have any added value: 11%
- Don’t taste as good: 10%
- No sustainable products where I shop: 9%
- Don’t last as long: 9%
- Don’t look good: 7%
- Have had bad experiences: 6%
- Other/Don’t know: 22%

“I only buy sustainable food/drinks: 7%”

Sources: Statista Global Consumer Survey “Sustainable Consumption 2021”; Survey period February 2021
Alnatura and Denn’s are perceived as the most sustainable grocery stores; discounters lag behind

Food & beverages: grocery stores landscape

Sustainability image of grocery store brands

1: Top 2 boxes: 4 = “sustainable” and 5 = “very sustainable”; “On a scale of 1 (not at all) to 5 (very), in your opinion, how sustainable/eco-friendly are the following brands?”; Rating; Base: at least n=388 per store: respondents who know the respective store; “Which of the following brands do you know?”; Multi Pick; “Which of the following brands have you purchased in the last 3 months?”; Multi Pick; Base: n=1,032 all respondents

Sources: Statista Global Consumer Survey “Sustainable Consumption 2021”; Survey period February 2021
The most popular and credibly sustainable organic private brands are EDEKA & REWE

Food & beverages: organic private brand landscape

Sustainability image of organic private brands

“Which of the following brands do you know?”; Multi Pick; “Which of the following brands have you purchased in the last 12 months?”; Multi Pick; Base: n=1,032 all respondents; “Which of these organic food brands do you feel have credibility in terms of sustainability?”; Multi Pick; Base: at least n=282 per brand, respondents who know the respective brand

Sources: Statista Global Consumer Survey “Sustainable Consumption 2021”; Survey period February 2021
Alnatura is by far the best-known and most-bought sustainable food brand and is followed by Rapunzel.

Food & beverages: top 10 sustainable brands

Top 10 sustainable food brands by awareness and purchases

*Brand awareness*  
*Brand purchases*

```
<table>
<thead>
<tr>
<th>Brand</th>
<th>Brand awareness</th>
<th>Brand purchases</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alnatura</td>
<td>86%</td>
<td>32%</td>
</tr>
<tr>
<td>Rapunzel</td>
<td>38%</td>
<td>14%</td>
</tr>
<tr>
<td>Zweragenwiese</td>
<td>28%</td>
<td>9%</td>
</tr>
<tr>
<td>Voelkel</td>
<td>26%</td>
<td>9%</td>
</tr>
<tr>
<td>Gepa</td>
<td>25%</td>
<td>8%</td>
</tr>
<tr>
<td>Dennree</td>
<td>24%</td>
<td>7%</td>
</tr>
<tr>
<td>Sonnenwelt</td>
<td>24%</td>
<td>8%</td>
</tr>
<tr>
<td>Natura</td>
<td>24%</td>
<td>8%</td>
</tr>
<tr>
<td>Nature's Way</td>
<td>23%</td>
<td>5%</td>
</tr>
<tr>
<td>Barleano</td>
<td>22%</td>
<td>6%</td>
</tr>
</tbody>
</table>
```

*Below you can see a list of selected sustainable/eco-friendly brands. Which of them do you know?*; Multi Pick  
*Below you can see a list of selected sustainable/eco-friendly brands. Which of them have you purchased products from in the last 3 months?*; Multi Pick  
Base: n=1,032 all respondents  
Sources: [Statista Global Consumer Survey](https://www.statista.com) “Sustainable Consumption 2021”; Survey period February 2021
Consumers are willing to try out new products and dig deeper into their pockets for sustainability reasons

Food & beverages: sustainability-conscious purchase changes (1/2)

**Changes in food purchase behavior for sustainability reasons**

<table>
<thead>
<tr>
<th>Behavior</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tried out a new product</td>
<td>48%</td>
</tr>
<tr>
<td>Spent more money on food</td>
<td>47%</td>
</tr>
<tr>
<td>Stopped buying a certain product (e.g., exotic fruits)</td>
<td>26%</td>
</tr>
<tr>
<td>No longer bought a certain brand</td>
<td>24%</td>
</tr>
<tr>
<td>Tried out a new shop</td>
<td>22%</td>
</tr>
<tr>
<td>Tried out the sustainable alternative of a brand I have purchased before</td>
<td>20%</td>
</tr>
<tr>
<td>Did not visit a certain store anymore</td>
<td>17%</td>
</tr>
<tr>
<td>Tried out the sustainable alternative of a brand I have had never previously purchased</td>
<td>16%</td>
</tr>
<tr>
<td>Boycotted a store/brand because of its sustainability policy</td>
<td>11%</td>
</tr>
</tbody>
</table>

“Thinking about food or drinks, which of the following statements apply to you? In the last 3 months I have done the following for sustainability reasons:”; Multi Pick; Base: n=527 respondents who purchased food or beverages and changed their buying behavior due to sustainability reasons

Sources: Statista Global Consumer Survey “Sustainable Consumption 2021”; Survey period February 2021
The younger the consumers, the more willing they are to switch shops or brands for sustainability reasons

Food & beverages: sustainability-conscious purchase changes (2/2)

Selected changes in food purchase behavior for sustainability reasons

- Tried out a new shop
- No longer bought a certain brand
- Did not visit a certain store anymore
- Boycotted a store/brand because of its sustainability policy

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Tried out a new shop</th>
<th>No longer bought a certain brand</th>
<th>Did not visit a certain store anymore</th>
<th>Boycotted a store/brand because of its sustainability policy</th>
</tr>
</thead>
<tbody>
<tr>
<td>16 - 29 years</td>
<td>33%</td>
<td>32%</td>
<td>25%</td>
<td>15%</td>
</tr>
<tr>
<td>30 - 49 years</td>
<td>21%</td>
<td>23%</td>
<td>17%</td>
<td>11%</td>
</tr>
<tr>
<td>50 years and older</td>
<td>13%</td>
<td>17%</td>
<td>8%</td>
<td>8%</td>
</tr>
</tbody>
</table>

"Thinking about food or drinks, which of the following statements apply to you? In the last 3 months I have done the following for sustainability reasons:"; Multi Pick; Base: n=527 respondents who purchased food or beverages and changed their buying behavior due to sustainability reasons

Sources: Statista Global Consumer Survey “Sustainable Consumption 2021”; Survey period February 2021
BEAUTY & PERSONAL CARE
Shower, wash, and hair care products lead the way among sustainable personal care purchases

Beauty & personal care: sustainable purchases by category

### Sustainable beauty and personal care purchases by category

<table>
<thead>
<tr>
<th>Category</th>
<th>Sustainable buyer</th>
<th>Non-sustainable buyer</th>
<th>Non-buyer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shower and wash products</td>
<td>28%</td>
<td>49%</td>
<td>23%</td>
</tr>
<tr>
<td>Hair care</td>
<td>25%</td>
<td>49%</td>
<td>26%</td>
</tr>
<tr>
<td>Dental care</td>
<td>20%</td>
<td>58%</td>
<td>22%</td>
</tr>
<tr>
<td>Deodorant</td>
<td>19%</td>
<td>56%</td>
<td>25%</td>
</tr>
<tr>
<td>Skin/body care</td>
<td>19%</td>
<td>35%</td>
<td>46%</td>
</tr>
<tr>
<td>Shaving products</td>
<td>11%</td>
<td>36%</td>
<td>53%</td>
</tr>
<tr>
<td>Decorative cosmetics / makeup</td>
<td>8%</td>
<td>18%</td>
<td>74%</td>
</tr>
<tr>
<td>Fragrances</td>
<td>7%</td>
<td>38%</td>
<td>55%</td>
</tr>
<tr>
<td>Feminine hygiene products</td>
<td>7%</td>
<td>28%</td>
<td>65%</td>
</tr>
</tbody>
</table>

*Which cosmetics and body care products have you purchased in the last 12 months?*; Multi Pick; *Which of these cosmetics and body care products that you purchased in the last 12 months were sustainable/eco-friendly?*; Multi Pick; Base: n=1,032 all respondents

Sources: Statista Global Consumer Survey "Sustainable Consumption 2021"; Survey period February 2021
Sustainability is 7th place among personal care purchase criteria; price and quality hold the top spots

Beauty & personal care purchase criteria

- Price: 60%
- Quality: 60%
- Skin compatibility: 53%
- Odor/scent: 50%
- Ingredients: 46%
- Animal welfare: 39%
- Sustainability/eco-friendliness: 27%
- Brand/manufacturer: 25%
- Quality seal/organic certification: 23%
- Package size: 23%
- Durability: 22%
- Origin: 19%
- Appearance: 14%
- None of the above: 5%

*Which of the following criteria are particularly important to you when buying cosmetics and body care products?*; Multi Pick; Base: n=1,032 all respondents

Sources: Statista Global Consumer Survey “Sustainable Consumption 2021”; Survey period February 2021
**Environmental and health reasons are the strongest drivers for buying sustainable personal care products**

**Beauty & personal care: drivers and barriers**

<table>
<thead>
<tr>
<th>Main reasons for buying sustainable personal care</th>
<th>Main reasons against buying sustainable personal care</th>
</tr>
</thead>
<tbody>
<tr>
<td>Better for the nature /environment</td>
<td>Too expensive</td>
</tr>
<tr>
<td>Better for my own health / my family’s health</td>
<td>Preference of familiar products</td>
</tr>
<tr>
<td>For my own conscience</td>
<td>Often a scam</td>
</tr>
<tr>
<td>Better quality</td>
<td>No sustainable option for familiar products</td>
</tr>
<tr>
<td>To support regional suppliers</td>
<td>Not as effective</td>
</tr>
<tr>
<td>To support social justice</td>
<td>Don't have any added value</td>
</tr>
<tr>
<td>To support projects for a good cause</td>
<td>Don't smell as good</td>
</tr>
<tr>
<td>Other / Don't know</td>
<td>No sustainable products where I shop</td>
</tr>
<tr>
<td></td>
<td>Don't last as long</td>
</tr>
<tr>
<td></td>
<td>Have had bad experiences</td>
</tr>
<tr>
<td></td>
<td>Don't look good</td>
</tr>
<tr>
<td></td>
<td>Other</td>
</tr>
</tbody>
</table>

"What are the reasons you purchase sustainable/eco-friendly cosmetics and body care products?"; Multi Pick; Base: n=546 respondents who purchased sustainable beauty/personal care products; "What are the reasons for not purchasing sustainable/eco-friendly cosmetics and body care products?"; Multi Pick; Base: n=992 respondents who purchased beauty/personal care products

Sources: Statista Global Consumer Survey “Sustainable Consumption 2021”; Survey period February 2021
Consumers place priority on avoiding harmful ingredients (e.g., microplastics, mineral oil)

 Beauty & personal care: sustainability influence (1/2)

Usage of beauty & personal care products for sustainable reasons

<table>
<thead>
<tr>
<th>Product Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cosmetics and care products without microplastic</td>
<td>33%</td>
</tr>
<tr>
<td>Products free of mineral oil</td>
<td>28%</td>
</tr>
<tr>
<td>Generally fewer cosmetics and care products</td>
<td>24%</td>
</tr>
<tr>
<td>All-in-one products</td>
<td>21%</td>
</tr>
<tr>
<td>Refillable products</td>
<td>17%</td>
</tr>
<tr>
<td>Products that have multiple functions</td>
<td>17%</td>
</tr>
<tr>
<td>Vegan products</td>
<td>16%</td>
</tr>
<tr>
<td>Products that are reusable</td>
<td>14%</td>
</tr>
<tr>
<td>None of the above</td>
<td>28%</td>
</tr>
</tbody>
</table>

1: e.g., soap as shampoo and shower gel in one) 2: e.g., coconut oil as hair mask and body lotion 3: e.g., fabric makeup-removal pads
"When thinking about cosmetics and body care, which of the following statements apply to you? For sustainability reasons I use..."; Multi Pick; Base: n=1,032 all respondents
Sources: Statista Global Consumer Survey "Sustainable Consumption 2021"; Survey period February 2021
Younger consumers are more likely to buy products that avoid waste through functionality (e.g., refillable).

Usage of beauty & personal care products for sustainable reasons, by age

1: e.g., soap as shampoo and shower gel in one) 2: e.g., coconut oil as hair mask and body lotion 3: e.g., fabric makeup-removal pads

1: e.g., soap as shampoo and shower gel in one) 2: e.g., coconut oil as hair mask and body lotion 3: e.g., fabric makeup-removal pads

"When thinking about cosmetics and body care, which of the following statements apply to you? For sustainability reasons I use...”

Sources:
- Statista Global Consumer Survey "Sustainable Consumption 2021"; Survey period February 2021

Nivea is above average for all dimensions; The Body Shop is the lesser-known sustainability champion

Beauty & personal care: brand landscape

Sustainability image of beauty & personal care brands

1: Top 2 boxes: 4 = “sustainable” and 5 = “very sustainable”; “On a scale of 1 (not at all) to 5 (very), in your opinion, how sustainable/eco-friendly are the following brands?”; Rating; Base: at least n=554 per brand; respondents who know the respective brand; “Which of the following brands do you know?”; Multi Pick; “Which of the following brands have you purchased in the last 12 months?”; Multi Pick; Base: n=1,032 all respondents

Sources: Statista Global Consumer Survey “Sustainable Consumption 2021”; Survey period February 2021
Kneipp leads the top 10 beauty and personal care brands for both awareness and purchases

Top 10 sustainable beauty & personal care brands by awareness and purchases

Brand awareness
Brand purchases

“Below you can see a list of selected sustainable/eco-friendly beauty & personal care brands. Which of them do you know?; Multi Pick; “Below you can see a list of selected sustainable/eco-friendly brands. Which of them have you purchased products from in the last 12 months?; Multi Pick; Base: n=1,032, all respondents

Sources: Statista Global Consumer Survey “Sustainable Consumption 2021”; Survey period February 2021
## Sustainability motivates consumers to try out new beauty & personal care products

**Beauty & personal care: sustainability-conscious purchase changes (1/2)**

### Changes in beauty and personal care purchase behavior for sustainability reasons

<table>
<thead>
<tr>
<th>Behavior</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tried out a new product</td>
<td>53%</td>
</tr>
<tr>
<td>Spent more money on cosmetics and body care products</td>
<td>32%</td>
</tr>
<tr>
<td>Stopped buying a certain product (e.g., disposable razors)</td>
<td>26%</td>
</tr>
<tr>
<td>No longer bought a certain brand</td>
<td>21%</td>
</tr>
<tr>
<td>Tried out a new shop</td>
<td>18%</td>
</tr>
<tr>
<td>Tried out the sustainable alternative of a brand I have purchased before</td>
<td>18%</td>
</tr>
<tr>
<td>Tried out the sustainable alternative of a brand I have never purchased</td>
<td>15%</td>
</tr>
<tr>
<td>Did not visit a certain store anymore</td>
<td>14%</td>
</tr>
<tr>
<td>Boycotted a store/brand because of its sustainability policy</td>
<td>12%</td>
</tr>
</tbody>
</table>

"Thinking about cosmetics and body care products, which of the following statements apply to you? In the last 12 months I have done the following for sustainability reasons:"; Multi Pick; n=496 respondents who purchased beauty/personal care products and changed their buying behavior due to sustainability reasons

Sources: [Statista Global Consumer Survey](https://www.statista.com) “Sustainable Consumption 2021”; Survey period February 2021
Younger consumers are the most likely to avoid or boycott brands for having poor sustainability policies

Beauty & personal care: sustainability-conscious purchase changes (2/2)

Selected changes in beauty and personal care purchase behavior for sustainability reasons

- No longer bought a certain brand
- Did not visit a certain store anymore
- Boycotted a store/brand because of its sustainability policy

Sources: Statista Global Consumer Survey “Sustainable Consumption 2021”; Survey period February 2021

“Thinking about cosmetics and body care products, which of the following statements apply to you? In the last 12 months I have done the following for sustainability reasons:”; Multi Pick; n=496 respondents who purchased beauty/personal care products and changed their buying behavior due to sustainability reasons
FASHION
Nearly 30% of Germans purchase sustainable clothing

**Sustainable fashion purchases by category**

<table>
<thead>
<tr>
<th>Category</th>
<th>Sustainable buyer</th>
<th>Non-sustainable buyer</th>
<th>Non-buyer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clothing</td>
<td>28%</td>
<td>44%</td>
<td>28%</td>
</tr>
<tr>
<td>Shoes</td>
<td>19%</td>
<td>43%</td>
<td>38%</td>
</tr>
<tr>
<td>Accessories</td>
<td>8%</td>
<td>19%</td>
<td>73%</td>
</tr>
<tr>
<td>Headwear</td>
<td>5%</td>
<td>9%</td>
<td>86%</td>
</tr>
</tbody>
</table>

"Which fashion items have you purchased in the last 12 months?"; Multi Pick; "Which of these fashion items that you bought in the last 12 months were sustainable?"; Multi Pick; Base: n=1,032 all respondents

Sources: Statista Global Consumer Survey "Sustainable Consumption 2021"; Survey period February 2021
Sustainability is not among the top criteria when buying fashion; price even tops comfort

Fashion: important purchase criteria

**Fashion purchase criteria**

- **Price**: 66%
- **Quality**: 66%
- **Comfort**: 56%
- **Material**: 49%
- **Durability**: 45%
- **Appearance/style**: 43%
- **Animal welfare**: 31%
- **Origin**: 26%
- **Sustainability/eco-friendliness**: 25%
- **Brand/manufacturer**: 23%
- **Quality seal / organic certification**: 17%
- **None of the above**: 4%

*Which of the following criteria are particularly important to you when buying fashion items?*; Multi Pick; Base: n=1,032 all respondents

Sources: Statista Global Consumer Survey “Sustainable Consumption 2021”; Survey period February 2021
Sustainable fashion drivers are tied to environmental impact, consumer consciences, and social justice

Fashion: drivers and barriers

Main reasons **for** buying sustainable fashion

- Better for the nature /environment: 60%
- For my own conscience: 37%
- To support social justice: 35%
- Better quality: 33%
- To support regional suppliers: 31%
- To support projects for a good cause: 28%
- Better for my own health / my family’s health: 27%
- Other / Don’t know: 10%

Main reasons **against** buying sustainable fashion

- Too expensive: 38%
- Often a scam: 23%
- Preference of familiar products: 18%
- No sustainable products where I shop: 15%
- Don’t look good: 14%
- Don’t have any added value: 13%
- No sustainable option for familiar products: 13%
- Have had bad experiences: 8%
- Preference of familiar products: 14%
- Other / Don’t know: 23%
- I only buy sustainable fashion items: 5%

“What are the reasons you purchase sustainable/eco-friendly fashion items?”; Multi Pick; Base: n=425 respondents who purchased sustainable fashion; “What are the reasons for not purchasing sustainable/eco-friendly fashion items?”; Multi Pick; Base: n=892 respondents who purchased fashion

Sources: Statista Global Consumer Survey; Sustainable Consumption 2021; Survey period February 2021
Younger consumers are more open to alternative ways of shopping such as secondhand or renting

Fashion: sustainability influence

Sustainability influence on fashion (in %)

- I prefer local stores to online stores
- I buy as few fashion items as possible
- I repair broken fashion items instead of replacing them
- I make sure that they do not contain animal products (e.g., leather, wool)
- I buy/wear more secondhand fashion items
- I rent/exchange fashion items instead of buying them
- None of the above

1: only shown to respondents who purchased fashion items

“When thinking about fashion, which of the following statements apply to you? For sustainability reasons...”; Multi Pick; Base: n=1,032 all respondents; “How old are you?”; Single Pick; Base: n=1,032 all respondents

Sources: Statista Global Consumer Survey “Sustainable Consumption 2021”; Survey period February 2021
The big fashion players are not seen as sustainable; hessnatur has the best sustainability image

Fashion: brand landscape

Sustainability image of fashion brands

1: Top 2 boxes: 4 = “sustainable” and 5 = “very sustainable”; “On a scale of 1 (not at all) to 5 (very), in your opinion, how sustainable/eco-friendly are the following brands?”; Rating; Base: n=330 per brand: respondents who know the respective brand; “Which of the following brands do you know?”; Multi Pick; “Which of the following brands have you purchased in the last 12 months?”; Multi Pick; Base: n=1,032 all respondents
Sources: Statista Global Consumer Survey “Sustainable Consumption 2021”; Survey period February 2021
For sustainability, around a third of consumers have tried something new or spent more on eco-fashion

Changes in fashion purchase behavior for sustainable reasons

- Tried out a new product: 37%
- Spent more money on fashion: 31%
- Tried out a new shop: 30%
- Stopped buying a certain product (e.g., leather, synthetic): 28%
- No longer bought a certain brand: 19%
- Did not visit a certain store anymore: 19%
- Tried out the sustainable alternative of a brand I have purchased before: 17%
- Boycotted a store/brand because of its sustainability policy: 16%
- Tried out the sustainable alternative of a brand I have had never previously purchased: 11%

“Thinking about fashion, which of the following statements apply to you? In the last 12 months I have done the following for sustainability reasons.”; Multi Pick; n=417 respondents who purchased fashion and changed their buying behavior due to sustainability reasons

Sources: Statista Global Consumer Survey “Sustainable Consumption 2021”; Survey period February 2021
Fashion brands risk losing younger consumers if their sustainability policies are poor

Fashion: sustainability-conscious purchase changes (2/2)

Selected changes in fashion purchase behavior for sustainable reasons

- **No longer bought a certain brand**
  - 16 - 29 years: 27%
  - 30 - 49 years: 19%
  - 50 years and older: 8%

- **Boycotted a store/brand because of its sustainability policy**
  - 16 - 29 years: 26%
  - 30 - 49 years: 10%
  - 50 years and older: 12%

- **Did not visit a certain store anymore**
  - 16 - 29 years: 21%
  - 30 - 49 years: 24%
  - 50 years and older: 10%

"Thinking about fashion, which of the following statements apply to you? In the last 12 months I have done the following for sustainability reasons:"; Multi Pick; n=417 respondents who purchased fashion and changed their buying behavior due to sustainability reasons

Sources: Statista Global Consumer Survey "Sustainable Consumption 2021"; Survey period February 2021
eCOMMERCE
25-34-year-olds keep eCommerce going: around 50% in this age group order online at least once a week

Online shopping frequency by age

*How often have you shopped online in the last 12 months?*, Single Pick; *How old are you*, Single Pick; Base: n=1,032 all respondents

Sources: Statista Global Consumer Survey *Sustainable Consumption 2021*; Survey period February 2021
Nearly 60% of online shoppers have not returned any orders in the past 12 months; the rest did so often.

**eCommerce: returned delivery habits**

**Returned online orders**

- **Yes**: 39%
- **No**: 58%
- **Don't know**: 2%

**Number of returned deliveries out of the last 10 orders**

- 26% returned 1 order
- 46% returned 2-3 orders
- 19% returned 4-7 orders
- 7% returned 8-10 orders

“In the past 12 months, have you returned any of your online orders (fully or partly)?”; Single Pick; Base: n=1.013 respondents who purchased online; “Thinking about your last 10 orders, how many of them did you return (fully or partly)?”; Single Pick, n=400 respondents who purchased online and returned orders.

Sources: Statista Global Consumer Survey “Sustainable Consumption 2021”; Survey period February 2021
Free, fast, and safe shipping are central criteria, nearly 50% want as little packaging waste as possible

eCommerce: personal importance in terms of delivery

Important delivery criteria

- Free shipping: 70%
- Free return shipping: 64%
- Shipment tracking: 60%
- Fast shipping: 56%
- Little packaging waste: 47%
- Environmentally friendly packaging: 38%
- Good customer ratings: 35%
- CO2 neutral shipping: 19%
- Time window of the delivery freely selectable: 17%
- Other: 2%
- Nothing is important to me when it comes to shipping: 2%

“When thinking about online shopping, which of the following criteria are important to you in terms of delivery?”; Multi Pick; Base: n=1,013, respondents who purchased online

Sources: Statista Global Consumer Survey "Sustainable Consumption 2021"; Survey period February 2021
Two thirds of consumers are willing to pay a surcharge for environmentally-friendly shipping

eCommerce: environmentally friendly delivery

Willingsness to pay for eco-friendly delivery

- Yes, definitely: 17%
- Yes, but it depends on the amount: 48%
- No: 30%
- Don’t know: 5%

"Would you be willing to pay a surcharge if the retailer guarantees environmentally friendly shipping (e.g., climate neutral / CO₂ neutral) in return?": Single Pick; Base: n=1,013 respondents who purchased online
Sources: Statista Global Consumer Survey "Sustainable Consumption 2021"; Survey period February 2021
General demographics

Study info

Gender

- Male: 52%
- Female: 48%

Age

- 16 – 17 years: 3%
- 18 – 24 years: 10%
- 25 – 34 years: 16%
- 35 – 44 years: 17%
- 45 – 54 years: 20%
- 55 – 64 years: 18%
- 65 years and older: 16%

Household size

- 1 person: 32%
- 2 people: 36%
- 3 people: 17%
- 4 people: 10%
- 5 or more: 5%

Region

- North: 28%
- West: 16%
- East: 22%
- South: 34%
The Statista Global Consumer Survey offers a global perspective on consumption and media usage, covering the offline and online world of the consumer. It is designed to help marketers, planners, and product managers understand consumer behavior and consumer interactions with brands.

- Cross-tabulation
- Customized target groups
- Trend and country comparisons
- Data export

Find out more on www.statista.com/global-consumer-survey
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