

Neue Anforderungen der Kund:innen an die Nachhaltigkeit

GfK Insight Talks 2023
Assess. Refocus. Emerge stronger.

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Q1 2023 – Where do we stand?

Technical Consumer Goods
Germany

GfK Insight Talks 2023

Alexander Dehmel
Head of CSM Germany and Austria
16th May 2023

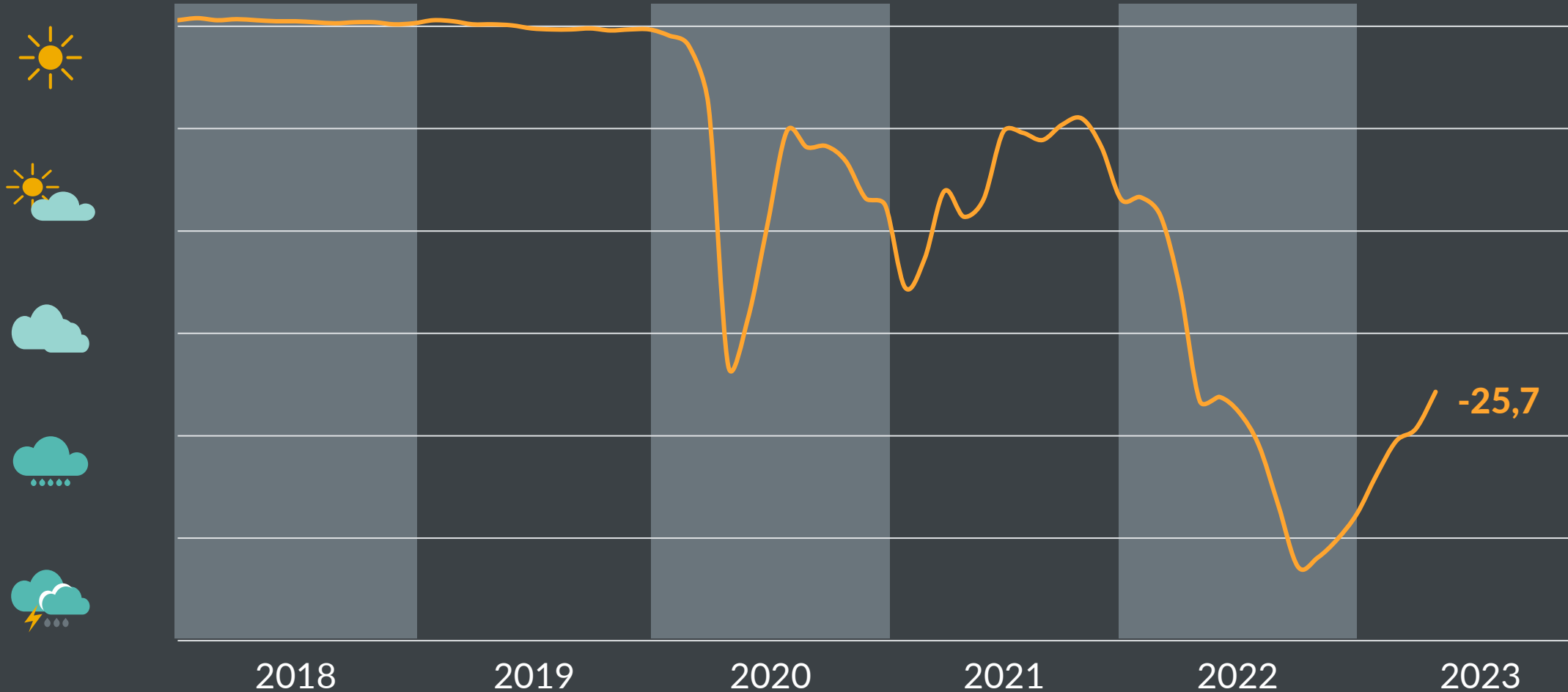
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The big picture.

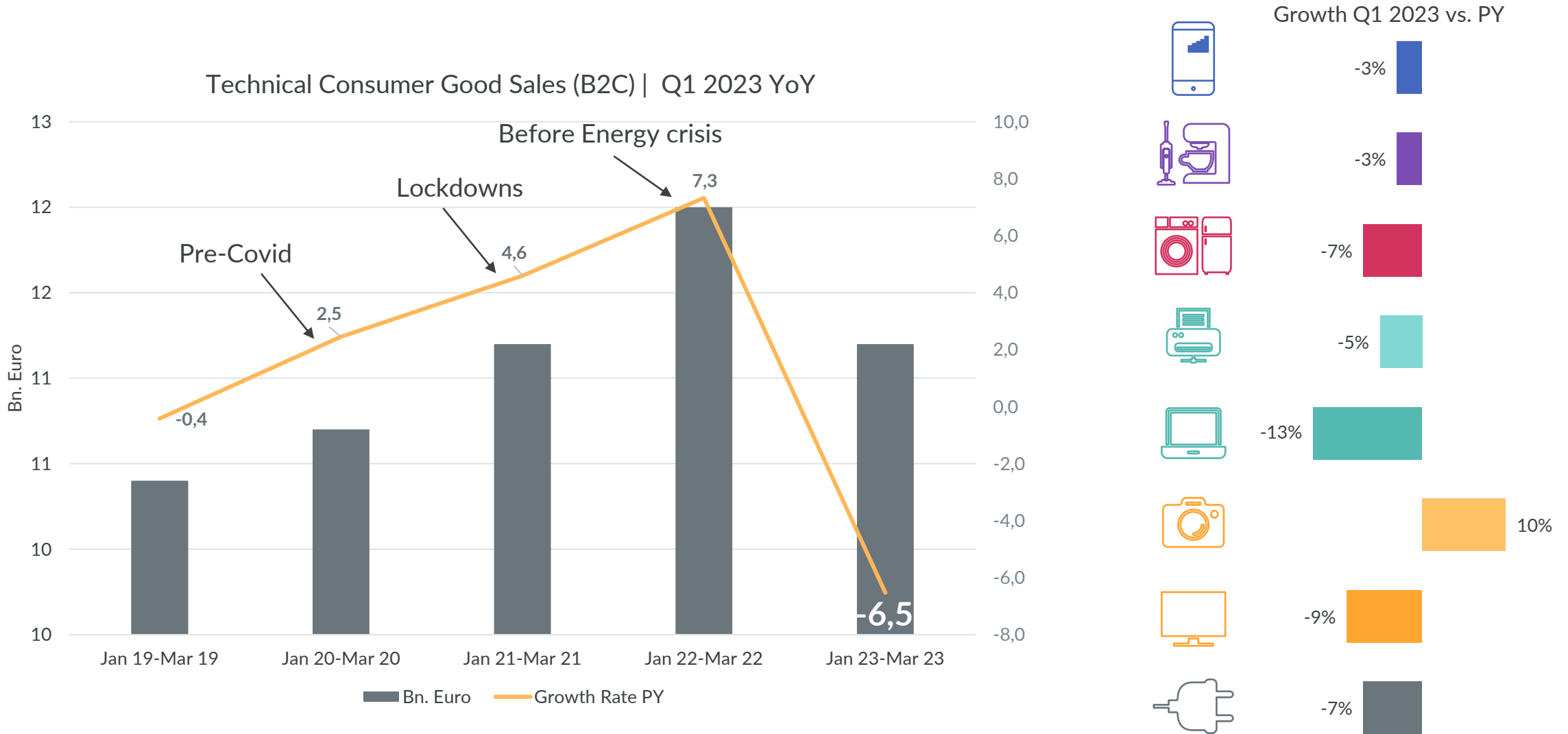
Consumer sentiment continues to recover in Germany, but is still on low level



GfK consumer climate May 2023



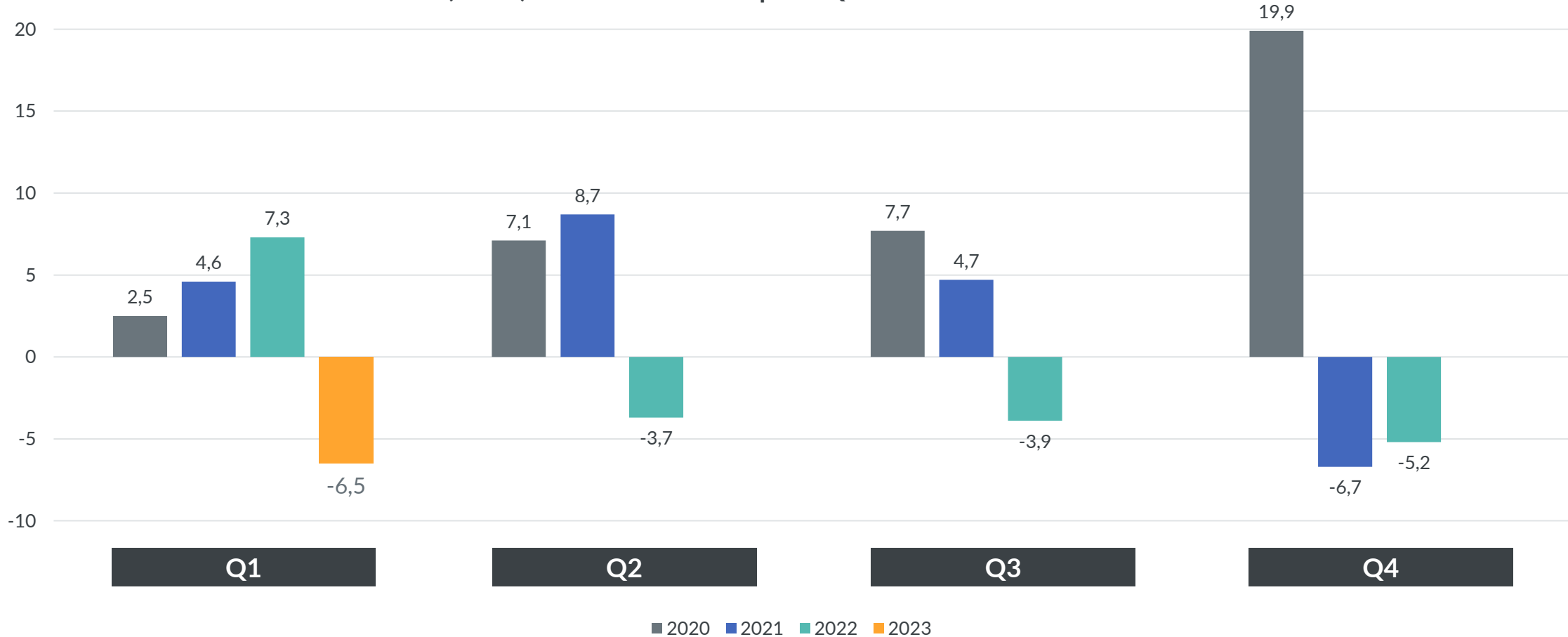
The start of 2022 was extremely positive (shops re-opened, pre-Ukraine war, inflation and energy crisis). 2023 ahead of 2021



After four consecutive quarters of decline – the base for recovery especially in Q3 and Q4 is set



TCG (B2C) Growth Rates per Quarter vs. Previous Year



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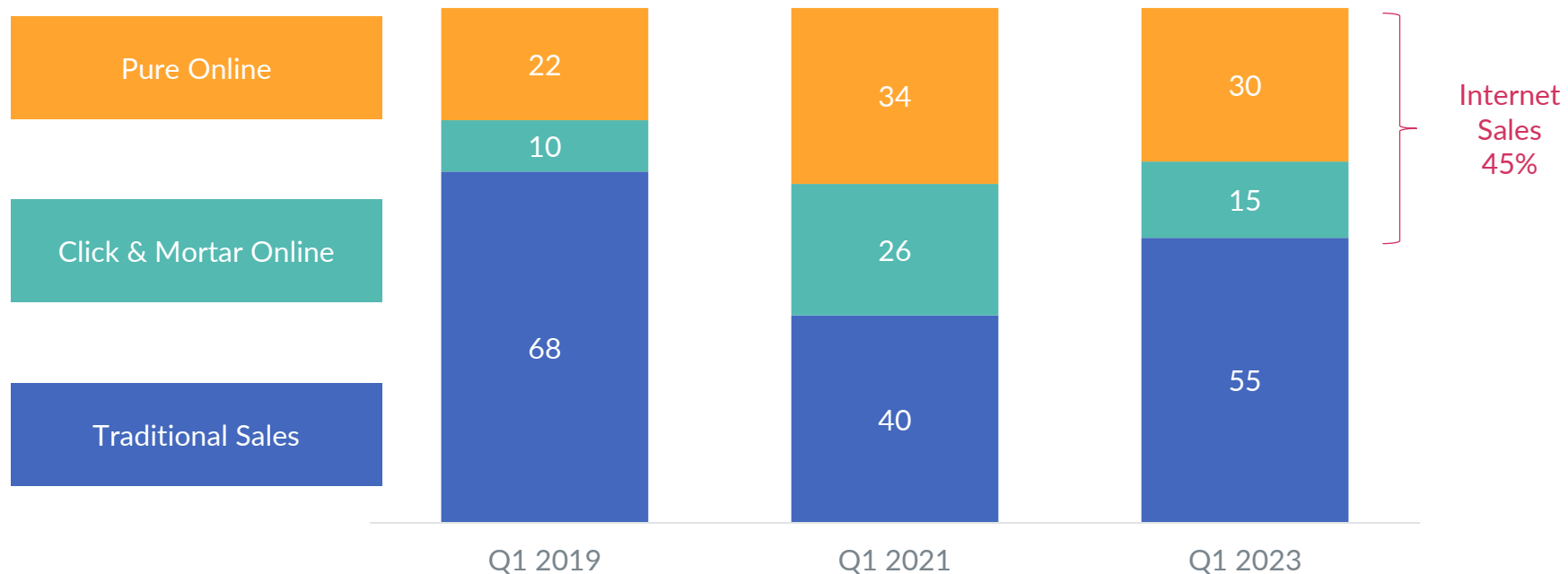
**What does that
mean for retail?**

Omnichannel (Phygital) retail even more important after Pandemic

Pure Offline retail does not see a recovery while pure online lost some shares.



Technical Consumer Goods (B2C) online/offline shares



Post-Covid:
People enjoying
In-Shop experience
and increase
pick-up-rate
(Click&Collect)*

Since November 2022 has the number of items with discounts increased

In addition, the promotional discount is higher



In a nutshell



- Mood improves slowly, market to follow from 2nd half 2023
- Phygital/Omnichannel as key
- Promotional activity will continue
- Premiumization a stable factor

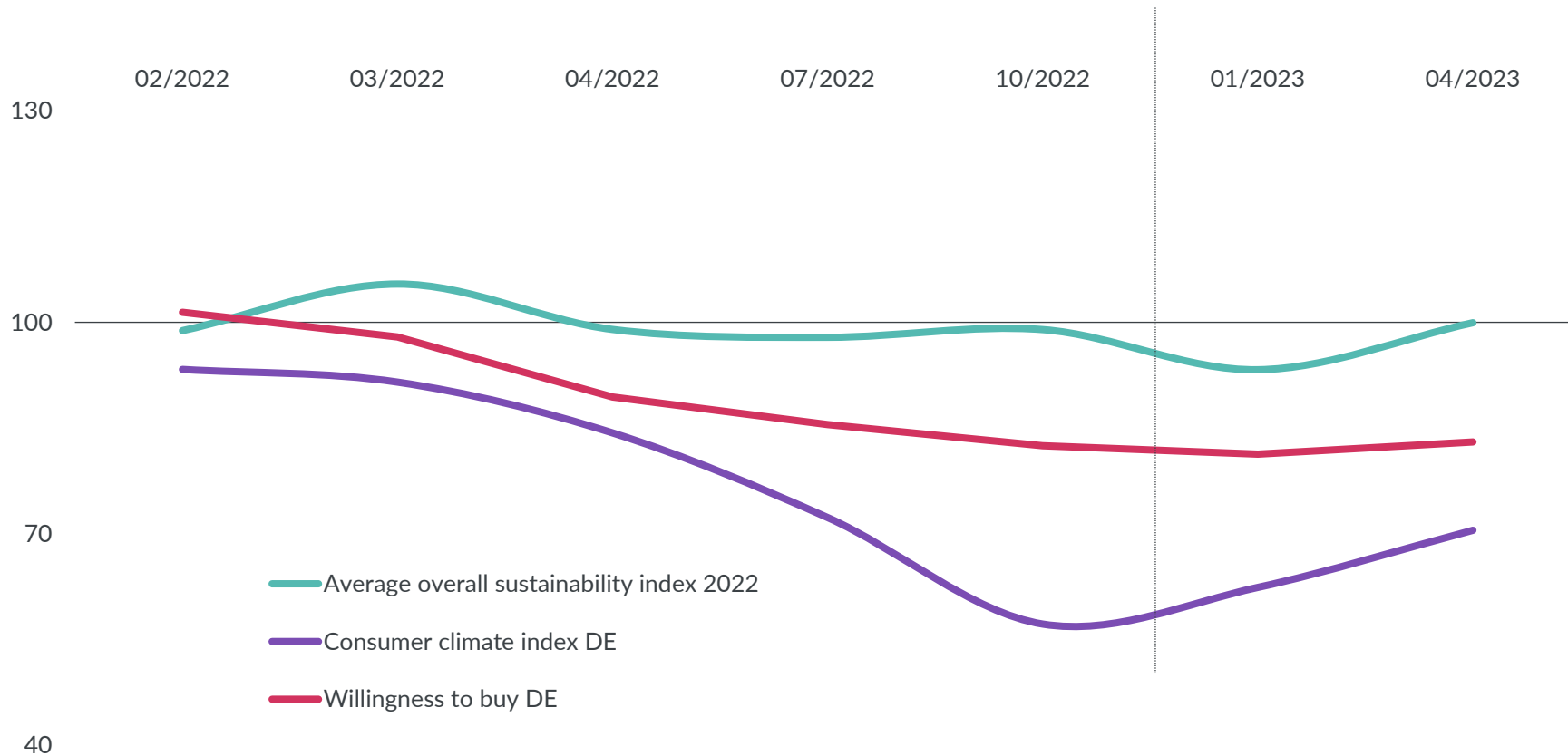
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**So how about
sustainability?**

Consumption related to sustainability remains significantly more resilient compared to general consumer mood in Germany




Germany | consumer indices | 2022-2023



Consumer indices change in % points vs Feb 2022

 Sustainability index
+1% pts.

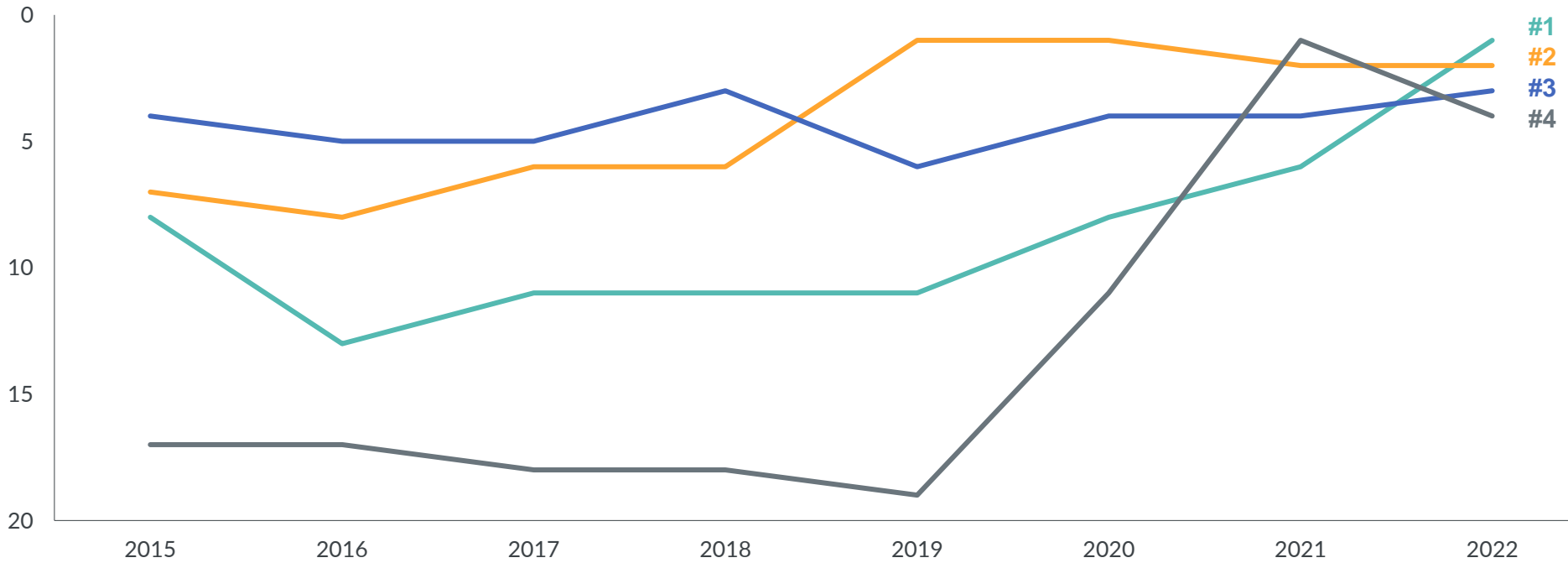
 Willingness to buy
-18% pts.


 Consumer climate index
-23% pts.

Climate change constantly went up in the last few years within the concern rank of the German society.



Societal concerns ranking
2015-2022



71% 

see climate
Change as a
very/extremely
serious problem

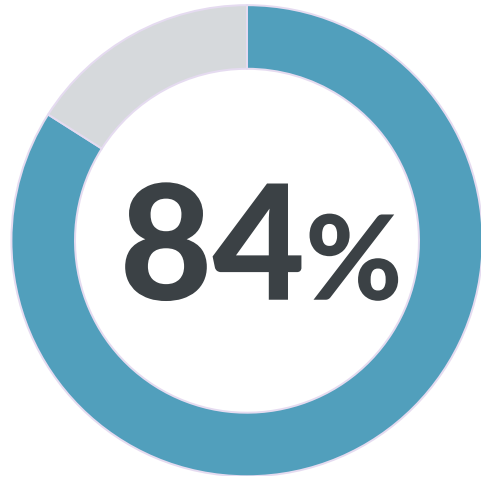
-  Inflation
-  Climate Change
-  Living Standard
-  Pandemic

\$700 Bn

will be spent by “Eco-actives” on Technical Consumer Goods until 2030

Act and communicate trustworthily and consistently

Many consumers are aware that greenwashing is a popular marketing tactic.
Make sure you implement sustainability in every aspect of your company and products



...of Germans agree: “Many companies say they do good things for the environment because it is good for their public image, not because they really care”



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