



THE TECTONICS OF CONSUMER VALUES IN TIMES OF RECENT CRISIS:

MAKE SUSTAINABILITY SUSTAINABLE AGAIN
Research Report | November 2023

QUANTITATIVE INSIGHTS

500 respondents

CAWI self-completed

When? October, 2023

Where? Large urban



QUALITATIVE INSIGHTS

20 participants

Diary self-applied ethnography

When? October, 2023

Where? Large urban



THE CONTEXT

Geo-political situation

(e.g. the wars in Israel and Ukraine, terrorist attacks)

Global warming & Environmental care

(e.g. resources crisis)

Humanity status-quo

(e.g. lack of empathy, hedonism, consumerism, crisis of values)

Financial crisis

(e.g. inflation, high interest rates, increasing prices for day-to-day products)

Job, health & family-related concerns

(e.g. job stress, health issues, family distress)



The global situation and the security concerns that derive from it are the “hot topics” of the moment. Yet, environmental related issues find their place as well on the list of concerns, even in these politically troubled times.

22%

Responsible use of resources

21%

Durability

15%

Environmental protection

12%

Eco-friendly

10%

Self-consistent

“By sustainability I understand the concept of creating a product or service that does not waste resources through its production, distribution and use.”

“Sustainability is the element that can bring benefits to nature and everything that life means, without sacrificing natural resources for purposes harmful to the environment.”

Care for the
environment

“Do all you can today so there is a better tomorrow.”

Protecting
resources

Care for the future

Economical & social
components

Smart
consumption

Quality of life

Sustainability is mainly associated with protecting the environment and wise management of resources, for today's sake, but also for the future generations' benefit.

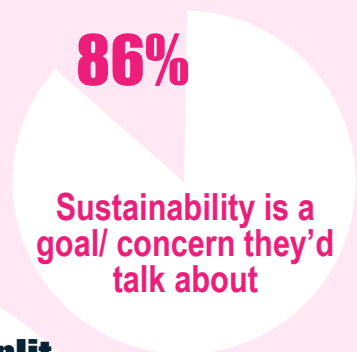
WHO IS RESPONSIBLE?

**THE
CONSUMERS?**



**THE
COMPANIES?**

...with a plus for companies



88%
responsibility is equally split between consumers and companies



	1%	26%	32%
TRYING*	1%	35%	4%
	1%	0%	0%
		SUCCESSING*	

* Strong correlation according to Pearson test (0.67)



1/3 consumers who manage to act sustainably finds it **very difficult**

Consumers in their 20s are significantly less interested in trying to make sustainable decisions, while also being less prone to making sustainability a topic of discussion in their circle. On the other hand, those who manage to act sustainably are more open to spreading the word on the matter.

BARRIERS

55%
sustainable choices = ↑ price

52%
poor recycling infrastructure

44%
lack of info/ campaigns

31%
distribution

29%
variety

24%
products' lifespan



“You know the saying: <Seeing is doing>. We didn’t really see it, therefore we’re not doing it.”

The higher price of sustainable/ durable products forces especially younger consumers to prioritize budget on the expense of sustainability.

The poor recycling infrastructure fuels mistrust in how things really happen and discourages consumers to put their effort in it.

Lack of info/ campaigns is associated with a **lack of education on sustainability**, esp. in the case of mature generations → consumers take matter in their own hands and are main responsible for sustainability in their families.

The most frequently seen sustainable ways of action are closely related to monitoring the energy consumption through careful products selection and eco friendly conduct.

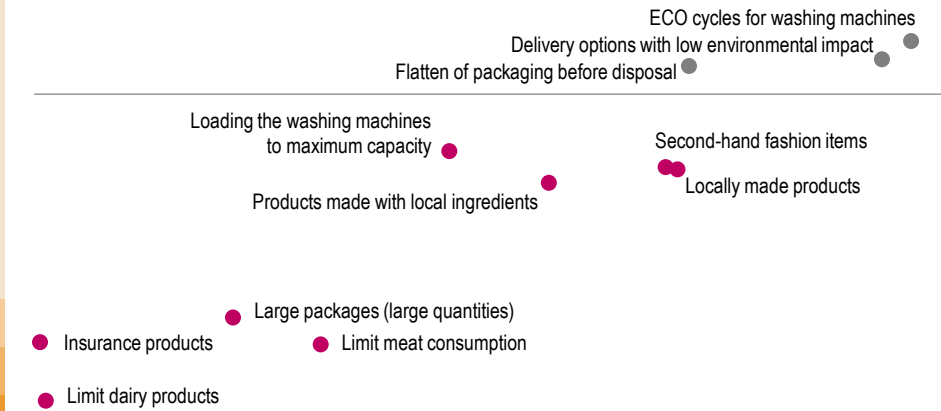
Overall, mature consumers and women find more sustainable solutions, both when it comes to household chores and OOH behaviors.



Highly sustainable
High adoption



Highly sustainable
Low adoption



Low sustainability
Low adoption



PACKAGE RELATED

- Using refill type of products (e.g. detergent, cosmetics)
- Buying 5/10L water cans instead of several 2L PETs
- Avoiding too large packages, leading to plastic waste
- Giving up brands that use too much plastic in package
- Buying larger quantities and then depositing in containers
- Avoiding plastic packaging – choosing cardboard, paper, refusing plastic cutleries and straws




ENERGY SAVING

- Energy-efficient home appliances
- Buying LED light bulbs/ turning off unnecessary lights
- Using the “short” washing machine programs, sun-drying clothes instead of using a dryer, fully loading the washing machine
- Turning off the water while showering/ brushing teeth, avoiding showering with hot water
- Installing solar panels



SUSTAINABILITY TIPS & TRICKS



REUSE & RECYCLE

- **Selective collection of plastic/ glass bottles**
- **Selective collection of batteries and light bulbs**
- **Reusing/ repurposing the plastic/ paper bags** from shopping/ delivery/ cleaning for further shopping sessions or as garbage bags
- **Reusing bottles/ jars/ boxes** for storing foods, as garden pots or storing small articles around the house
- **Buying SH clothes, reconditioning old/ inherited ones, exchanging clothes with friends and refurbishing furniture**
- **Donate/ sell clothes** they are no longer used

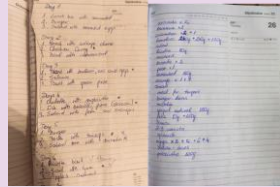


SUSTAINABILITY TIPS & TRICKS



SMART CONSUMPTION

- **Planning the shopping sessions and the meals** in order to avoid food waste (e.g. using shopping/ menu lists, home cooking instead of ordering)
- **Buying a wide range of products from local producers:** vegetables, fruits, cosmetics, clothes, accessories, furniture
- **Avoid/ minimize consumption of products of animal origin**
- **Minimize the number of cosmetics used** and choosing **fair-trade brands**
- **Choosing bio/ eco/ fair-trade products**
- **Buying only what is really needed/ necessary** or investing in **higher quality, more durable goods** (if the budget allows it)
- **Buying a life insurance/ private pension**




ECO-FRIENDLY BEHAVIORS

- **Walking/ riding a bike/ using public transport** instead of cars
- **Online orders with pick-up from storage boxes**
- **Buying movie tickets online/ not asking for ATM receipt**
- **Avoid damaging substances when gardening**
- **Gifting experiences** instead of objects
- **Buying plants/ having a small garden**



SUSTAINABILITY TIPS & TRICKS



INDUSTRIES' INVOLVEMENT

Consumers actively involved in making sustainable decisions themselves are more appreciative of industries' efforts to become greener. Some industries are better assessed by residents of very big cities (e.g. insurance, food, telecommunications, home care).

For consumers, sustainability tips & tricks also result in **savings on the long term**:


- **buying less** and **smarter**
- **discouraging consumerism** and **food waste**
- **saving energy**
- **reuse & repurpose**, instead of buying new items
- investing in more **durable goods**

“If we have a responsible consumption, the personal budget cannot negatively impact sustainability. For example: we can support sustainable businesses that in time will reduce their price and become as cheap as those that are not sustainable.”

“As regular consumer, it costs almost nothing to be sustainable, on the contrary, it's good for your budget to limit consumption.”



Despite the barrier of the higher price in case of sustainable products, there is still a silver lining: overall sustainability is a budget friendly strategy on the long term, which can prove to be motivational for consumers.

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- ✓ Consumers need more **education campaigns** (44%), in order to identify those sustainable conducts that are appropriate for them. Despite being a **difficult process** (34%), the data show that once consumers are moved by the cause, they manage to be 'greener' in their choices and behavior. There is also a feeling of fulfillment and satisfaction that makes sustainable consumers eager to **spread the word** (97%).
 - ✓ Romanians want to **share the responsibility** (88%) **with the brands and manufacturers**. They appreciate what industries have achieved so far in terms of sustainability, but feel like there is still **room to grow**. Consumers believe that the **entire supply chain** could benefit from improvements, meaning that sustainable efforts should not only be focused on disposal, but also on production.
 - ✓ Eco friendly changes should focus on **packaging**, as **plastic waste** is hold accountable by many consumers. Plastic choices are starting to be blamed and **over usage** of such materials is no longer well tolerated by consumers.
 - ✓ In the attempt to improve their sustainable conduct, consumers face 2 main barriers: the **high prices** of environmentally-safe alternatives and the **deficient infrastructure**. The latter makes responsible waste management difficult.



THANK YOU!

We would love to hear from you in case of any questions!

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