

Greenwashing vs. Greenacting

Wishes, expectations and perspectives of
consumers and marketing managers in eight
countries

**NIMpulse
2023-4**



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Authors

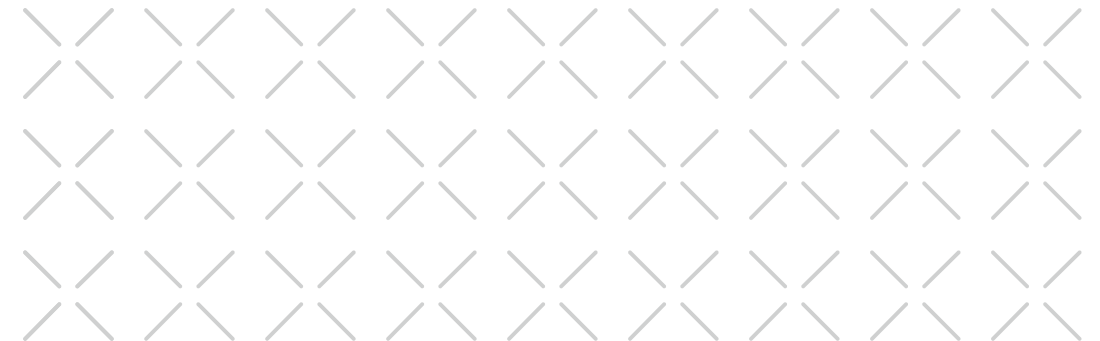
Tobias Biró

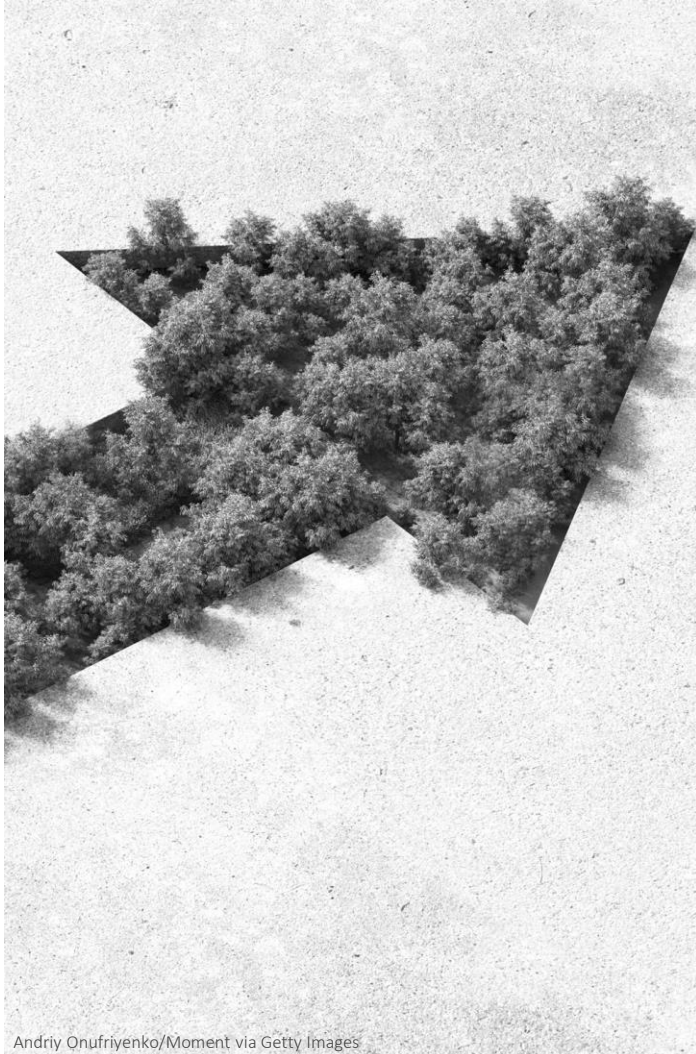
tobias.biro@nim.org



Dr. Andreas Neus

andreas.neus@nim.org





Whether it's cosmetics, food or electronics, consumers are currently under the impression that almost all products promise properties such as climate-neutral, plastic-free or recyclable.

This study confirms this: 52 percent of the companies surveyed currently use green claims, i.e., advertising statements related to the environment and sustainability, in their customer communications. In doing so, they are meeting a great demand – sustainable shopping is important for 76 percent of the consumers questioned.

For the study, NIM surveyed consumers and marketing managers in eight countries. The aim was not only to measure attitudes and usage in the context of sustainability-related product promises. It also focused on the phenomenon of greenwashing. How do consumers react when companies actively communicate that they are behaving sustainably, even though this would not stand up to critical scrutiny?

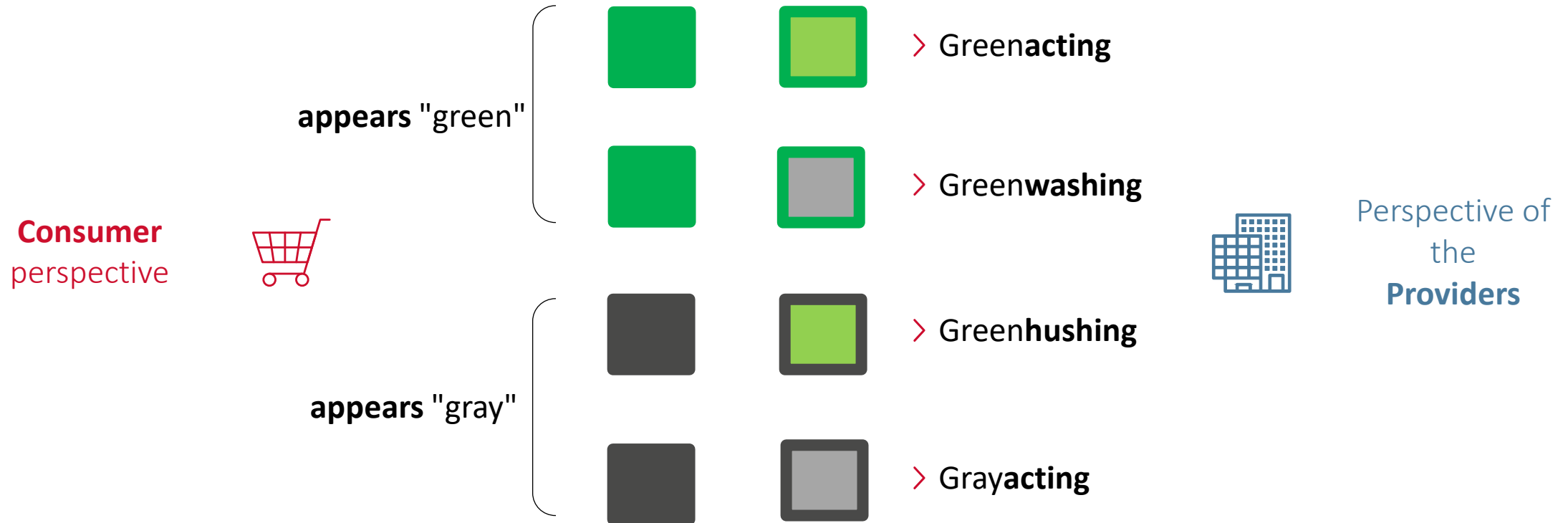
In addition to major industrialized countries, the study includes South Africa and Brazil, two emerging economies from the so-called global south. The figures from these countries are of particular interest, as they are considered to be very strongly affected by the consequences of climate change. However, caution should be exercised when interpreting the figures, as experience has shown that the online survey method tends to reach more highly educated people from economic centers in these countries.



Climate change is a global problem that requires global action to resolve. The market decisions of consumers and companies are a key factor in this. This is another reason why the international comparison made for this study is so relevant.

Nuremberg, July 2023
Dr. Andreas Neus

The problem: Greenacting vs. Greenwashing



As a rule, consumers cannot identify beyond doubt which products are "green" or only pretend to be "green" (so-called greenwashing). In addition, there are also products that are "green" without this being communicated (so-called greenhushing). As a rule, only the suppliers have knowledge about the sustainability of their products. This information asymmetry leads to an inefficient market where consumers cannot shop according to their preferences. To solve this problem, it is important to look at both sides of the market, both consumers and suppliers.

KEY INSIGHTS

1

→ Sustainability is a guiding factor in consumer behavior. Every second company addresses the customer's desire also through sustainability promises.

2

→ Consumers are willing to pay more for products that promise sustainability. This is an opportunity for companies to increase sales and thus cover additional costs related to sustainability.

3

→ Consumers trust sustainability promises if the company advertising them is credible to them. Credibility can also be achieved through certifications, transparency and cooperation with external stakeholders.

4

→ Credibility is often called into question. One in three companies has already been confronted with greenwashing allegations. The associated risks weigh heavily: 7 out of 10 consumers turn away from such companies or brands.

5

→ Interest in sustainability is great. However, the potential for misunderstandings and accusations of fraud in sustainability promises is also great. To resolve this dilemma, consumers and companies want clear standards and legal requirements.

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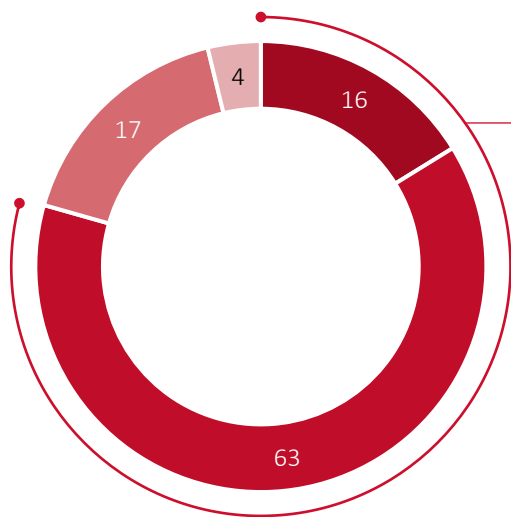
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What do you personally think is the main cause of climate change?



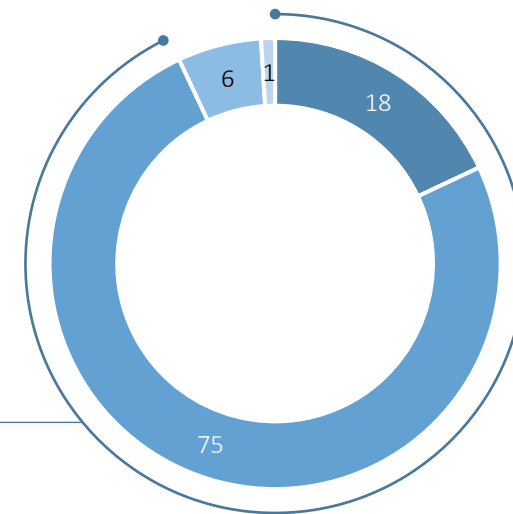
Motivation to pay attention to sustainability concerns in market decisions as well, lies in the perception of the cause of the problem.







79% of consumers

and even **93%** of the marketing managers

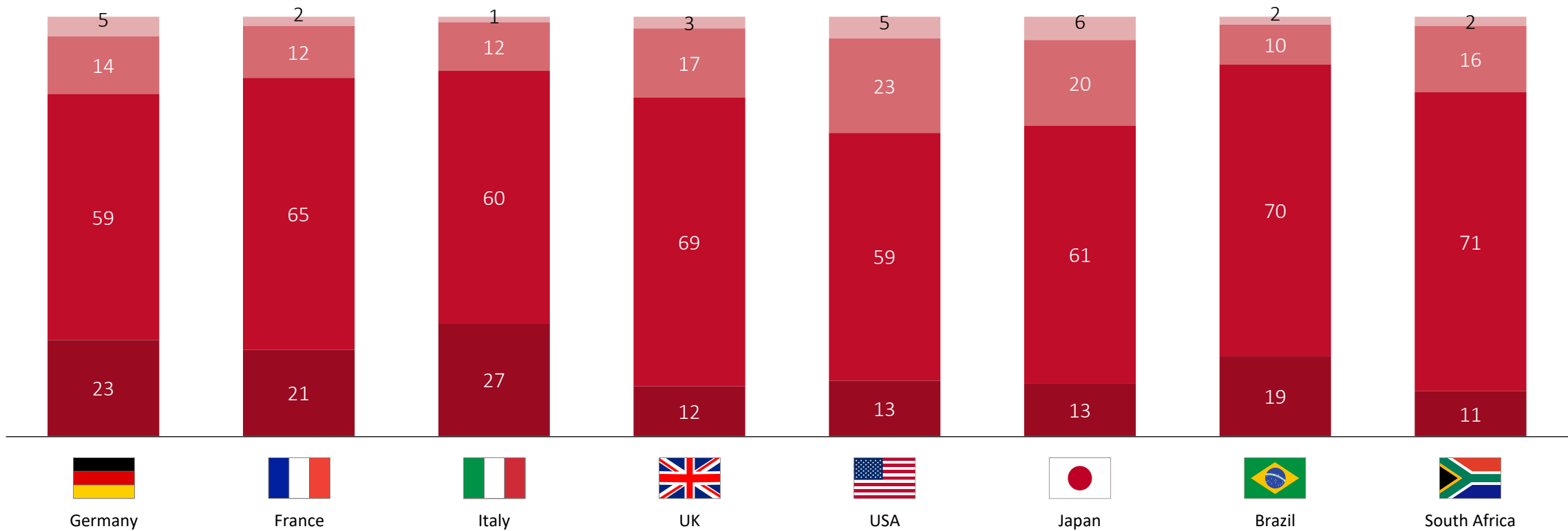
think that the main cause of climate change is human activity.



-  Only natural patterns in climate
-  Mainly natural patterns in climate
-  Mainly human activity
-  Only human activity

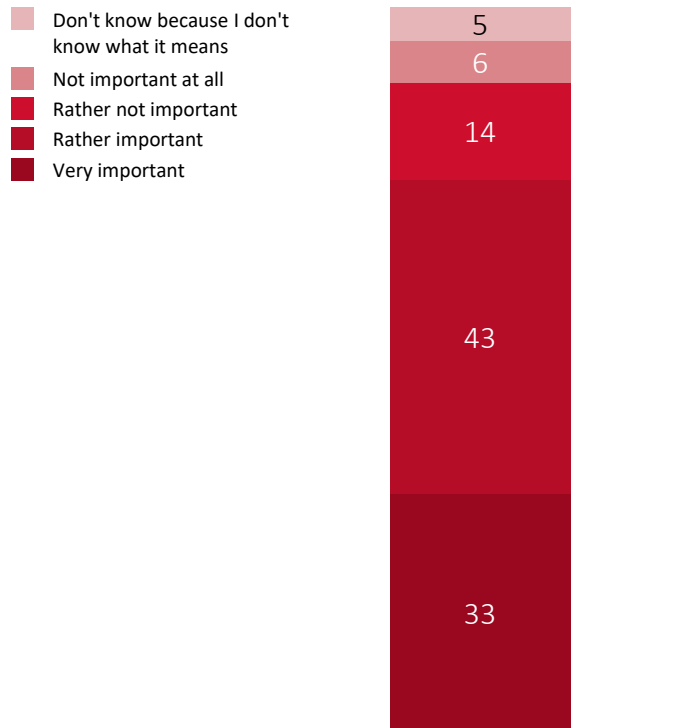
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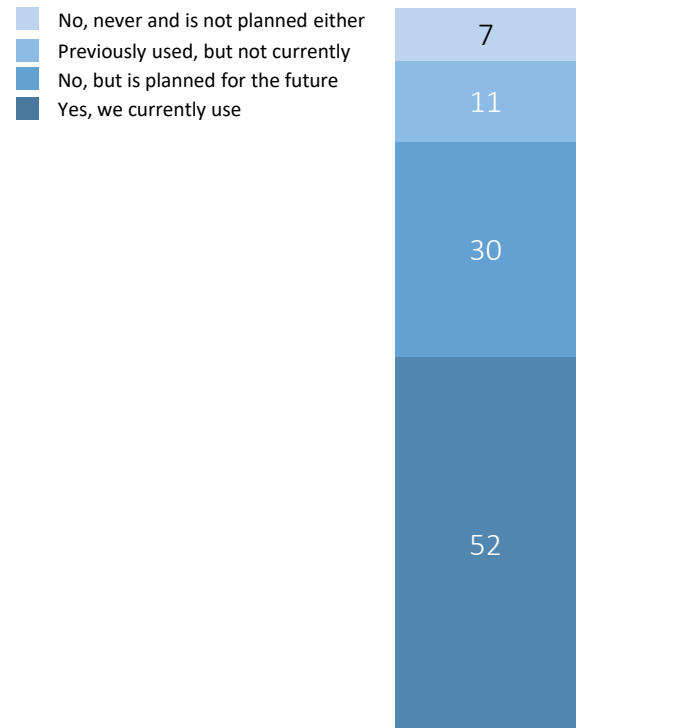
BASE: all consumers n=8,008; all companies n=805 | Values in %, Survey period: April and May 2023, NIMpulse 2023-4, nim.org

What role does the topic of **sustainability** currently play in your purchasing behavior in general?



BASE: all consumers n=8,008 | Values in %

When you think about product or corporate communication: Does your company use **sustainability promises** in this context or did it use them in the past?



BASE: all companies n=805 | Values in %, Survey period: April and May 2023, NIMPulse 2023-4, nim.org



For **76 percent** of consumers, sustainability plays an important role when shopping. Only **5 percent** of consumers say they are not familiar with the term.

Companies are responding to this demand by, among other things, using sustainability promises on packaging or in advertising. **52 percent** of the companies surveyed use such claims, for example, and a further **30 percent** are planning to do so in the future.

What role does the topic of **sustainability** currently play in your purchasing behavior in general?



When you think about product or corporate communication: Does your company use **sustainability promises** in this context or did it use them in the past?



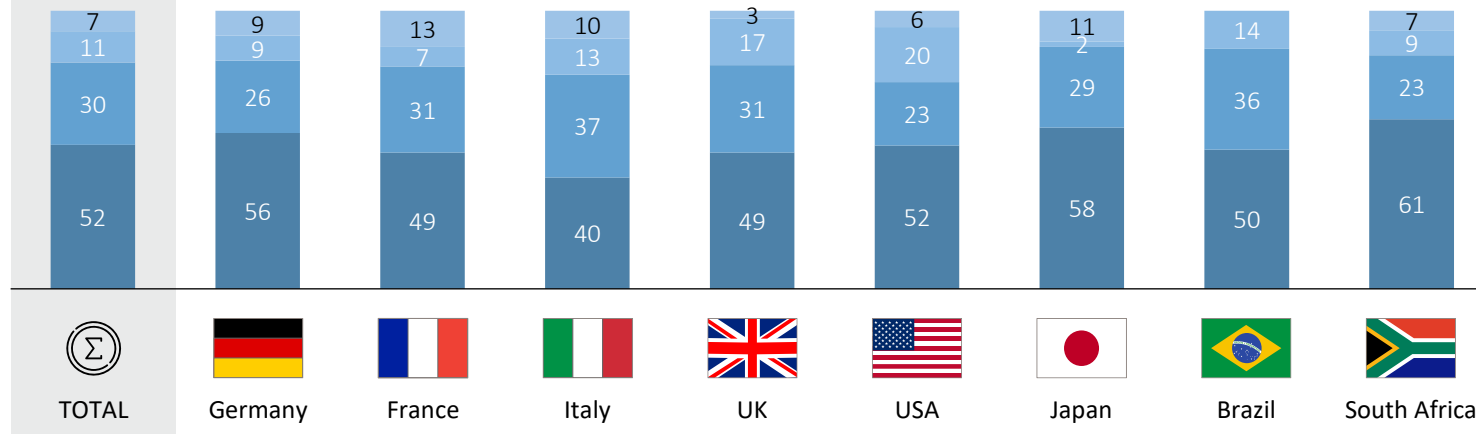
In the emerging markets and in Italy **sustainability** plays a **greater role** for consumers than in the other countries investigated – Japan brings up the rear in this respect.

Sustainability promises are currently used most frequently by companies in South Africa, Japan and Germany. The highest proportion of brands that plan to use them in the future is in Italy and Brazil. The USA and Great Britain, on the other hand, have the highest number of companies that have abandoned the use of sustainability promises.

Consumers: Importance of sustainability when shopping ("Very important"/"rather important")



Marketers: Use of sustainability promises



■ Yes, we currently use
 ■ No, but is planned for the future
■ Previously used, but not currently
 ■ No, never and is not planned either

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Sustainability promises: Widespread and even more in the pipeline.



Oscar Wong/Moment via Getty Images



Many consumers have the impression that almost all products currently promise features such as climate-neutral, plastic-free or recyclable. And this impression is not deceptive: in fact, the majority of companies and brands in almost all the countries surveyed use sustainability promises. According to the marketing managers interviewed, there will be even more green claims in the future.

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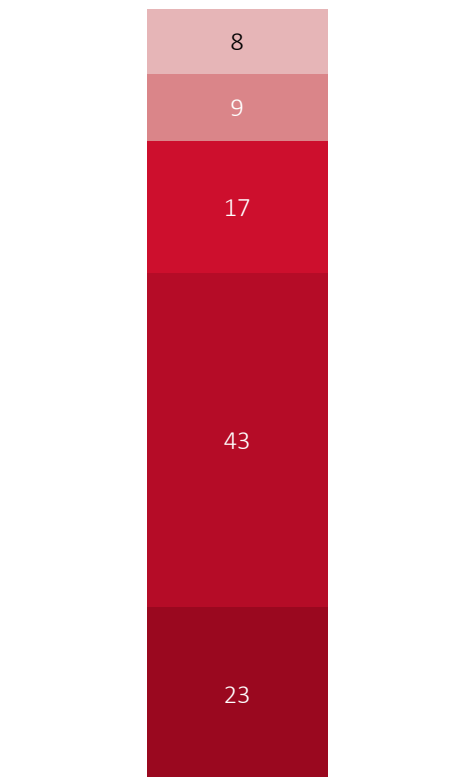
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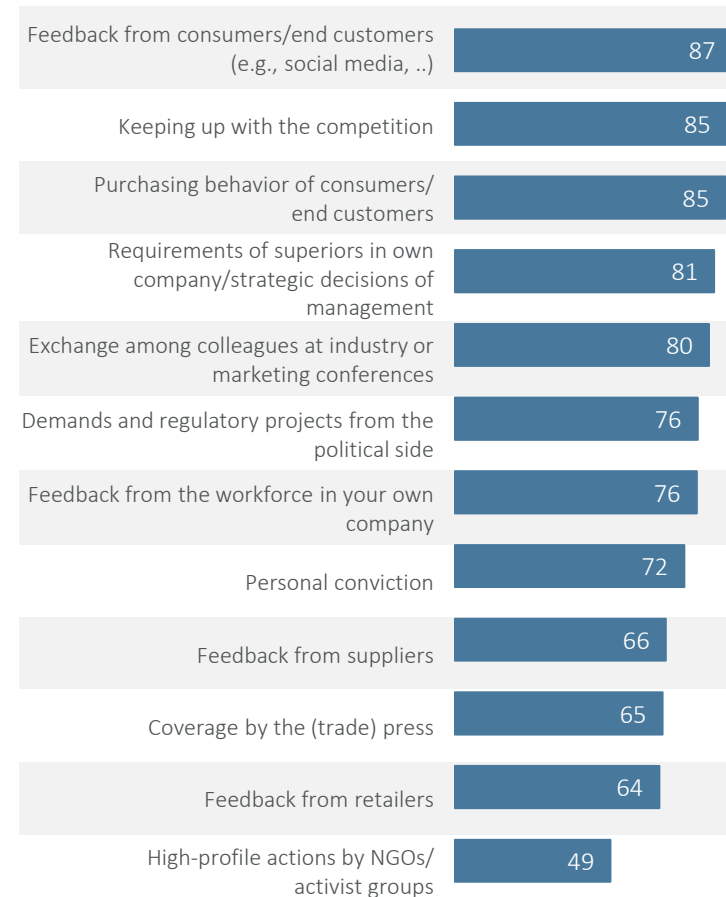
We are very interested in your personal attitude. Please tell us, to what extent you agree with the following statement: **I prefer to buy products/services that advertise sustainability promises.**

- Don't know
- Do not agree at all
- Rather disagree
- Rather agree
- Fully agree



BASE: all consumers n=8,008 | Values in %

When you think about marketing in your company: What **motivates** you to pay more attention to sustainability aspects?



BASE: all companies n=805 | Values in %, Survey period: April and May 2023, NIMpulse 2023-4, nim.org

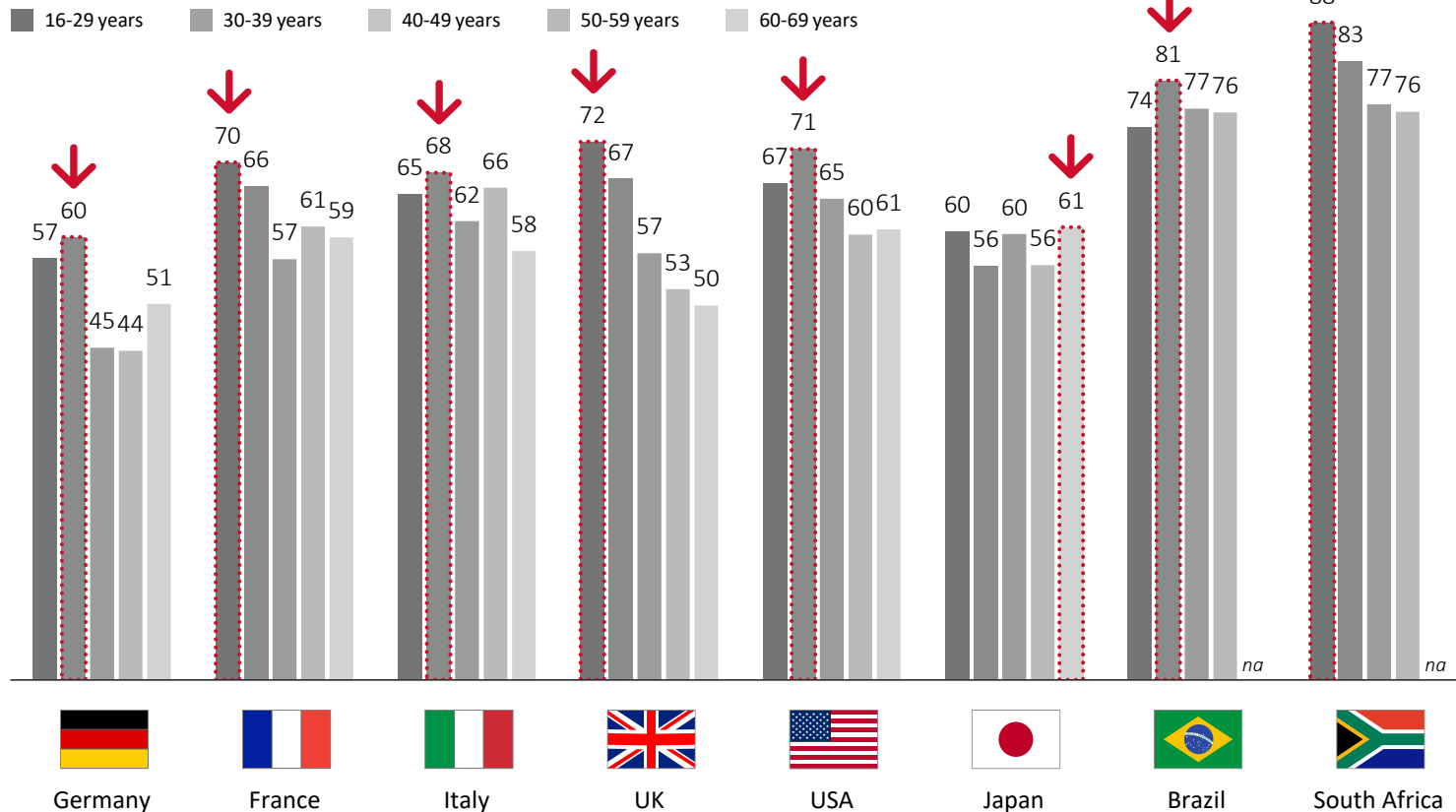


In line with the high relevance that sustainability has for the majority of respondents, they also prefer to buy products that advertise **sustainability promises.**

The reaction of companies shows that this attitude is also reflected in consumer behavior. They describe the feedback and purchasing behavior of consumers as the **most important motivators** for paying greater attention to sustainability. Politics, retail and activists, on the other hand, have less influence.

We are very interested in your personal attitude. Please tell us, to what extent you agree with the following statement: I **prefer** to buy products/services that advertise sustainability promises.

Percentage "Fully agree"/"rather agree"



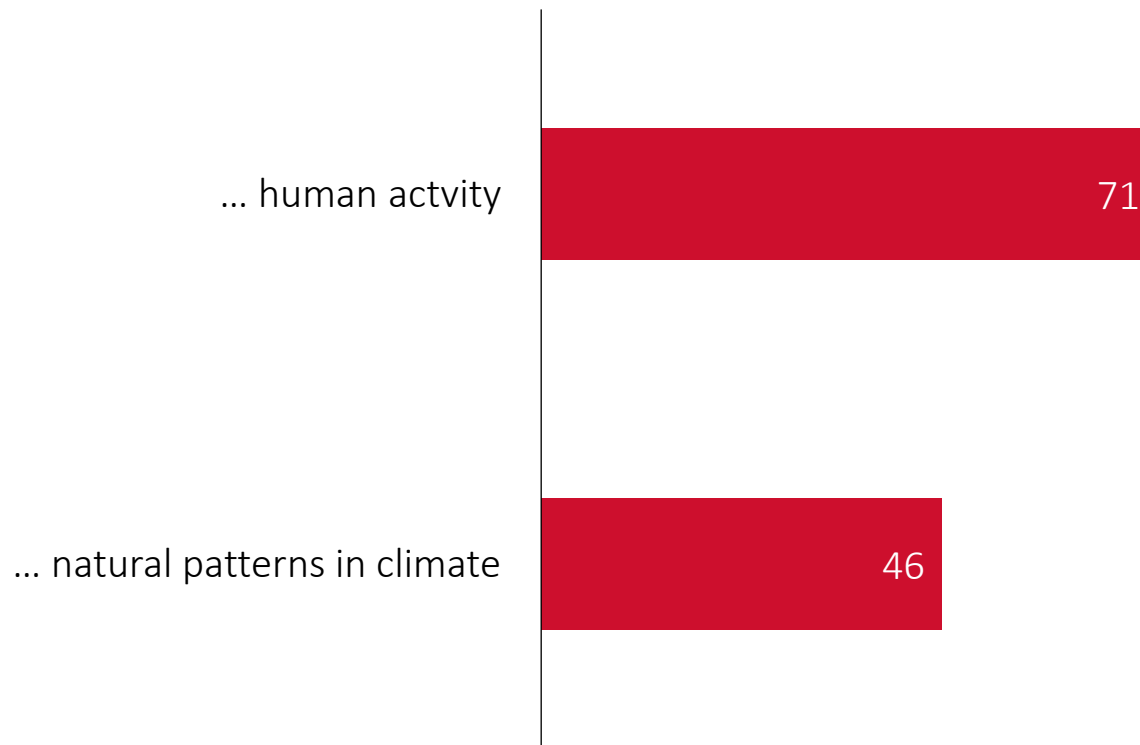
In all the countries surveyed except Japan, it is primarily **younger people** who prefer to buy products that advertise sustainability promises.

The generation gap is above average in **Germany** and **Great Britain**, with Germany standing out with the lowest overall approval ratings. The highest approval ratings for this question are also found in the emerging countries Brazil and South Africa.

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We are very interested in your personal attitude. Please tell us, to what extent you agree with the following statement: I **prefer** to buy products/services that advertise sustainability promises.

Percentage "Fully agree"/"rather agree" according to the assignment of the main cause of climate change



In addition to younger people, those who attribute climate change primarily to human activity also prefer to buy products with sustainability promises. A majority of **71 percent** make a corresponding statement.

Across all countries, however, **half of** those who believe climate change is a natural phenomenon also prefer products with sustainability promises.

If a company were to verifiably avoid or offset its **CO₂ emissions** completely: How much more would you estimate you would pay for the product or service in percentage terms?



On \emptyset , consumers would accept the following **additional price:** **22%**



A total of 36 percent of respondents answered "Don't know".

BASE: all consumers n=8,008

Assuming your company were to completely avoid or offset **CO₂ emissions**: How much more would your product(s) or service(s) have to cost in estimated percentage terms?



On \emptyset estimated by companies **necessary price increase:** **23%**



A total of 22 percent of respondents answered "Don't know".

BASE: all companies n=805 | Survey period: April and May 2023, NIMpulse 2023-4, nim.org

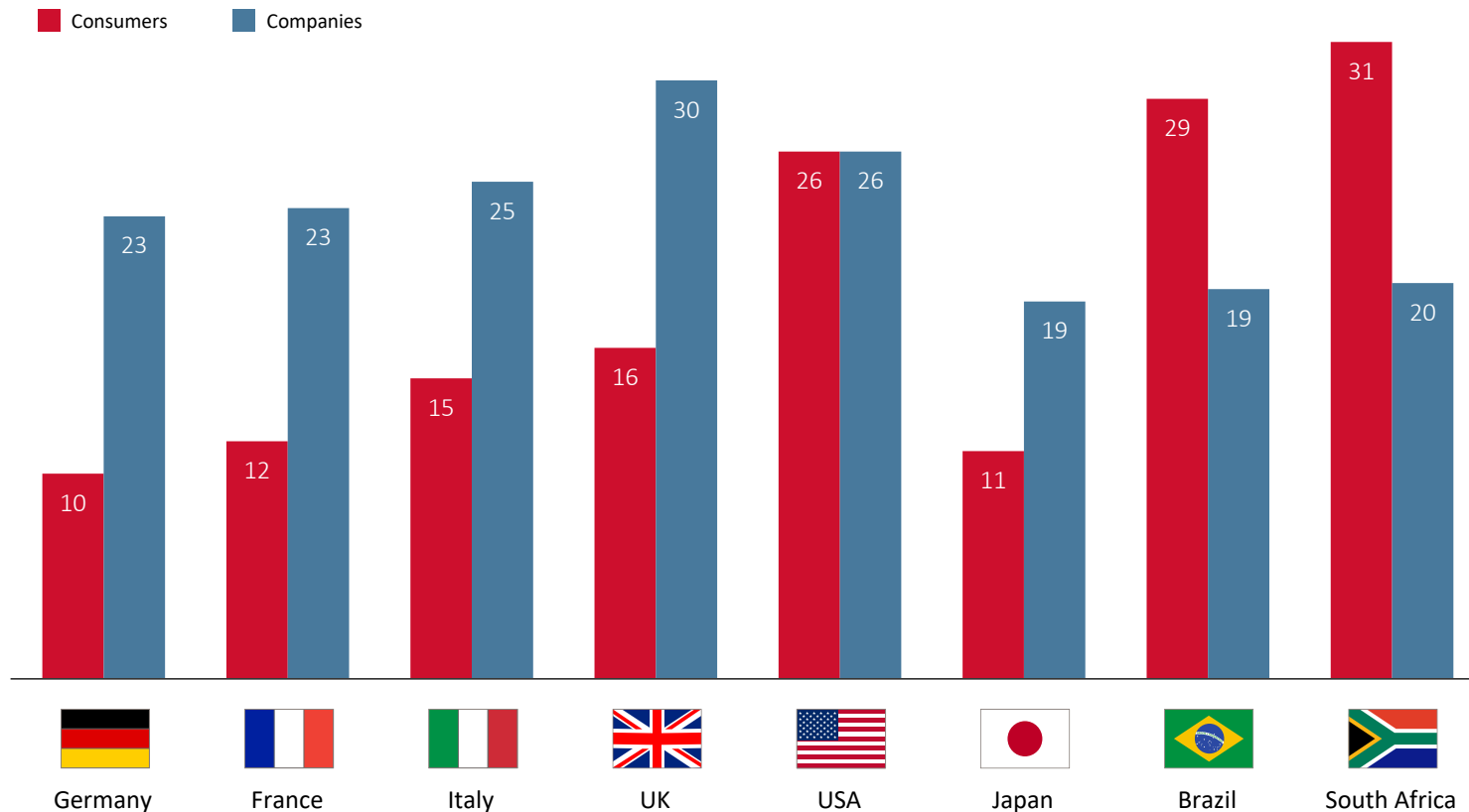
Measured against the complete **avoidance** or **compensation** of all **CO₂ emissions**, the willingness to pay more and the necessary price increase estimated by marketing managers are almost identical on average in all the countries surveyed.

It should be noted in this context that **36 percent** of consumers and **23 percent** of those responsible for marketing cannot state how high the accepted additional price or the necessary price increase would be.



If a company were to verifiably avoid or offset its **CO₂ emissions** completely: How much more would you estimate you would pay for the product or service in percentage terms?

Assuming your company were to completely avoid or offset **CO₂ emissions**: How much more would your product(s) or service(s) have to cost in estimated percentage terms?



However, a comparison of the countries reveals major differences in the additional price. There is a gap above all in the European countries. In **Germany, France, Italy** and **Great Britain**, the estimated higher price would clearly exceed consumers' willingness to pay more. The same applies, albeit at a lower level, to Japan. Conversely, in the emerging markets, the willingness to pay more clearly exceeds the necessary price adjustment.

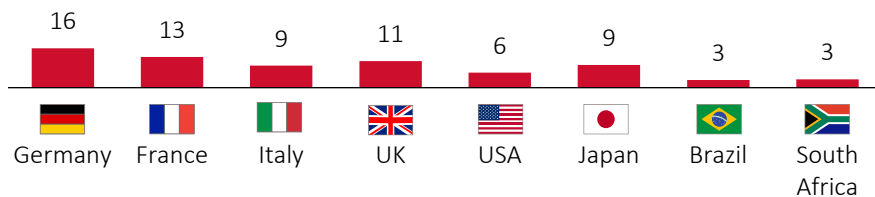
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If a company were to verifiably avoid or offset its **CO₂ emissions** completely: How much more would you estimate you would pay for the product or service in percentage terms?



8% of respondents are **not prepared to pay an additional price** for complete avoidance/compensation of CO₂ emissions.

Share **no** additional price willingness per country



Would, despite CO₂ avoidance/compensation, in principle **not pay more, because:**

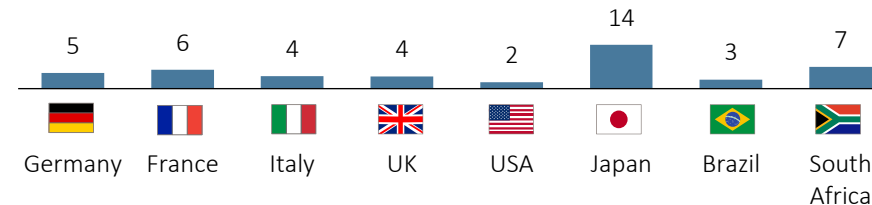
- Do not believe in CO₂ compensation/fake
- Duty of the company
- Already buy only such products
- Do not believe in climate change

Assuming your company were to completely avoid or offset **CO₂ emissions**: How much more would your product(s) or service(s) have to cost in estimated percentage terms?



6% of companies would **not** have to **increase** prices, mostly because they already fully offset or avoid CO₂ emissions.

Share **no** necessary price increase per country



Would, despite CO₂ avoidance/compensation, **not increase the price in principle, because:**

- Would have a negative impact on competitiveness/revenue
- Acquiring new customers or retaining customers through sustainability
- All CO₂ emissions are already fully offset or avoided

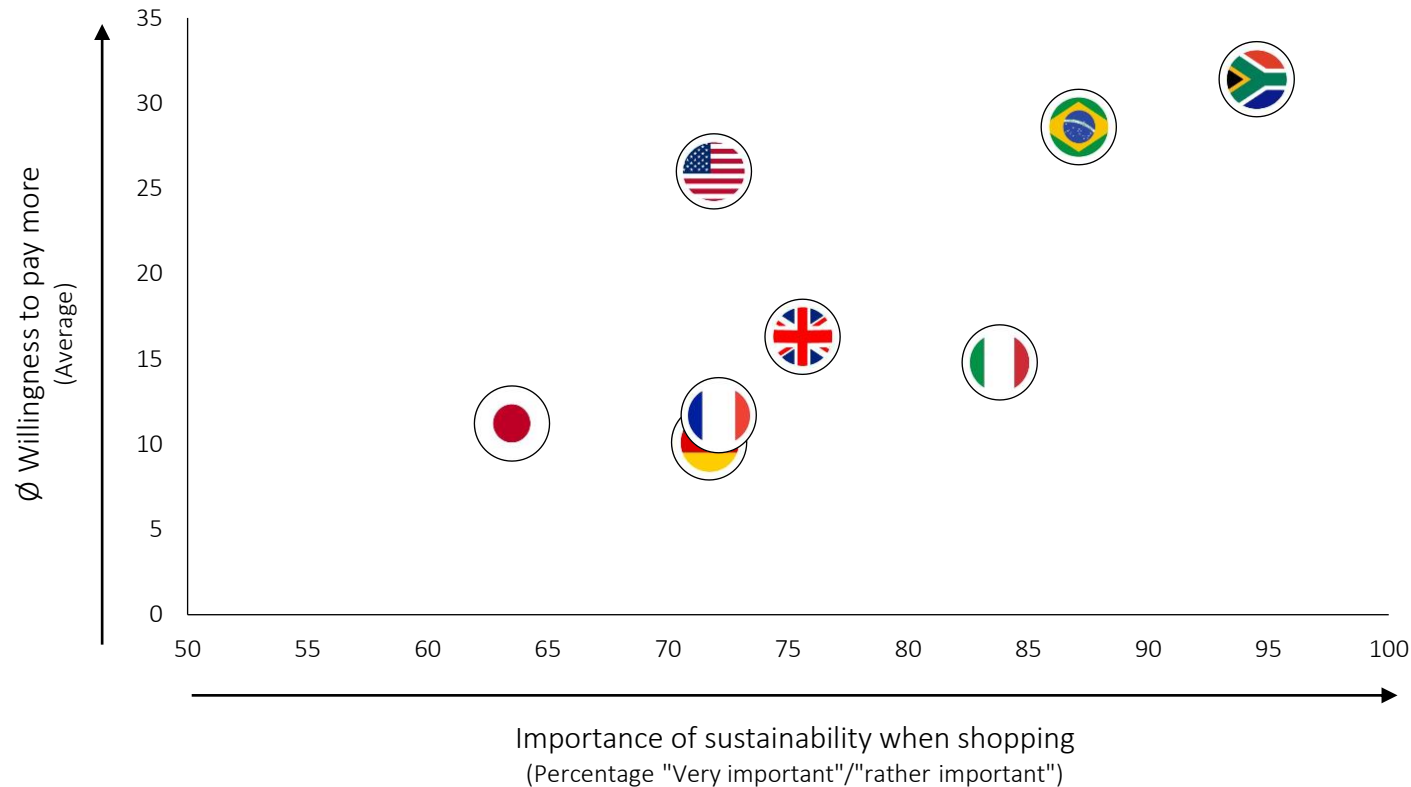


Reasons

BASE: all consumers n=8,008; all companies n=805 | Survey period: April and May 2023, NIMpulse 2023-4, nim.org

If a company were to verifiably avoid or offset its **CO₂ emissions** completely: How much more would you estimate you would pay for the product or service in percentage terms?

What role does the topic of **sustainability** currently play in your purchasing behavior in general?



The willingness of consumers to pay more to **avoid** or **compensate for CO₂ emissions** seems to be related to the relevance of sustainability in consumer behavior. Countries with higher values in this category also show a **higher willingness to pay more**.

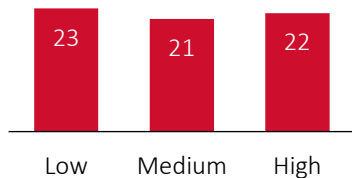
Exceptions to this pattern are the USA and Italy: In the USA, sustainability is less important when shopping than in other countries, but the willingness to spend is higher – and in Italy, the reverse is true.

If a company were to verifiably avoid or offset its **CO₂ emissions** completely: How much more would you estimate you would pay for the product or service in percentage terms?

Socioeconomic characteristics and willingness to pay more

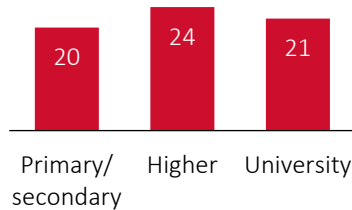
Income

The willingness to spend does not differ according to the stated income



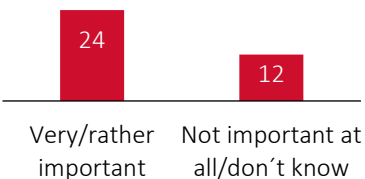
Education

The level of education does not correlate with willingness to spend



Shopping sustainability

The more important the topic of sustainability in shopping is in general, the higher the willingness to spend



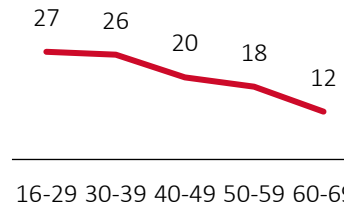
Gender

At 24 percent, women have a higher willingness to spend than men (21 percent)



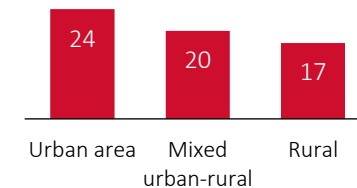
Age

With increasing age, the willingness to pay decreases



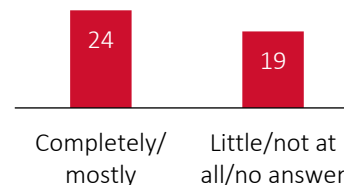
Region

Willingness to pay more is higher in the city than in the countryside



Majority group in the society

The feeling of belonging to the majority society is accompanied by a greater willingness to spend



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The fact that younger people in particular are more interested in sustainability is not a new finding. It remains to be seen whether the young will set other priorities as they get older or whether they will stick to their interest in sustainability. If the latter occurs, the importance of sustainability-oriented consumer behavior is likely to increase further in the future, and worldwide.

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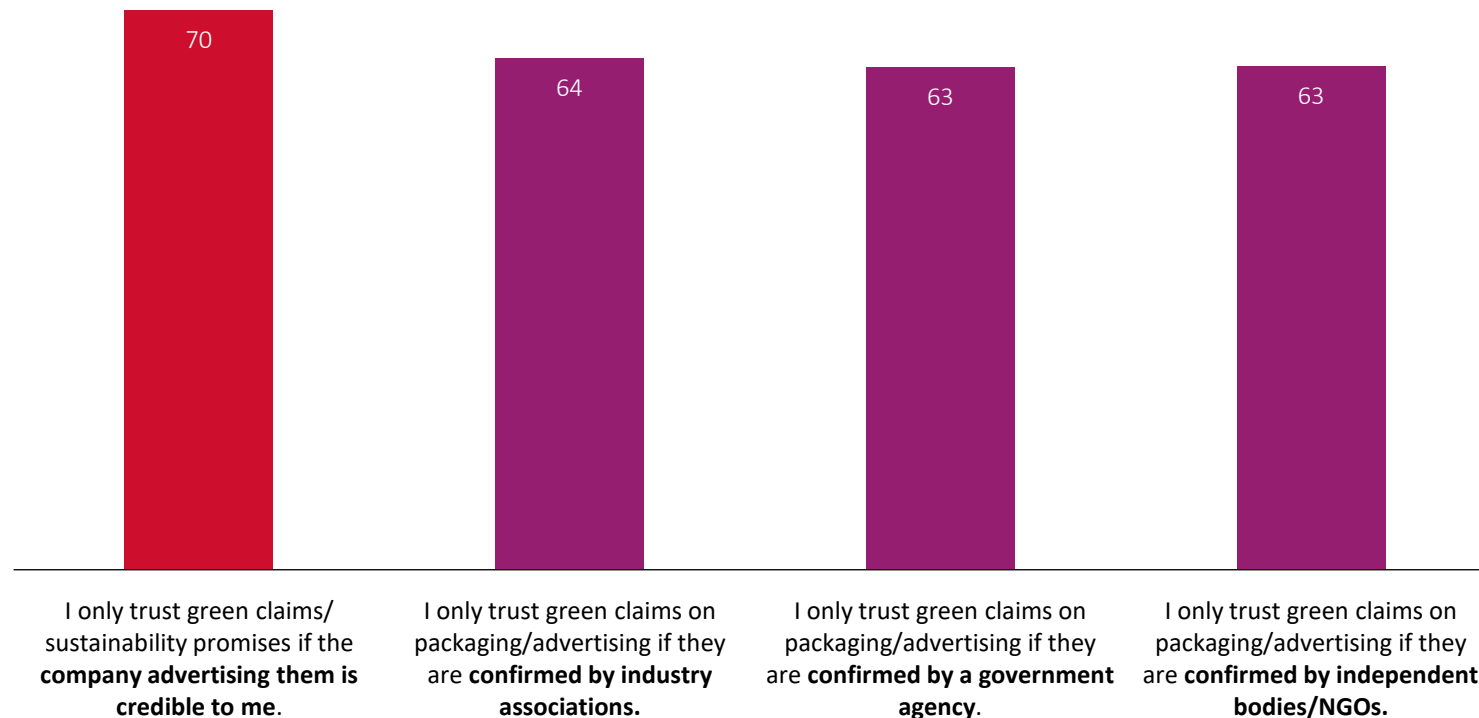
→ Credibility is often called into question. One in three companies has already been confronted with greenwashing allegations. The associated risks weigh heavily: 7 out of 10 consumers turn away from such companies or brands.

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→ Interest in sustainability is great. However, the potential for misunderstandings and accusations of fraud in sustainability promises is also great. To resolve this dilemma, consumers and companies want clear standards and legal requirements.

More and more companies/brands advertise with **sustainability promises**, for example in advertising or with a corresponding seal on the packaging. Please tell us in each case to what extent you agree with these statements.

Percentage "Fully agree"/"rather agree"



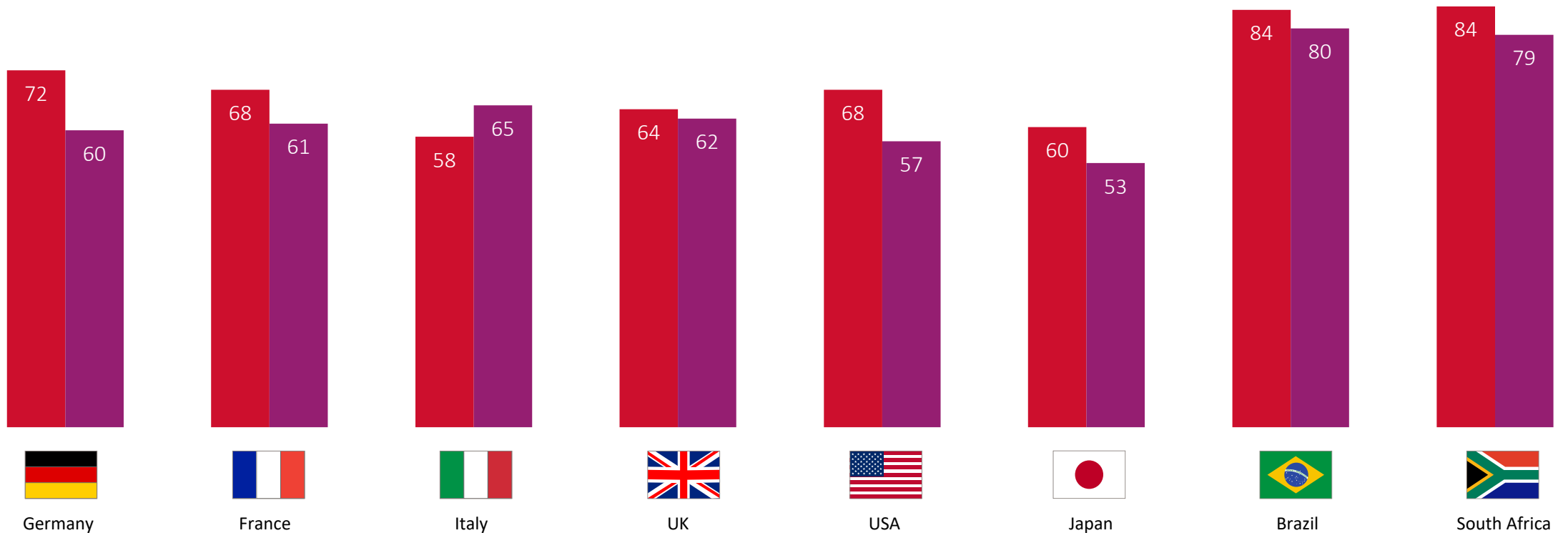
A company's credibility is the most important guide for consumers when it comes to placing trust in sustainability promises.

Another positive effect on trust in sustainability promises is when companies cooperate with stakeholders such as **industry associations**, **NGOs** or **government agencies**.

More and more companies/brands advertise with **sustainability promises**, for example in advertising or with a corresponding seal on the packaging. Please tell us in each case to what extent you agree with these statements.

Percentage "Fully agree"/"rather agree"

- I only trust sustainability promises if the company advertising them is credible to me.
- I only trust sustainability promises on packaging/advertising if they are confirmed by industry associations/NGOs/government agencies.*

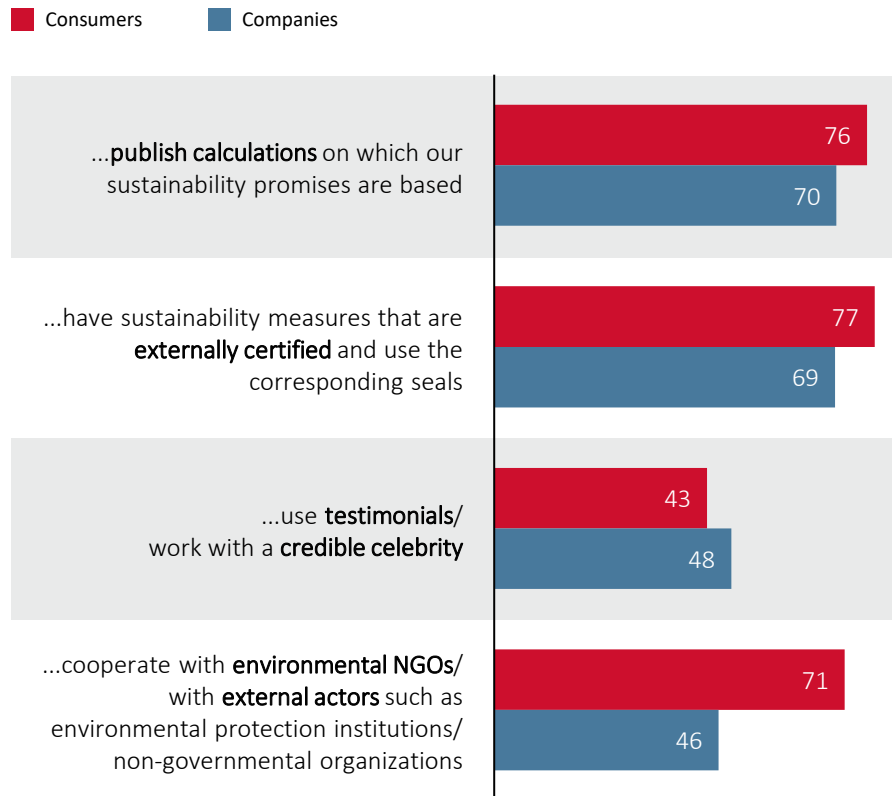


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*Average over three statements

Next, we show you a list of measures that are discussed in the context of "Credibility of sustainability promises in products or services". For each measure, please tell us whether it would make **sustainability promises more credible for you**.

What is your brand or company doing to give **more credibility to sustainability promises?**



Consumers agree that the following specific actions can increase the credibility of green claims:

- > public accessibility of calculation bases on which statements are based,
- > external certification of sustainability measures.

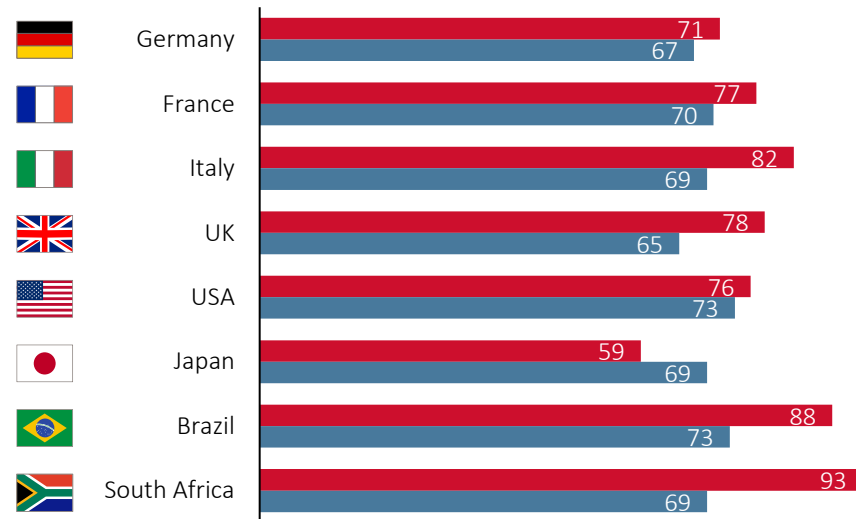
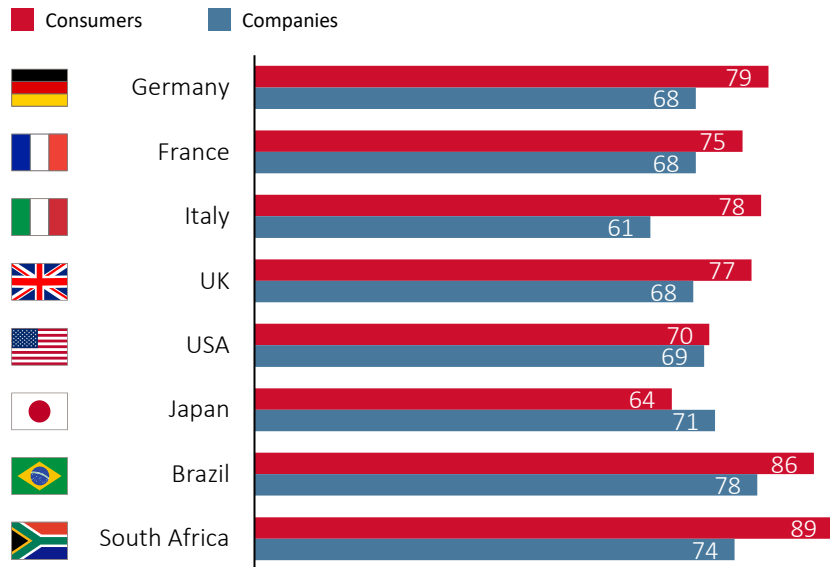
Collaboration with celebrities, on the other hand, has a less credibility-enhancing effect from both a company and consumer perspective.

The biggest difference is in cooperation with environmental NGOs: In the eyes of many consumers, such a measure boosts credibility. However, only a few companies are currently taking advantage of this.

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Publish calculations:

Proportion of consumers stating that use would increase credibility and proportion of companies currently using the measure

External certification:

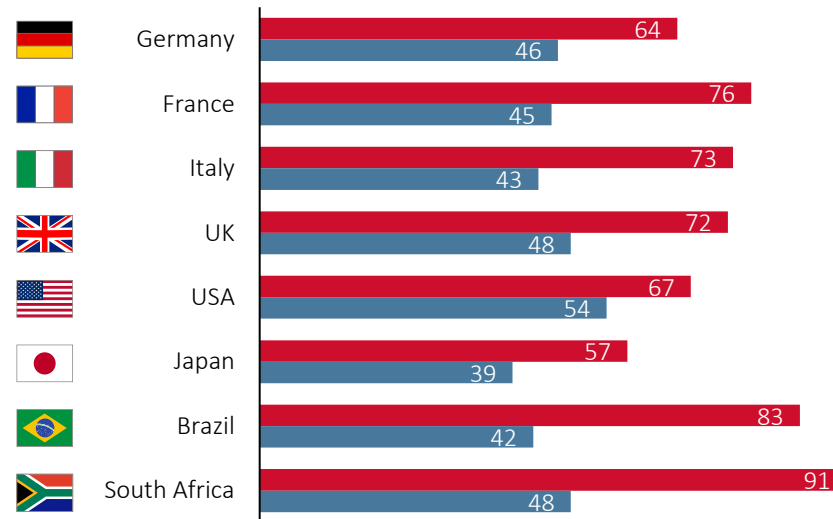
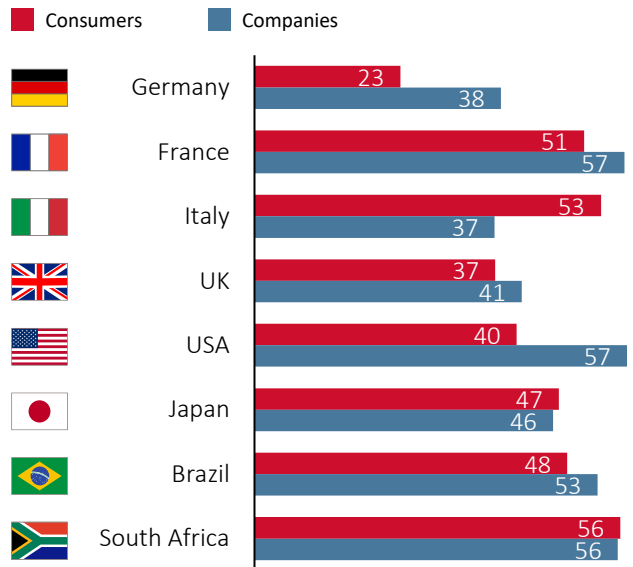
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Testimonials:

Proportion of consumers stating that use would increase credibility and proportion of companies currently using the measure

Cooperation with environmental NGOs:

Proportion of consumers stating that use would increase credibility and proportion of companies currently using the measure



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Credibility of sustainability promises: Does it always have to be an external label?



Companies can increase the credibility of their sustainability promises by relatively simple means. The publication of the calculation bases on which sustainability-related statements are based is already sufficient for the majority of consumers surveyed worldwide. Additional measures, such as external support, also provide leverage for this, albeit with little added value.

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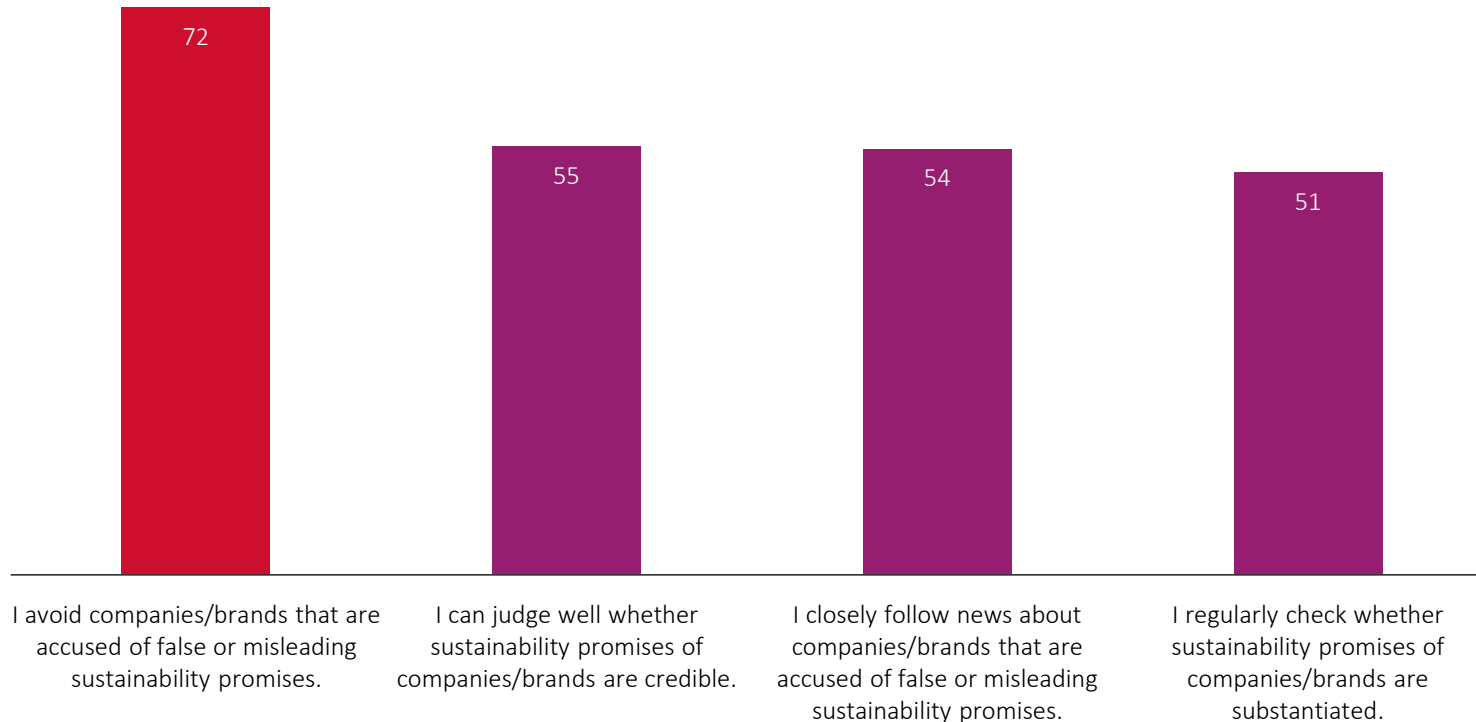
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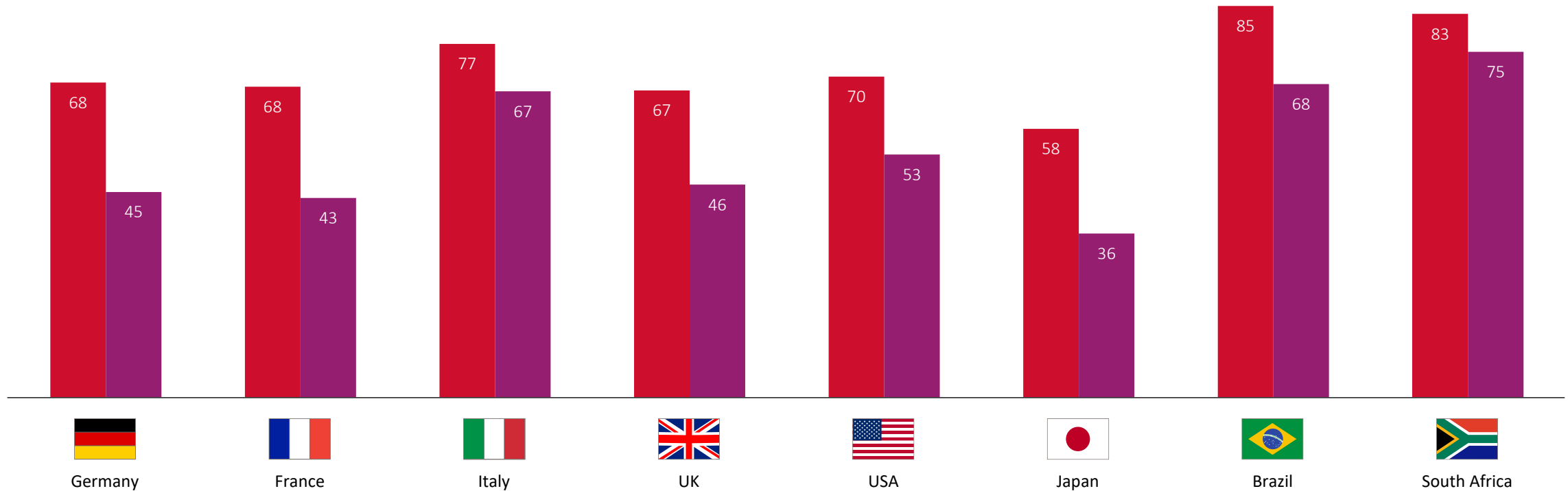


A slight majority of consumers **regularly inform themselves** about product- or company-related sustainability promises, either via the media or other channels. As a result, a slight majority of respondents are convinced that they can judge well whether sustainability promises are credible. False or misleading promises are risky for suppliers: **7 out of 10 respondents** say they avoid companies or brands that are accused of such behavior.

More and more companies/brands advertise with **sustainability promises**, for example in advertising or with a corresponding seal on the packaging. Please tell us in each case to what extent you agree with these statements.

Percentage "Fully agree"/"rather agree"

- I avoid companies/brands that are accused of false or misleading sustainability promises.
- I closely follow news about companies/brands that are accused of false or misleading sustainability promises.

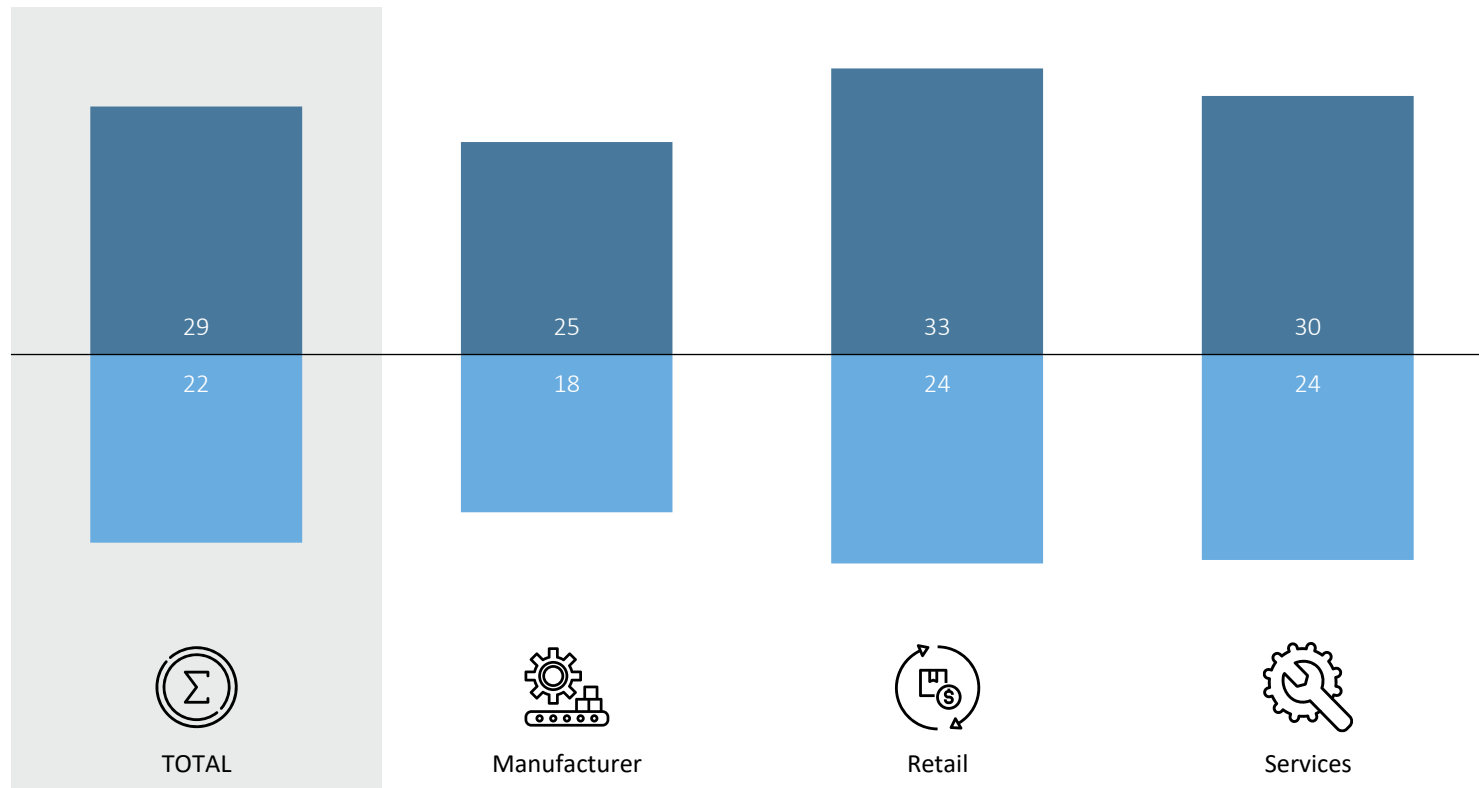


BASE: all consumers n=8,008 | Values in %, Survey period: April and May 2023, NIMPulse 2023-4, nim.org

Has your company or brand ever been publicly confronted with **greenwashing accusations**, whether justified or not?

Has your company or brand ever consciously **refrained** from communicating progress in its own sustainability for fear of being confronted with greenwashing accusations?

■ Confronted with greenwashing accusations
■ Consciously refrained from communicating progress (Greenhushing)



29%

of companies or brands have already been publicly confronted with greenwashing allegations. Companies from the retail and services sectors are particularly affected.



22%

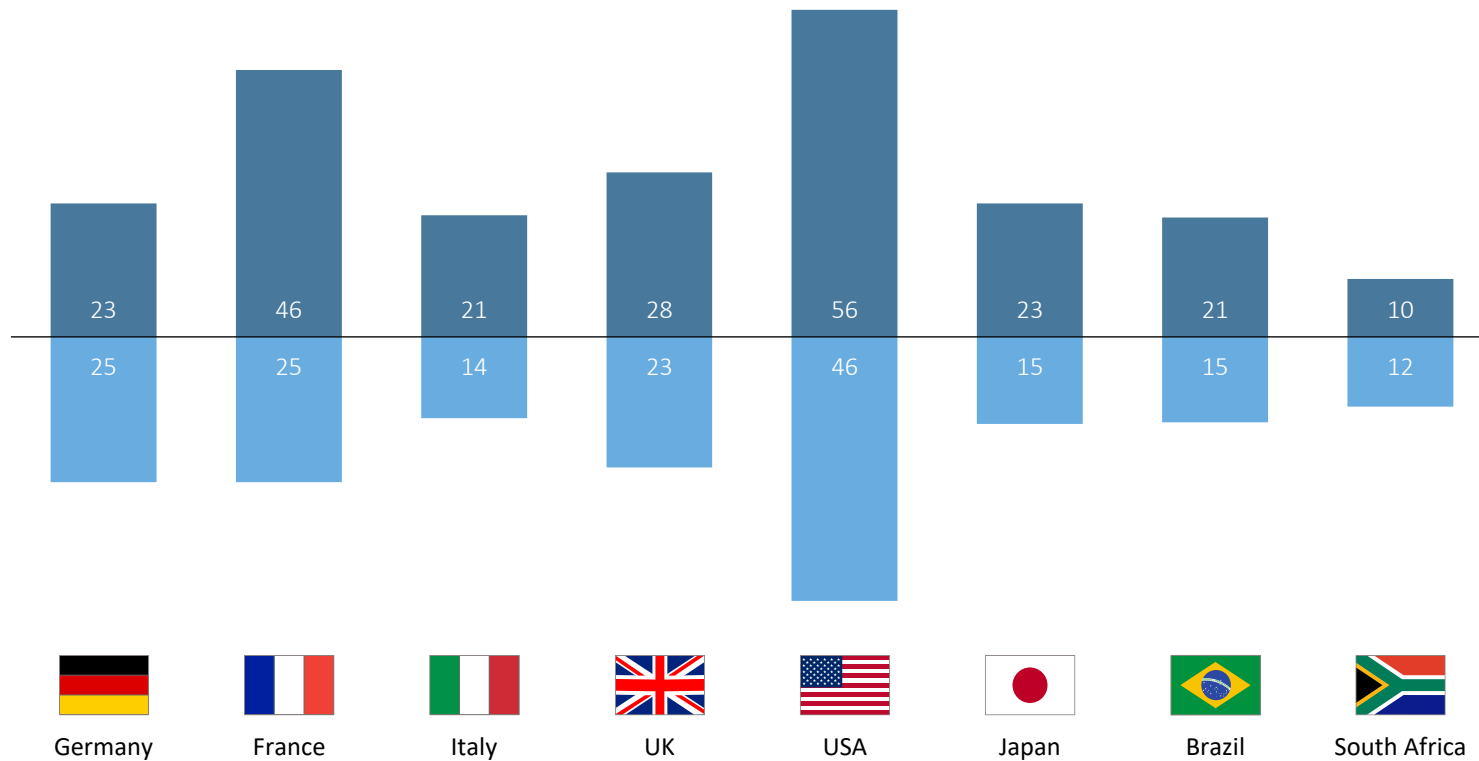
of companies or brands refrain from communicating sustainability progress for fear of greenwashing accusations (so-called greenhushing).

BASE: all companies n=805; manufacturer n=302, retail n=191, services n=312 | Values in %, Survey period: April and May 2023, NIMpulse 2023-4, nim.org

Has your company or brand ever been publicly confronted with **greenwashing accusations**, whether justified or not?

Has your company or brand ever consciously **refrained** from communicating progress in its own sustainability for fear of being confronted with greenwashing accusations?

■ Confronted with greenwashing accusations
■ Consciously refrained from communicating progress (Greenhushing)



In a country comparison, the differences are vast. For example, the proportion of companies that have already been publicly accused of greenwashing in most countries is around 20 to 30 percent. In France and the USA, this is even reported to be around

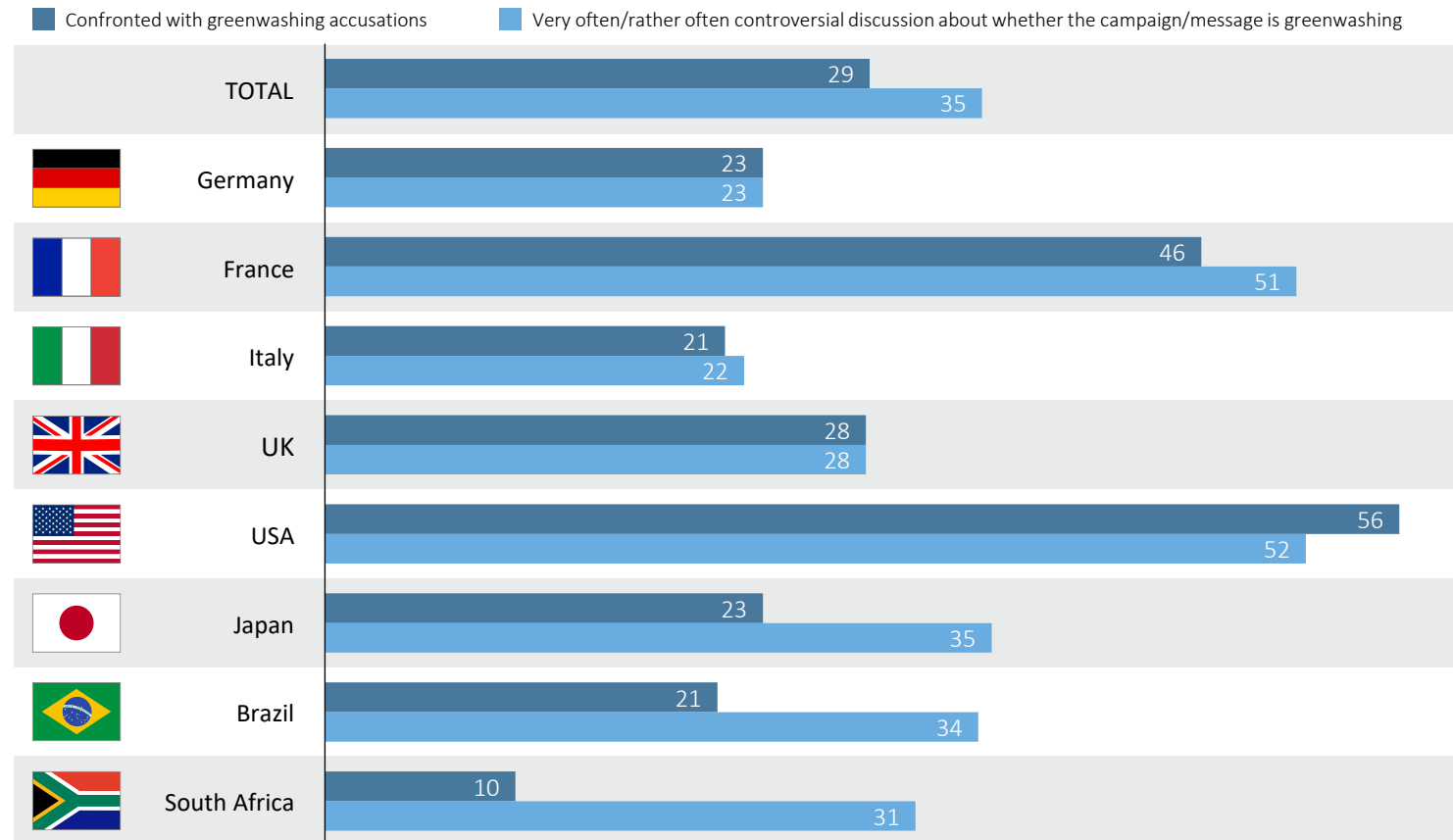
50%

Especially in the USA, the high risk also seems to lead increasingly to greenhushing.

BASE: all companies n=805 | Values in %, Survey period: April and May 2023, NIMPulse 2023-4, nim.org

When the responsible group of persons in your company decides whether to use sustainability-related messages in marketing campaigns or advertising material: How often is there a **controversial discussion** about whether the campaign/message on the advertising material is greenwashing or can be perceived as greenwashing?

Has your company or brand ever been publicly confronted with **greenwashing accusations**, whether justified or not?



In the USA and France, the countries in which greenwashing accusations are made particularly frequently, decision-makers also have by far the most controversial discussions about whether a green advertising message can be accused accordingly. The global average is

35%

BASE: all companies n=805 | Values in %, Survey period: April and May 2023, NIMPulse 2023-4, nim.org

Greenwashing allegations: Who is particularly affected? What are the reactions?



The risk of being suspected of greenwashing seems to increase with proximity to the end customer. Retailers and service providers are more frequently confronted with such accusations than manufacturers. The higher the risk of coming under suspicion, the more difficult it is for companies to decide to use sustainability-related messages. This plus the fact that companies not infrequently refrain from using green messages shows the extent of the uncertainty surrounding this topic at present.

KEY INSIGHTS

1

→ Sustainability is a guiding factor in consumer behavior. Every second company addresses the customer's desire also through sustainability promises.

2

→ Consumers are willing to pay more for products that promise sustainability. This is an opportunity for companies to increase sales and thus cover additional costs related to sustainability.

3

→ Consumers trust sustainability promises if the company advertising them is credible to them. Credibility can also be achieved through certifications, transparency and cooperation with external stakeholders.

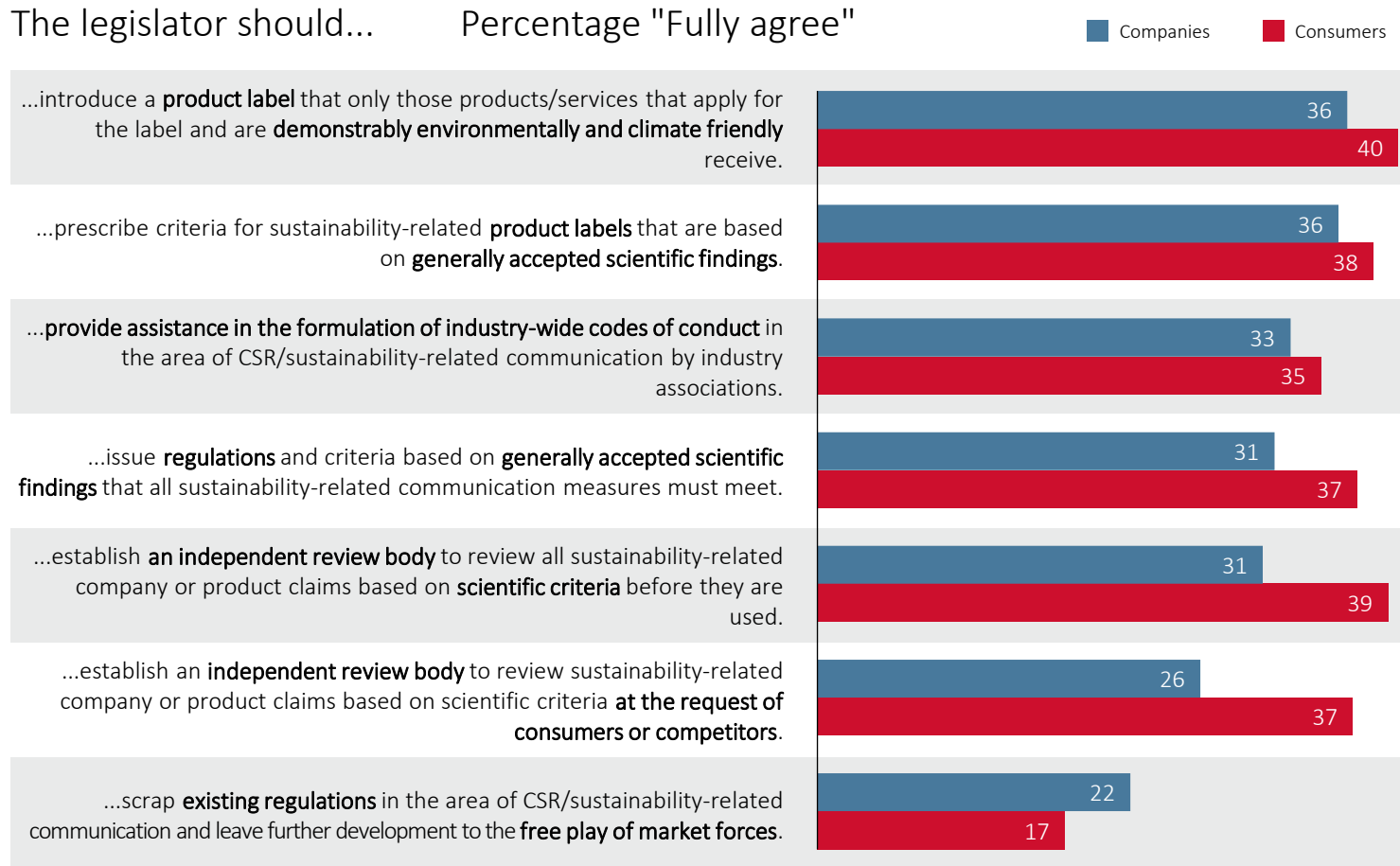
4

→ Credibility is often called into question. One in three companies has already been confronted with greenwashing allegations. The associated risks weigh heavily: 7 out of 10 consumers turn away from such companies or brands.

5

→ Interest in sustainability is great. However, the potential for misunderstandings and accusations of fraud in sustainability promises is also great. To resolve this dilemma, consumers and companies want clear standards and legal requirements.

Legislators in many countries are currently pursuing the goal of establishing more sustainable activities and business practices in their economies. Sustainability promises made by companies/ brands also play a role in this. In each case, please tell us the extent to which you agree with the following statements about **regulatory ideas** for sustainability claims.



When asked about specific regulatory ideas, neither consumers nor companies state a clear preference. There is a tendency among companies to prefer supportive measures (such as product labels and assistance with industry standards) to more far-reaching measures such as **additional regulations** or **new inspection bodies**. Consumer's view the latter more positively. There is little support from either consumers or companies for abolishing existing regulations in the area of green communications.

BASE: all consumers n=8,008; all companies n=805 | Values in %, Survey period: April and May 2023, NIMpulse 2023-4, nim.org

"Green Claims" legislation: An opportunity for market players and the environment?



The figures can be interpreted as approval in principle of the European Commission's current green claims intention. If implemented effectively, the initiative could bring together consumer interests with opportunities for companies to serve them credibly. This could in turn give a boost to the transformation of the economy and society toward greater sustainability.

Sample of the consumer survey



Concept and questionnaire

Nürnberg Institut für
Marktentscheidungen e. V.

Survey

GfK

Online Access Panels
Quotation on age, gender,
region



Sample

8,008

men and women
aged from 16 – 59 resp.
69 years, representative
of the (online) population
in the 8 countries (see next
page for details).

For the total value, the
sample was extrapolated to
the population per country.



Scope

8 questions,
mostly scaled, partly
with filter guide

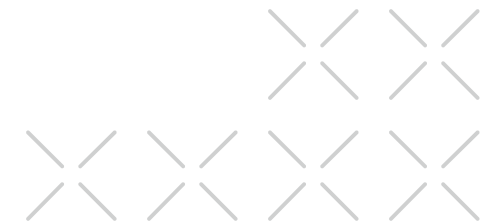


Period of the survey

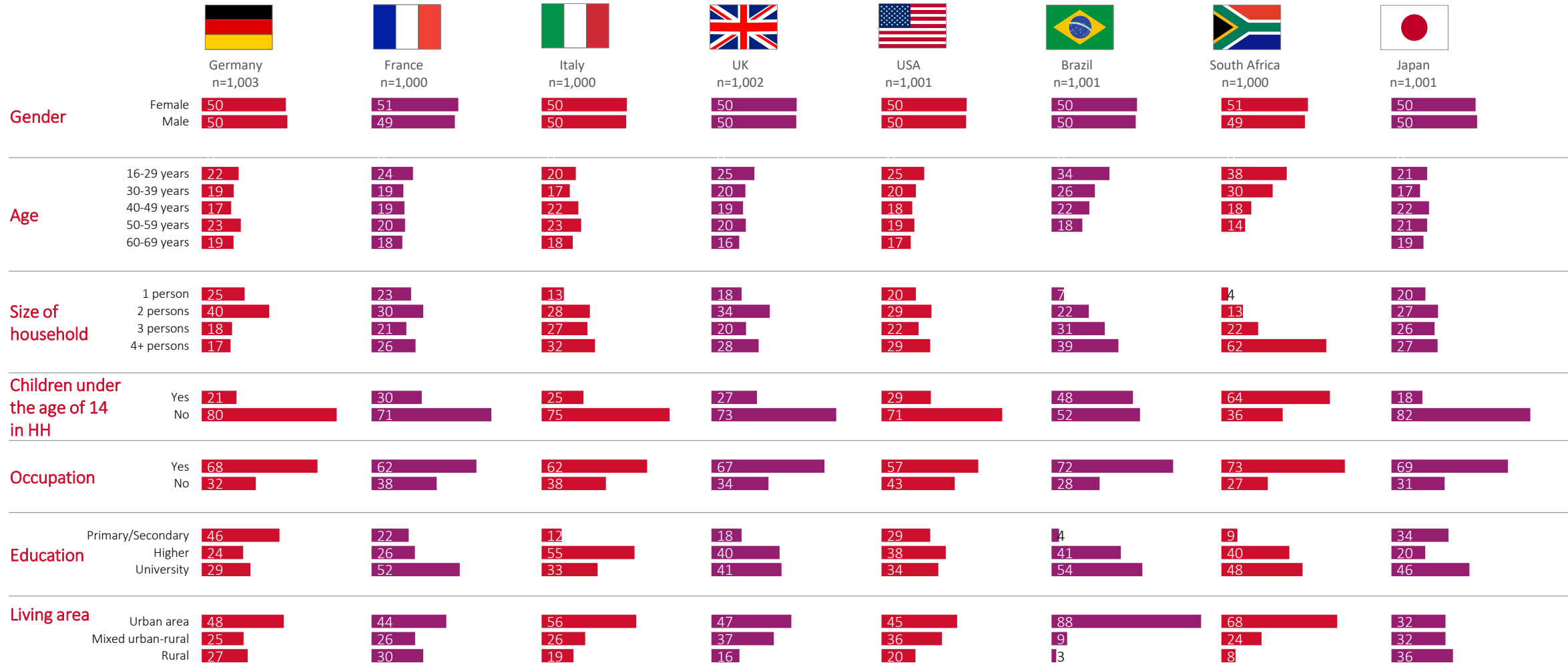
April 25th, 2023 until
May 11th, 2023

Number of demographic characteristics

10



Sample of the consumer survey in detail



BASE: all consumers n=8,008 | Values in %, Survey period: April and May 2023, NIMPulse 2023-4, nim.org

Sample of the company survey



Concept and questionnaire

Nürnberg Institut für
Marktentscheidungen e. V.

Survey

GfK

Telephone
Interviews (CATI)

No quota system, but spread
according to sectors
and company size



Sample

805

companies with 50 and more
employees in the
manufacturing, services,
retail sectors
(selection by SIC codes,
industries with focus on
end customers).

Target persons in the
company (screening):
Persons responsible for end
customer marketing.



Scope

11 questions,

partly scaled resp.
with filter guide

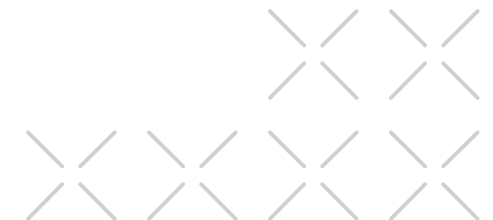


Period of the survey

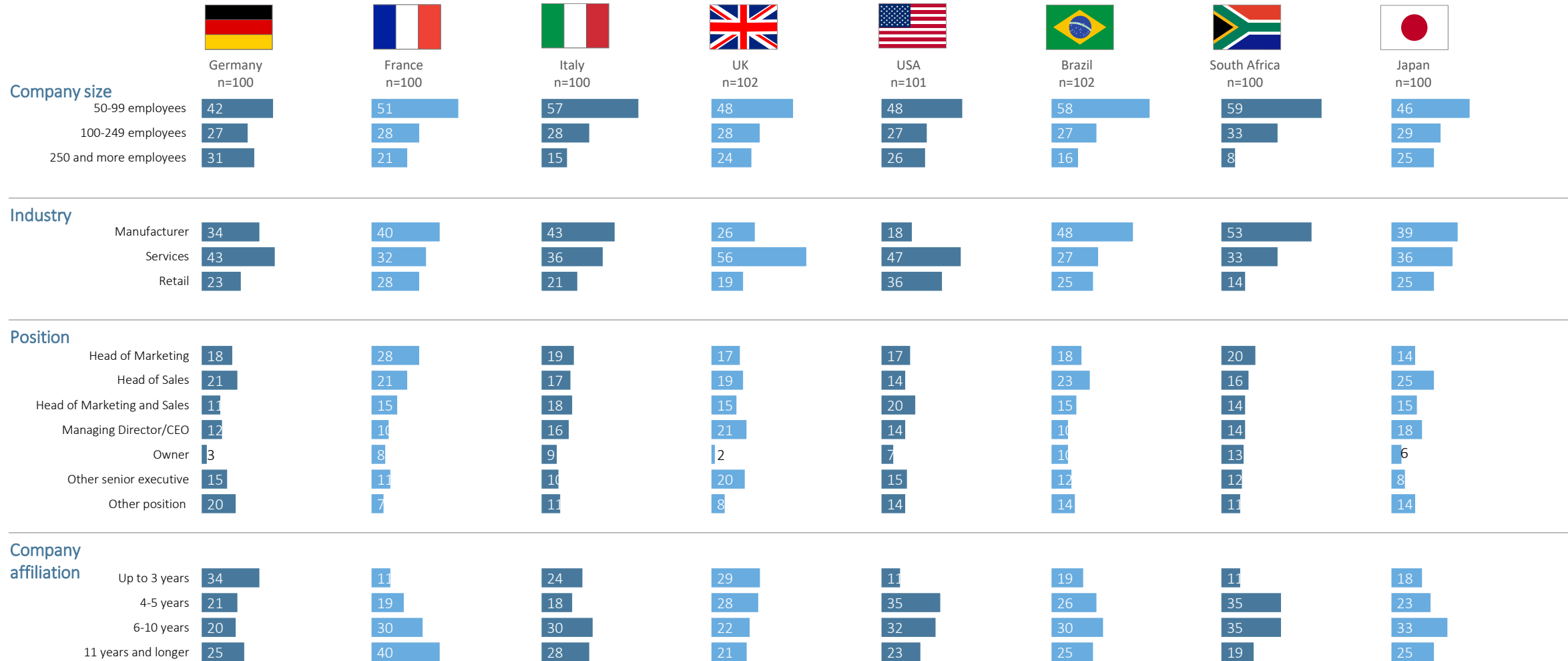
April 18th, 2023 until
May 22nd, 2023

Number of characteristics in company statistics

8



Sample of the company survey in detail



BASE: all companies n=805 | Values in %, Survey period: April and May 2023, NIMPulse 2023-4, nim.org

Contact

Tobias Biró

Research Communication

Tel.: +49 911 951519-98

E-mail: tobias.biro@nim.org

www.nim.org



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