



2018 GREEN HOME FURNISHINGS CONSUMER STUDY

December 2018

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SUMMARY OF KEY FINDINGS

The 2018 Green Home Furnishings Consumer Study was conducted to assess consumer awareness, interest in and behavior regarding sustainable furnishings.

To provide the most applicable results for companies that service this market, the survey sample was intentionally limited to: Male and female homeowners, age 30-60 with household incomes of \$50,000 or more that have spent more than \$500 on home furnishings in the past 12 months.

The study was conducted for the Sustainable Furnishings Council by Research Solutions, Inc. between November 7th and 12th, 2018.

The purpose of the research is to provide insight into how today's consumers perceive environmentally-sensitive topics, the concerns they have regarding the environment and the actions they take in response to their perceptions and concerns.

Virtually all (98%) respondents expressed concern about presented environmental issues with women especially concerned about natural disasters, indoor air quality and global warming. Eight in ten have experienced heightened levels of concern about the environment in the wake of recent natural disasters and 9 in 10 vote for political candidates that promise eco-friendly policies and legislation.

- Hazardous indoor air quality is believed to be an issue for 97% of respondents with 83% expressing concern. One-third are directly affected while half describe themselves as not directly affected but believe everyone should be concerned.
- Global warming is believed to be an issue for 87% of respondents with nearly 8 in 10 expressing concern. Four in ten feel they are directly affected with another 43% believing everyone should be concerned despite not being directly affected.

Practicing any environmentally friendly habits has become nearly universal (99%).

- More than 8 in 10 recycle and replace light bulbs with energy-efficient options and 67% have made food/drink related changes including reducing their consumption of bottled water and/or regularly buying organic food.
- More than three-quarters (78%) are going green when shopping with 71% opting for reusable shopping bags and 46% purchasing green products.
- Seven in ten are helping by setting thermostats lower in the winter and higher in the summer.
- More than half of respondents are also environmentally friendly drivers with 46% cutting back on driving and 15% opting for a hybrid or high MPG vehicle.

When asked about the term that best fits the description of environmentally friendly products, "Environmentally Safe" was most often ranked #1 (30%) and fell into the top three for 3 in 4 respondents (73%). "Sustainable" (25% ranked #1 and 60% top three) and "Eco Friendly" (23% ranked #1 and 73% top three) round out the top mentions.

When respondents hear a product described as their most-preferred term, more than three quarters (77%) have a positive reaction.

Most respondents (89%) have purchased environmentally safe products, with a concentration on home-related products such as cleaning supplies (63%) and paper products (60%). For those who have not purchased environmentally safe products, a lack of awareness (39%) and cost (28%) were primary obstacles.

Energy Star (73%), recycled content (64%) and reclaimed wood (63%) are the most familiar terms associated with environmentally safe home furnishing options while Fair Trade is a term that resonates with 78% of respondents when purchasing textiles for their home.

Two thirds of respondents (68%) spent \$1,000 or more on household furnishings over the past year and 4 in 10 expect to increase that amount over the next year. Furniture is expected to be of good quality, a suitable style and affordable for all respondents. Specifically, the top three most important attributes respondents look for when purchasing furniture are comfort (95%), style (85%) and price/value (84%). On average, respondents expect their furniture purchases to last approximately 8 years.

Information gathering for furniture purchases is conducted primarily online (98%) at retail store sites (78%) and search engines such as Google (67%). Ethan Allen (58%), Pottery Barn (56%) and Crate & Barrel (55%) are the top three favored home furnishing brands for a majority of respondents.

Respondents are interested/very interested in...

- Purchasing environmentally safe home furnishings if style and cost considerations were comparable (92%).
- Buying wood furniture certified as legal wood coming from responsibly managed forests (92%).
- Purchasing textiles for their home that are labeled with a 3rd party certificate as made with safe (95%), quality materials (97%) and produced at a verified environmentally friendly facility that is safe and socially responsible (87%).
- Purchasing gifts made from environmentally friendly materials (85%) and those with an environmentally friendly story (78%).
- Working with an environmentally safe interior designer (69%) if style and cost were comparable.

Respondents are willing to pay up to 5-10% more for wood furniture that is certified as legal and responsibly harvested and for home furnishings certified to be environmentally safe (58% and 59% respectively).

The chemicals and materials used in the furnishings manufacturing process are important/very important in the purchase decision process for at least 9 in 10 respondents (ex. Children's, Living Room, Bedroom and Dining Room furnishings).

- Other important/very important eco-attributes across all four furnishings categories include labor practices (8 in 10), traceability of the manufacturing process (three-quarters), and the company's eco-story (7 in 10).

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The study was conducted for the Sustainable Furnishings Council by Research Solutions, Inc. The study was fielded between November 7th and 12th, 2018.

Interviews were conducted among a sample of 300 female and 200 male homeowners, age 30-60, with household incomes of \$50,000+, that have spent \$500 or more on home furnishings in the past 12 months.

Gender	Total	Females	Males
<i>Total Respondents</i>	500	300	200
Female	60%	100%	0%
Male	40%	0%	100%

Age	Total	Females	Males
<i>Total Respondents</i>	500	300	200
30-44 (Net)	50%	50%	49%
45-60 (Net)	50%	50%	51%
Mean (in years)	44.9	45.2	44.5
Median (in years)	45.1	45.0	45.3

Household Income	Total	Females	Males
<i>Total Respondents</i>	500	300	200
\$50,000-\$74,999	26%	24%	28%
\$75,000+ (Net)	74%	76%	72%
\$125,000+ (Subnet)	25%	22%	31%
Mean	\$105,900	\$103,800	\$109,000
Median	\$96,000	\$96,400	\$95,400

Region	Total	Females	Males
<i>Total Respondents</i>	500	300	200
Northeast	29%	28%	31%
Southeast	22%	23%	20%
Upper Midwest	21%	23%	17%
Lower Midwest	12%	9%	17%
West	16%	17%	15%
Outside Continental U.S.	<1%	<1%	1%

Home Ownership	Total	Females	Males
<i>Total Respondents</i>	500	300	200
Own Home (Net)	100%	100%	100%
Yes, own primary home	100%	100%	100%
Yes, own second/vacation home	4%	5%	4%

Approximate Amount Household Spent on Home Furnishings Past Year	Total	Females	Males
<i>Total Respondents</i>	500	300	200
\$500+ (Net)	100%	100%	100%
\$1000+ (Subnet)	68%	65%	73%
\$5,000+	9%	9%	9%
Mean	\$2,178	\$2,058	\$2,358
Median	\$1,758	\$1,600	\$2,023

Over the next year, do you expect to spend more, less or the same amount on home furnishings as you did last year?	Total	Females	Males
<i>Total Respondents</i>	500	300	200
Expect to spend <u>more</u> on home furnishings than last year	40%	39%	43%
Expect to spend <u>the same</u> amount on home furnishings as last year	39%	38%	40%
Expect to spend <u>less</u> on home furnishings than last year	21%	23%	18%

In general, when you buy furniture for your home, for how long do you typically expect to own it before replacing it for any reason?	Total	Females	Males
<i>Total Respondents</i>	500	300	200
5 years or more (Net)	83%	85%	81%
10 years or more	28%	30%	24%
Mean (in years)	7.6	7.8	7.4
Median (in years)	8.0	8.2	7.7

How important is the following the next time you buy furniture? (Very Important/Important)	Total	Females	Males
<i>Total Respondents</i>	500	300	200
Style that suits me or my family	100%	100%	100%
Quality that will last a long time	99%	100%	99%
Fair price that we can afford	99%	99%	98%
On sale, promotion or discount	79%	83%	73%
Brand name that I know and trust	75%	71%	82%
Made with materials and processes that do not harm the environment	72%	71%	74%
In-stock and immediately available	71%	71%	71%
Store is close to my home	59%	59%	59%
<i>Women are more likely to seek out a good deal when shopping for furniture while men are more likely to look for a trusted brand name.</i>			

Assuming you were in the market for furniture, which of the following sources would you use for information?	Total	Females	Males
<i>Total Respondents</i>	500	300	200
Retail store sites (i.e. Crate & Barrel)	78%	79%	78%
Google or other search engines (i.e. furniture stores in San Diego)	67%	65%	70%
Manufacturer sites (i.e. La-Z-Boy)	58%	58%	57%
Shopping sites (i.e. shopping guides, rating services)	49%	51%	48%
Home decor magazines	41%	40%	43%
Home decor catalogs	38%	36%	40%
Media sites (i.e. local TV/radio/newspaper/magazine sites)	19%	19%	18%
Smart phone apps	18%	15%	24%
Blogs or other social media	17%	14%	21%
Online (Subnet)	98%	99%	98%
Print (Subnet)	52%	51%	52%
Mean Number Of Sources	3.9	3.8	4.0
<i>More so than women, men turn to smartphone apps and social media sources when researching a new furniture purchase.</i>			

Please rank the following product attributes in order of importance when you are in the market for furniture. (Ranked #1)	Total	Females	Males
<i>Total Respondents</i>	500	300	200
Comfort	33%	32%	34%
Price/Value	32%	33%	30%
Style	27%	29%	25%
Made in America	6%	3%	10%
Earth-friendly	3%	3%	3%

(Ranked #1, #2, or #3)	Total	Females	Males
<i>Total Respondents</i>	500	300	200
Comfort	95%	97%	92%
Style	85%	86%	84%
Price/Value	84%	87%	80%
Made in America	24%	20%	30%
Earth-friendly	12%	10%	15%
<i>Comfortable furniture and good values are more important to women when shopping for furniture. Men are more likely than women to look for the “made in America” label.</i>			

Please rate your level of concern about the following environmental issue. (Very Concerned/Concerned)	Total	Females	Males
<i>Total Respondents</i>	500	300	200
Any (Net)	98%	99%	98%
Toxic pollutants in the waste stream	92%	93%	92%
Extinction of species	85%	87%	84%
Using up natural resources	85%	87%	83%
Overloading of landfills	85%	87%	82%
Deforestation/loss of rainforests	84%	85%	83%
Increase in natural disasters	84%	87%	79%
Hazardous indoor air quality	83%	86%	78%
Unfair labor and trade practices	79%	82%	75%
Global warming	79%	82%	74%
<i>Concerns about natural disasters, indoor air quality and global warming run higher among women.</i>			

Please tell us which best describes your opinion on the following.	Total	Females	Males
<i>Total Respondents</i>	500	300	200
<i>Hazardous Indoor Air Quality</i>			
Believe It's An Issue (Net)	97%	98%	97%
Directly affects me and my family	34%	30%	41%
Not directly affected, but think everyone should be concerned	51%	56%	43%
<i>Global Warming</i>			
Believe It's An Issue (Net)	87%	87%	88%
Directly affects me and my family	40%	39%	41%
Not directly affected, but think everyone should be concerned	43%	45%	41%
<i>Men are more likely to feel that the quality of indoor air directly affects them and their families, while women are more likely <u>not</u> to feel directly affected but think everyone should have concern.</i>			

Which of these “environment-friendly” habits do you have?	Total	Females	Males
<i>Total Respondents</i>	500	300	200
Recycle at home	85%	86%	84%
Replace light bulbs with energy-efficient options	82%	84%	80%
Use reusable shopping bags	71%	74%	68%
Set thermostat lower in winter, higher in summer	70%	72%	68%
Reduce consumption of bottled water	53%	56%	49%
Buy some products claiming to be “green”	46%	47%	44%
Consolidate trips, cut back on driving	46%	49%	42%
Regularly purchase organic foods	36%	37%	34%
Choose a hybrid or high MPG car	15%	12%	19%
Any (Net)	99%	99%	100%
Home Related Change (Subnet)	98%	98%	99%
Shopping Related Change (Subnet)	78%	80%	76%
Food/Drink Related Change (Subnet)	67%	70%	61%
Driving Related Change (Subnet)	53%	54%	52%
Mean Number Of Environmentally-Friendly Habits	5.1	5.2	4.9
<i>Women are more likely to practice environment-friendly habits related to food and drink, such as reducing bottled water consumption and buying organic foods.</i>			

Please rank your preference for terms that could be used to describe products that are <u>good for the environment</u>. (Ranked #1)	Total	Females	Males
<i>Total Respondents</i>	500	300	200
Environmentally Safe	30%	29%	32%
Sustainable	25%	25%	24%
Eco Friendly	23%	23%	24%
Green	15%	17%	12%
Eco Conscious	4%	4%	4%
Pro Planet	3%	2%	5%

(Ranked #1, #2, or #3)	Total	Females	Males
<i>Total Respondents</i>	500	300	200
Environmentally Safe	73%	76%	69%
Eco Friendly	73%	73%	72%
Sustainable	60%	58%	64%
Green	47%	49%	44%
Eco Conscious	31%	29%	34%
Pro Planet	17%	16%	19%

When you hear a product claiming to be environmentally safe (i.e. good for the environment) what is your reaction?	Total	Females	Males
<i>Total Respondents</i>	500	300	200
Right thing to do	53%	52%	55%
Will probably cost more	39%	39%	40%
Want to learn more	35%	35%	35%
From a good company	26%	24%	29%
Would be my first choice	24%	21%	27%
Doubtful or skeptical	11%	10%	12%
Uncertain what it means	6%	6%	6%
Will be hard to find	5%	4%	6%
Not interested	3%	3%	3%
Style probably not for me	2%	1%	4%
Positive Reaction (Net)	77%	76%	80%
Negative Reaction (Net)	47%	46%	50%

Have you ever purchased environmentally safe products in the following categories?	Total	Females	Males
<i>Total Respondents</i>	500	300	200
Cleaning Supplies	63%	64%	61%
Paper Products	60%	62%	57%
Lighting (lamps/bulbs)	46%	44%	50%
Plastic Products	39%	39%	40%
Clothing	23%	20%	28%
Appliances	22%	19%	26%
Linens (sheets/towels)	18%	16%	22%
Home Furnishings	15%	9%	24%
Automobiles	9%	6%	14%
Any (Net)	89%	89%	90%
Home Related Product (Subnet)	80%	81%	80%
Mean Number Of Product Categories Purchased	3.0	2.8	3.2
<i>Environmentally-safe clothing, home furnishings and automobiles are purchased more by men than women.</i>			

Why haven't you ever purchased environmentally safe products?			
<i>Base = Never Purchased</i>	Total	Females	Males
<i>Total Answering</i>	54	33	21
Not aware of any	39%	36%	43%
Too expensive vs. other options	28%	30%	24%
Not interested	17%	18%	14%
Did not understand/believe it was any better	11%	15%	5%
Not available where I shop	7%	3%	14%
Did not suit my style	4%	3%	5%
Not in stock/hard to order	4%	0%	10%

How interested would you be in buying environmentally safe home furnishings if you liked the style and they cost about the same as other options?	Total	Females	Males
<i>Total Respondents</i>	500	300	200
Interested (Net)	92%	91%	93%
Very interested	50%	47%	56%
Interested	41%	44%	37%
Not that interested	8%	8%	7%
Not interested at all	1%	1%	1%

How much more would you be willing to pay, if necessary, to buy home furnishings that were certified to be legitimately environmentally safe and you liked the style?	Total	Females	Males
<i>Total Respondents</i>	500	300	200
Nothing more	24%	24%	23%
Willing To Pay More (Net)	76%	76%	77%
Up to 5% more	31%	34%	27%
Up to 10% more	28%	29%	26%
Up to 15% more	10%	7%	14%
Up to 20% more	5%	4%	7%
Greater than 20% more	2%	2%	4%

Which of these environmentally safe options in home furnishings have you heard of?	Total	Females	Males
<i>Total Respondents</i>	500	300	200
Energy Star rated	73%	73%	72%
Recycled content	64%	64%	63%
Reclaimed wood	63%	70%	54%
Organic fabrics	49%	52%	44%
Fairly traded	41%	45%	35%
Rapidly renewable resources	27%	27%	28%
Certified wood (FSC, SFI, etc.)	27%	25%	30%
Latex or bio-based foams	13%	11%	16%
<i>Reclaimed wood & fair trade products are more widely known among females.</i>			

How interested would you be in buying one type of wood furniture vs. another if it was certified as legal wood coming from a responsibly managed forest?	Total	Females	Males
<i>Total Respondents</i>	500	300	200
Interested (Net)	92%	92%	92%
Very interested	43%	42%	45%
Interested	49%	49%	48%
Not that interested	7%	7%	7%
Not interested at all	1%	1%	1%

How much more would you be willing to pay if necessary to buy wood furniture that was certified as legal and responsibly harvested?	Total	Females	Males
<i>Total Respondents</i>	500	300	200
Nothing more	24%	23%	25%
Willing To Pay More (Net)	76%	77%	75%
Up to 5% more	32%	36%	27%
Up to 10% more	26%	26%	25%
Up to 15% more	10%	8%	14%
Up to 20% more	6%	6%	7%
Greater than 20% more	2%	2%	3%

How important is the following in regard to your next purchase of <u>home textile products</u> (such as sheets, blankets and towels)? (Very Important/Important)	Total	Females	Males
<i>Total Respondents</i>	500	300	200
Made from durable, higher quality materials	99%	98%	100%
Is at a fair price that I can afford	98%	99%	96%
Made with materials safe from substances that could harm me and my family	96%	97%	96%
Made in facilities verified to be environmentally friendly, safe and socially responsible	82%	84%	80%
From a brand name or store that I know and trust	78%	77%	79%
<i>Affordable pricing is important to women when in the market for home textiles.</i>			

How interested are you to purchase home textile products (such as sheets, blankets and towels) that are certified by a 3rd party to meet the following requirements? (Very Interested/Interested)	Total	Females	Males
<i>Total Respondents</i>	500	300	200
Made from durable, higher quality materials	97%	97%	98%
Made with materials safe from substances that could harm me and my family	95%	94%	96%
Made in facilities verified to be environmentally friendly, safe and socially responsible	87%	89%	84%

Given the right price and style, how likely would the following attributes drive you to purchase home textile products (such as sheets, blankets, and towels) from the same store or brand in the future? (Very Likely/Likely)	Total	Females	Males
<i>Total Respondents</i>	500	300	200
Made with materials safe from substances that could harm me and my family	92%	91%	93%
Made in facilities verified to be environmentally friendly, safe and socially responsible	91%	91%	90%
Made from organic materials	83%	82%	84%

How important do you consider the following label when purchasing home textile products (such as sheets, blankets and towels)? (Very Important/Important)	Total	Females	Males
<i>Total Respondents</i>	500	300	200
Fair Trade	78%	78%	79%
MADE IN GREEN by OEKO-TEX®	55%	49%	64%
Higg Product approved	47%	41%	57%
STANDARD 100 by OEKO-TEX®	46%	40%	55%
GOTS	36%	31%	44%
<i>Environmentally-safe certifications resonate more with men than women when shopping for home textiles.</i>			

Assuming you were in the market, how important are each of the following <u>eco-attributes</u> in your purchase decision for Children's Furniture? (Very Important/Important)	Total	Females	Males
<i>Total Respondents</i>	500	300	200
Chemicals Used In the Manufacturing Process	92%	90%	94%
Materials Used In the Manufacturing Process	90%	89%	93%
Labor Practices Used In the Manufacturing Process	81%	81%	80%
Traceability of the Manufacturing Process	77%	75%	79%
Eco-Story (that is, what the company shared at point of sale about their corporate commitment to sustainability)	73%	71%	76%

When shopping for a gift, how interested would you be if it were the following? (Very Interested/Interested)	Total	Females	Males
<i>Total Respondents</i>	500	300	200
Gift(s) made from environmentally friendly materials	85%	86%	84%
Gift(s) with an environmentally friendly story	78%	79%	78%

How important are each of the following <u>eco-attributes</u> in your purchase decision for <u>Living Room</u> furnishings? (Very Important/Important)	Total	Females	Males
<i>Total Respondents</i>	500	300	200
Materials Used In the Manufacturing Process	92%	92%	93%
Chemicals Used In the Manufacturing Process	91%	90%	93%
Labor Practices Used In the Manufacturing Process	81%	82%	79%
Traceability of the Manufacturing Process	74%	72%	78%
Eco-Story (that is, what the company shared at point of sale about their corporate commitment to sustainability)	68%	65%	73%

How important are each of the following <u>eco-attributes</u> in your purchase decision for <u>Bedroom</u> furnishings? (Very Important/Important)	Total	Females	Males
<i>Total Respondents</i>	500	300	200
Materials Used In the Manufacturing Process	93%	92%	94%
Chemicals Used In the Manufacturing Process	92%	92%	94%
Labor Practices Used In the Manufacturing Process	81%	81%	80%
Traceability of the Manufacturing Process	75%	73%	78%
Eco-Story (that is, what the company shared at point of sale about their corporate commitment to sustainability)	69%	66%	74%

How important are each of the following <u>eco-attributes</u> in your purchase decision for <u>Dining Room</u> furnishings? (Very Important/Important)	Total	Females	Males
<i>Total Respondents</i>	500	300	200
Chemicals Used In the Manufacturing Process	91%	90%	91%
Materials Used In the Manufacturing Process	90%	90%	92%
Labor Practices Used In the Manufacturing Process	79%	78%	79%
Traceability of the Manufacturing Process	74%	72%	77%
Eco-Story (that is, what the company shared at point of sale about their corporate commitment to sustainability)	70%	67%	74%

How do you typically dispose of home furnishings (such as furniture, lighting, rugs, etc.) when you no longer want/need them?	Total	Females	Males
<i>Total Respondents</i>	500	300	200
Donate them to a charity	66%	66%	65%
Offer them to a family member/friend	58%	63%	51%
Drop them at a thrift store	48%	51%	44%
Sell them at garage sale/rummage sale	36%	37%	35%
Sell them online – Craigslist, etc.	29%	28%	29%
Put them out for pickup/garbage	27%	25%	31%
Take them to a recycling center	25%	23%	28%
<i>Women are more likely to keep family and friends in mind when getting rid of home furnishings they no longer use.</i>			

Which best describes any experience you may have had with an environmentally safe interior designer?	Total	Females	Males
<i>Total Respondents</i>	500	300	200
Heard Of/Worked With One (Net)	41%	33%	53%
Have heard of, but never worked with one	32%	28%	38%
Have worked with one, but had a bad experience	2%	1%	5%
Have worked with one, and would again	7%	5%	10%
Have never heard of one	59%	67%	48%
<i>Men are more likely to have heard of/worked with an environmentally safe interior designer.</i>			

How interested would you be in working with a certified environmentally safe interior designer if you liked their sense of style and they charged no more than other designers?	Total	Females	Males
<i>Total Respondents</i>	500	300	200
Interested (Net)	69%	64%	75%
Very interested	25%	18%	34%
Interested	44%	46%	41%
Not that interested	23%	25%	19%
Not interested at all	9%	10%	6%
<i>And, men would be more likely to consider working with an environmentally safe interior designer if they liked their style and the price was on par with other designers.</i>			

Have recent disasters, such as strong storms and landslides, increased your concern about environmental issues?	Total	Females	Males
<i>Total Respondents</i>	500	300	200
Increased Concern (Net)	80%	82%	78%
Yes, they have increased my level of concern <u>very much</u>	39%	38%	40%
Yes, they have increased my level of concern <u>somewhat</u>	41%	44%	38%
No, not at all	20%	18%	23%

Do you vote for political candidates that care about protecting our environment through eco-friendly policies and legislation?	Total	Females	Males
<i>Total Respondents</i>	500	300	200
Yes (Net)	90%	91%	90%
Yes, always	42%	39%	46%
Yes, sometimes	49%	52%	45%
No, not at all	10%	9%	10%