



**sustainable**  
FURNISHINGS COUNCIL  
sustainablefurnishings.org

2021 GREEN HOME FURNISHINGS CONSUMER STUDY

March 2021

Final Report

Prepared by MOCA+

Sustainable Furnishings Council  
2021 Green Home Furnishings Consumer Survey

**RESEARCH OBJECTIVES**

The 2021 Green Home Furnishings Consumer Study is the latest wave of a longitudinal study tracking consumer interest in and behavior regarding sustainable furnishings. The 2021 study was conducted by MOCA+, using its proprietary Design Insights Forum as the sample source.

**METHODOLOGY**

The sample source for the 2021 survey was the Design Insights Forum (DIF), a division of MOCA+, a marketing advisory firm. For over a decade, the Design Insights Forum (formerly, the Inside Dwell Panel) made its mark studying a segment of affluent consumers known as, “New Affluents,” affluent consumers at the forefront of trends and shifts in consumer attitudes and behaviors.

The Design Insights Forum is comprised of more than 7,000 panelists screened demographically and attitudinally based on the following key criteria:

- Owning good quality things brings me enjoyment
- I like to stand out from others
- I am usually one of the first to try new products/services
- I think of myself as a creative person
- I try to keep up with technological developments
- I believe in protecting the environment

**SURVEY TARGET SAMPLE CRITERIA**

As in previous waves, the 2021 criteria for the survey sample were as follows:

Female and male homeowners

Age 30-60

Household Income: \$50K+ HHI

Spent more than \$500 on home furnishings in the past 12 months.

The study was conducted for the Sustainable Furnishings Council by MOCA+ between February 12 – March 4, 2021.

Geographic Distribution/Weighting: Representative of U.S. population distribution

## SUMMARY OF RESULTS

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.

### **Respondent Profiles**

#### **Purchase Profile**

In the past year, nearly half of total respondents (47%) spent between \$1,000 - \$4,999 on home furnishings. The median spend for total respondents was \$1,500. Men outspent women by roughly \$1,000, with women's median spend pegged at \$1,500 versus \$2,500 median spend for men.

However, when respondents were asked whether they expect to spend more, less, or the same amount on home furnishings over the next year, nearly half (47%) of women said they expect to spend more versus just 35% of men.

#### **Attitudinal Profile – Environmental Issues**

The survey found nearly universal high levels of concern (90+%) about presented environmental issues. Toxic pollutants in the waste stream topping the list, with deforestation/loss of rainforests, and using up natural resources rounding out the top three environmental issues of concern.

Women revealed slightly higher levels of concern about the increase in natural disasters, global warming, and hazardous indoor air quality than men.

Women and men were closely aligned on global warming and hazardous indoor air quality. Two-thirds of women and men agreed that global warming "directly affects me and my family," with another quarter agreeing that, while global warming does not directly affect them or their family, "everyone should be concerned."

Similarly, roughly 4 in 10 of both women and men agreed that hazardous indoor air quality directly affects them and their family while half of remaining respondents concurring that, while hazardous indoor air quality does not directly affect them or their family, "everyone should be concerned."

## **Behavioral Profile – Environmentally-Friendly Habits**

All respondents in the SFC survey report practicing some/any of the environmentally friendly habits presented. However, women appear to be more likely than men to practice environmentally friendly habits, overall, concentrating on food and shopping-related activities.

- Nearly 9 in 10 replace light bulbs with energy-efficient options, while 8 in 10 have reduced consumption of bottled water and/or set thermostats lower in winter, higher in summer.
- Nearly 9 in 10 use reusable shopping bags, while 7 in 10 buy some products claiming to be “green” and two thirds regularly purchase organic foods.
- Whether influenced by environmental concerns, COVID lockdowns, or a combination, nearly 7 in 10 report cutting back on driving, consolidating trips, with 4 in 10 driving a hybrid or high MPG vehicle.

## **Terminology and Messaging**

When asked about preferences for terms that could be used to describe products that are good for the environment nearly half (46%) of both women and men selected, “Sustainable” as their first choice (i.e., #1), with “Environmentally Safe” in a distant second place, garnering first choice by just 3 in 10 (28%).

Rank order remained essentially the same when first, second, and third choices were consolidated, although percentage point differences do not appear as stark. For example, “Sustainable” remained at the top of the preference list with 8 in 10 respondents, followed by “Environmentally Safe” in second place with three quarters of respondents.

In the consolidated rankings, “Sustainable” was the overwhelmingly preferred term among both women and men. However, farther down the preference list, “Eco-Friendly” resonated more with women, and “Green” with men.

## **Furniture/Furnishings Purchases**

The 2021 SFC survey revealed nearly universal (97%) interest (very interested/interested) in buying environmentally safe furnishings, assuming favorable style and cost is about the same. Women expressed slightly stronger interest with 72% of women being “very interested” versus 66% of men.

An overwhelming majority of respondents say they are willing to pay more for environmentally friendly furnishings, with 4 out of 10 willing to pay up to 10% more.

Respondents expressed nearly universal (96%) interest (very interested/interested) in “certified legal wood,” with women slightly more predisposed, 73% of women “very interested” versus 62% of men.

The overwhelming majority of respondents (86%) are willing to pay more for “certified legal wood,” with women inclined to pay more than men in the 10%-15% more spending brackets

**Furniture/Furnishings Purchase Considerations**

Asked to think about the most important considerations the next time they purchase furniture, there was nearly universal agreement (more than 90%) that furniture made from durable, higher quality materials, made with materials safe from substances that could harm me my family, available at a fair price that I can afford, and made in facilities verified to be environmentally friendly, safe and socially responsible were very important/important purchase considerations.

Almost 9 in 10 said that 3rd Party Certification validating that furniture was made with materials safe from substances that could harm me and my family, made from durable, higher quality materials, and made in facilities verified to be environmentally friendly, safe and socially responsible were also very important/important, with women even more predisposed to 3rd Party Certification than men.

When in the market for Children’s Furniture, the importance of environmentally safe products and manufacturing processes is extremely high, overall, and especially high among women.

Interestingly, when asked to rank the importance of product attributes presented in the survey, “Style” and “Comfort” took the top spot with most respondents (more than 90%), while “Earth Friendly,” placed fourth garnering just 30% in terms of importance, ahead of last/fifth place, “Made in America,” at 13%.

Age	Total	Female	Male
	554	338	216
Average	56	55	56
Median	58	58	58

Household Income	Total	Female	Male
	533	321	211
\$30,000-\$49,999	7%	10%	3%
\$50,000-\$74,999	10%	12%	9%
\$75,000-\$99,999	15%	14%	18%
\$100,000-\$124,999	17%	17%	16%
\$125,000-\$149,999	8%	7%	10%
\$150,000-\$174,999	11%	12%	9%
\$175,000-\$200,000	6%	4%	9%
Above \$200,000	25%	24%	27%
Average	155,000	149,000	164,000
Median	138,000	113,000	138,000

Region	Total	Female	Male
	554	338	216
East North Central	15%	16%	13%
East South Central	6%	5%	8%
Mid Atlantic	12%	16%	7%
Mountain	8%	6%	10%
None	0%	0%	0%
Northeast	5%	5%	4%
Pacific	15%	14%	16%
South Atlantic	21%	19%	23%
West North Central	7%	5%	9%
West South Central	12%	14%	8%

Do you own your own home?	Total	Female	Male
	506	305	201
Yes, own primary home	93%	92%	95%
Yes, own second/vacation home	15%	15%	15%
No, do not own home	7%	8%	5%

Approximately how much, in total, has your household spent on home furnishings in the past year?	Total	Female	Male
	523	312	211
\$1-\$499	17%	22%	11%
\$500 - \$999	19%	21%	17%
\$1,000 - \$4,999	47%	40%	56%
\$5,000 +	17%	17%	16%
Average	2,220	2,091	2,412
Median	1,500	1,500	2,500
In the past year, men spent more on home furnishings than women			

	Total	Female	Male
Over the next year, do you expect to spend more, less or the same amount on home furnishings as you did last year?	489	289	201
Expect to spend more on home furnishings than last year	42%	47%	35%
Expect to spend the same amount on home furnishings as last year	39%	36%	43%
Expect to spend less on home furnishings than last year	19%	17%	22%
Women plan to spend more on home furnishings over the next year than the past year			

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	Female	Male
1 to 4 years	2%	1%	3%
5 to 9 years	33%	30%	38%
10 years or more	65%	68%	59%
Average	10	10	10
Median	12	12	12
Women say they typically expect to own furniture for 10 years or more, longer than majority of men			

How important is the following the next time you buy furniture?	Total	Female	Male
	523	312	211
Style that suits me or my family	100%	100%	99%
Quality that will last a long time	98%	98%	99%
Fair price that we can afford	95%	96%	95%
Made with materials and processes that do not harm the environment	86%	89%	81%
On sale, promotion or discount	67%	66%	68%
Brand name that I know and trust	61%	58%	64%
In-stock and immediately available	39%	39%	38%
Store is close to my home	21%	22%	19%
Materials and processes that do not harm the environment are somewhat more important to women than men. Men are likely to be more brand-reliant			

Please rank the following product attributes in order of importance when you are in the market for furniture, 1 being most important, 5 being least important. (Ranked #1)	Total	Female	Male
	523	312	211
Style	55%	54%	55%
Comfort	22%	21%	22%
Price/Value	15%	14%	18%
Earth-friendly	5%	6%	3%
Made in America	3%	4%	2%
Men likely to be slightly more price/value conscious than women			

Please rank the following product attributes in order of importance when you are in the market for furniture, 1 being most important, 5 being least important. (Ranked #1, #2, or #3)	Total	Female	Male
	523	312	211
	Total	Female	Male
Style	93%	90%	96%
Comfort	90%	89%	90%
Price/Value	74%	73%	77%
Earth Friendly	30%	35%	23%
Made in America	13%	13%	14%
Overall, men likely to be more style and price/value conscious. Women slightly more focused on products that are "earth friendly."			

Please rate your level of concern about the following environmental issues	Total	Female	Male
	503	296	207
Toxic pollutants in the waste stream	97%	97%	97%
Deforestation/loss of rainforests	95%	96%	94%
Using up natural resources	94%	96%	92%
Extinction of species	94%	96%	90%
Overloading of landfills	92%	93%	90%
Increase in natural disasters	90%	94%	86%
Global warming	90%	92%	88%
Hazardous indoor air quality	90%	93%	86%
Women express a slightly higher level of concern with virtually all environmental issues than men, though level of concern is extremely high across the board			

Please tell us which best describes your opinion on the following.	Total	Female	Male
	503	296	207
<b>Global Warming</b>			
Directly affects me and my family (Global Warming)	65%	66%	64%
Not directly affected, but think everyone should be concerned (Global Warming)	25%	26%	25%
Think it's an issue (Net)	91%	92%	88%
Women and men likeminded about Global Warming's direct impact on themselves and family			
<b>Hazardous Indoor Air Quality</b>			
Not directly affected, but think everyone should be concerned (Hazardous Indoor Air Quality)	50%	50%	50%
Directly affects me and my family (Hazardous Indoor Air Quality)	43%	44%	41%
Think it's an issue (Net)	93%	94%	91%
Women and men also likeminded about concerns related to Hazardous Indoor Air Quality			

Which of these “environment-friendly” habits do you have? Select all that apply	Total	Female	Male
	503	296	207
Recycle at home	91%	92%	89%
Replace light bulbs with energy-efficient options	89%	90%	89%
Use reusable shopping bags	87%	90%	84%
Reduce consumption of bottled water	81%	85%	75%
Set thermostat lower in winter, higher in summer	81%	80%	82%
Buy some products claiming to be “green”	73%	75%	71%
Consolidate trips, cut back on driving	69%	74%	61%
Regularly purchase organic foods	65%	70%	57%
Choose a hybrid or high MPG car	43%	43%	43%
Other (tell us)	27%	31%	21%
None of these	0%	0%	0%
Women appear to be more likely to practice environmentally friendly habits than men, overall, with more focus on food and shopping-related habits			

Please rank your preference for terms that could be used to describe products that are good for the environment, 1 being your favorite, 6 being your least favorite. (Ranked #1)	Total	Female	Male
	500	294	206
Sustainable	46%	46%	46%
Environmentally Safe	28%	28%	28%
Green	8%	10%	6%
Eco Friendly	7%	6%	9%
Eco Conscious	6%	6%	7%
Pro Planet	5%	6%	4%
"Sustainable" was the overwhelming preferred term among both women and men			

Please rank your preference for terms that could be used to describe products that are good for the environment, 1 being your favorite, 6 being your least favorite. (Ranked #1, #2, or #3)	Total	Female	Male
	500	294	206
Sustainable	81%	80%	82%
Environmentally Safe	76%	77%	74%
Eco Friendly	50%	53%	45%
Green	37%	33%	43%
Eco Conscious	34%	34%	35%
Pro Planet	22%	23%	21%
Sustainable was the overwhelming preferred term among both women and men. However, farther down the preference list, "Eco-Friendly" resonated more with women, and "Green" with men			

When you hear a product claiming to be environmentally safe (i.e., good for the environment) what is your reaction?	Total	Female	Male
	497	291	206
Right thing to do	67%	70%	62%
Want to learn more	62%	63%	60%
Will probably cost more	46%	45%	48%
Would be my first choice	28%	31%	23%
From a good company	28%	31%	23%
Doubtful or skeptical	21%	13%	31%
Uncertain what it means	20%	15%	26%
Style probably not for me	3%	4%	3%
Will be hard to find	3%	3%	4%
Not interested	2%	2%	2%
None of these	1%	2%	0%
Other (tell us)	5%	5%	5%
Positive Reaction (Net)	TK	TK	TK
Negative Reaction (Net)	TK	TK	TK
Majority of respondents interpret claims positively and would seek out additional information			

Have you ever purchased environmentally safe products in the following categories?	Total	Female	Male
	492	290	203
Cleaning Supplies	82%	82%	82%
Paper Products	74%	73%	76%
Lighting (lamps/bulbs)	63%	61%	66%
Clothing	56%	60%	51%
Linens (sheets/towels)	43%	49%	35%
Plastic Products	42%	43%	39%
Home Furnishings	35%	37%	34%
Appliances	28%	27%	31%
Automobiles	19%	19%	18%
Other (tell us)	4%	4%	5%
None of these	4%	5%	3%
Women were more likely than men to have purchased environmentally safe clothing and linens, men more likely to have purchased lighting and appliances			

Why haven't you ever purchased environmentally safe products?	Total	Female	Male
	19	13	5
Not aware of any	27%	35%	6%
Not interested	26%	22%	36%
Did not understand/believe it was any better	22%	23%	19%
Too expensive vs. other options	17%	10%	32%
Not available where I shop	16%	12%	27%
None of these	16%	20%	6%
Did not suit my style	9%	10%	6%
Not in stock/hard to order	9%	12%	0%
Among the small percentage of respondents who claimed they had never purchased any environmentally safe products in the categories queried, women were more likely to be "unaware of any (in the category)," while men appeared to be more resistant or uninterested			

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	Female	Male
	491	288	203
Very Interested/Interested (Net)	97%	97%	95%
Very interested	70%	72%	66%
Interested	27%	25%	29%
Not that interested	3%	3%	4%
Not interested at all	0%	0%	0%
Nearly universal interest in buying environmentally safe furnishings, assuming favorable style and cost is about the same			

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	Female	Male
	490	287	203
Willing to Pay More (Net)	87%	88%	85%
Nothing more	13%	12%	15%
Up to 5% more	23%	24%	23%
Up to 10% more	39%	39%	40%
Up to 15% more	13%	16%	10%
Up to 20% more	8%	8%	8%
Greater than 20% more	3%	2%	4%
Overwhelming majority of respondents say they are willing to pay more for environmentally friendly furnishings, with 4 out of 10 willing to pay up to 10% more			

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	Female	Male
	487	284	203
Interested (Net)	96%	96%	95%
Very interested	69%	73%	62%
Interested	27%	23%	33%
Not that interested	3%	3%	3%
Not interested at all	1%	1%	2%
Nearly universal interest in "certified legal wood," with women more predisposed than men by a small margin			

How much more would you be willing to pay if necessary to buy wood furniture that was certified as legal and responsibly harvested?	Total	Female	Male
	487	284	203
Willing to Pay More (Net)	86%	89%	83%
Up to 5% more	21%	21%	20%
Up to 10% more	33%	34%	32%
Up to 15% more	19%	22%	15%
Up to 20% more	10%	9%	10%
Greater than 20% more	4%	3%	5%
Overwhelming majority of respondents are willing to pay more for "certified legal wood," with women inclined to pay slightly more than men			

How important is the following the next time you buy furniture?	Total	Female	Male
	483	282	200
Made from durable, higher quality materials	98%	97%	100%
Made with materials safe from substances that could harm me and my family	97%	98%	96%
Is at a fair price that I can afford	97%	98%	95%
Made in facilities verified to be environmentally friendly, safe and socially responsible	90%	94%	84%
3rd Party Certified: made with materials safe from substances that could harm me and my family	89%	93%	84%
3rd Party Certified: made from durable, higher quality materials	87%	89%	84%
3rd Party Certified: made in facilities verified to be environmentally friendly, safe and socially responsible	86%	90%	81%
From a brand name or store that I know and trust	64%	63%	66%
Women likely to be more predisposed to 3rd Party Certification, in general, although influence of 3rd Party Certification is high overall			

Assuming you were in the market, how important are each of the following eco attributes in your purchase decision for Children's Furniture? (Very Important/Important)	Total	Female	Male
	476	277	199
Chemicals Used In the Manufacturing Process	94%	96%	92%
Materials Used In the Manufacturing Process	93%	94%	90%
Labor Practices Used In the Manufacturing Process	89%	93%	83%
Traceability of the Manufacturing Process	77%	79%	75%
Eco-Story	75%	78%	72%
The importance of environmentally safe products and manufacturing processes is high, overall, and especially high among women			

How do you typically dispose of home furnishings (such as furniture, lighting, rugs, etc.) when you no longer want/need them? Select all that apply	Total	Female	Male
	472	277	195
Donate them to a charity	82%	85%	79%
Offer them to a family member/friend	79%	83%	72%
Drop them at a thrift store	70%	67%	74%
Sell them online – Craigslist, etc.	50%	49%	52%
Sell them at garage sale/rummage sale	33%	32%	33%
Take them to a recycling center	32%	31%	33%
Put them out for pickup/garbage	19%	20%	17%
Other (tell us)	6%	7%	4%
Women more likely to donate home furnishings to a charity or offer to a family member/friend, while man prefer thrift stores or selling items online			

Which best describes any experience you may have had with an environmentally safe interior designer?	Total	Female	Male
	470	277	193
Have heard of, but never worked with one	35%	34%	35%
Have worked with one, but had a bad experience	1%	1%	0%
Have worked with one, and would again	6%	8%	3%
Have never heard of one	59%	57%	62%
Majority of respondents, roughly 6 out of 10, had never heard of an environmentally safe interior designer			

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	Female	Male
	470	277	193
Interested (Net Very Interested/Interested)	63%	63%	63%
Very interested	25%	24%	27%
Interested	37%	39%	36%
Not that interested	27%	26%	28%
Not interested at all	10%	11%	9%
Two thirds of respondents expressed interest in working with a certified environmentally safe interior designer			