



A GLOBAL VOICES REPORT

The Sustainability Factor

What Shoppers Want
from Your Brand



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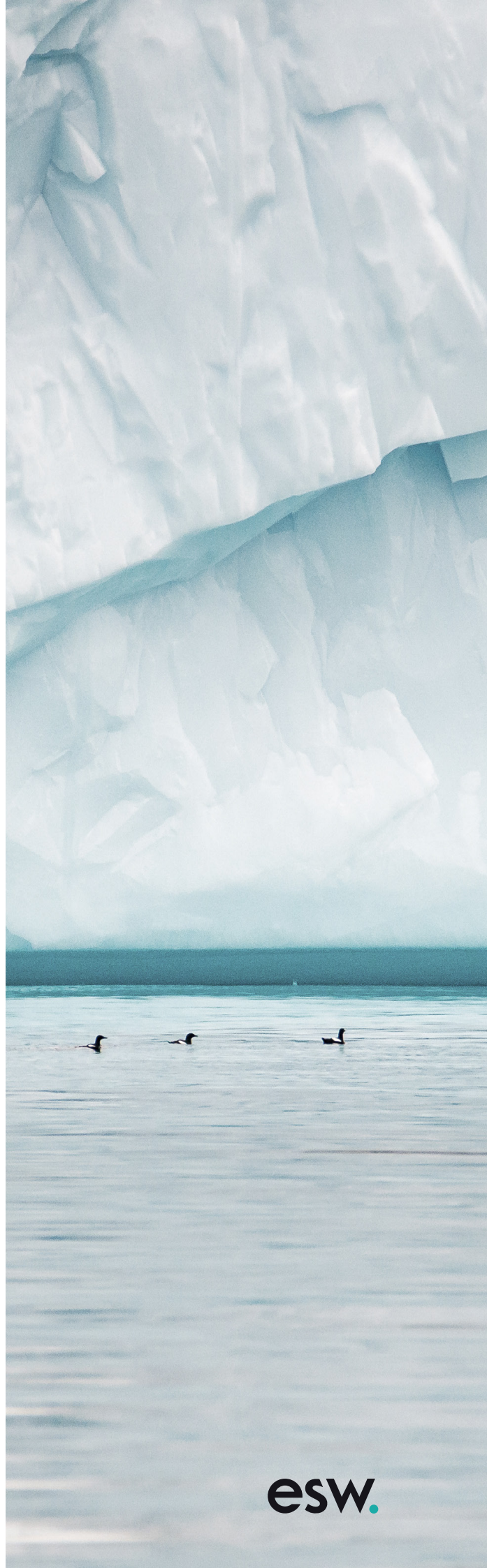
Summary of Findings

Brands and retailers continue to face scrutiny and pressure from shoppers, the media, governments and advocacy organizations to be more sustainable. The retail industry produces millions of tons of waste every year and as a result feels pressure to make changes – for the sake of the environment and the bottom line.

In addition to governments, media and non-profits, environmental concerns remain top of mind for many global shoppers. But how do their concerns affect how they shop? What do they want brands to do? To find out more about environmentally attuned shoppers, who they are and how to reach them, ESW conducted a survey of more than **18,000 consumers in 18 countries**.

This Global Voices Report shows that the degree to which consumers are concerned about sustainability depends largely on where they live and what they value about brands and merchants they buy from.

Overall, brands and retailers entering new global markets have tremendous opportunities to tout their environmental accomplishments and win loyal customers.



Global Sustainability Sentiment

When breaking down our survey results, we gave respondents sustainability scores based on how strongly they felt about environmental issues. The average sustainability score was 55.

We then analysed the data further to find out which shopper segments were the most sustainably minded.

strong interested in environmental issues

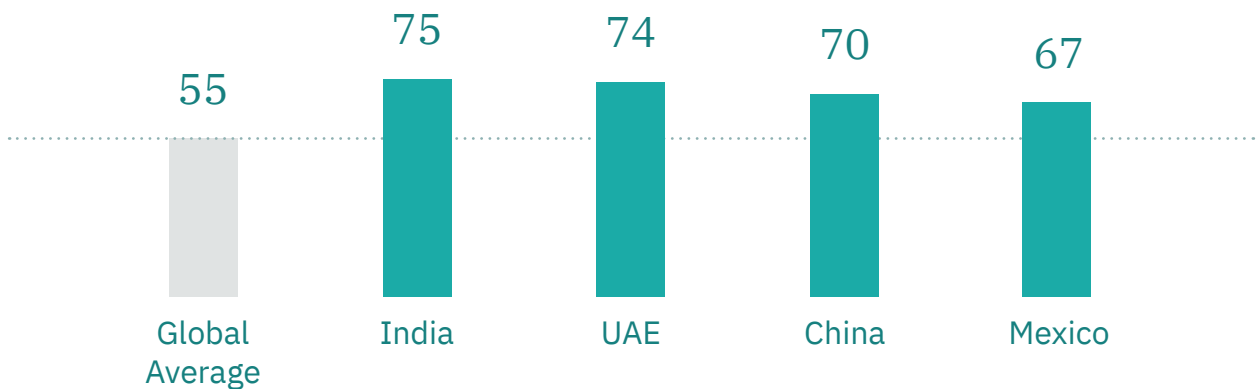
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low interested in environmental issues

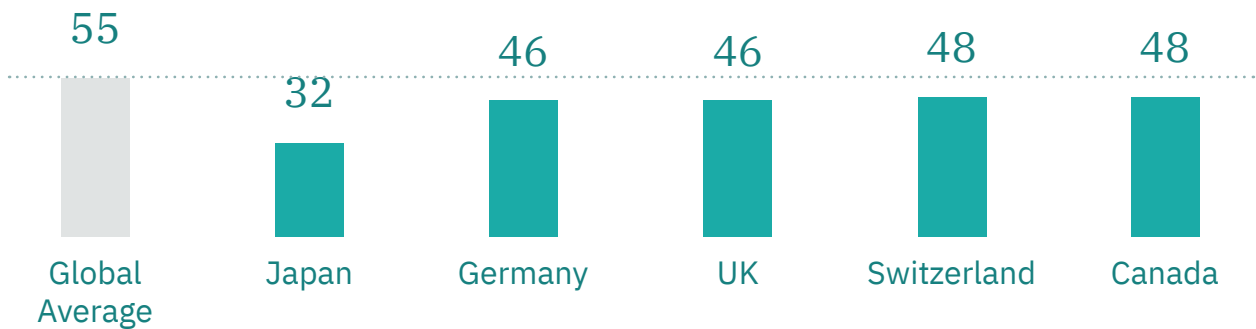
Sustainability by Market

Emerging markets in LATAM and APAC were more concerned about sustainability than their established, Western-market counterparts.

Countries with the Highest Sustainability Scores



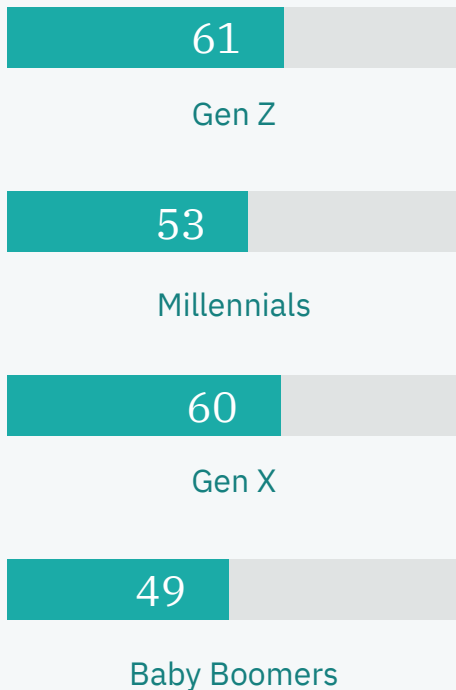
Countries with the Lowest Sustainability Scores



Sustainability by Generation

In general, younger people were more concerned with sustainability than their older counterparts. However, in certain markets, the gap showed signs of closing with Gen X showing nearly equal concern as Millennials and Gen Z.

Global Average Sustainability Score



Emerging Market Sustainability Score by Generation

India



Gen Z



Millennials



Gen X



Baby Boomers



China



Gen Z



Millennials



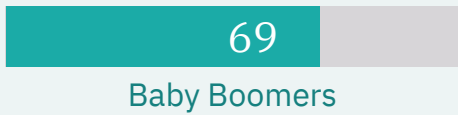
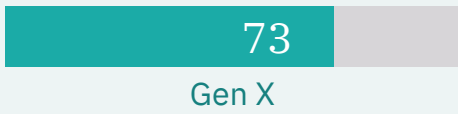
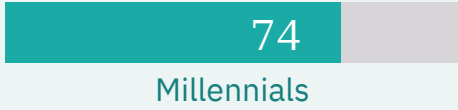
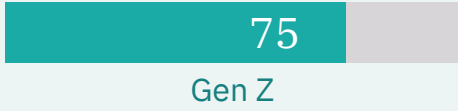
Gen X



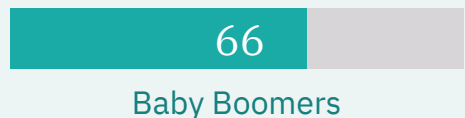
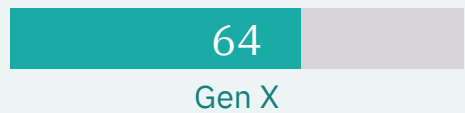
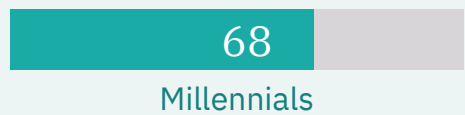
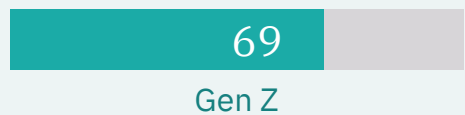
Baby Boomers



UAE



Mexico



Further Segmentation

and What it Means for Brands

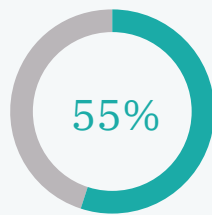
After segmenting respondents, we looked at the group of shoppers we could classify as environmentally attuned shoppers. These shoppers scored an 80 or above on the sustainability scale compared to an average global sustainability score of 55.



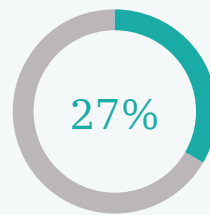
Authenticity and Sustainability go Hand-in-Hand

Our survey found that shoppers who valued brand authenticity were 50% more likely to be environmentally attuned shoppers. As new technologies like artificial intelligence enter the mainstream and it becomes more difficult to discern real from fake, consumers want authentic experiences with authentic brands.

Globally, 63% of shoppers valued brand authenticity. These shoppers want brands to be truthful and transparent – including about company environmental credentials.



55% said they are more aware of greenwashing than they were a year ago.



27% said they consider a brand's environmental transparency record when making a purchase.



What does this mean for brands?

Shoppers who want to buy from brands they perceive to be authentic are looking for those same brands to have a strong, authentic message of sustainability.

To win these shoppers, brands must be able to demonstrate their efforts toward a more sustainable shopping experience and environment.

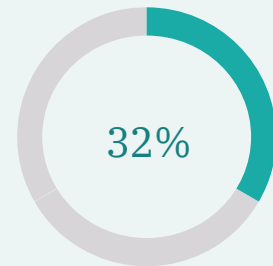


Brand Loyalists are Sustainability Attuned

Shoppers who valued brand names were also more likely to be sustainably minded shoppers. Our survey showed that brand name shoppers were **32% more** likely to also be environmentally attuned shoppers.

Brand name shoppers believe that a brand name means higher quality and better value. These shoppers have high expectations not just of products and services, but of environmental records.

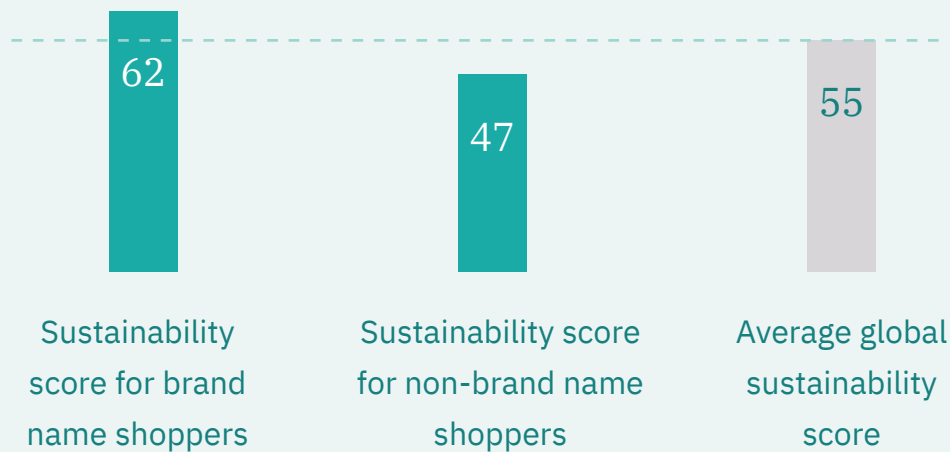
Nearly **6 in 10 (58%) global shoppers** had positive opinions of brand name merchants. But the data show a positive correlation between brand-loyalty and being environmentally attuned. These shoppers are more likely to hold brands to higher standards.



Brand name shoppers are **32% more likely** to be environmentally attuned shoppers.



Sustainability Scores by Brand Name Affinity



Sustainably Attuned Shoppers



Luxury shoppers were 1.5x more likely to be sustainably attuned shoppers.

What does this mean for brands?

Brand name shoppers have high expectations of merchants. Brands with demonstrably positive environmental records should promote its achievements to boost brand reputation and shopper loyalty.

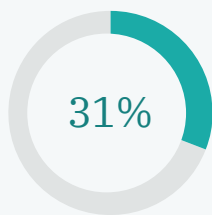


Meeting Sustainability Expectations

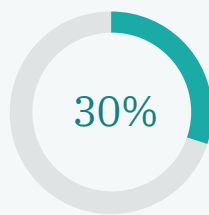
Sustainability itself is a word that can be defined in a variety of ways. Brands trying to discern what shoppers mean when they say they "value sustainability" and "want brands to be more sustainable" can get frustrated by ambiguity.

Our survey found that there are concrete steps that brands can and should take to attract and retain sustainably attuned customers.

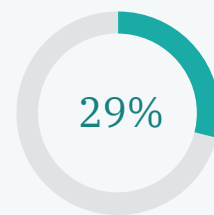
Shoppers' Considerations When Making Online Purchases



Sustainable packaging



Sustainable shipping



Less packaging overall





The Takeaway

In international ecommerce, brands must understand how shoppers in local markets feel about sustainability and what to do to meet those felt needs.



Embrace authentic, transparent messaging.



Integrate environmental record and accomplishments into brand messaging.



Enhance brand reputation by offering recyclable packaging and carbon-neutral shipping and delivery.

To find out how your brand can reach more shoppers in more markets with a positive environmental message, contact ESW.

Methodology: Responses were gathered from an online panel of adults 18+, representative of national quotas for key demographics in 18 countries. Survey questions and responses were translated into each country's native language and currencies were converted to local currencies before being converted back to \$US for comparison purposes. 18,679 surveys were completed between October 31st and November 14th 2023. Overall margin of error is approximately 5% at a 95% confidence level, varying by country population size.

CONTACT US AT

growmybrand@esw.com

VISIT

[ESW.com](https://www.esw.com)