

The background features a close-up of hands holding a piece of woven, light-brown material, possibly a basket or bag. The image is overlaid with several decorative, curved lines in shades of cyan, yellow, and light blue, some ending in small circular dots. The overall aesthetic is clean and modern, emphasizing sustainability and craftsmanship.

esw.

GLOBAL
VOICES

SUSTAINABLE GLOBAL GROWTH

and Shopper Expectations

TABLE OF CONTENTS

- 4 ECO-MINDED SHOPPER SEGMENTS
- 6 SUSTAINABILITY MINDED
MARKETS AND CATEGORIES
- 8 THE SUSTAINABLE PRACTICES
SHOPPERS WANT TO SEE
- 10 SHOPPERS WILL REWARD
SUSTAINABLE BRANDS
- 11 ESW ENABLES GLOBAL GROWTH

EXECUTIVE SUMMARY

Sustainability is no longer a buzzword or even a competitive advantage – it's a requirement. Surveys consistently show that consumers expect brands and retailers to be sustainable.

But what does it mean for a brand to be sustainable? What actionable steps can brands take to meet customer demands and be environmentally responsible?

ESW surveyed more than 16,000 shoppers from 16 countries about their attitudes toward sustainable shopping and what brands need to do to earn their trust and their business.

These survey results provide insights that serve as a valuable source of consumer insight that helps you make data-driven decisions that are good for both business and the planet.

SUSTAINABILITY IS TOP-OF-MIND FOR THE MOST VALUABLE CUSTOMERS

More than 8 in 10 shoppers consider sustainability when making purchases. A deeper look at the data shows that the most coveted customers are even more environmentally conscious.



CROSS-BORDER SHOPPERS



YOUNG SHOPPERS

MORE THAN 9 IN 10 CROSS-BORDER SHOPPERS CONSIDER SUSTAINABILITY WHEN PURCHASING

Do you consider sustainability criteria when making a purchase?

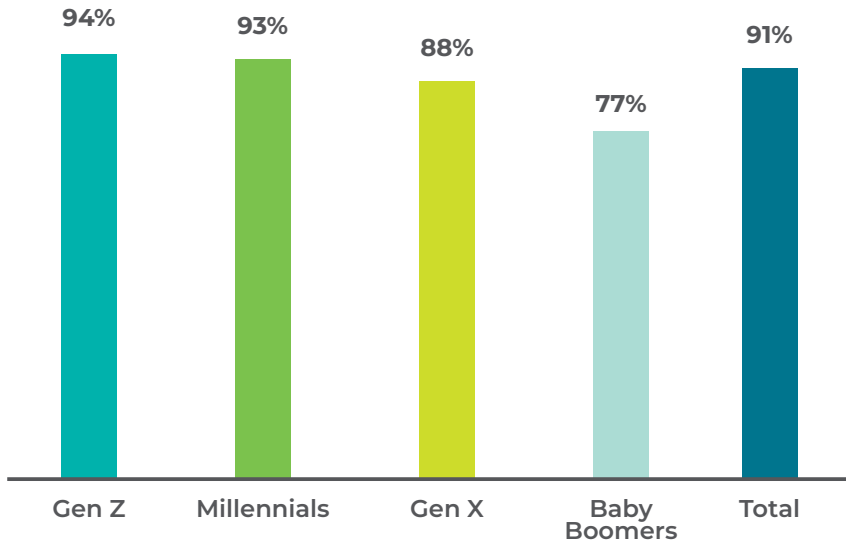


Values are percent of shoppers who responded Yes.
(N=16,557) Source: Global Voices Survey conducted November 2022

64%
OF SHOPPERS
have significantly
changed shopping
behaviour to lessen their
environmental impact

YOUNG SHOPPERS ARE MORE LIKELY TO CONSIDER SUSTAINABILITY

Do you consider sustainability when making a purchase decision?



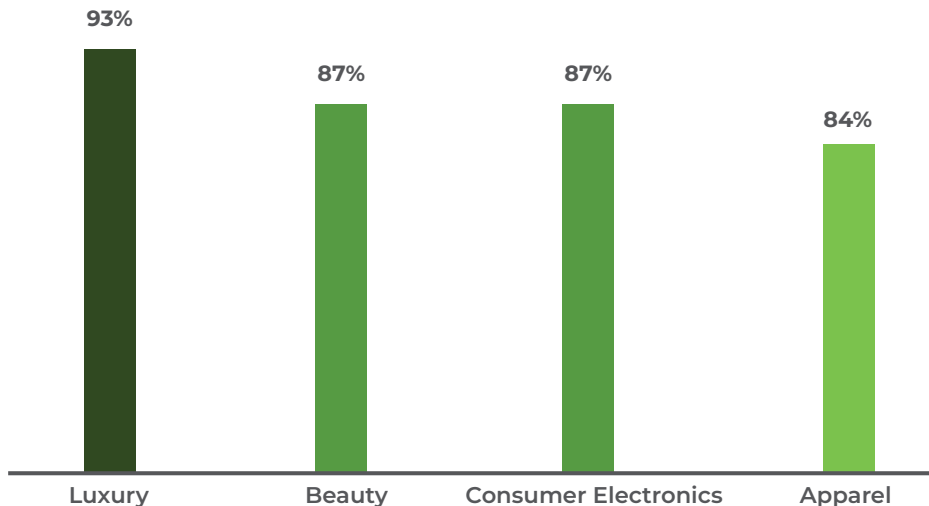
Values are percent of shoppers who responded Yes. Gen Z (N=1422), Millennials (N=3968), Gen X (N=1611), Baby Boomers(N=592)
Source: Global Voices Survey conducted November 2022

LUXURY SHOPPERS AND MARKETS WITH YOUNG SHOPPERS ARE MOST SUSTAINABLY MINDED

ESW asked shoppers in 16 markets about online category purchases. Luxury shoppers and those living in countries with younger populations are most likely to consider sustainability when buying online.

LUXURY SHOPPERS CONSIDER SUSTAINABILITY MORE THAN OTHER CATEGORIES

When you shop online do you consider sustainability criteria in your purchase consideration?



Values are % of respondents who responded Yes. (N=13,715) Source: Global Voices Survey conducted November 2022

MARKETS WITH MORE YOUNG SHOPPERS GIVE MOST CONSIDERATION TO SUSTAINABILITY WHEN SHOPPING ONLINE

When you shop online do you consider sustainability criteria in your purchase consideration?



Values are % of respondents who responded Yes. (N=13,715)
Source: Global Voices Survey conducted November 2022

BOTTOM LINE:

Today's customers consider sustainability when buying online. To reach them, brands expanding into new markets should prioritise sustainability from day one.



THE SUSTAINABLE PRACTICES SHOPPERS WANT TO SEE

Shoppers clearly want brands to employ sustainable measures. But what exactly do shoppers expect and what criteria do shoppers use when making a purchase decision?

SHOPPERS EXPECT BRANDS TO BE TRANSPARENT AND ETHICAL

Consider sustainability and shopping, how strongly do you agree or disagree with the statement?



91%

I expect brands to be transparent about their environmental credentials



71%

I'm more willing to buy a product if it has a positive environmental impact



67%

I consider ethical production when shopping online



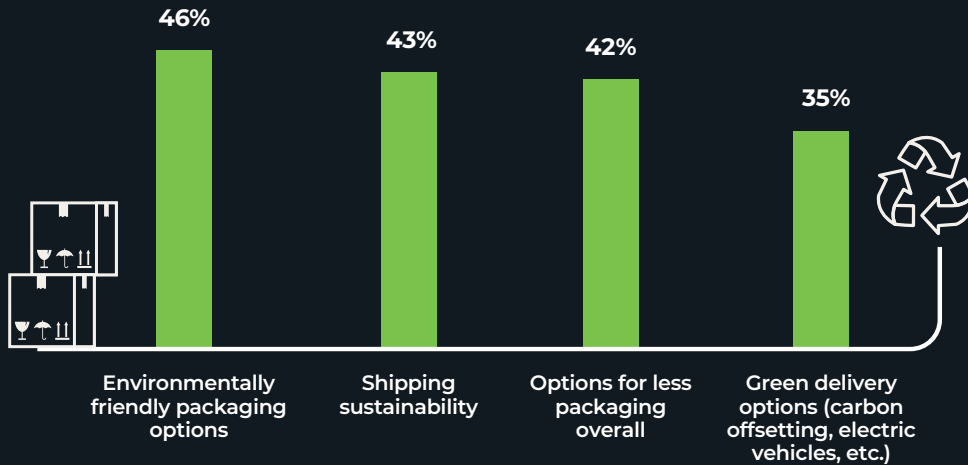
62%

I'm more aware of greenwashing than I was a year ago

Values are percent of consumers who Strongly Agree/Agree (N=13,715)
Source: Global Voices survey conducted November 2022

SHOPPERS FAVOUR SUSTAINABLE PACKAGING AND DELIVERY

When you shop online, do you include the following criteria in your purchase consideration?



Values are % of respondents who responded Yes to each question (N=13,715)
Source: Global Voices Survey conducted November 2023

BOTTOM LINE:
Brands don't need to overhaul entire supply chains to appeal to shoppers. Partners and vendors that offer carbon-neutral delivery and sustainable packaging help brands meet customer expectations.



SHOPPERS WILL REWARD SUSTAINABLE BRANDS

While the data shows that shoppers want to be more sustainable, making and distributing environmentally conscious products is expensive. So how can brands be sure that their customers will do more than virtue signal when it comes to sustainability? Do shoppers act on their concerns for the environment? Our survey shows they do.

SHOPPERS MODIFY BEHAVIOUR TO BE MORE SUSTAINABLE

Consider sustainability and shopping, how strongly do you agree or disagree with the statement?



59%

I have purchased from a new brand specifically because of their sustainability practices



54%

I have stopped buying from certain brands because they lack environmental credentials



61%

I have spent more on a product because it was more sustainable



63%

I have gone out of my way to buy products in sustainable packaging

Values are percent of consumers who Strongly Agree/Agree (N=13,715)

Source: Global Voices Survey conducted November 2022

BOTTOM LINE:

Shoppers will seek out and spend more with brands that prioritise sustainability. Brands that engage with sustainable partners boost their own environmental credentials and win more customers.

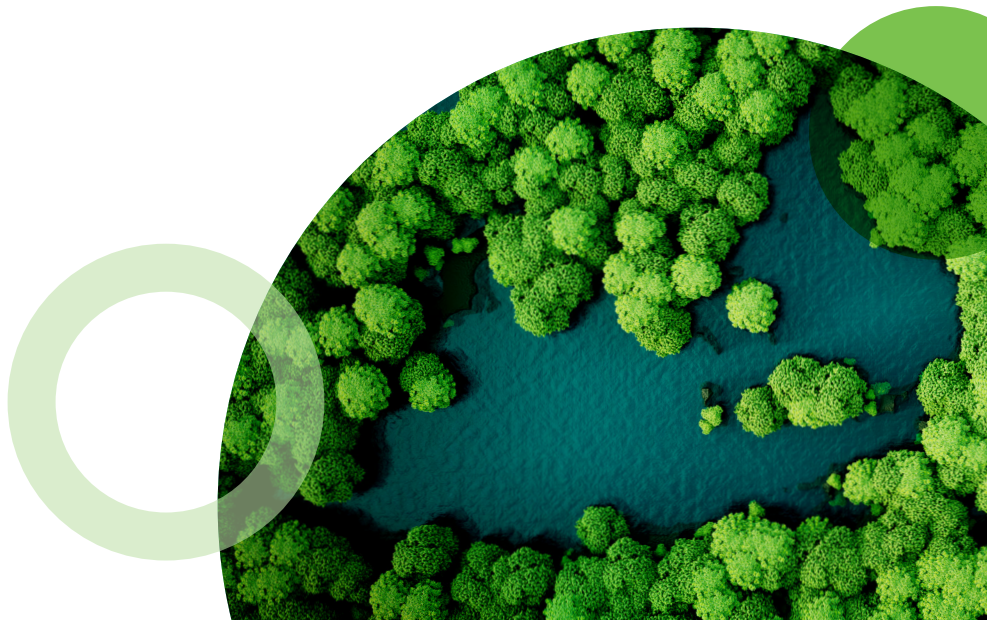
CONCLUSIONS AND RECOMMENDATIONS

Shoppers are doing more than saying they care about sustainability, they're taking action. Brands that prioritise sustainability and transparency will win the customers they want most.

- + **More than 90%** of cross-border shoppers consider sustainability
- + **More than 90%** of shoppers expect environmental credential transparency
- + **More than 60%** of shoppers have spent more money on a product that was sustainable

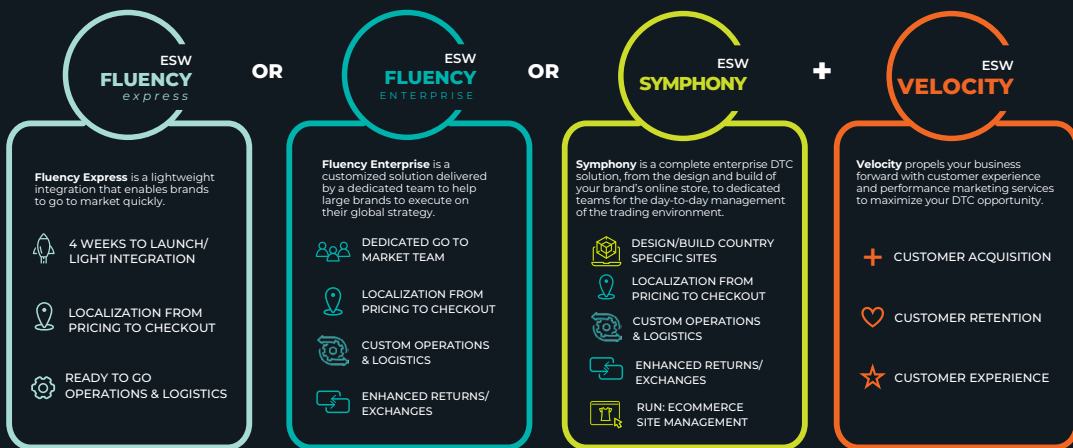
BRANDS SHOULD

- + Prioritise sustainability from day one
- + Focus on reducing packaging and delivery footprint
- + Partner with sustainable vendors



ESW ENABLES GLOBAL GROWTH

ESW helps the world's best-loved brands accelerate DTC growth and meet shoppers' sustainability expectations with a suite of solutions that deliver a superior end-to-end consumer experience



Contact us at growmybrand@esw.com or visit [esw.com](https://www.esw.com)

Methodology: ESW's latest *Global Voices* consumer survey was conducted in November 2022 in 16 countries (Canada, the United States, Mexico, the United Kingdom, Switzerland, Spain, France, Italy, Germany, South Africa, the United Arab Emirates, India, China, South Korea, Japan and Australia), with 16,557 people responding. In this report Gen Z is defined as those between 18 and 24; Millennials as those ages 25-40; Gen X as those ages 41-56; and Baby Boomers defined as those ages 57-75.