SB Socio-Cultural Trends Research™ Highlights

2023 Pulse: Consumer Sustainability Segments and Gen Z

Executive Summary

- **Gen Z are not all activists.** Over half of Gen Z are less likely to act on environmental issues due to perceived barriers or detachment from the issue.
- They are skeptical of companies' abilities to drive change, but simultaneously **believe that they can have an impact by shopping more sustainably**.
- The younger generation feels more pressure to live sustainably, and say they are **willing to switch brands or pay more**, but are **less willing to sacrifice their lifestyle**.
- A lead barrier for Gen Z is that **they feel that not enough of the products and services that they want are sustainable**. They want more information on product sustainability, and feel strongly that **companies should share their sustainability efforts** with consumers.

About SB Socio-Cultural Trends Research™

What Are Consumers Saying And Doing When It Comes To Sustainable Behaviors?

The Socio-Cultural Trends Research is designed to assess consumer values around sustainability, their supporting behaviors, and understand the gap between intentions and actions through the lens of the SB Nine Sustainable Behaviors™.

Methodology

10-minute survey of the U.S. general public (n=1,005), fielded August 23-24th, 2023

Ipsos is the research partner for SB Socio-Cultural Trends Research™

Prior research identified the SB Nine Sustainable Behaviors™ that brands and consumers can take together to have the greatest impact

SB NINE SUSTAINABLE BEHAVIORS™

ADDRESS CLIMATE CRISIS

EAT MORE PLANTS
Moderate meat consumption and eat mostly plant-based foods.

BE ENERGY SMART
Conserve energy and use renewable energy sources where possible.

THINK DURABLE
Purchase durable, reusable products and use fewer disposable ones.

PRESERVE RESOURCES FOR LIFE

REDUCE FOOD + WATER WASTE
Use only what you need and find ways to reduce water and food waste.

GO CIRCULAR
Choose products made with recycled content and recycle, rent, share, and buy used over new products.

CHOOSE NATURE-FRIENDLY
Buy products with clean ingredients and products that protect habitats and biodiversity.

FOSTER RESILIENT SOCIETIES

SUPPORT WOMEN & GIRLS
Support causes and products that support women and girls, that includes purchasing from women-owned businesses.

EXPAND EQUITY & OPPORTUNITY
Support brands offering inclusive and equitable products, policies and practices.

SHOW UP
Actively participate in organizations, buy from companies that support sustainable living, and vote.

Only the behavior descriptions were shown to respondents, not behavior names.

Most people consider themselves to be sustainable/ethical consumers to some extent, but concerns, attitudes, priorities and actions are not homogeneous when it comes to environmental and social issues

72%

“I CONSIDER MYSELF TO BE A SUSTAINABLE / ETHICAL CONSUMER”

Consumers can be split into five segments based on what they feel and how they act. By understanding these segments we can better educate, engage and drive constructive behavior change through relevant and respectful solutions and messaging.

ACTIVISTS
17%

More likely to be female. Believe environment is at a critical stage and the world must act now. Will compromise lifestyle for environment.

PRAGMATISTS
28%

Older & affluent. Concerned about the environment and will take action through low-cost, home-oriented actions. Will compromise if necessary.

CONFLICTED CONTRIBUTORS
19%

Concerned about the environment but their financial situation takes precedence.

BUSY BYSTANDERS
19%

Concerned about the environment and feel guilty. But, see many barriers to action on climate change, believing it to be inconvenient, expensive, and not a priority. Economy is generally viewed as more important.

DISENGAGED DENIALISTS
17%

The environment is not a concern, not immediate, largely overblown, or may feel it's too late. Less inclined to take environmental action nor believe government/ companies should act.

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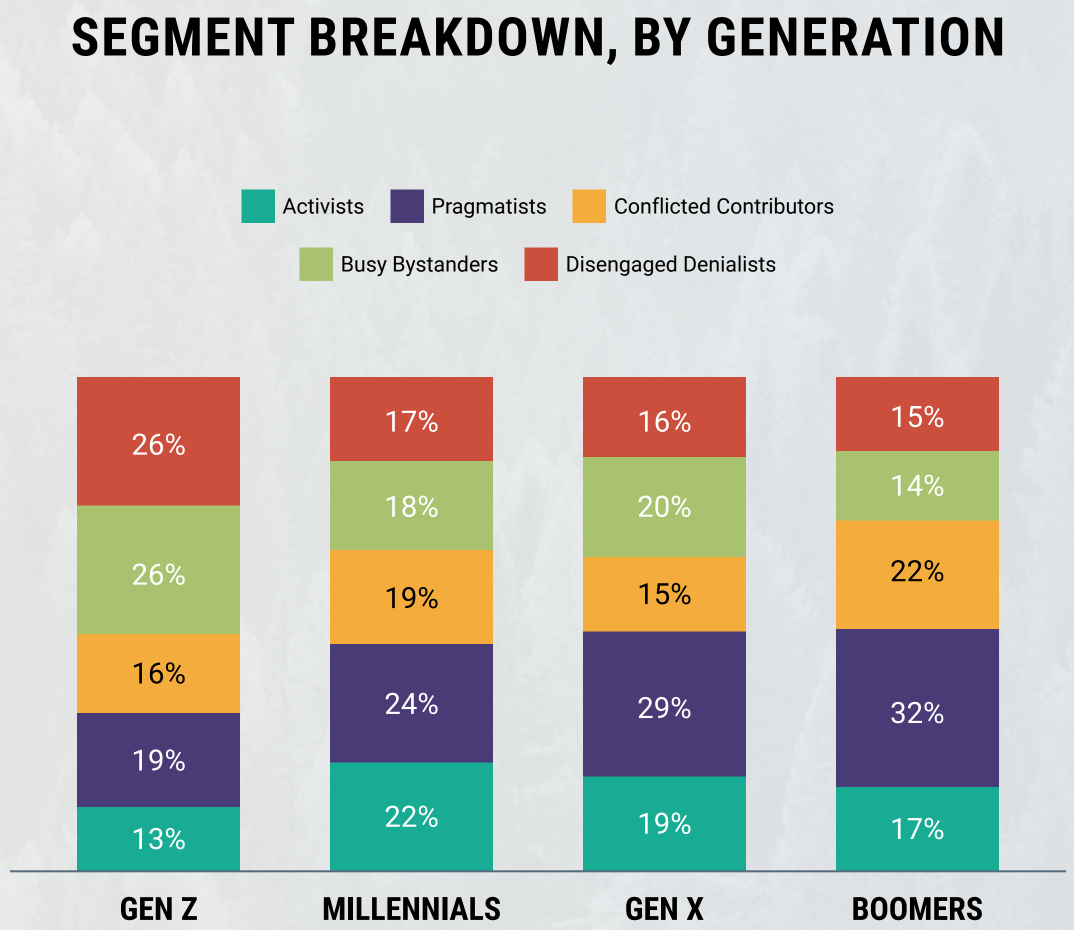
Gen Z are not all Activists

Although activism is commonly associated with younger generations, only 13% of the US general population are considered "Activists." In fact, more than half are Busy Bystanders and Disengaged Denialists.

Busy Bystanders: concerned, feel guilty but many barriers (including inconvenience). Disengaged Denialists: less inclined to take action, less concerned or think it's too late.



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Gen Z is more skeptical about companies' ability to drive change

They are most likely to believe that companies are not doing enough, and least likely to believe that companies can drive sustainable outcomes while still generating profit.

"Companies are **not doing enough** in terms of supporting sustainability and ethical best practices"

GEN Z	MILLENNIALS	GEN X	BOOMERS
80%	77%	72%	69%

"Companies can adopt impactful environmental and social initiatives **while still generating profit**"

GEN Z	MILLENNIALS	GEN X	BOOMERS
65%	79%	78%	79%

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Even so, younger generations indicate that they shop with sustainability in mind

Despite their skepticism in corporate sustainability, they are the most likely to say they're willing to pay more for products and services that are ethical and sustainable.

They are also the most likely to say they would switch brands for more sustainable versions and will choose sustainable options when buying something new.

A contributing factor could be the higher levels of pressure that Gen Z feels to be sustainable; 64% say they feel pressure to behave in environmental/sustainable ways, more than any other age group.

"I am **willing to pay more** for products and services that are ethical and sustainable"

GEN Z	MILLENNIALS	GEN X	BOOMERS
72%	69%	60%	56%

"All else being equal, I would **switch brands** if a competitor offered a more sustainable version of that product"

GEN Z	MILLENNIALS	GEN X	BOOMERS
75%	79%	70%	67%

"When buying products that are new to me, I **choose a brand with a sustainable product option** rather than defaulting to a familiar brand"

GEN Z	MILLENNIALS	GEN X	BOOMERS
65%	61%	57%	52%

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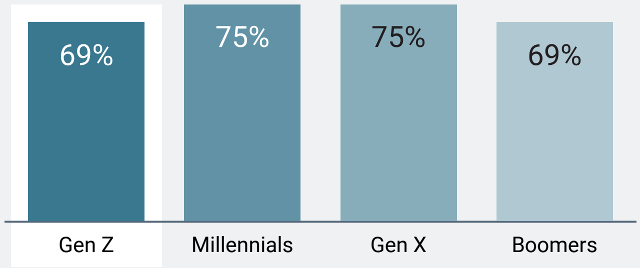
Inconvenience and unwillingness to compromise limit Gen Z action

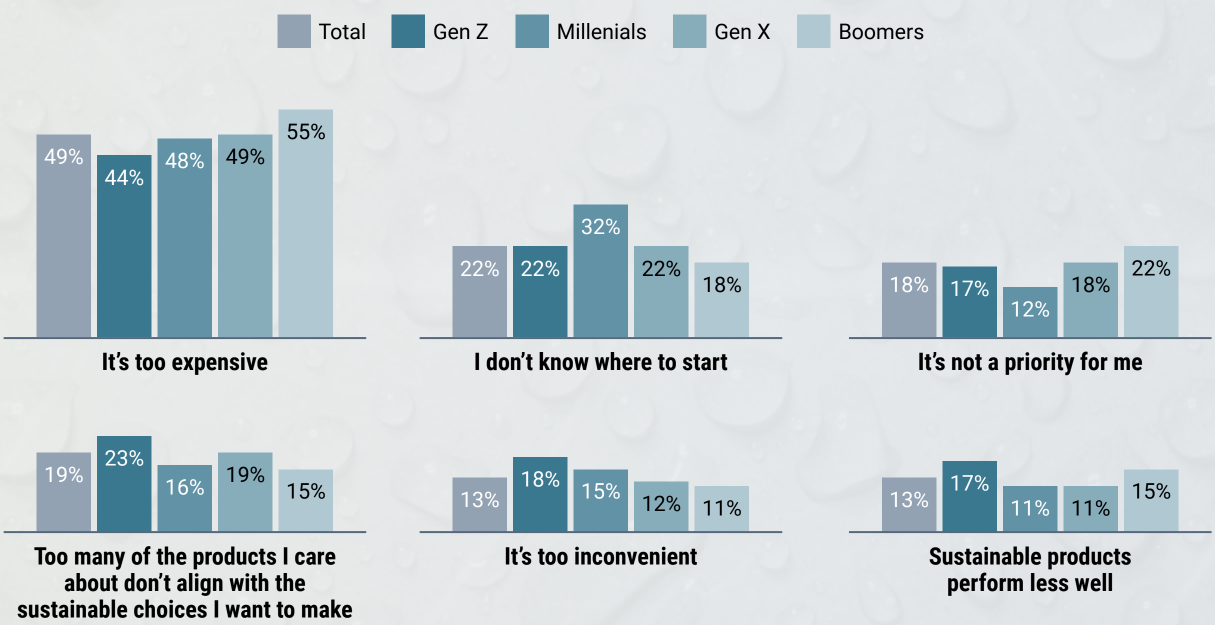
Barriers for Gen Z are not any more about expense or priority than they are for other generations, or about knowing where to start.

Gen Z don't want to be inconvenienced and do not want to compromise on products or lifestyle. They're also more likely to question performance quality of sustainable products.

"I'm prepared to make lifestyle compromises to benefit the environment"



BARRIERS PREVENTING CONSUMERS FROM CHOOSING SUSTAINABLE PRODUCTS



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Being genuine is key

4-in-10 Americans believe private companies need to take action first and foremost to help improve the environment and fight climate change. But a large majority don't think they're doing enough and more than half are suspicious of motive when they do.

Consumers want to see sustainability embedded into brands and for companies to take action themselves rather than simply encouraging purchasers to do the work.

82%

"IT'S IMPORTANT FOR COMPANIES TO SHARE THEIR SUSTAINABILITY EFFORTS WITH THEIR CUSTOMERS"

75%

"Companies are **not doing enough** in terms of supporting sustainability and ethical best practices"

67%

"It's not enough for companies to just support environmental and social causes, **I expect it to be embedded in how they operate**"

62%

"I don't want companies to ask for me to take action to benefit society or the environment, **I just want them to do the right thing**"

67%

"I am **suspicious** of companies using environmental and social messages to **get me to buy**"

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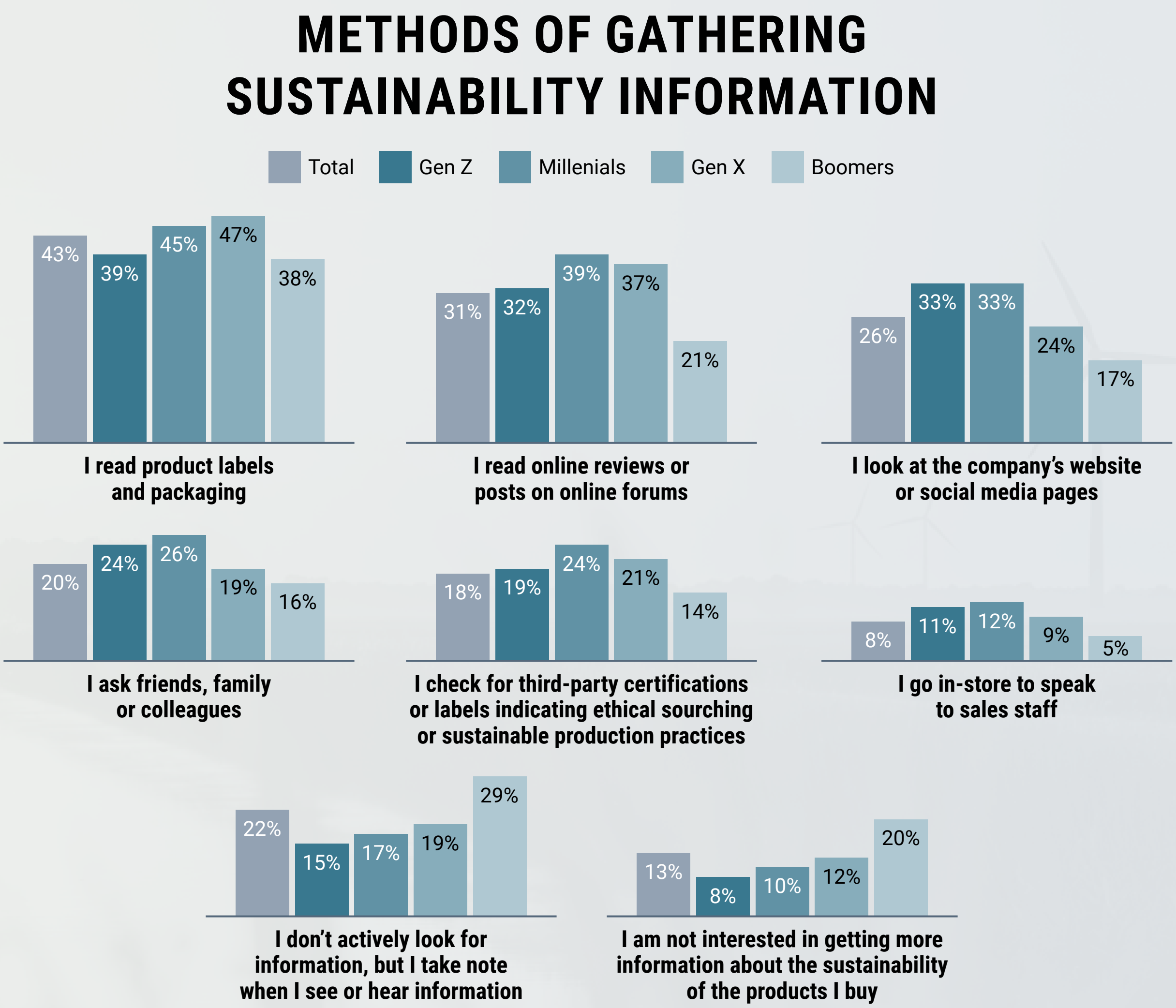
Only 8% of Gen Z is not interested in getting more information about the sustainability of the products they buy



Q: How do you usually gather information about the sustainability of a product before making a purchase?

Base: 1005, Gen Z: 277, Millennials: 277, Gen X: 306, Boomers: 300

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Next Up in SB Socio-Cultural Trends Research™

Submit any brand into the 2024 annual study and receive unparalleled insights on customer perception of that brand's performance. Benchmark how your customers rate your brand on social and environmental sustainability and overall brand trust, while also seeing how your brand compares to others included in the study.

Brand-Specific Testing Includes:

- Data on customer perceptions of your brand's social and environmental performance
- Progress on your customer's adoption of the SB Nine Sustainable Behaviors™
- One-page brand scorecard overview
- 15-page in-depth brand report
- Virtual analysis to review your brand's results

CLICK TO LEARN MORE & SUBMIT YOUR BRANDS

The deadline to submit brands into the annual study is January 15, 2024. Space is limited and will be filled on a first come, first served basis.

To subscribe to the full 2023 Socio-Cultural Trends Research™ or to understand the benefits and deliverables associated with submitting your brand into upcoming research, please contact us.

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