



esw.

GLOBAL  
VOICES

**SUSTAINABLE  
GLOBAL GROWTH**  
and Luxury Shopper Expectations

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# EXECUTIVE SUMMARY

The luxury industry finds itself at an inflection point. The future of the industry lies with young shoppers but those shoppers have higher expectations than their older counterparts. Along with exclusivity and white-glove service, these young, wealthy shoppers are keenly aware of the human and environmental costs of luxury retail. They demand that luxury brands commit to being sustainable.

But what does it mean for a luxury brand to be sustainable? What actions should 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 steps luxury brands can take to earn their trust and their business.

The following report is meant to serve as a valuable source of consumer insight that helps you make data-driven decisions that are good for the bottom line, the future of your business and the planet.



# LUXURY'S MOST SOUGHT-AFTER SHOPPERS DEMAND SUSTAINABILITY

More than 9 in 10 luxury shoppers consider sustainability as part of their purchase decision. In fact, luxury shoppers are more environmentally demanding than shoppers in other sectors. This is especially true for shopper segments luxury brands most want to capture



POWER SHOPPERS



CROSS-BORDER SHOPPERS



YOUNG SHOPPERS

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## CONSUMERS THAT SPEND MORE PRIORITISE SUSTAINABILITY

Do you consider sustainability when making a purchase decision?



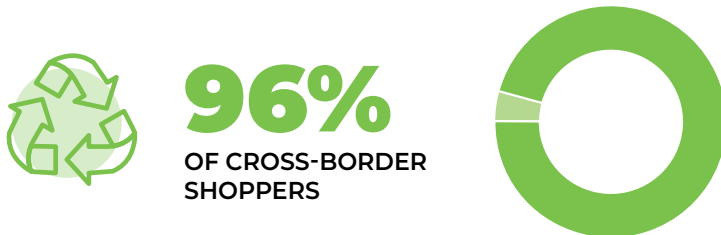
\*(Those *spending* >\$2,500 per year online) consider sustainability as part of their purchase decisions.

Values are percent of shoppers who responded Yes to survey questions. (N=4,203)  
Source: Global Voices Survey conducted November 2022

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## INTERNATIONAL SHOPPERS WEIGH SUSTAINABILITY WHEN BUYING LUXURY

Do you consider sustainability when making a purchase?



Values are percent of shoppers who responded Yes. (N=8,692)  
Source: Global Voices Survey conducted November 2022

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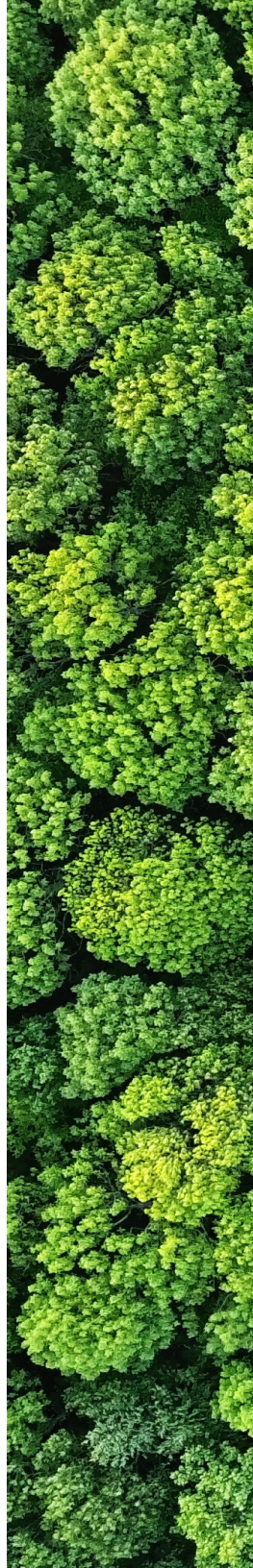
## SUSTAINABILITY IS A REQUISITE FOR YOUNG LUXURY SHOPPERS

Do you consider sustainability when making a purchase decision?



Values are percent of shoppers who responded Yes. Gen Z (N=1,523), Millennials (N=4,537), Gen X (N=1,967), Boomers (N=665) Source: Global Voices Survey conducted November 2022

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**70%**  
**OF SHOPPERS**  
have significantly  
changed shopping  
behaviour to lessen  
their environmental  
impact

## **THE MOST SUSTAINABILITY MINDED MARKETS HAVE YOUNG POPULATIONS**

Which global markets are the most sustainably minded? Luxury shoppers in countries with younger populations are more likely to consider sustainability when buying online.

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## MARKETS WITH YOUNG SHOPPERS ARE MOST LIKELY TO CONSIDER SUSTAINABILITY WHEN PURCHASING

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



Values are % of respondents who responded Yes. (N=640-825 per country)  
Source: Global Voices Surveys conducted November 2022

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### BOTTOM LINE:

Luxury brands entering new markets should prioritise sustainability from day one. The most valuable customers demand sustainable practices.



# HOW LUXURY BRANDS CAN MEET SHOPPERS' SUSTAINABILITY EXPECTATIONS

Luxury shoppers have sent a clear message that brands must be sustainable. But what do shoppers expect and what criteria do shoppers use when deciding to make a purchase?

## SHOPPERS EXPECT LUXURY BRANDS TO BE TRANSPARENT AND ETHICAL

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



**74%**

I expect brands to be transparent about their environmental credentials



**73%**

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



**70%**

I consider environmental impact (e.g. carbon emissions, dye water contamination, etc.) when shopping



**71%**

I consider ethical production when shopping online

Values are percent of consumers who Strongly Agree/Agree (N=8,091)  
Source: Global Voices survey conducted November 2022



## SUSTAINABLE PACKAGING AND GREEN DELIVERY INFORM PURCHASE DECISIONS

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=15,875)  
Source: Global Voices Survey conducted November 2022

**BOTTOM LINE:**  
Luxury brands can demonstrate sustainable credentials by implementing incremental changes. Brands that engage partners for carbon neutral delivery and sustainable packaging satisfy consumers' sustainability demands.



# LUXURY SHOPPERS WILL REWARD SUSTAINABLE BRANDS

Luxury shoppers demand sustainability. But adopting and executing new solutions is complicated and costly. Will shoppers respond? Do shoppers act on their beliefs and support sustainable brands? Our survey shows they do.

## LUXURY SHOPPERS MODIFY BEHAVIOUR BASED ON VALUES

Consider sustainability and shopping, do you agree with the statement?



**68%**

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



**62%**

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



**69%**

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



**69%**

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

Values are percent of consumers who Strongly Agree/Agree (N=8,091)  
Source: Global Voices Survey conducted November 2022

### BOTTOM LINE:

Luxury shoppers will privilege brands that demonstrate a genuine commitment to sustainability. Brands that engage with sustainable partners boost their own environmental credentials and win more customers.

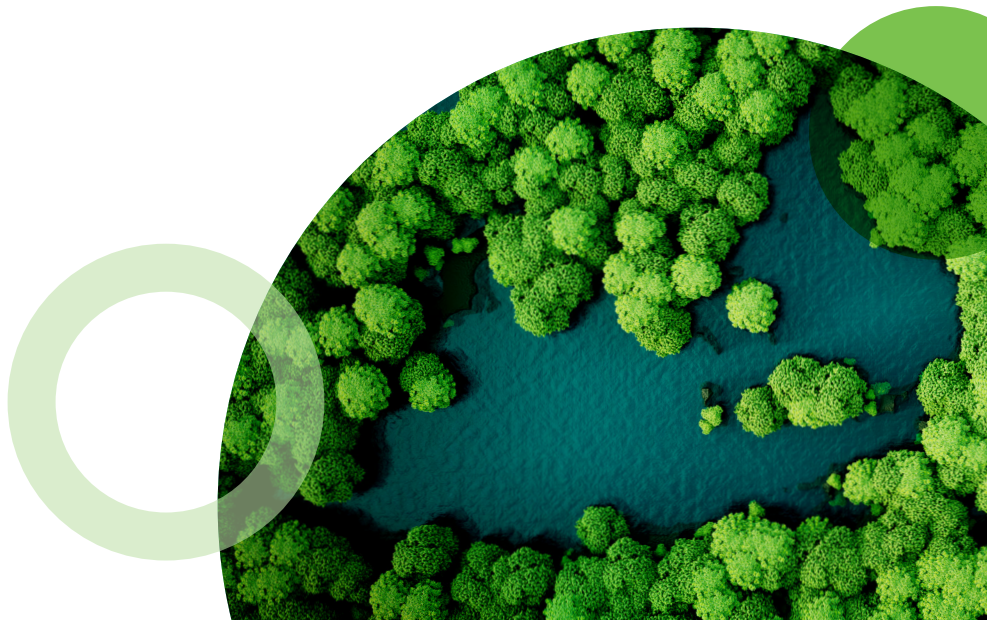
# CONCLUSIONS AND RECOMMENDATIONS

When it comes to sustainability, luxury shoppers are aware of environmental issues and spend their money with brands that show commitment to sustainability issues.

- + **96% of customers** who spend more than \$2,500 factor sustainability into purchase decisions
- + **62% of shoppers** have stopped buying from brands that lack environmental credentials
- + **68% of shoppers** have spent more money on a product that was sustainable

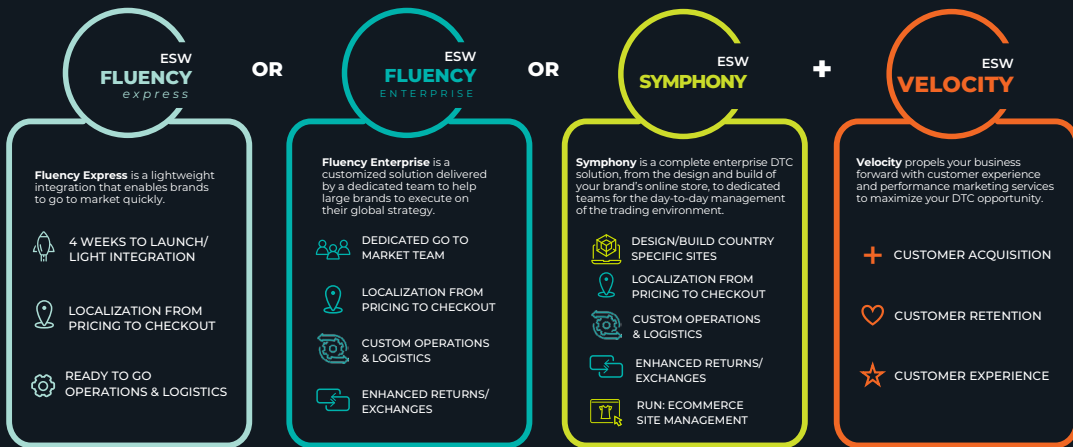
## BRANDS SHOULD

- + Prioritise sustainability from day one
- + Reduce delivery footprints and increase sustainable packaging
- + 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](mailto: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.