



esw.

GLOBAL  
VOICES

# SUSTAINABLE GLOBAL GROWTH

and Consumer Electronics  
Shopper Expectations

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# EXECUTIVE SUMMARY

The consumer electronics industry is facing increased scrutiny of its sustainability practices from consumers. Short product lifecycles lead to overwhelming electronic waste while exploitive sourcing and manufacturing raise ethical concerns.

Today's consumers have more access to information about brands' sustainability credentials and are holding brands to higher standards. Consumers expect brands and retailers to be sustainable.

But what does it mean for a consumer electronics brand to be sustainable? What actions 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 steps consumer electronics 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 and the planet.



# THE MOST VALUABLE SHOPPERS VALUE SUSTAINABILITY

Nearly 90% of all consumer electronics shoppers consider sustainability when making purchases. A closer analysis shows that the most coveted customers are even more environmentally conscious.



**POWER SHOPPERS**



**CROSS-BORDER SHOPPERS**



**YOUNG SHOPPERS**



## 95%

**OF POWER SHOPPERS**

(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: Do you consider sustainability when making a purchase decision. (N=4,751)

Source: Global Voices Survey conducted November 2022



## CROSS-BORDER SHOPPERS ARE MORE LIKELY TO FACTOR SUSTAINABILITY INTO PURCHASE DECISIONS

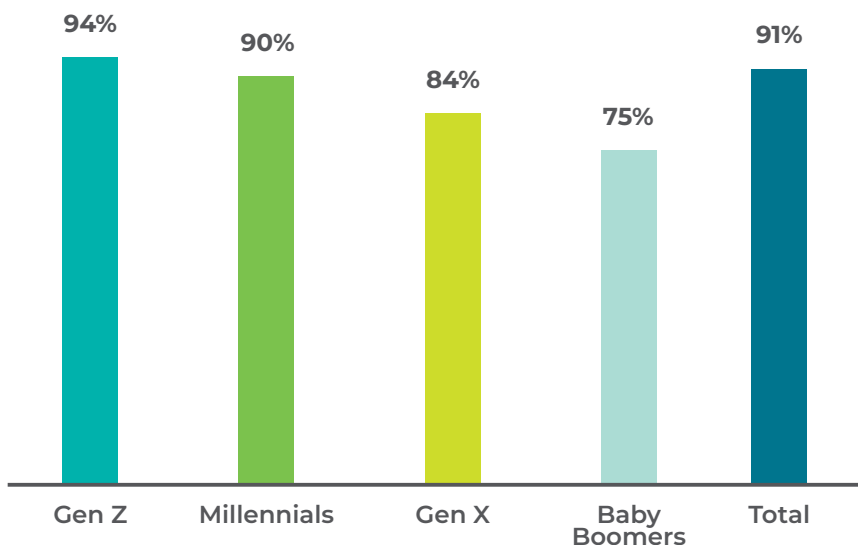
Do you consider sustainability criteria when making a purchase?



Values are percent of shoppers who responded Yes. (N=11,814)  
Source: Global Voices Survey conducted November 2022

## YOUNG SHOPPERS PRIORITISE SUSTAINABLE PURCHASES

Do you consider sustainability when making a purchase decision?



Values are percent of shoppers who responded Yes. Gen Z (N=1,915), Millennials (N=5,564), Gen X (N=2,910), Boomers(N=1,425)  
Source: Global Voices Survey conducted November 2022



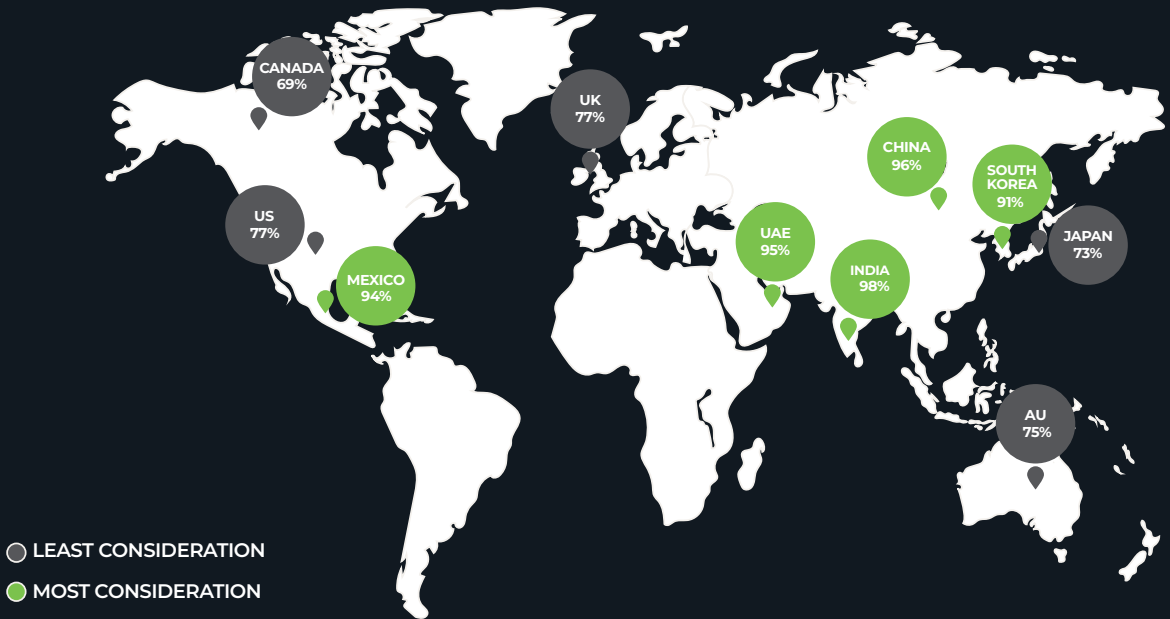
**64%**  
**OF SHOPPERS**  
have significantly  
changed shopping  
behaviour to  
lessen their  
environmental impact

## **MARKETS WITH YOUNG POPULATIONS ARE THE MOST SUSTAINABLY MINDED**

Which geographic markets are the most sustainably minded? The survey showed that consumer electronics shoppers in countries with younger populations are around 20 percentage points more likely to consider sustainability when making an online purchase.

# 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=500-920 per country)  
Source: Global Voices Surveys conducted November 2022

**BOTTOM LINE:**  
Sustainability is top-of-mind for the most sought-after consumer electronics shoppers. Brands expanding into new markets should prioritise sustainability from day one.



# HOW CONSUMER ELECTRONICS BRANDS CAN MEET SUSTAINABILITY EXPECTATIONS

Shoppers clearly want consumer electronics brands to implement sustainable practices. But what exactly do shoppers expect and what criteria do shoppers use when deciding to make a purchase?

## SHOPPERS WANT CONSUMER ELECTRONICS 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



**72%**

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



**68%**

I consider ethical production when shopping online



**68%**

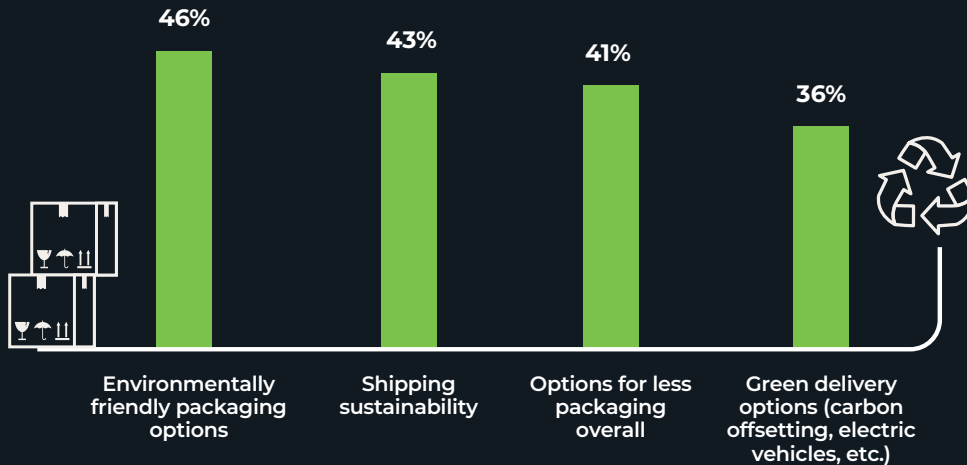
I would buy a product if the delivery was carbon neutral

Values are percent of consumers who Strongly Agree/Agree (N= 11,814)  
Source: Global Voices survey conducted November 2022



## CONSUMER ELECTRONICS SHOPPERS LOOK FOR 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=11,814)  
Source: Global Voices Survey conducted November 2023

**BOTTOM LINE:**  
Consumer electronics brands can deploy sustainable measures without starting from scratch or disrupting core business. Brands that engage with partners and vendors for carbon neutral delivery and sustainable packaging can satisfy consumers' sustainability demands.



# SHOPPERS WILL REWARD SUSTAINABLE CONSUMER ELECTRONICS BRANDS

Consumer electronics shoppers want brands to be sustainable. Yet implementing these processes and practices is expensive. So is there data that supports investing in sustainability? Do shoppers act on their beliefs and support sustainable brands? Our survey shows they do.

## CONSUMER ELECTRONICS CUSTOMERS ACT IN ACCORDANCE WITH THEIR SUSTAINABILITY VALUES

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



**61%**

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



**55%**

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



**63%**

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



**65%**

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

Values are percent of consumers who Strongly Agree/Agree (N=11,814)  
Source: Global Voices Survey conducted November 2022



### BOTTOM LINE:

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

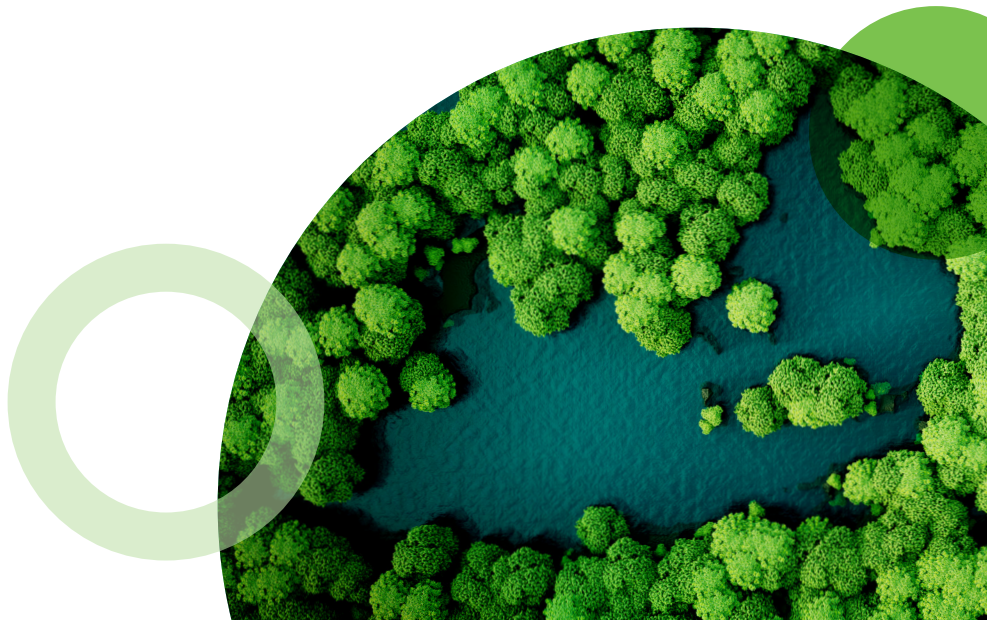
# CONCLUSIONS AND RECOMMENDATIONS

When it comes to sustainability, consumer electronics shoppers align their spending with their values. Brands that demonstrate a genuine commitment to sustainability will win and keep customers.

- + **95% of customers** who spend more than \$2,500 factor sustainability into purchase decisions
- + **55% of shoppers** have stopped buying from brands that lack environmental credentials
- + **63% of shoppers** have spent more money on a product that was sustainable

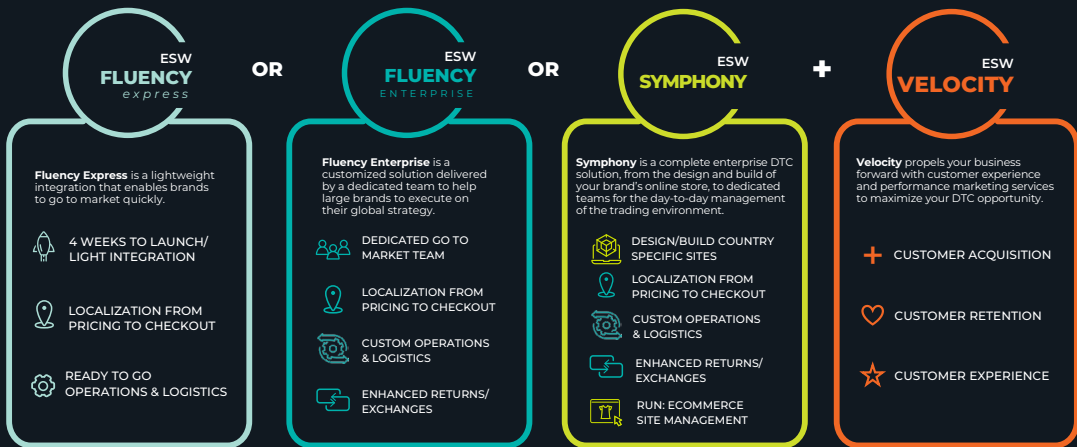
## BRANDS SHOULD

- + 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.