

Voice of the Consumer Sustainability Survey



We support businesses, governments and investors to bring change, gain competitive advantage and create sustainable value and growth by providing insights and data on where to play and how to win with sustainability. Our objective is to help organisations launch the right sustainable products with the right claims in the right markets at the right time.

The Voice of the Consumer: Sustainability Survey is one of several data-driven solutions within our Sustainability practice. The survey explores consumers' evolving attitudes, expectations and adoption for sustainability in 40 countries and identifies sustainability trends that influence their shopping preferences and decision making. It helps you sharpen your brand positioning, create more targeted sustainability and CSR campaigns and better engage with consumers, shareholders and other stakeholders for your organisation.



FOCUS AND DESIGN

Voice of the Consumer: Sustainability topic coverage includes:

- » Awareness and behaviour
- » Trust in claims
- » Willingness to pay
- » Shopping behaviour
- » Lifestyle choices
- » Information sources
- » Spending and saving

Survey, design, execution and analysis were developed collaboratively across teams within Euromonitor International, in conjunction with outside sample partners.

FIELDING

- Euromonitor International administers its consumer surveys through leading panel companies who abide by the ICC / ESOMAR code for ethical market research.
- A diverse set of online panellists in 40 countries were invited to participate in the Voice of the Consumer: Sustainability Survey between January and February 2023. 1000 responses were captured in each market.
- Panellists were pre-screened to ensure that the sample matched each country's population according to nested quotas for age (from 15 to 74) and gender.

ANALYSIS AND INTERPRETATION

- Only unique, complete responses to the Voice of the Consumer: Sustainability Survey questionnaire were used in analysis. Data cleaning includes removing duplicate IP addresses, illogical responses and responses with fast completion times.

- Responses were examined to identify consumer attitudes, behaviors and trends. Industry and consumer specialists then contextualise findings within industries, geographic regions, demographics and consumer segments

RESPONDENT SEGMENTATION

Voice of the Consumer: Sustainability Survey results can be segmented by extensive demographics and socio-economic traits as well as by custom sustainability-related consumer segments. These include:

- » Animal lovers
- » Anti-plastic warriors
- » Climate activists
- » Eco enthusiasts
- » Green spenders
- » Meat avoiders
- » Natural product seekers
- » Planet lovers
- » Purpose-driven consumers
- » Sustainability activists
- » Water savers
- » Zero wasters

2023 SURVEY COUNTRY COVERAGE

- » **Africa:** Morocco, Nigeria, South Africa
- » **Asia Pacific:** China, Hong Kong (China), India, Indonesia, Japan, Malaysia, Philippines, Singapore, South Korea, Taiwan, Thailand, Vietnam
- » **Australasia:** Australia, New Zealand
- » **Eastern Europe:** Poland, Romania
- » **Middle East:** Egypt, Saudi Arabia, United Arab Emirates
- » **Latin America:** Argentina, Brazil, Chile, Colombia, Mexico, Peru
- » **North America:** Canada, USA
- » **Western Europe:** Belgium, Denmark, France, Germany, Italy, Netherlands, Spain, Sweden, Turkey, United Kingdom

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