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Conscious Consumer Research

April 26th, 2023

Background & Objectives

Overview

Provoke Insights, a leader in research for branding, advertising, media, and content marketing initiatives, conducts a bi-annual consumer trends study to keep a pulse on the market across multiple industries.

The extensive study allows Provoke Insights to stay ahead of the trends and understand consumer mindset in the current moment.

Summer 2023 Wave

The research determined who is the socially conscious consumer and what are their shopping habits.

Methodology

Provoke Insights conducted a 15-minute survey among x Americans between the ages of 21 and 65. The study was in-field in Spring 2023.

A random stratified sample was used followed by weighting to ensure a high degree of representation of the U.S. population (household income, age, gender, geography, ethnicity, and children in the household).[1]

Results based on this sample have a maximum margin of sampling error ±2.5% at a 95% confidence level.

Statistical differences between subgroups indicated in this report were tested at a 95% confidence level.

[1] https://data.census.gov/cedsci/table?q=general%20population&tid=ACSDP1Y2018.DP05&vintage=2018

Key Findings

The majority of consumers are socially conscious when making purchases. However, these Americans are not consistently buying these items. Only a tenth of these shoppers say they always purchase socially responsible brands; this cohort is more likely to like to be democratic, live in urban areas, and have a household income of $100K+.

Cost is the largest barrier to purchasing socially responsible products. Only a fifth of consumers mentions they will pay more for sustainably sourced items. Those living in urban areas, democrats, millennials, and parents are willing to pay the premium. The economy is also impacting purchases, as those who buy sustainably sourced items say they are more budget conscious.

"Made with clean ingredients" is the number one attribute that consumers consider when buying socially conscious products. Companies focusing on charitable givings, minority-owned and B-corp certified were not high consideration factors.

Yet, a third of Americas will switch brands if the company does not align with their values. Democrats, wealthier Americans, and Millennials are more likely to have this sentiment.

32%

Will Switch Brands if They Do Not Align with Values

Top 2 of 7 Point Agree Scale

Those Who Will Pay More for Sustainably Sourced

These Shoppers are Significantly More likely to Purchase

- 39% Democrat
- 38% HHI $150K+
- 37% Millennials
- 36% Live in Urban Areas
- 36% Parents
- 36% Male

Q. I will switch brands if they do not align with my values: How much do you agree or disagree with the following statements?

Base All Qualified Respondents (N=1,500)

Most consumers shop socially responsible. Democrats are especially purchasing this way.

The Socially Conscious

These Shoppers are Significantly More likely to Purchase

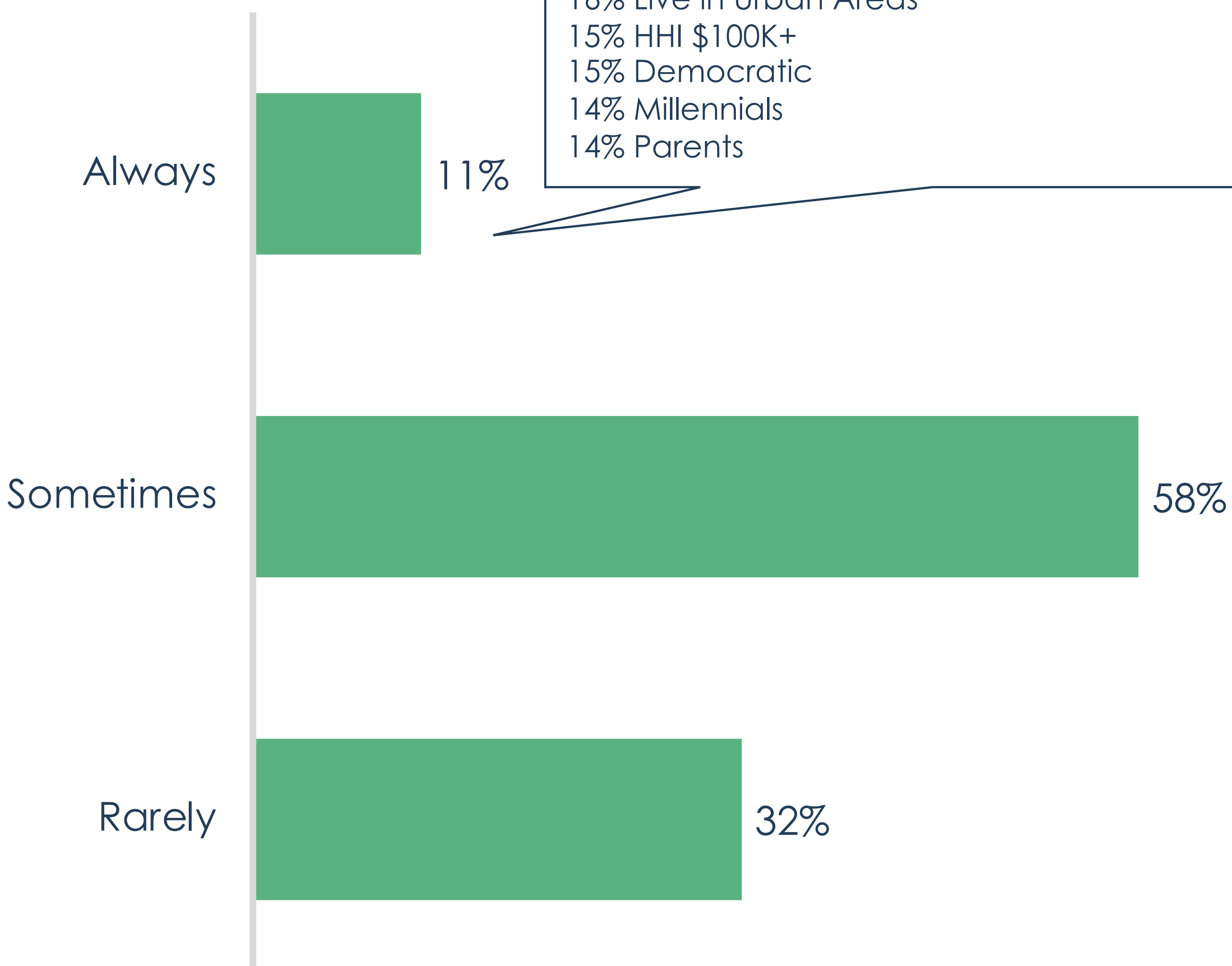
- 84% Democrat
- 81% Millennials
- 81% Live in Urban Area
- 80% are Parents

Q. . How often do you purchase socially conscious/responsible products?

Base All Qualified Respondents (N=1,500)

While most Americans purchase socially responsible items, the cadence is not consistent.

Groups Significantly More Likely to Always Purchase
16% Live in Urban Areas
15% HHI $100K+
15% Democratic
14% Millennials
14% Parents



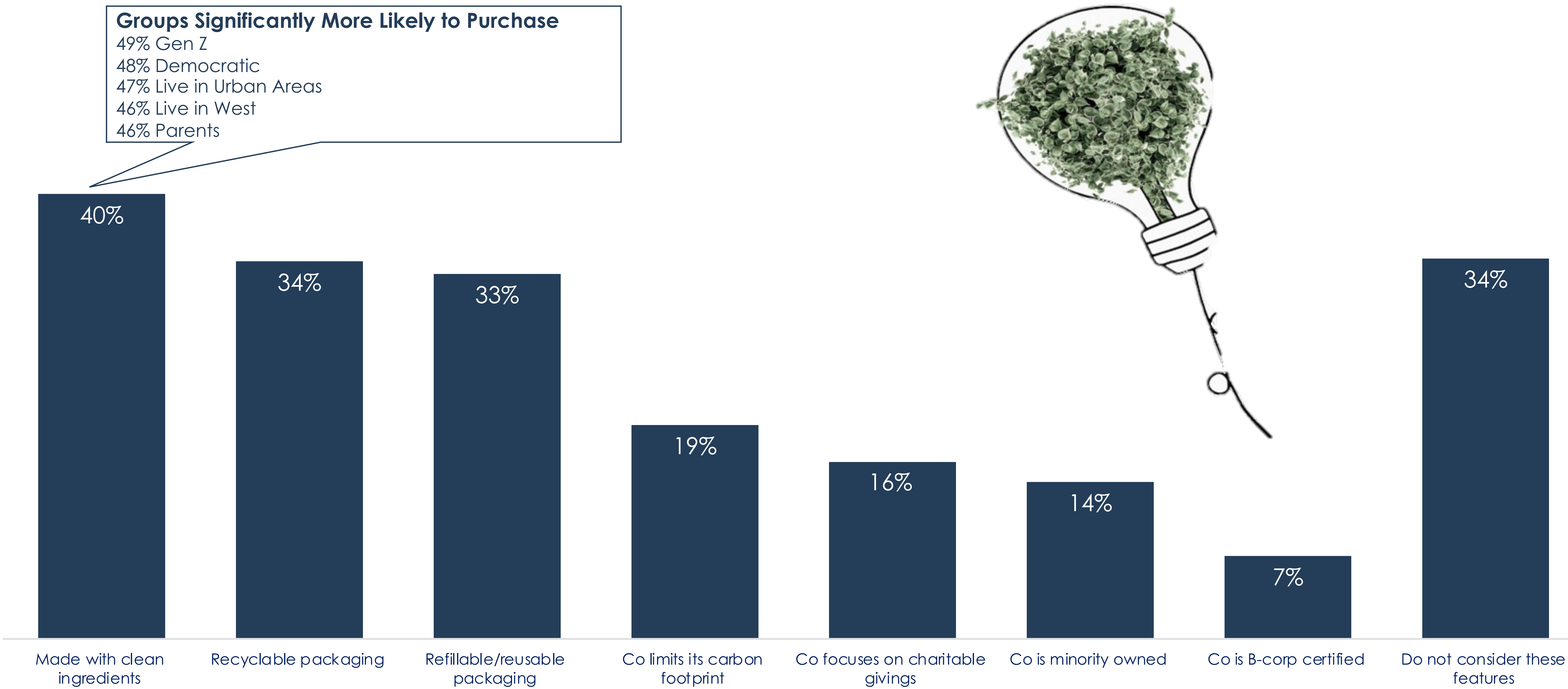
Q. . How often do you purchase socially conscious/responsible products?

Base Purchase Socially Responsible (n=1,103)

Sustainability Product Purchase Consideration

Made with clean ingredients is the top attribute considered when buying socially conscious. Generation Z and democrats are most likely to be looking for these type of items.

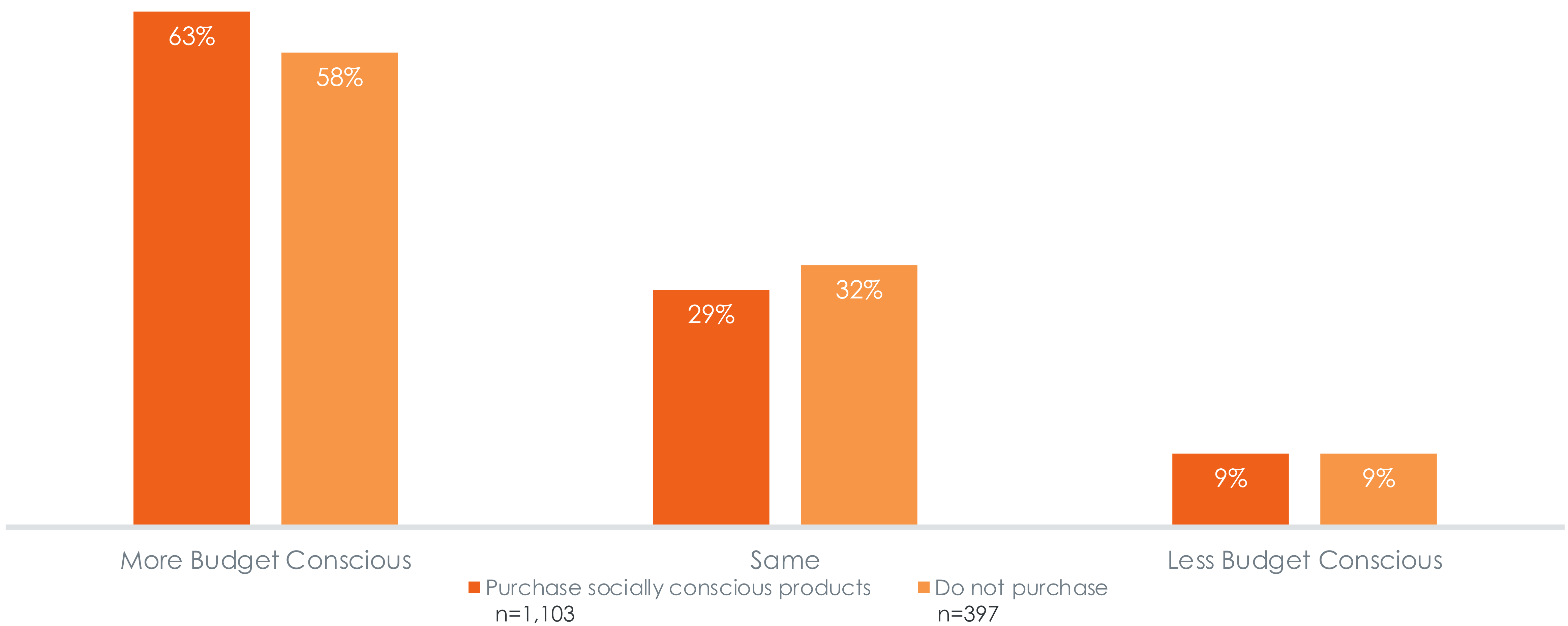
Groups Significantly More Likely to Purchase
49% Gen Z
48% Democratic
47% Live in Urban Areas
46% Live in West
46% Parents



Q. Which of the following attributes do you seriously consider when purchasing a product/brand? (Select all that apply)

Base All Qualified Respondents (N=1,500)

Those who are purchasing sustainably sourced items, say they are more budget conscious than six months ago.



Q. . How often do you purchase socially conscious/responsible products? Q. Compared to six months ago, how budget conscious are you?

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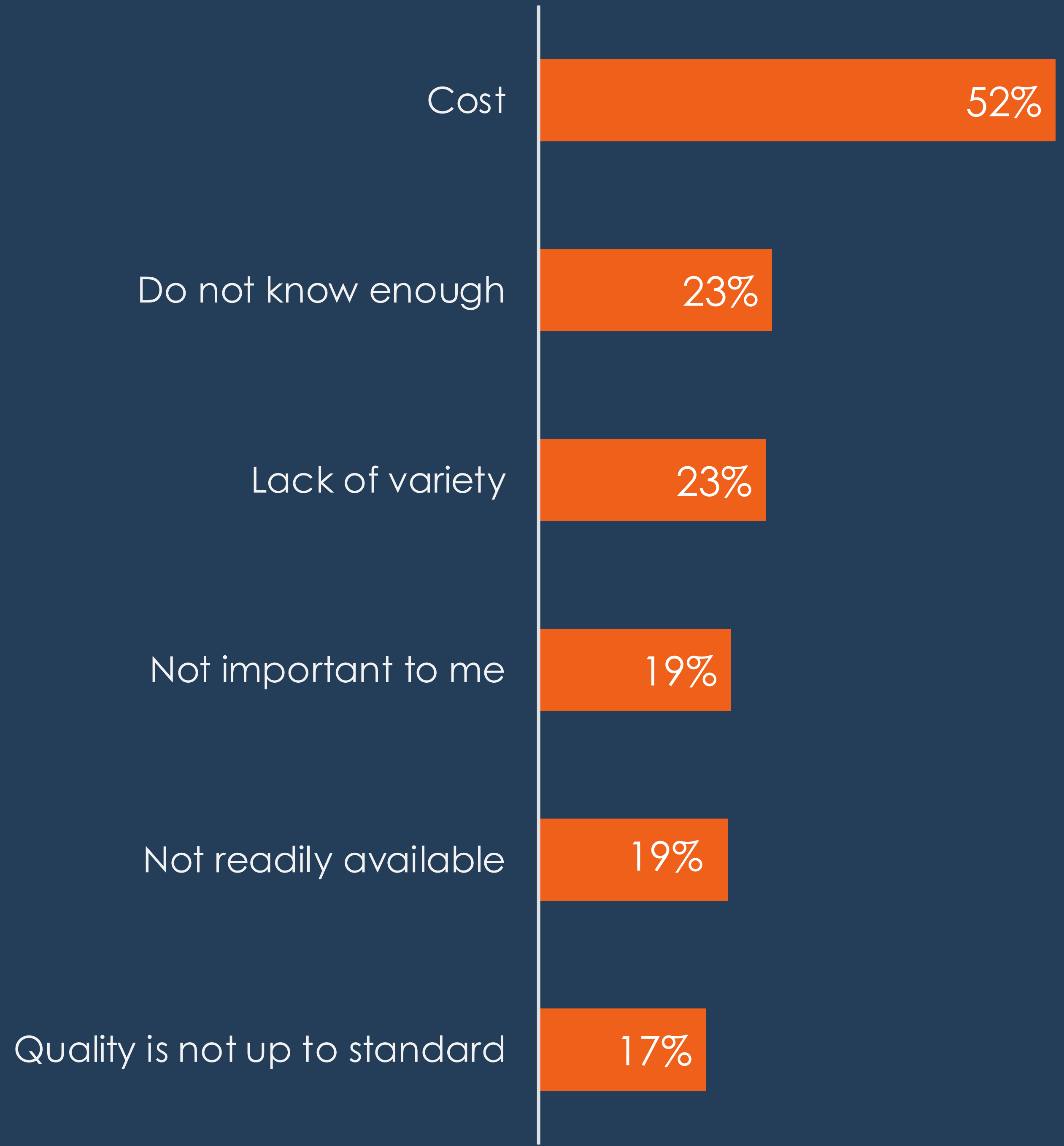
Sustainability Product Barriers

Price is the largest barrier to purchasing socially responsible products.



Q. Which of these reasons best describes why you do not purchase socially responsible products more often? (Select up to two)

Base: Know what socially responsible shopping , but do not always buy this way (n=1,121)

22%

Will Pay More For Sustainably Sourced Items

Top 2 of 7 Point Agree Scale

Those Who Will Pay More for Sustainably Sourced

These Shoppers are Significantly More likely to Purchase

- 34% Live in Urban Areas
- 33% Democrat
- 33% Millennials
- 32% Parents
- 30% HHI $100K+
- 29% Male
- 27% Live in the West

Q. I would pay more for items that are sustainably sourced: How much do you agree or disagree with the following statements?

Base All Qualified Respondents (N=1,500)

Respondent Overview

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Gender

51%
Female

49%
Male

*<1% other identity

Generation

42 years old
Median Age

Z **18%** Gen Z

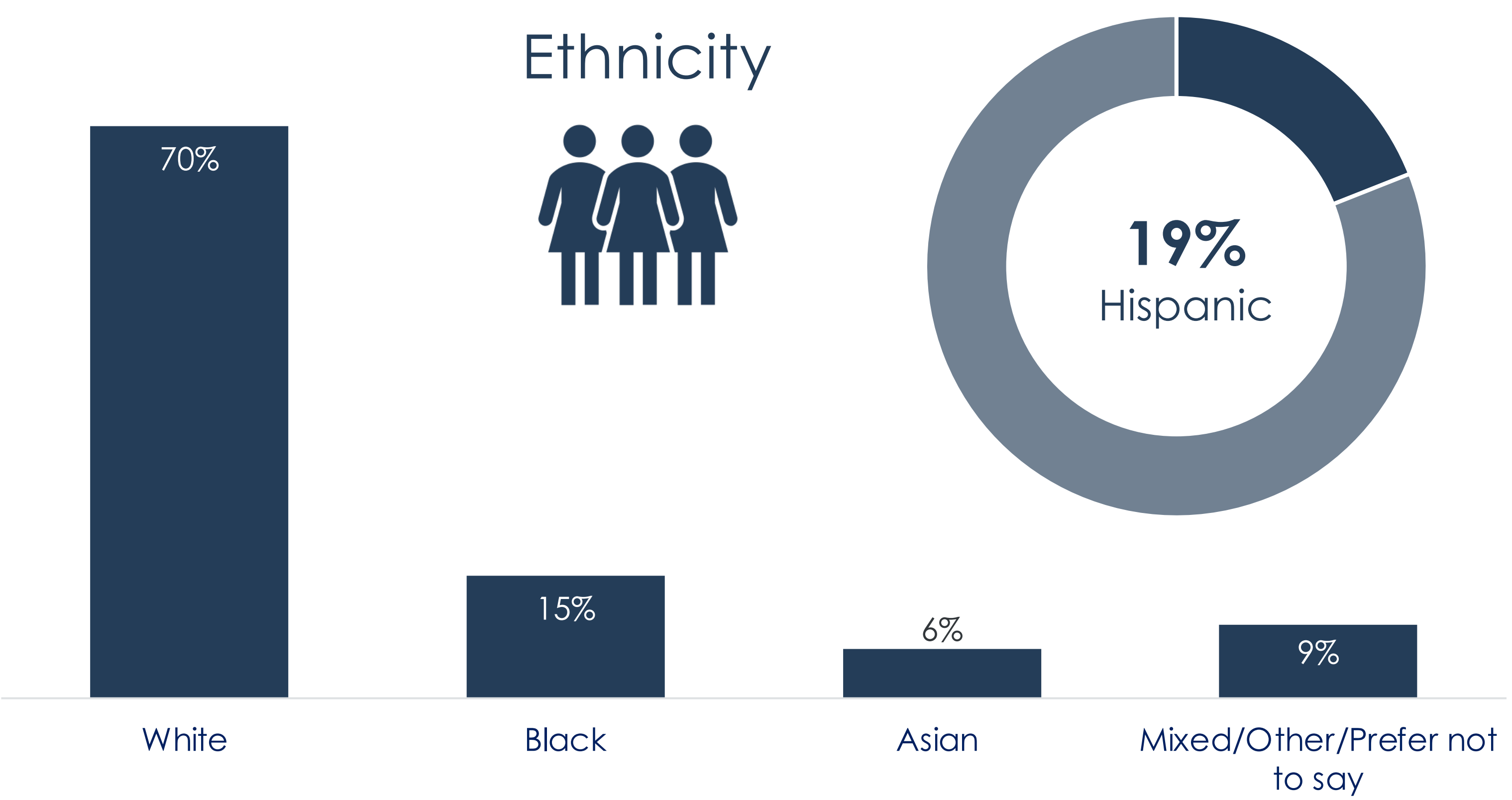
X **30%** Gen X

M **35%** Millennials

B **18%** Baby Boomers

Parental Status

Ethnicity



Household Income