



Consumer pulse March 2023 report: ESG data

Consumer & Retail

March 2023



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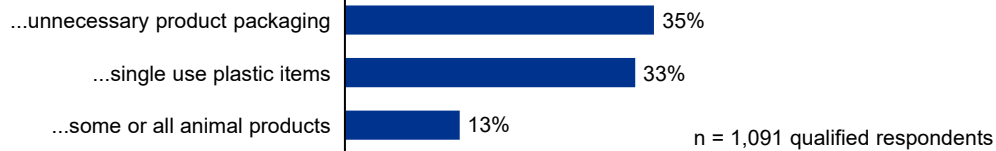


Consumer environmental sustainability efforts

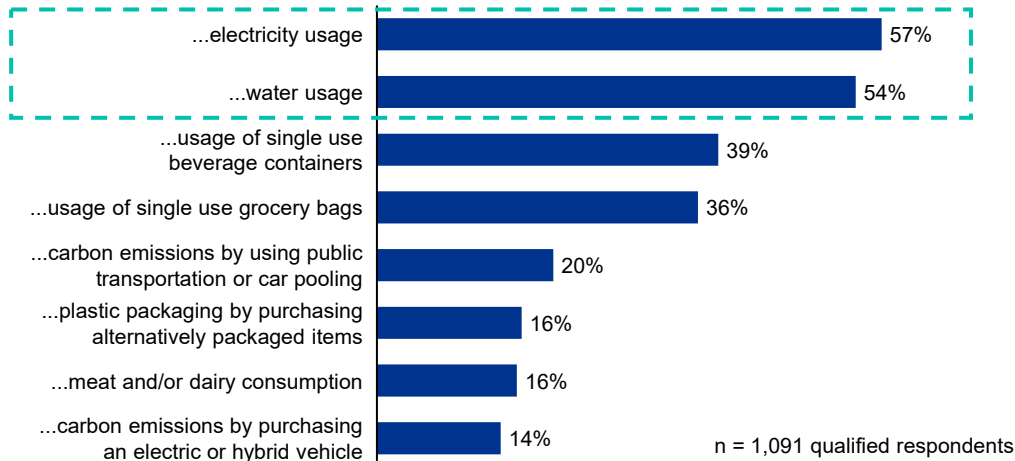
Over 50 percent of consumers report that they try to reduce water or energy usage, reuse single use plastic bags, or recycle plastic household items at home.

Environmentally sustainable consumer behaviors to date

Refuse...



Reduce...



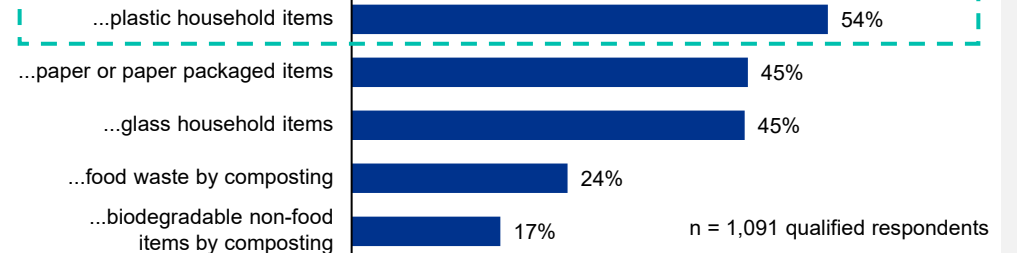
Reuse...



Repurpose...



Recycle...



Note(s): KPMG conducted surveys of a representative sample of 1,091 consumers across the United States and, in all instances, asked, "What actions have you taken to live a more environmentally sustainable lifestyle? Select all that apply."
 Source(s): KPMG Consumer Pulse Survey, fielded January 31, 2023–February 10, 2023

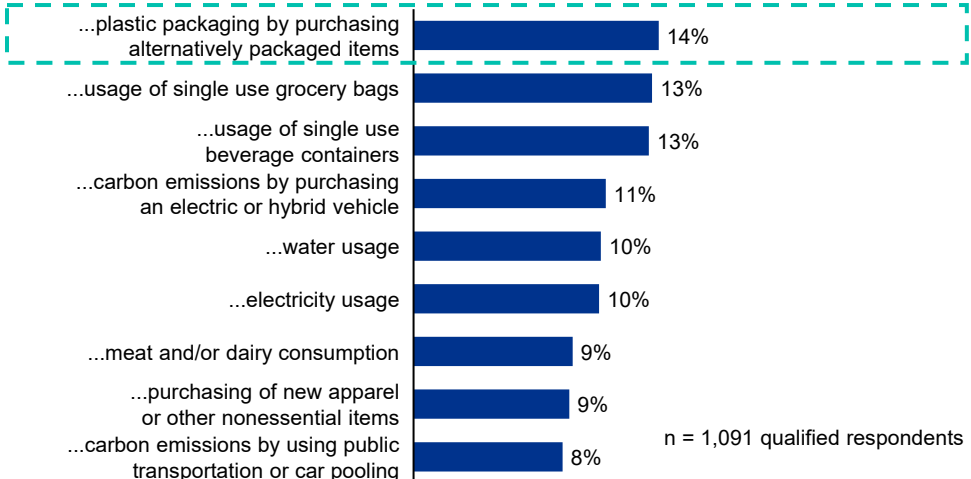
Approximately 15 percent of consumers plan to start refusing single use plastic items or unnecessary product packaging or purchasing alternatively packaged items.

New environmentally sustainable consumer behaviors, 2023 (planned)

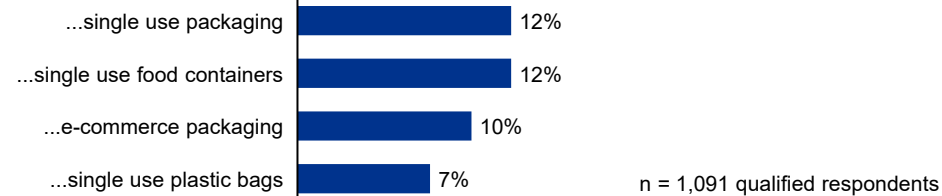
Refuse...



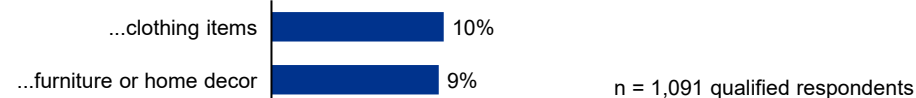
Reduce...



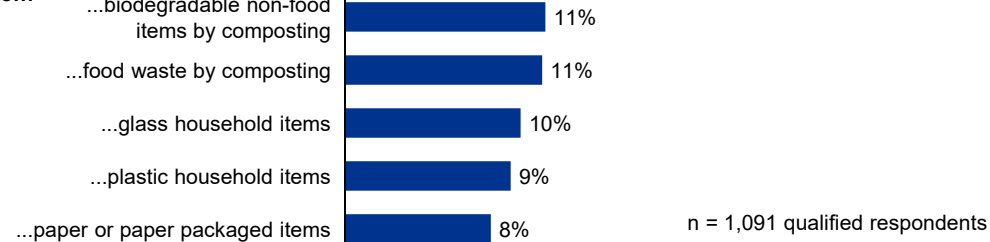
Reuse...



Repurpose...



Recycle...

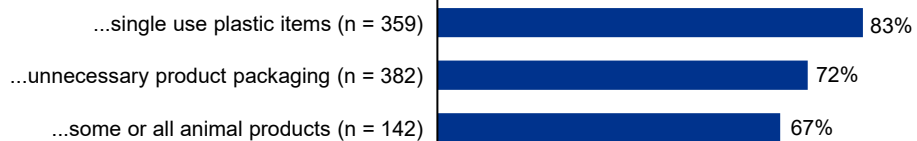


Note(s): KPMG conducted surveys of a representative sample of 1,091 consumers across the United States and, in all instances, asked, "Which of the following environmentally sustainable actions are you planning to start this year (2023)? Select all that apply."
 Source(s): KPMG Consumer Pulse Survey, fielded January 31, 2023–February 10, 2023

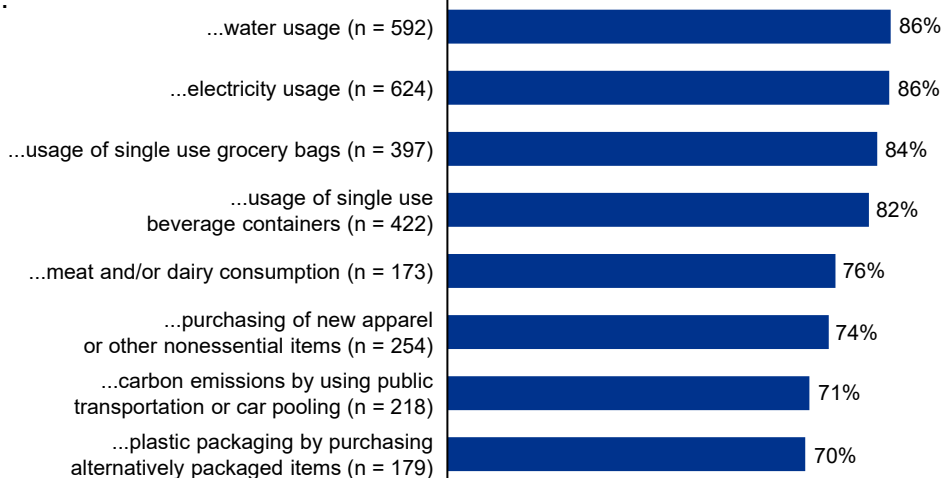
Most consumers who already take environmentally sustainable actions plan to continue these actions in 2023.

Continued environmentally sustainable consumer behaviors, 2023 (planned) ^(a)

Refuse...



Reduce...



Reuse...



Repurpose...



Recycle...



Note(s): KPMG conducted surveys of a representative sample of 1,091 consumers across the United States and, in all instances, asked, "Which of the following environmentally sustainable actions are you least likely to continue this year (2023)? Select all that apply."; (a) For each activity, n count includes only those respondents who indicated that they already do the respective action.

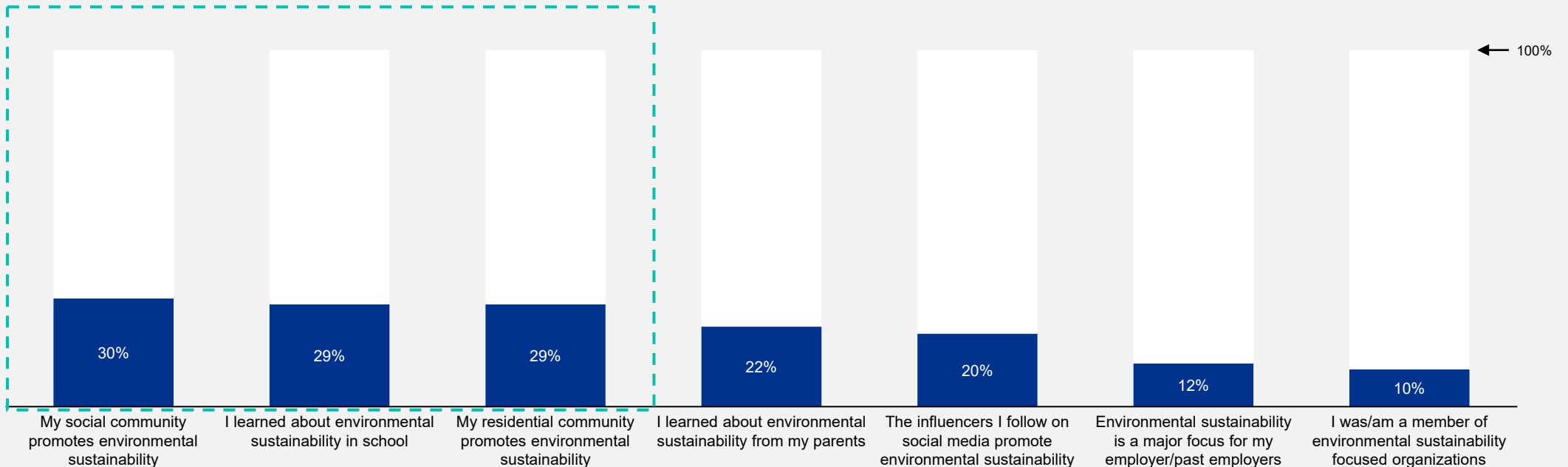
Source(s): KPMG Consumer Pulse Survey, fielded January 31, 2023–February 10, 2023

Consumers are most often motivated to be environmentally sustainable by their social communities (30 percent), schools (29 percent), and residential communities (29 percent).

Environmental sustainability influencers

(Respondents may select multiple responses)

n = 977 qualified respondents who report taking at least one environmentally sustainable action



Note(s): KPMG conducted surveys of a representative sample of 1,091 consumers across the United States and, where applicable, asked, "How did you become interested in living a more environmentally sustainable lifestyle? Select all that apply."
 Source(s): KPMG Consumer Pulse Survey, fielded January 31, 2023–February 10, 2023

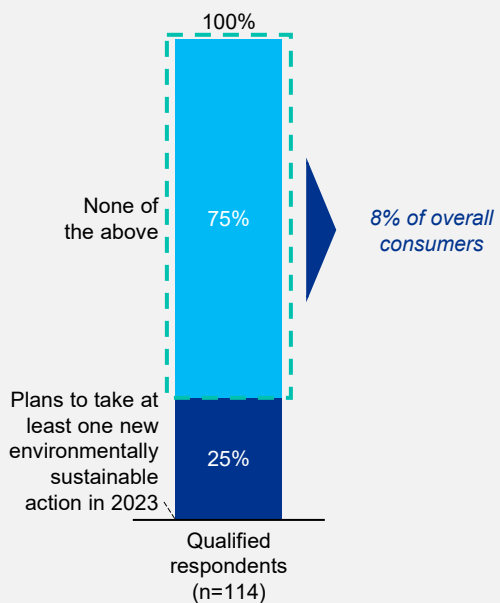
Only 8 percent of consumers report that they have not taken any environmentally sustainable actions and do not plan to in 2023.

Environmental sustainability obstacles

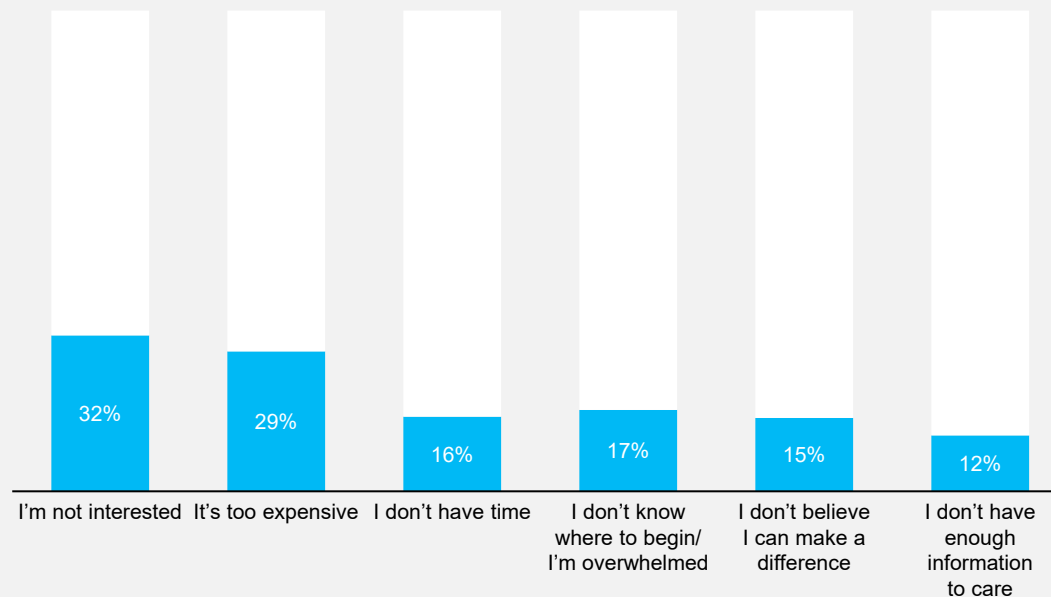
Actions to date



Planned actions for 2023

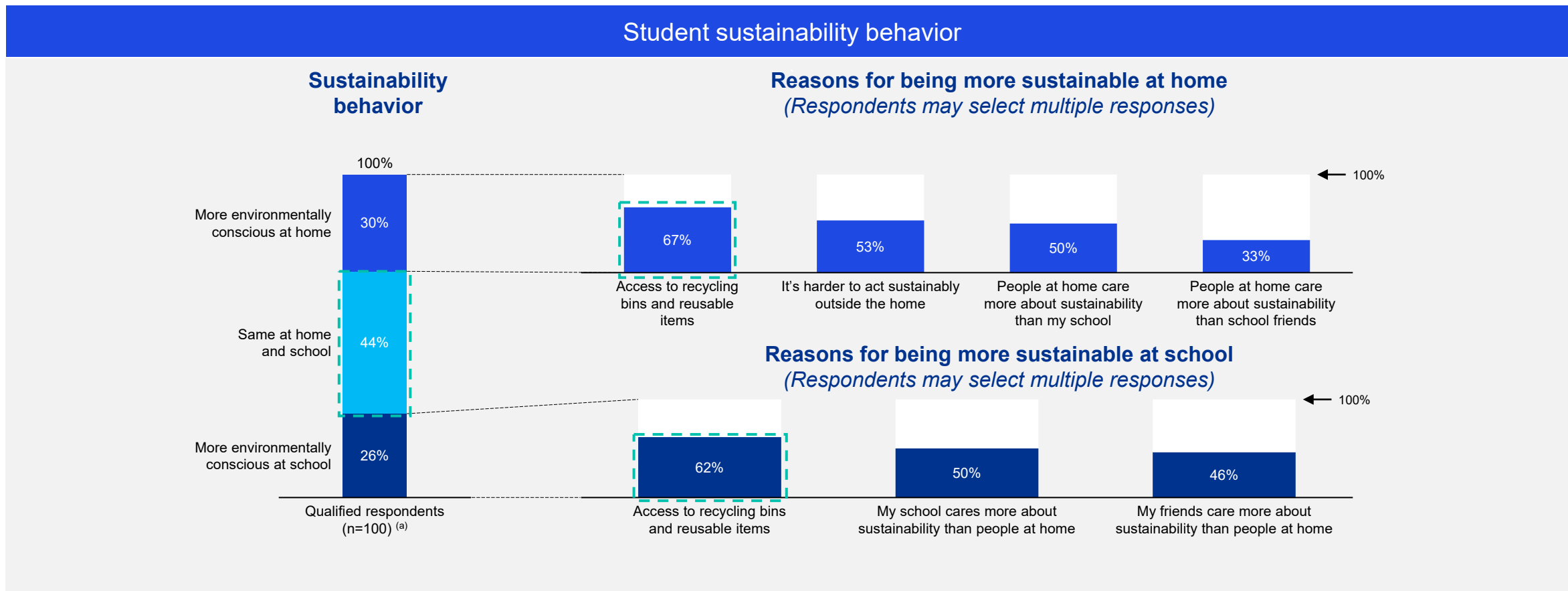


Reasons for not taking any environmentally sustainable actions at home
(Respondents may select multiple responses)



Note(s): KPMG conducted surveys of a representative sample of 1,091 consumers across the United States and, in all instances, asked, "What actions have you taken to live a more environmentally sustainable lifestyle? Select all that apply.," "Which of the following environmentally sustainable actions are you planning to start this year (2023)? Select all that apply.," and, where applicable, "What is preventing you from adopting a more environmentally sustainable lifestyle? Select all that apply."
Source(s): KPMG Consumer Pulse Survey, fielded January 31, 2023–February 10, 2023

On average, student consumers behave similarly at home and at school with respect to environmental sustainability; those who behave differently at home or at school, do so due to access to recycling bins and reusable items.

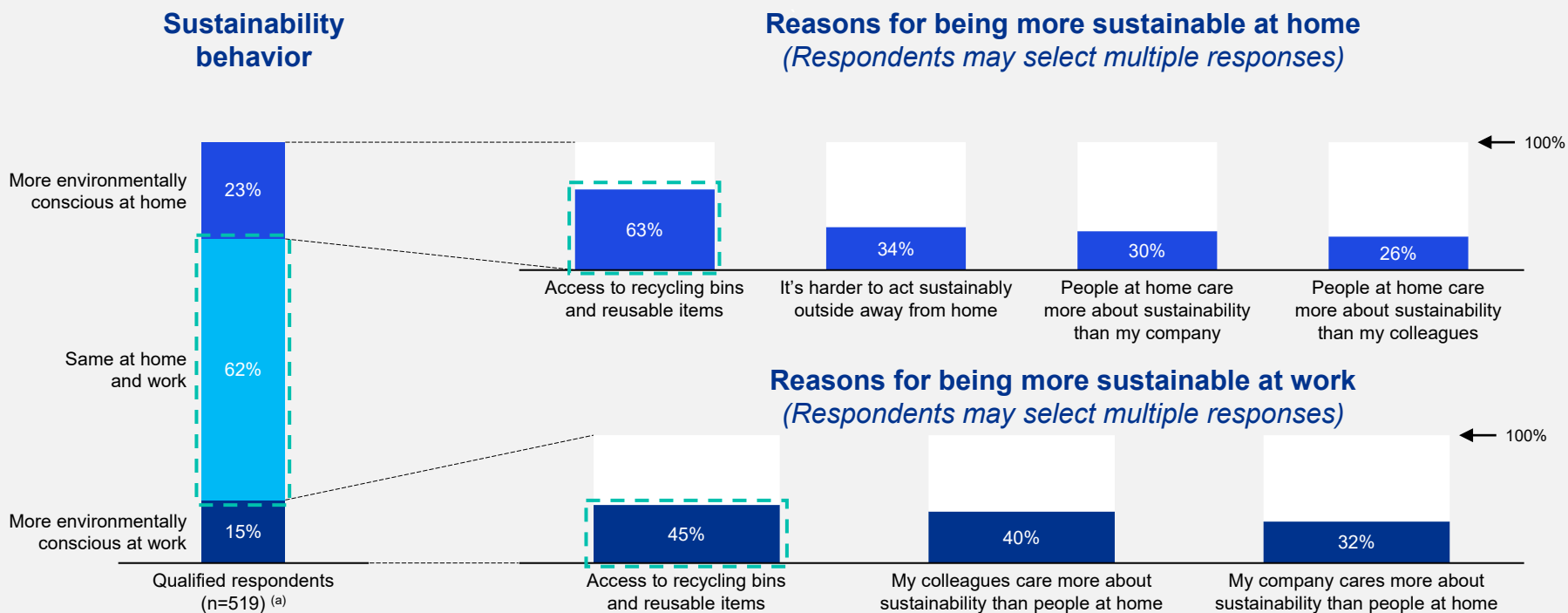


Note(s): KPMG conducted surveys of a representative sample of 1,091 consumers across the United States. Respondents under 18 years old were asked, “Are you more environmentally conscious in your home or at school?”, and “Why are you more environmentally conscious at home/school?”; (a) Includes only underage Gen Z respondents.

Source(s): KPMG Consumer Pulse Survey, fielded January 31, 2023–February 10, 2023

Most adults (62 percent) behave similarly at home and at work with respect to environmental sustainability; those who behave differently at home or at work, do so due to access to recycling bins and reusable items.

Employee sustainability behavior



Note(s): KPMG conducted surveys of a representative sample of 1,091 consumers across the United States and, adult respondents who work at least part time in a workplace were asked, "Are you more environmentally conscious in your home or at work?", and "Why are you more environmentally conscious at home/work?"; (a) Includes only employed adult respondents who do not work from home full-time.
Source(s): KPMG Consumer Pulse Survey, fielded January 31, 2023–February 10, 2023

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Environmental sustainability and consumer purchasing behaviors

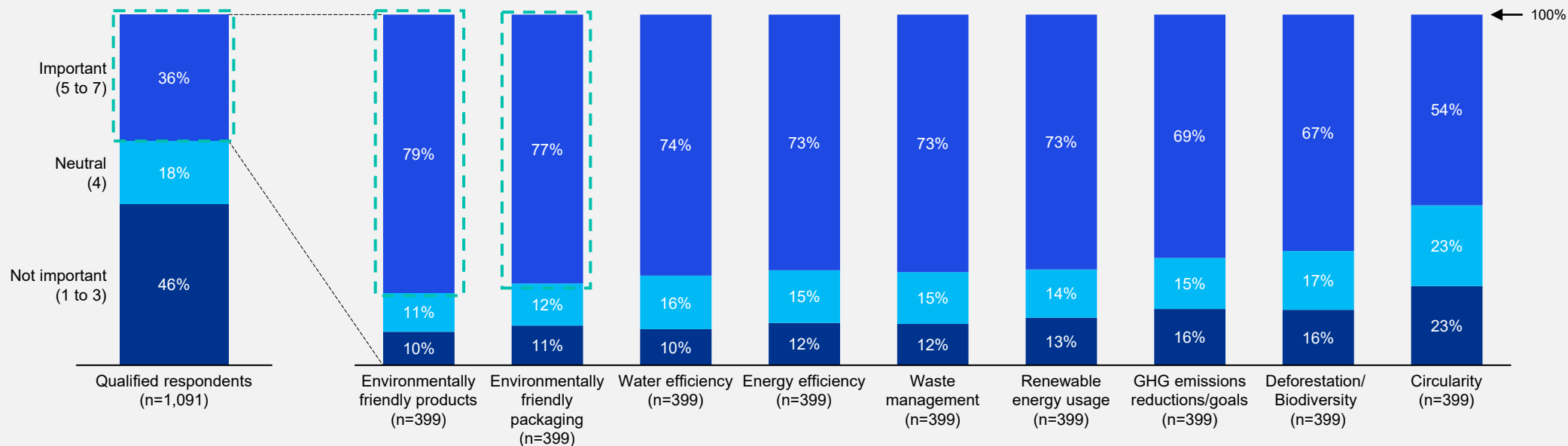
Over 35 percent of consumers say environmental sustainability is important to purchase decisions; over 75 percent of these consumers are looking for environmentally friendly products and/or packaging.

Environmental sustainability purchase criteria importance

Environmental sustainability importance rating

Environmentally conscious consumers' top environmental sustainability purchase criteria

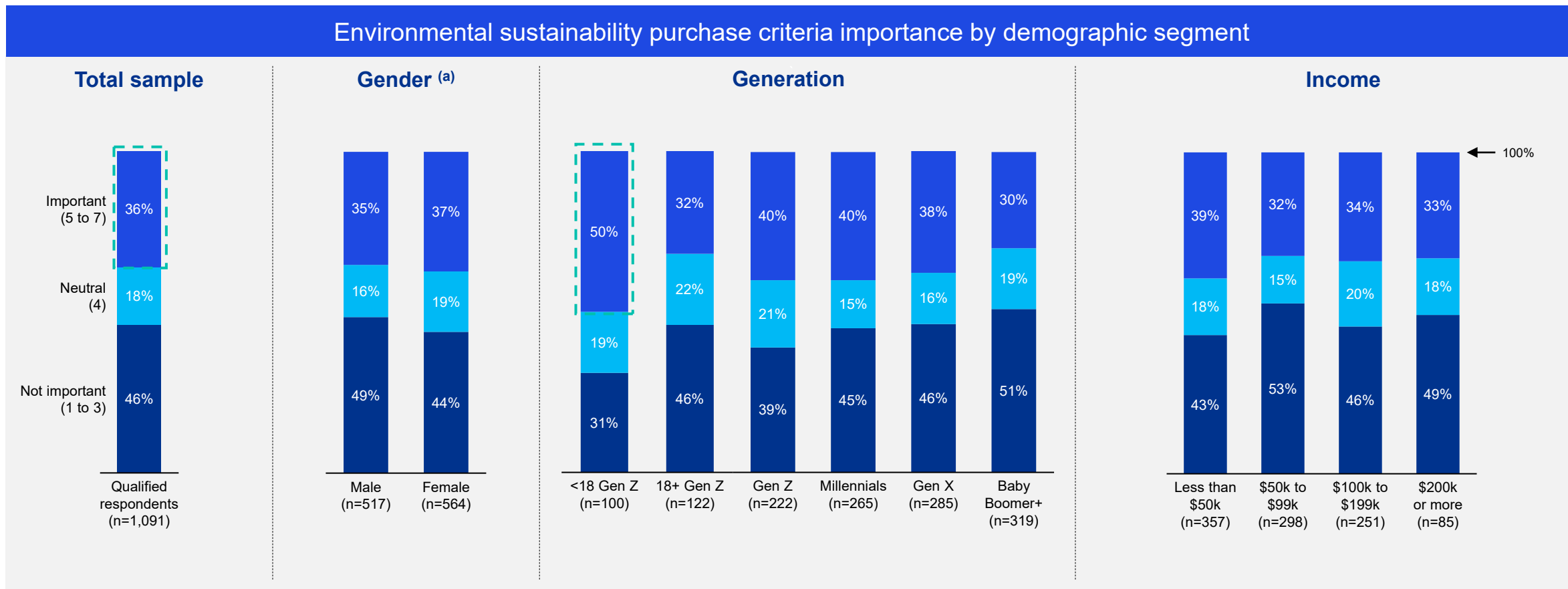
n = 399 qualified respondents who say environmental sustainability is important to purchase decisions



Note(s): KPMG conducted surveys of a representative sample of 1,091 consumers across the United States and, in all instances, asked, "How important is environmental sustainability to you when making a purchase decision between similar products? Please indicate the importance on a scale of 1 to 7, 1 being not important and 7 being extremely important." and "How important are the following environmental sustainability topics to you when making purchase decisions? Please indicate the importance of each criteria on a scale of 1 to 7, 1 being not important and 7 being extremely important."

Source(s): KPMG Consumer Pulse Survey, fielded January 31, 2023–February 10, 2023

Over 35 percent of consumers say environmental sustainability is important to purchase decisions; underage Gen Z consumers are most likely to say that environmental sustainability is important to purchase decisions (50 percent).



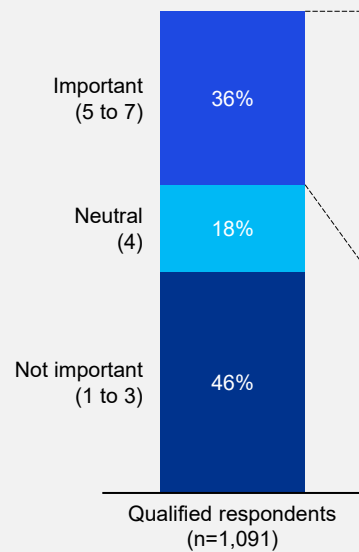
Note(s): KPMG conducted surveys of a representative sample of 1,091 consumers across the United States and, in all instances, asked, “How important are the following criteria to you when making a purchase decision between similar products? Please indicate the importance of each criteria on a scale of 1 to 7, 1 being not important and 7 being extremely important..”; (a) Respondents who selected “Prefer to self describe” have been excluded due to low sample size.

Source(s): KPMG Consumer Pulse Survey, fielded January 31, 2023–February 10, 2023

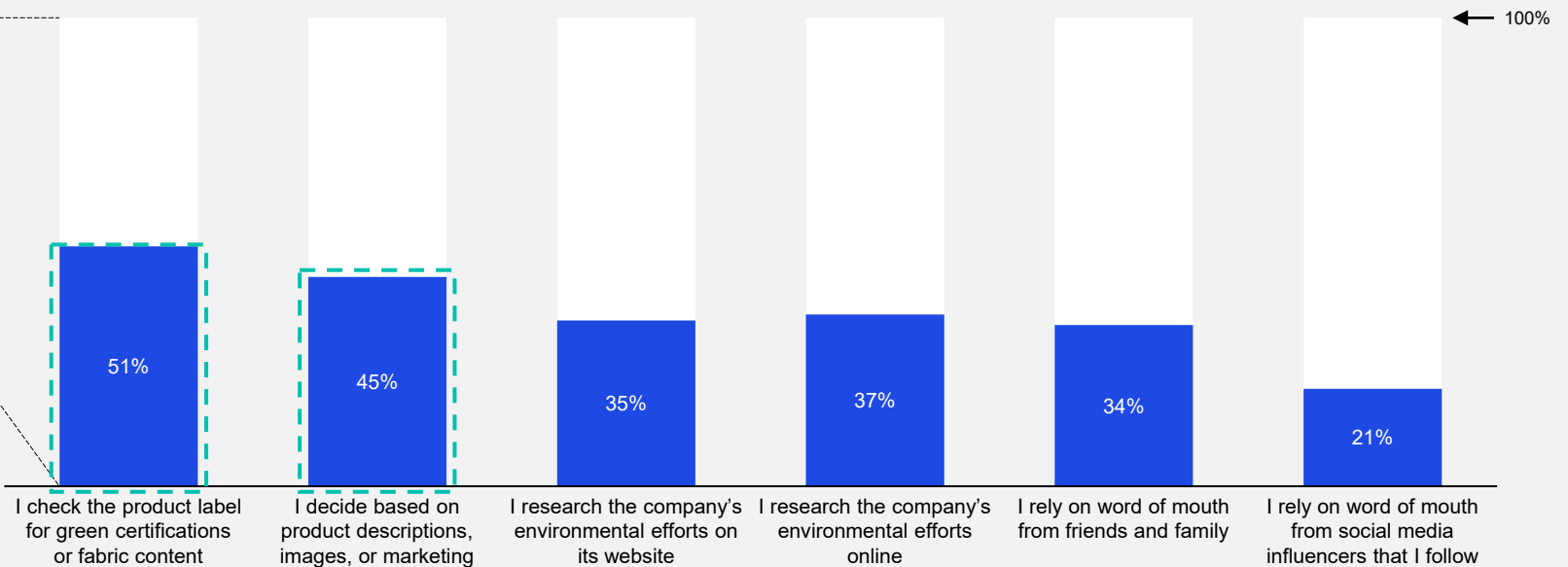
Approximately 50 percent of consumers who say environmental sustainability is important to their purchase decisions determine a product’s environmental sustainability based on product labels, descriptions, images, or marketing.

Environmentally conscious consumers’ key indicators regarding product environmental sustainability

Environmental sustainability importance rating



Consumer indicators regarding product environmental sustainability
(Respondents may select multiple responses)



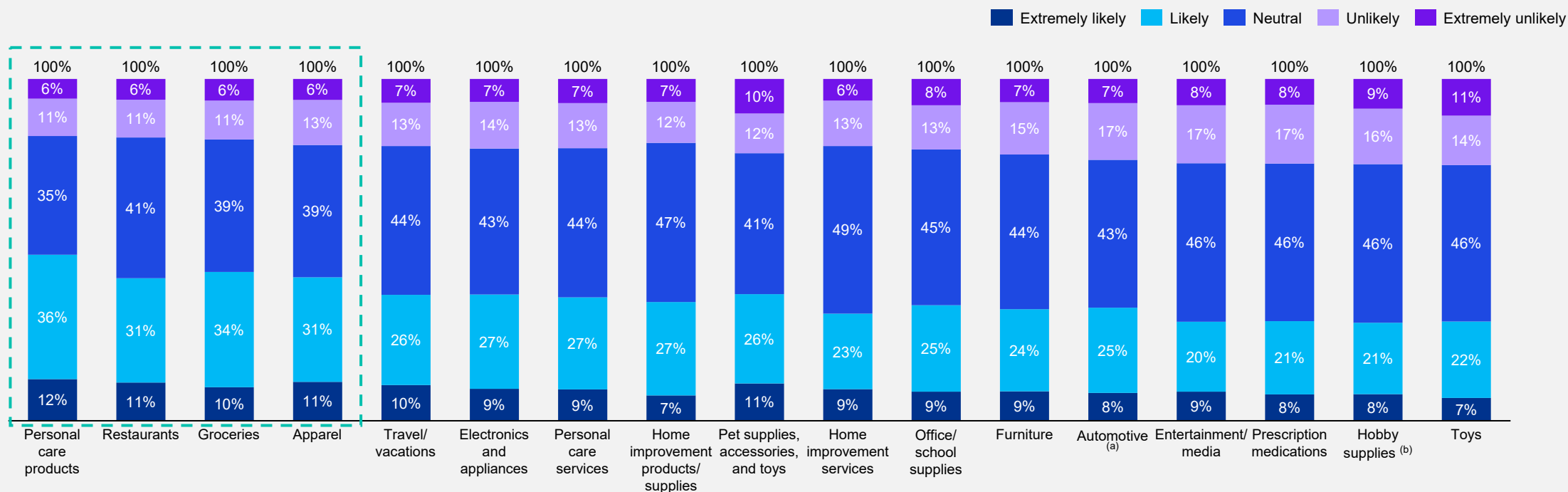
Note(s): KPMG conducted surveys of a representative sample of 1,091 consumers across the United States and, in all instances, asked, “How important is environmental sustainability to you when making a purchase decision between similar products? Please indicate the importance on a scale of 1 to 7, 1 being not important and 7 being extremely important.” and, where applicable “How do you determine whether a brand is environmentally sustainable? Select all that apply.”

Source(s): KPMG Consumer Pulse Survey, fielded January 31, 2023–February 10, 2023

Consumers are most likely to choose a product/service based on environmental sustainability features in the personal care products (48 percent), groceries (44 percent), restaurants (42 percent), and apparel (42 percent) categories.

Impact of environmental sustainability on purchase decisions by category

n = 1,091 qualified respondents

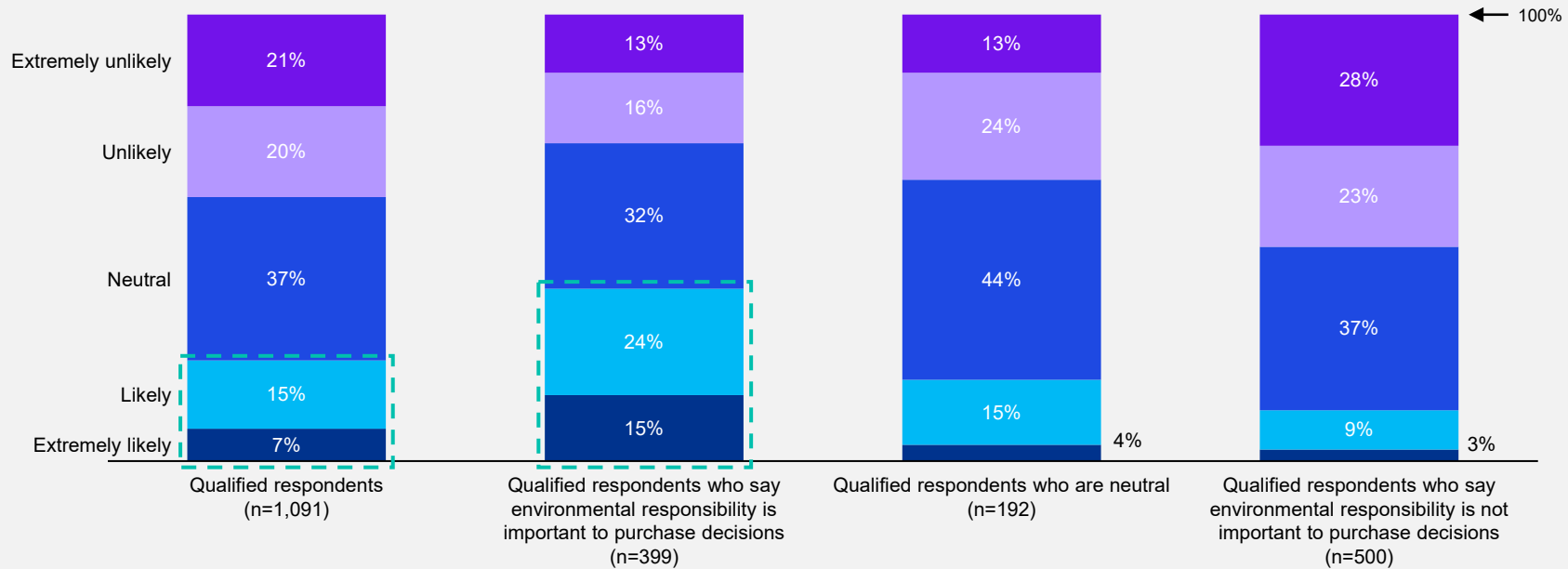


Note(s): KPMG conducted surveys of a representative sample of 1,091 consumers across the United States and, in all instances, asked, "For each of the following products or service categories, how likely are you to choose a particular brand or retailer because of its environmental sustainability features or commitments?"; (a) Automotive includes gas, tolls, auto insurance, and auto maintenance; (b) Hobby supplies includes sporting goods, musical instruments, books, and other hobby supplies.

Source(s): KPMG Consumer Pulse Survey, fielded January 31, 2023–February 10, 2023

Approximately 40 percent of consumers who say environmental sustainability is important to purchase decisions (and approximately 20 percent overall) claim that they would boycott a company for not being environmentally sustainable.

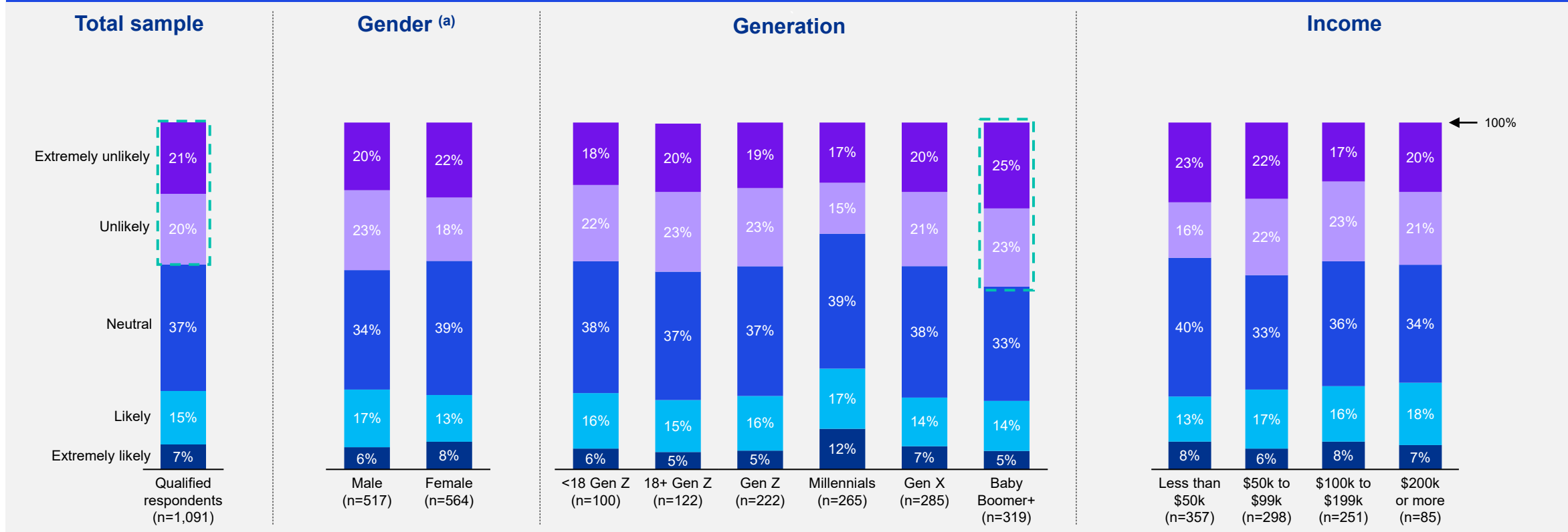
Consumer likelihood of boycotting a company they believe is not environmentally sustainable



Note(s): KPMG conducted surveys of a representative sample of 1,091 consumers across the United States and, in all instances, asked, "How important is environmental sustainability to you when making a purchase decision between similar products?"
 Source(s): KPMG Consumer Pulse Survey, fielded January 31, 2023–February 10, 2023

Approximately 40 percent of overall consumers are unlikely to boycott a brand they believe is not environmentally sustainable; Baby Boomers+ are least likely, with nearly 50 percent saying they are unlikely or extremely unlikely to boycott.

Consumer likelihood of boycotting a company they believe is not environmentally sustainable by demographic segment

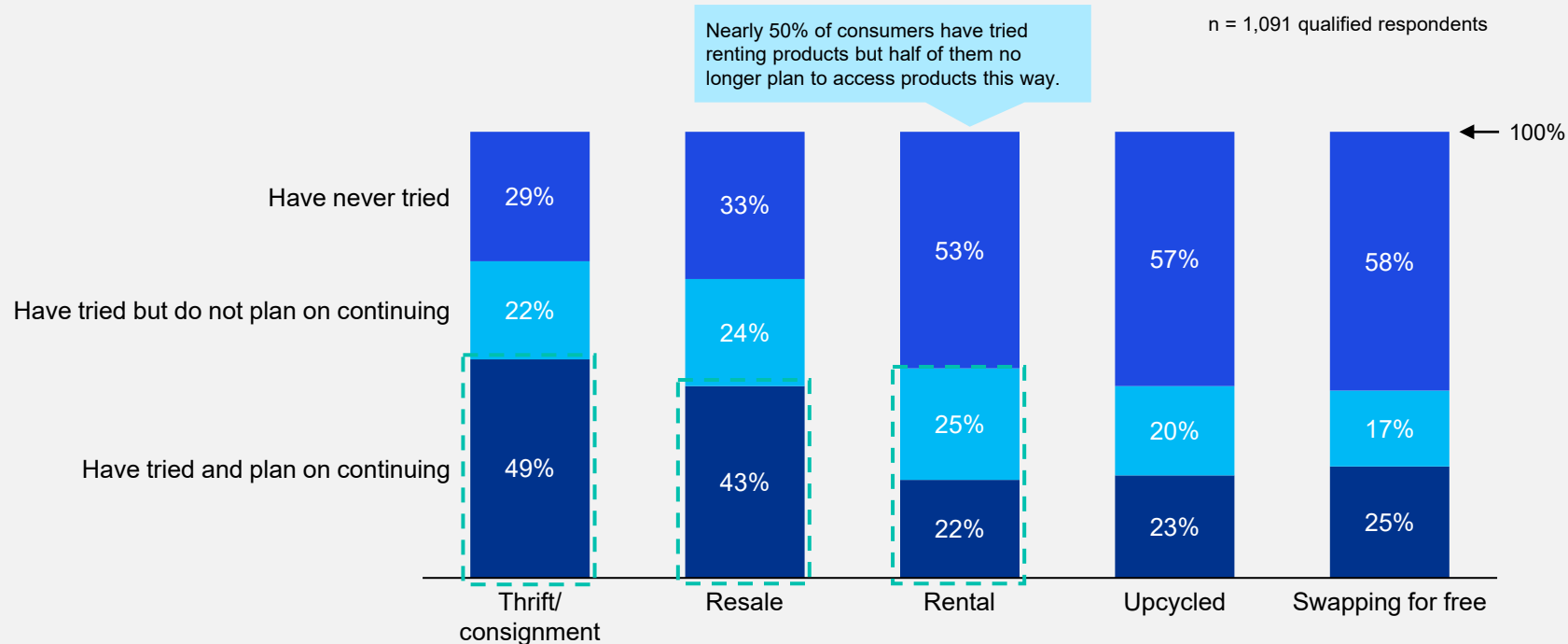


Note(s): KPMG conducted surveys of a representative sample of 1,091 consumers across the United States and, in all instances, asked, "How likely are you to boycott a company for not being environmentally sustainable?"; (a) Respondents who selected "Prefer to self describe" have been excluded due to low sample size.

Source(s): KPMG Consumer Pulse Survey, fielded January 31, 2023–February 10, 2023

Over 40 percent of consumers have tried and plan to continue purchasing products through thrift/consignment (49 percent) or resale (43 percent).

Environmentally sustainable product channels



Note(s): KPMG conducted surveys of a representative sample of 1,091 consumers across the United States and, in all instances, asked, "How much experience do you have with each of the following non-traditional product purchasing alternatives?"
 Source(s): KPMG Consumer Pulse Survey, fielded January 31, 2023–February 10, 2023

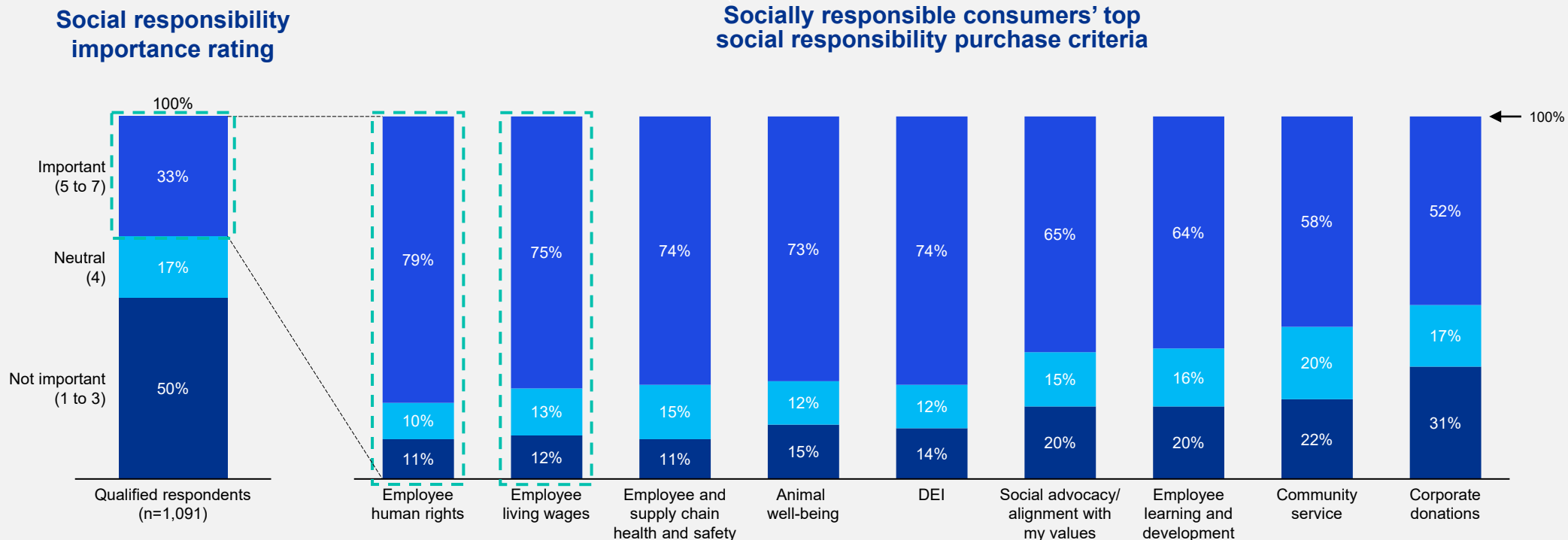
3



Social responsibility and consumer purchasing behaviors

One in three consumers say a company's social responsibility is important to their purchase decisions; 75 percent or more say that employee human rights and living wages are important to their purchase decisions.

Social responsibility purchase criteria importance

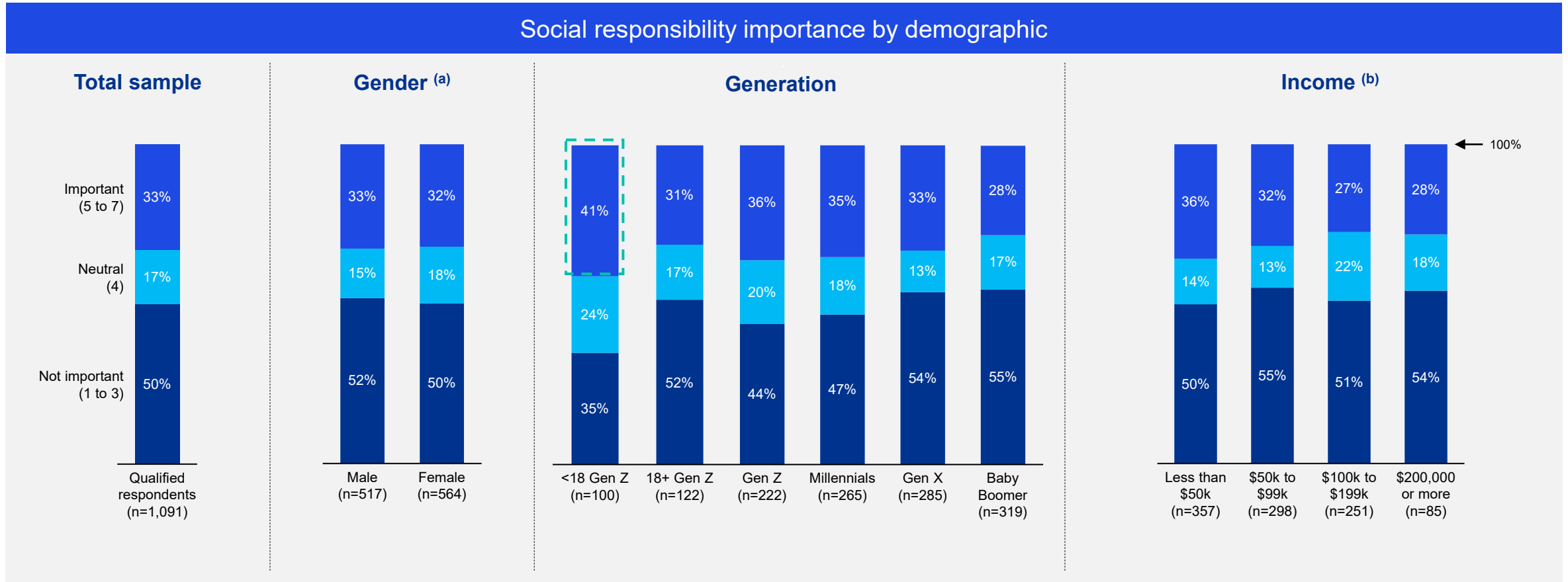


Note(s): KPMG conducted surveys of a representative sample of 1,091 consumers across the United States and, in all instances, asked, "How important is social responsibility to you when making a purchase decision between similar products? Please indicate the importance on a scale of 1 to 7, 1 being not important and 7 being extremely important." and "How important are the following social responsibility topics to you when making purchase decisions? Please indicate the importance of each criteria on a scale of 1 to 7, 1 being and 7 being extremely important."

Source(s): KPMG Consumer Pulse Survey, fielded January 31, 2023–February 10, 2023

Underage Gen Z consumers are more likely to say that social responsibility is important to their purchase decisions (41 percent versus 33 percent for overall consumers).

Social responsibility importance by demographic



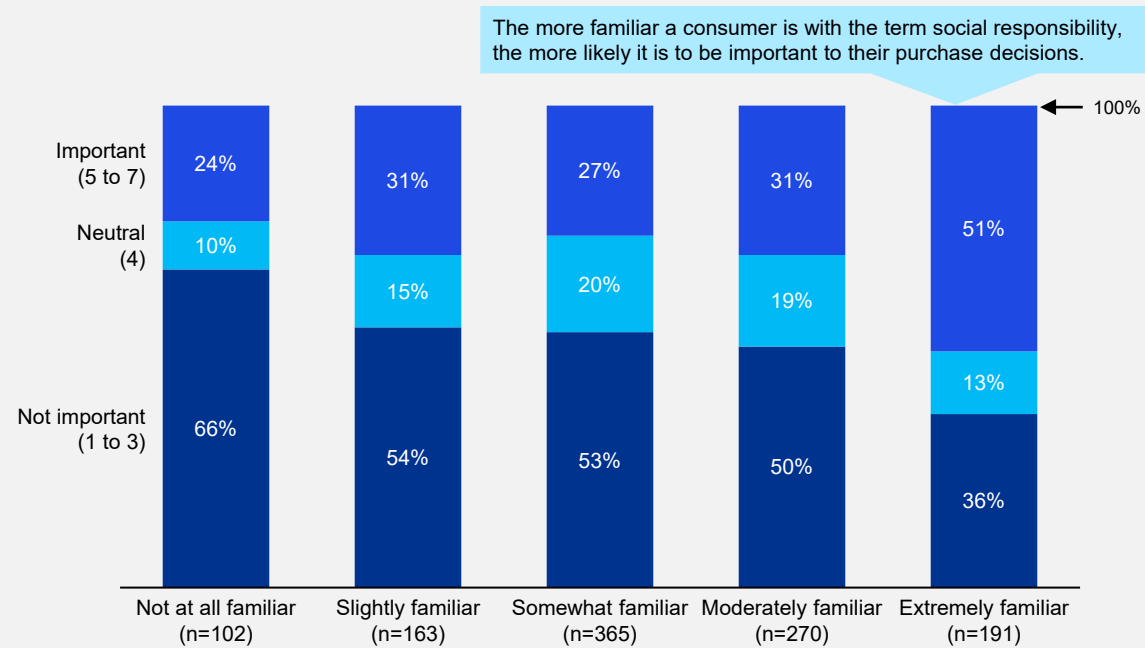
Note(s): KPMG conducted surveys of a representative sample of 1,091 consumers across the United States and, in all instances, asked, "How important is social responsibility to you when making a purchase decision between similar products? Please indicate the importance on a scale of 1 to 7, 1 being not important and 7 being extremely important."; (a) Respondents who selected "Prefer to self describe" have been excluded due to low sample size; (b) Underage respondents were excluded from questions pertaining to household income.

Source(s): KPMG Consumer Pulse Survey, fielded January 31, 2023–February 10, 2023

51 percent of consumers that are extremely familiar with social responsibility say it is important to their buying decision.

Importance of social responsibility to consumers based on level of familiarity

Importance of social responsibility to consumer purchase decisions by level of familiarity with the term social responsibility



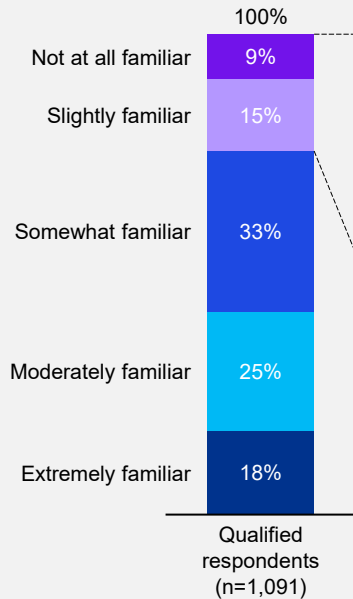
Note(s): KPMG conducted surveys of a representative sample of 1,091 consumers across the United States and, in all instances, asked, "How important is social responsibility to you when making a purchase decision between similar products? Please indicate the importance on a scale of 1 to 7, 1 being not important and 7 being extremely important." and "How familiar are you with the term social responsibility?"

Source(s): KPMG Consumer Pulse Survey, fielded January 31, 2023–February 10, 2023

Of those consumers unfamiliar or slightly unfamiliar with the term social responsibility, nearly 50 percent claim that their purchase decisions have at some point been influenced by at least one social responsibility related topic.

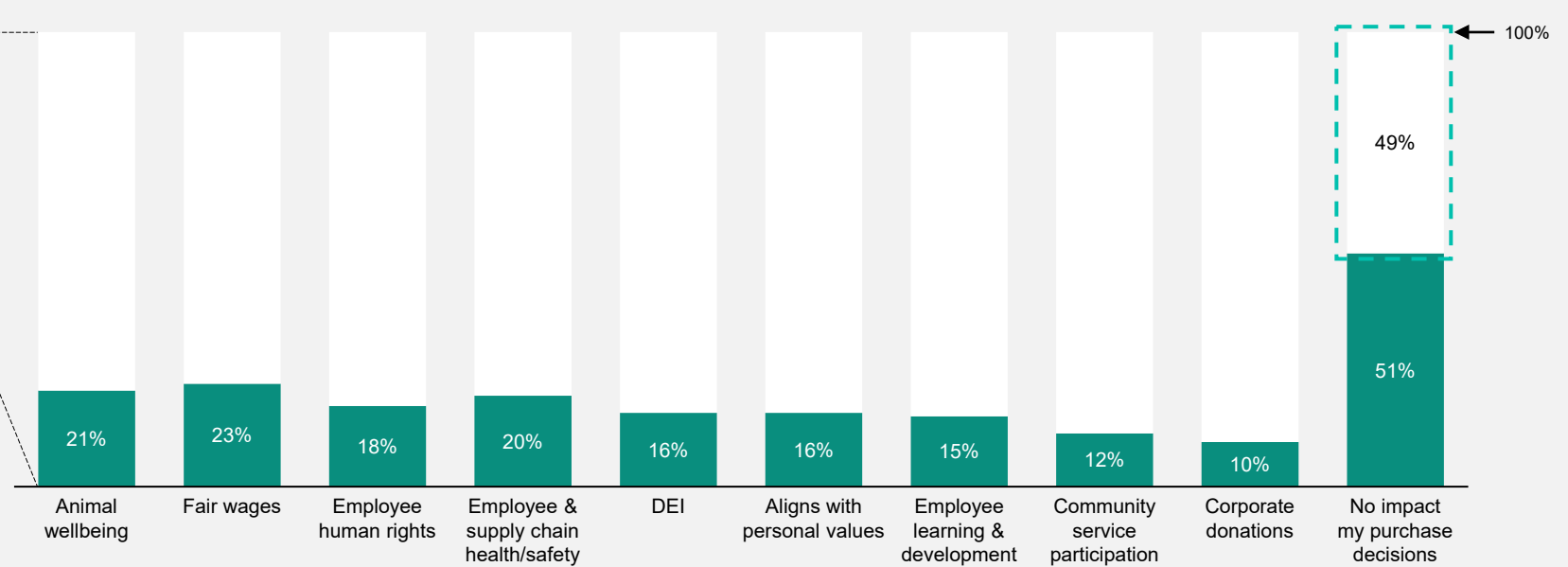
Social responsibility and consumer behaviors

Familiarity with social responsibility



Impact of social responsibility on purchase decisions

(Respondents may select multiple responses)



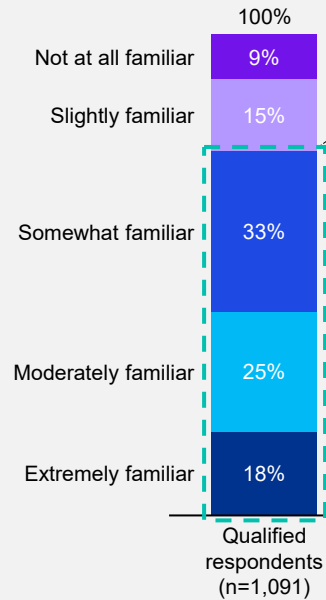
Note(s): KPMG conducted surveys of a representative sample of 1,091 consumers across the United States and, in all instances, asked, “How familiar are you with the term “social responsibility?” and “Have you ever made purchasing decisions based on whether a brand or retailer does or doesn’t demonstrate any of the following socially responsible characteristics?”

Source(s): KPMG Consumer Pulse Survey, fielded January 31, 2023–February 10, 2023

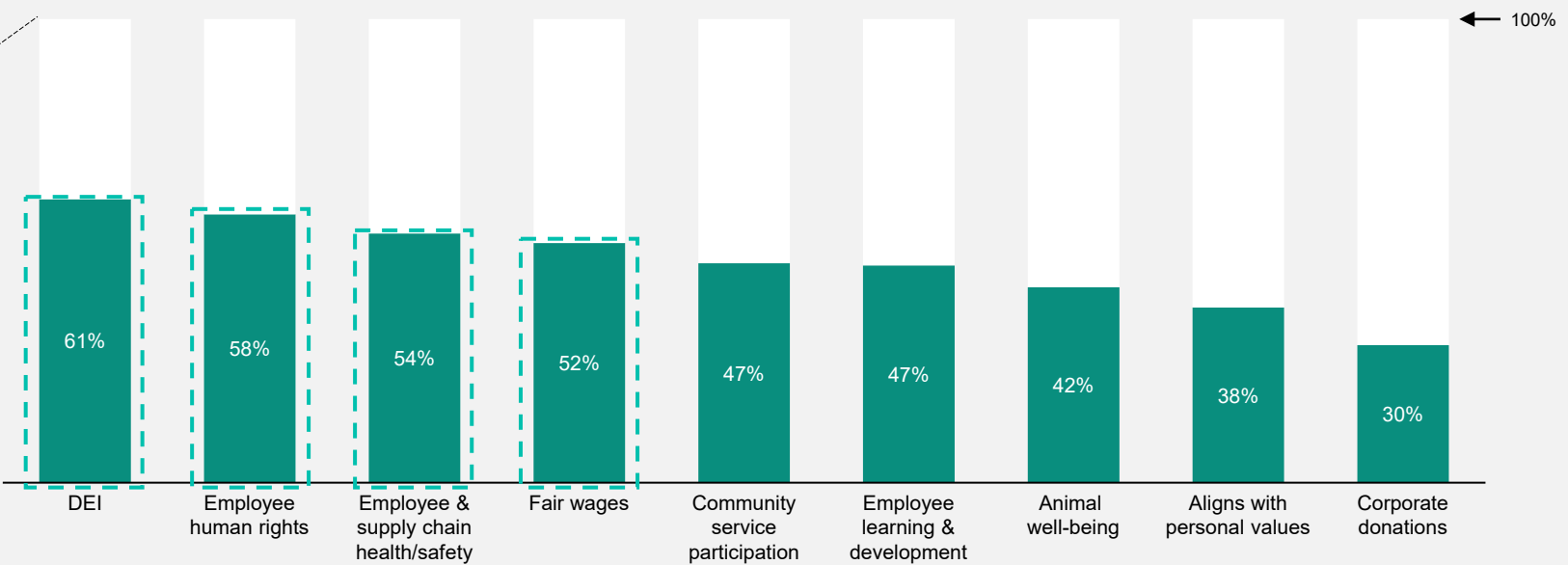
Over 75 percent of consumers are at least somewhat familiar with social responsibility; over 50 percent of them associate social responsibility with DEI, employee human rights, health and safety, and fair wages.

Social responsibility and consumer behaviors

Familiarity with social responsibility



Understanding of social responsibility (Respondents may select multiple responses)

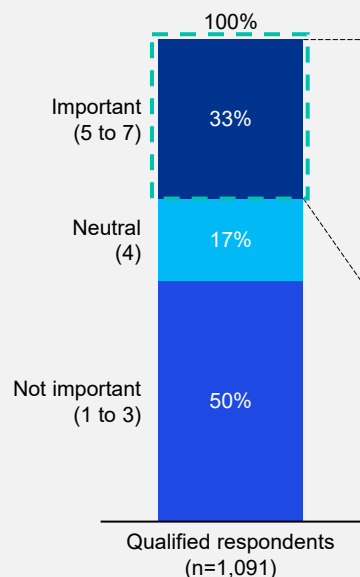


Note(s): KPMG conducted surveys of a representative sample of 1,091 consumers across the United States and, in all instances, asked, "How familiar are you with the term "social responsibility"?" and "What do you think it means for a company to be "socially responsible"?"
 Source(s): KPMG Consumer Pulse Survey, fielded January 31, 2023–February 10, 2023

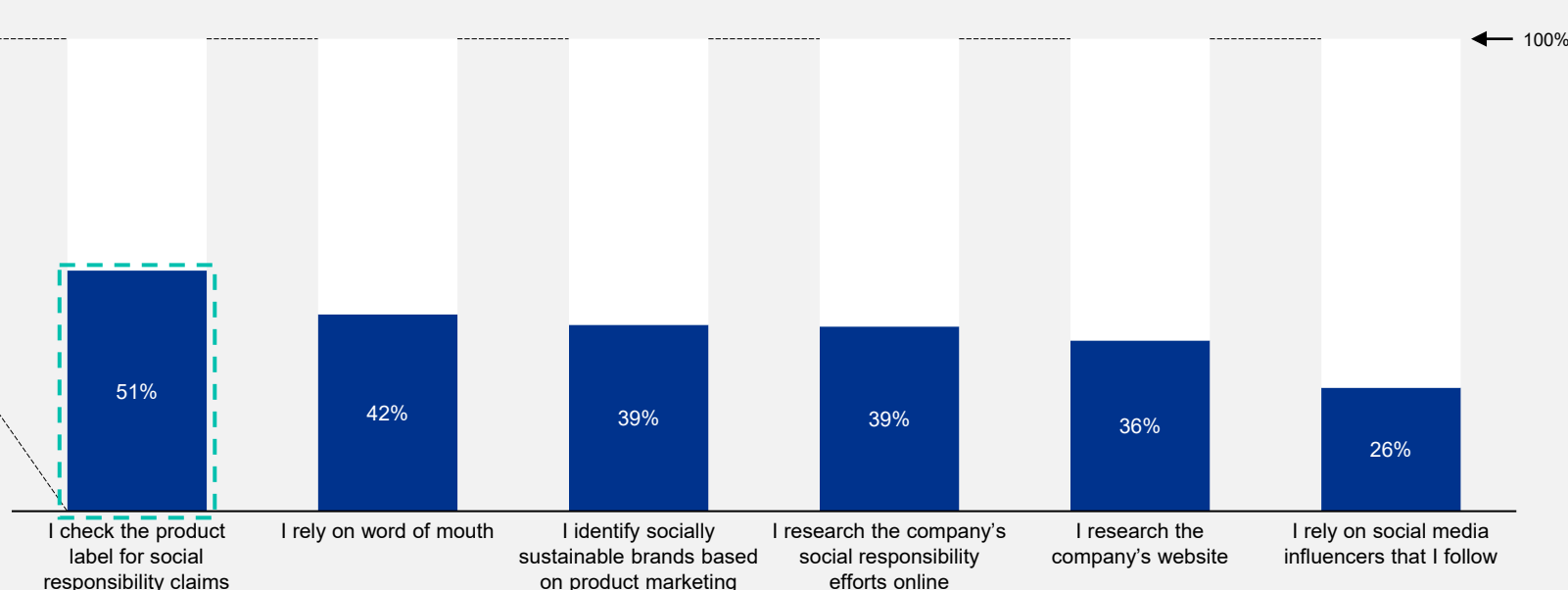
Of consumers who say a company's social responsibility is important to their purchase decisions, over half (51 percent) determine a product's social responsibility based on product labels.

Social responsible consumers' key indicators regarding social responsibility

Social responsibility importance rating



Consumer indicators regarding product social responsibility (Respondents may select multiple responses)

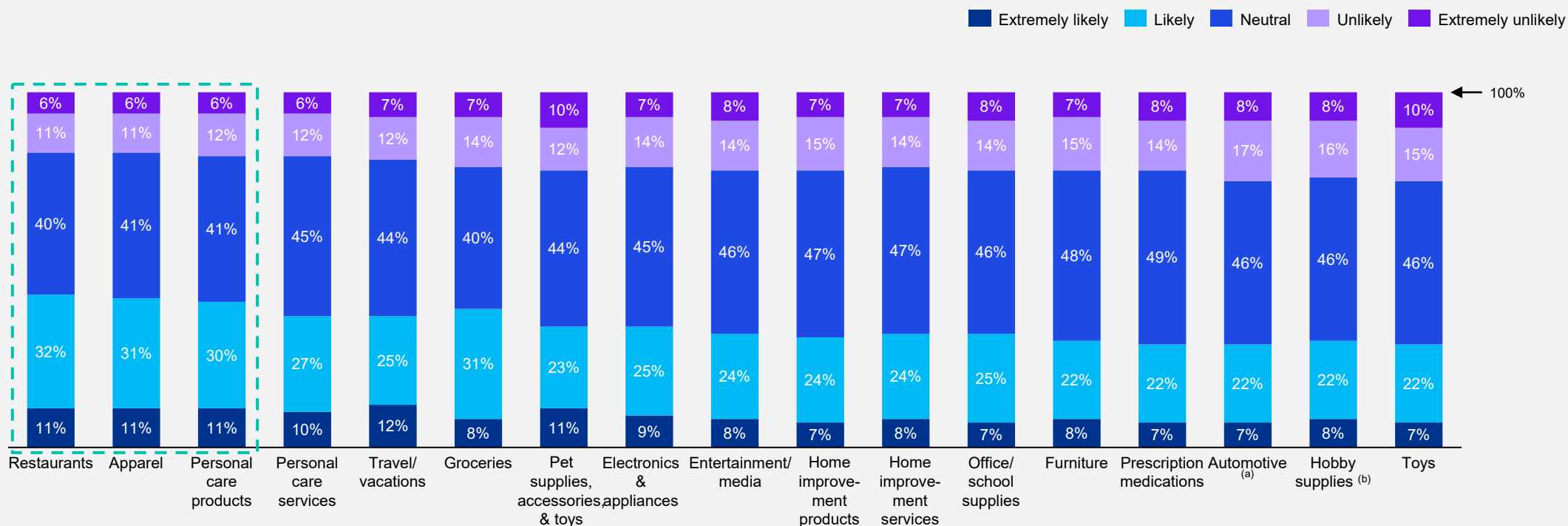


Note(s): KPMG conducted surveys of a representative sample of 1,091 consumers across the United States and, in all instances, asked, "How do you determine whether a brand or retailer is socially responsible?" Please indicate the importance on a scale of 1 to 7, 1 being not important and 7 being extremely important." and "How important are the following social responsibility topics to you when making purchase decisions?"

Source(s): KPMG Consumer Pulse Survey, fielded January 31, 2023–February 10, 2023

The categories for which consumers are most likely to choose a product or service based on social responsibility features are restaurants, apparel, and personal care products.

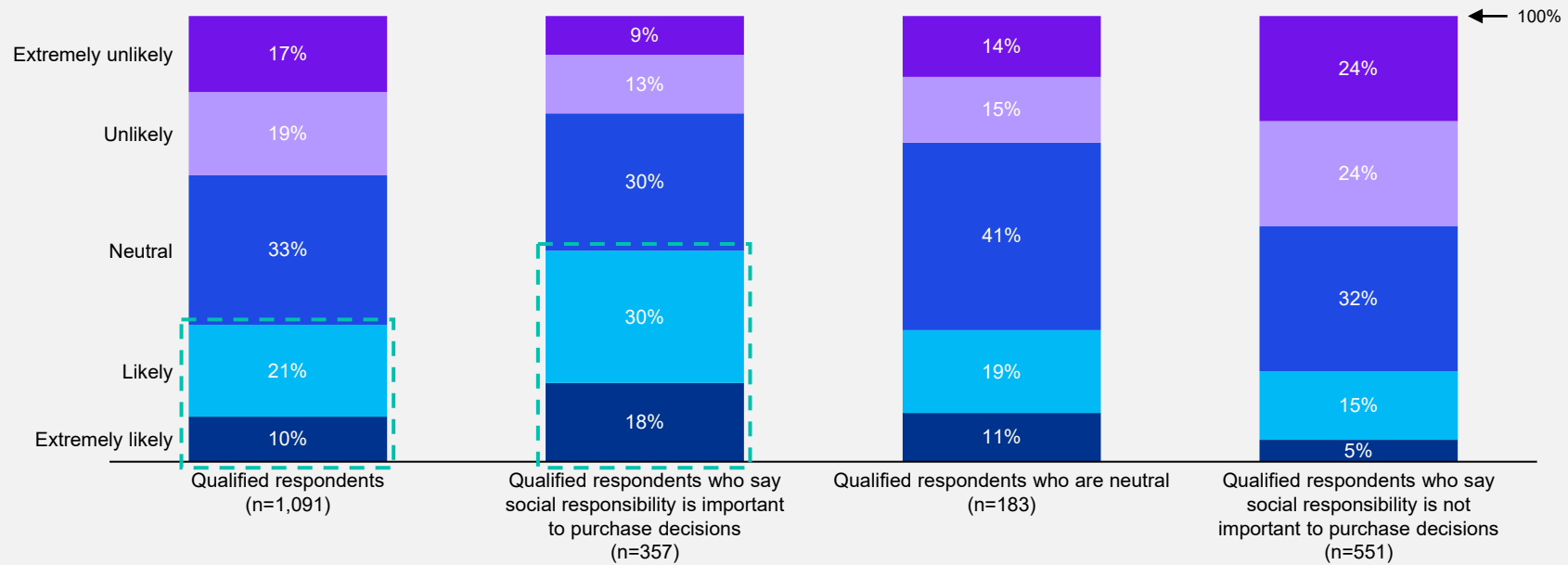
Impact of social responsibility on purchase decisions by category



Note(s): KPMG conducted surveys of a representative sample of 1,091 consumers across the United States and, in all instances, asked, "For each of the following products or service categories, how likely are you to choose a particular brand or retailer because of its social responsibility values or commitments?" (a) Automotive includes gas, tolls, auto insurance, and auto maintenance; (b) Hobby supplies includes sporting goods, musical instruments, books, and other hobby supplies.
 Source(s): KPMG Consumer Pulse Survey, fielded January 31, 2023–February 10, 2023

Nearly 50 percent of consumers who say social sustainability is important to purchase decisions (and 31 percent overall) claim that they would be likely to boycott a company for not being socially responsible.

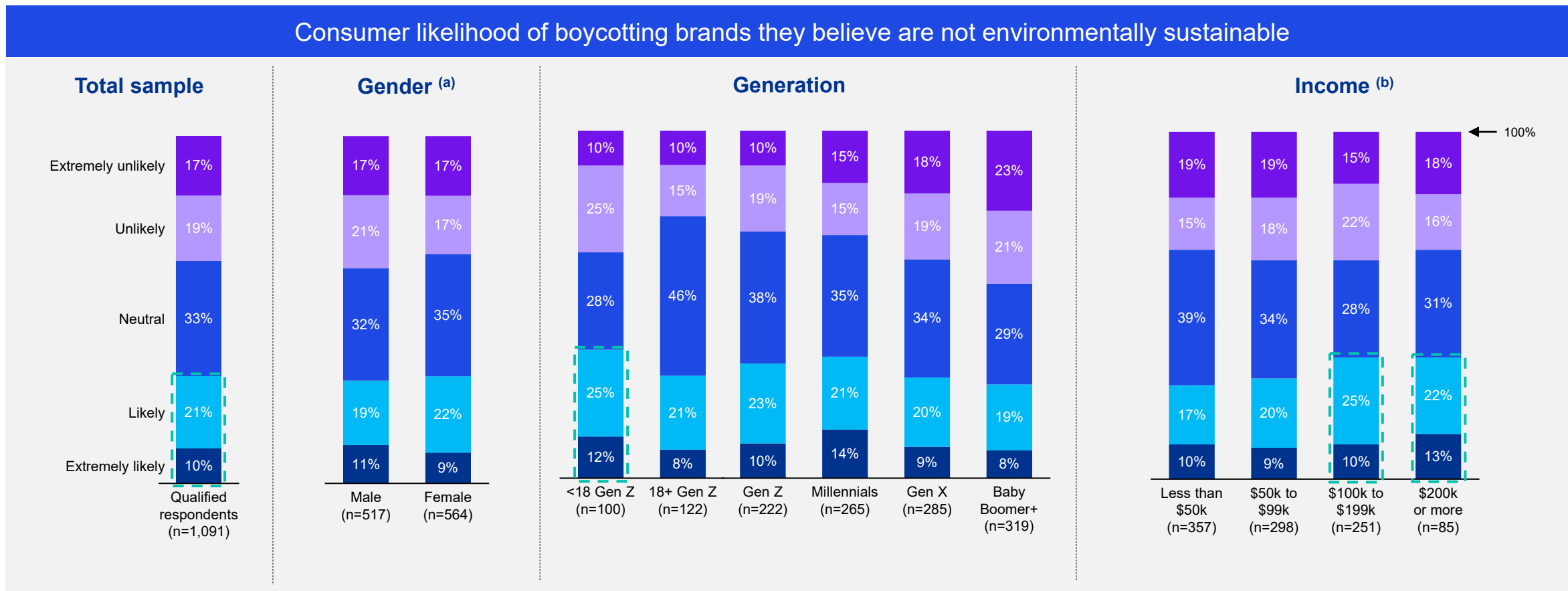
Consumer likelihood of boycotting brands they believe are not environmentally sustainable



Note(s): KPMG conducted surveys of a representative sample of 1,091 consumers across the United States and, in all instances, asked, "How likely are you to boycott a company for not being socially responsible?", "How important are the following criteria to you when making a purchase decision between similar products?"

Source(s): KPMG Consumer Pulse Survey, fielded January 31, 2023–February 10, 2023

Higher income households and underage Gen Z consumers are more likely to boycott a company that they believe is not socially responsible.



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 Source(s): KPMG Consumer Pulse Survey, fielded January 31, 2023–February 10, 2023

U.S. KPMG Consumer & Retail leadership team



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National Sector Leader,
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Consumer & Retail



Sam Ganga
Consulting Industry Leader
Consumer & Retail



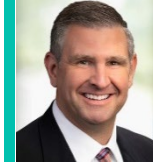
Kevin Martin
Deal Advisory Leader
Consumer & Retail



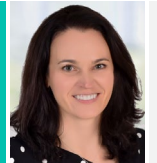
Elizabeth Miller
Retail Audit Leader



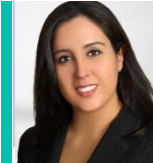
Asad Chaudry
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Brian Campbell
Tax Industry Leader
Consumer & Retail



Julia Wilson
Partner, Strategy
Research Lead



Monica Rodriguez
Director
Research Lead

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- 550 U.S. partners and performance improvement professionals
- 3,500 global network of Performance Improvement practitioners
- 24,000 team members globally
- Provide professional services to 78 percent of top 100 consumer and retail companies on the Fortune 1000



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