

SHOPTIVISM

Why Consumers (& Job Seekers)
Opt In & Out of Today's Brands

October 2021

About Shelton Group

Shelton Group is the nation's leading marketing communications agency focused in sustainability and corporate social responsibility. We deliver thought-leading research, results-oriented marketing campaigns, emotionally compelling stories and user-friendly designs – all intended to help companies gain a market advantage as they work to create a more sustainable future.

Learn more at sheltongrp.com.

Introduction and Methodology

This report comes from our Good Company survey data, which was fielded from **December 2020 to January 2021**, and included a total of 2,000 U.S. respondents.

The survey sample was stratified to mirror the U.S. population, using quotas for geography, age, gender, education and race; data were weighted slightly to match U.S. population distributions. Margin of error is +/- 3.1%.

That survey explores how Americans view companies, including:

- What they expect a “good” company to do
- Why they view companies as good or bad
- How much they trust the companies they buy from
- How favorably they view real-world companies and the social or environmental stand they’re taking

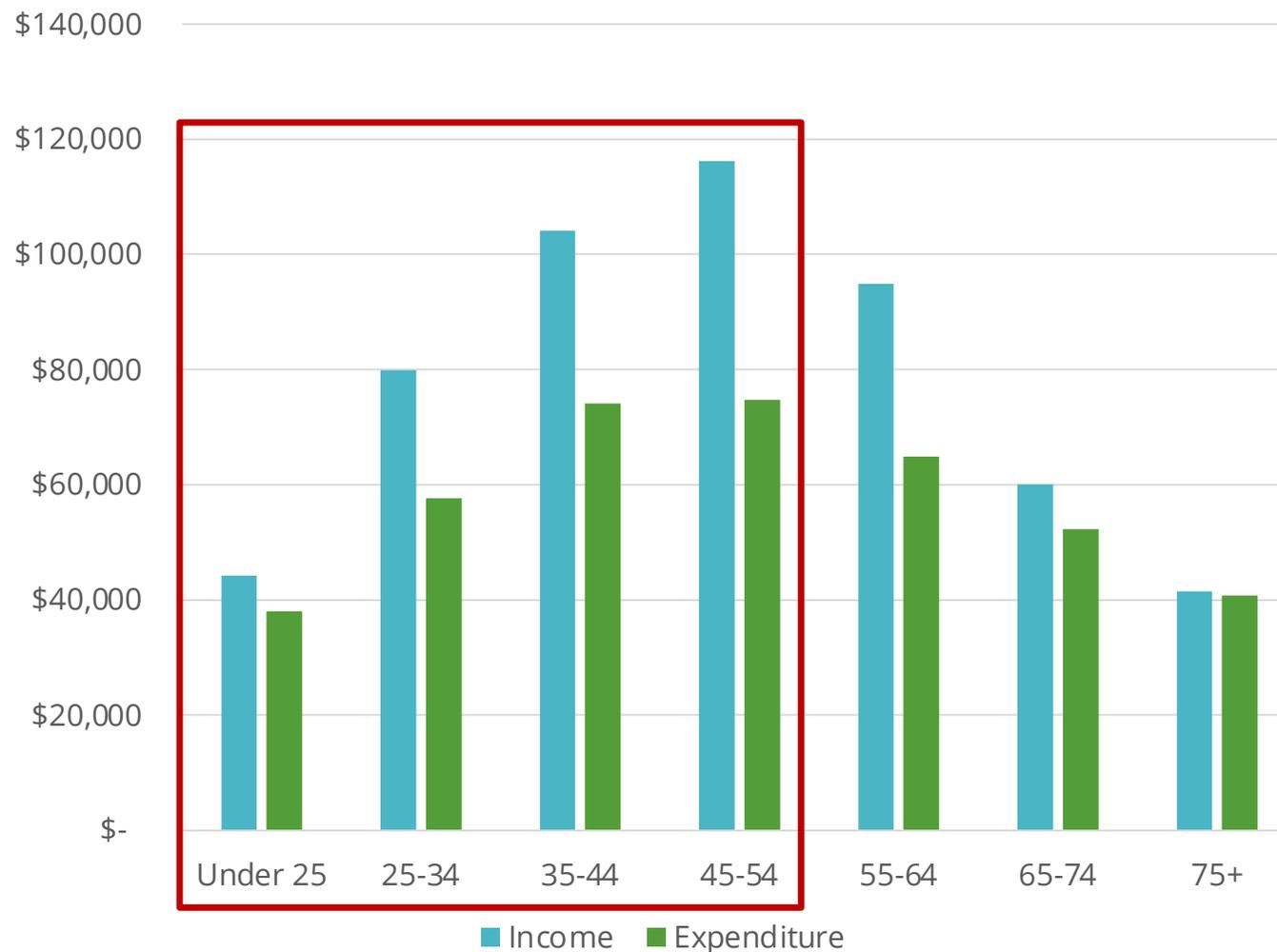
To develop the profiles you’ll see in this report, **we studied consumer attitudes, behaviors, and beliefs based on their current brand selection (or deselection) behavior due to companies’ social or environmental record.**



LIFE STAGE HAS A
BIG IMPACT ON
BUYING BEHAVIOR

For the first part of adulthood, age, income and spending increase together – and the majority of Millennials are living this right now

Income and expenditures by age



Source: US Bureau of Labor Statistics, Consumer Expenditure Surveys 2020

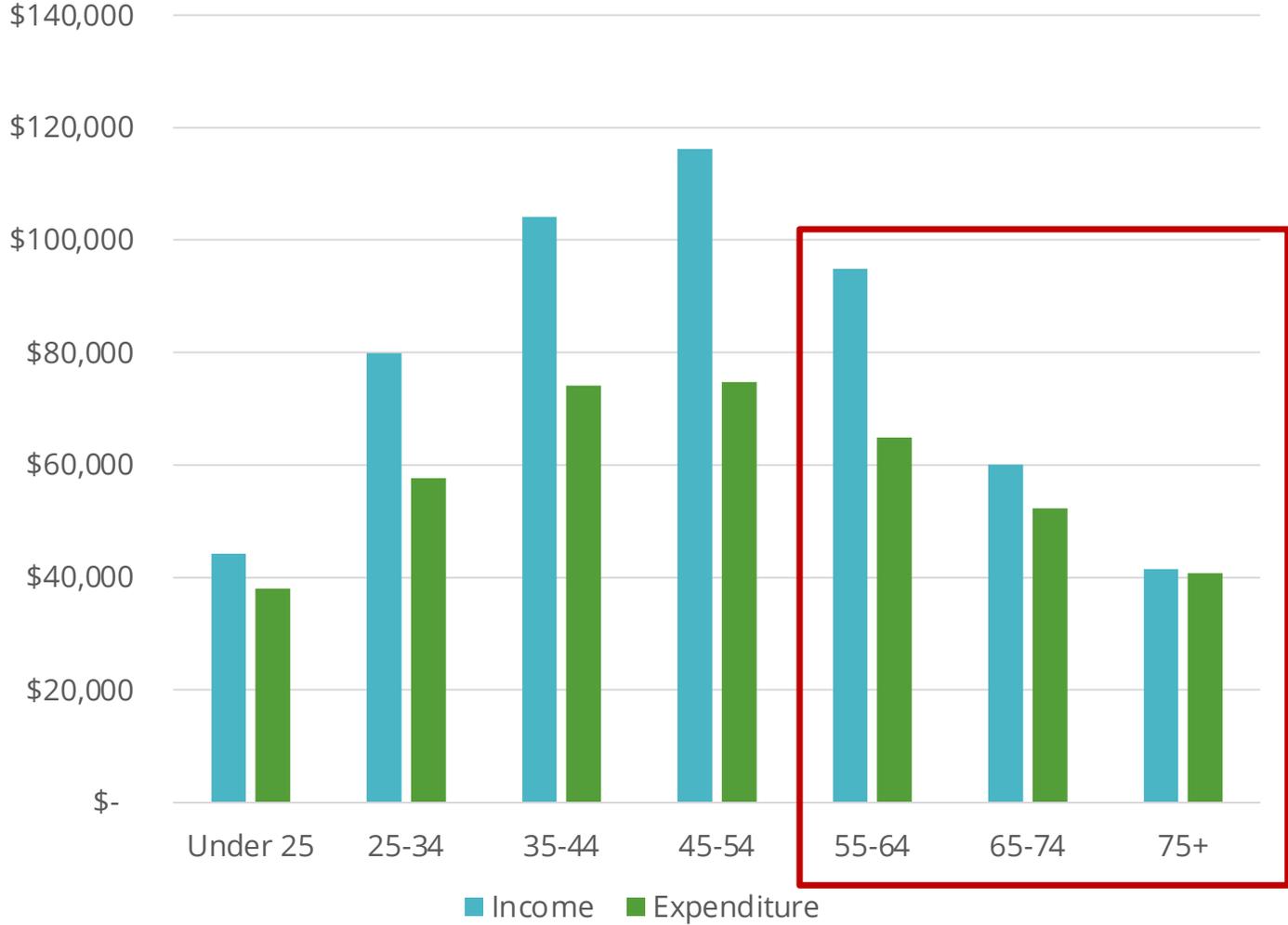
The biggest driver of spending for the current cohort of 25-44 years old is parenthood.

The average American spends \$233,610 to raise one child.



For the second half of adulthood, age, income, and spending decrease together; these are predominantly Boomers and older Gen Xers

Income and expenditures by age



Source: US Bureau of Labor Statistics, Consumer Expenditure Surveys 2020
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Boomers are retiring differently. They are living longer and have the freedom from careers and kids to pursue what they want while leaving behind what they don't.

Today's average life expectancy is 79 years, a 16-year increase from when Boomers were first born in the late 1940's.

Source: Signature MD

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Sustainability is becoming a key decision factor for selection and de-selection.



Concern about the environment – and belief that it is caused by human activity – is a mainstream belief



57%

of Americans believe that climate change is occurring and caused by human activity

Source: Eco Pulse® Wave 13 2020

How much do you agree or disagree with the following statement: Global warming, or climate change, is occurring, and it is primarily caused by human activity. n=2,006

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42%

say buying green products is tied
to their identity

(up from 34% in May 2020)

Source: Eco Pulse® Wave 13 2020

How much do you agree or disagree with: Buying/using eco-friendly products is an important part of my personal image.
n=2,006

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CHOOSERS, STOPPERS AND CHANGELINGS: Patterns of Shoptivism

Every year we ask Americans:

“Have you ever chosen a product or service over another or stopped purchasing a product or service based on the social or environmental record of the brand?”

33% answered “yes,” but...
can they follow that up by naming
the brand?

This year,

26%

of Americans can.

And out of that **26%**, we have Three Groups of People



Choosers

have chosen a product or service because of the social or environmental record of the brand

n=248



Stoppers

have stopped purchasing a product or service because of the social or environmental record of the brand

n=214



Changelings

have done both

n=66

What holds these
groups together?

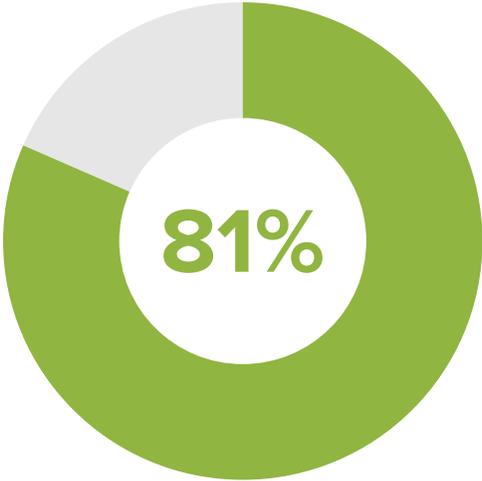
All three groups have
some demographic
similarities

*All three groups are equally
likely to be:*

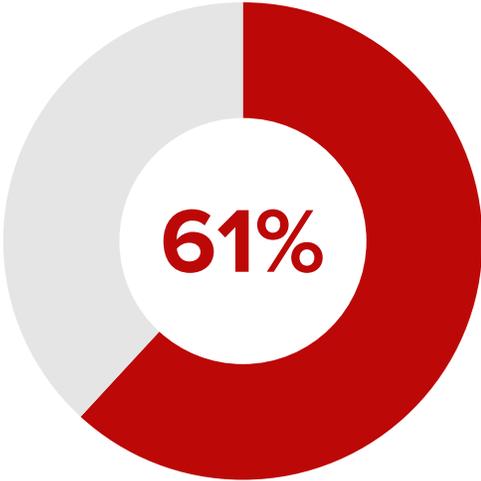
- Any gender
- Democrats
- From all income ranges
- Any marital status
- “Actives” rather than any other Shelton Segment



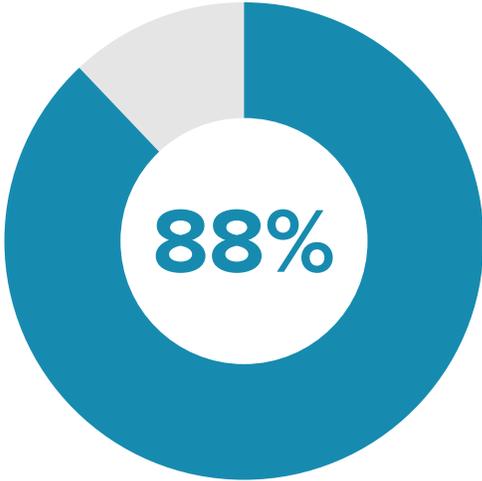
ALL the groups who have made changes to purchase decisions are **more likely to be searching for greener products these days** than those who haven't made changes to their purchasing



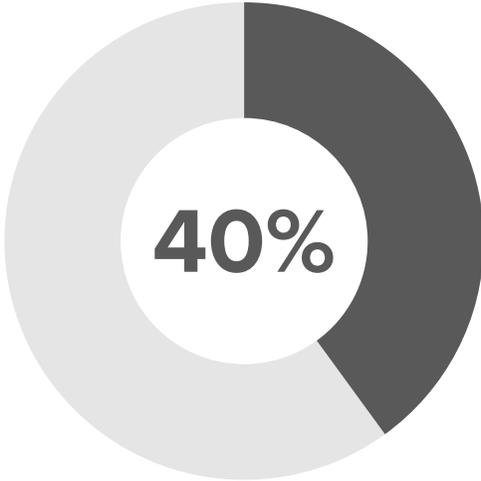
Choosers



Stoppers



Changelings



Others

Source: Good Company

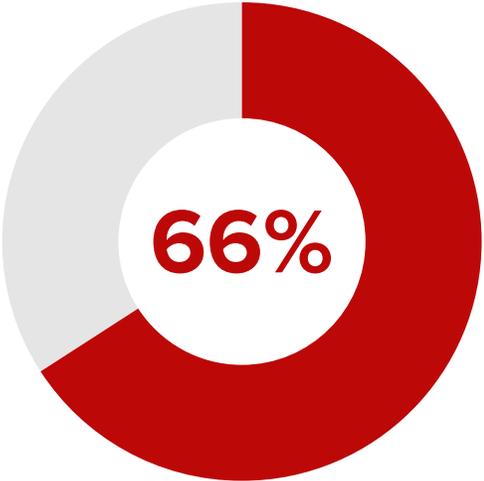
Seg1 - Are you searching for greener (more energy-efficient, natural, eco-friendly, etc.) products these days? n=2,000

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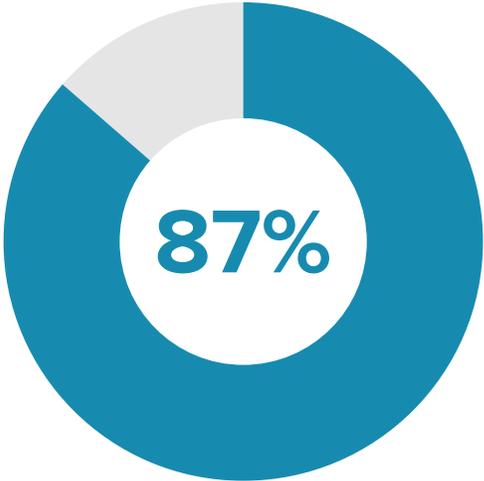
ALL the groups are *more likely to agree that global warming, or climate change, is occurring, and is primarily caused by human activity* than those who haven't made changes to their purchasing



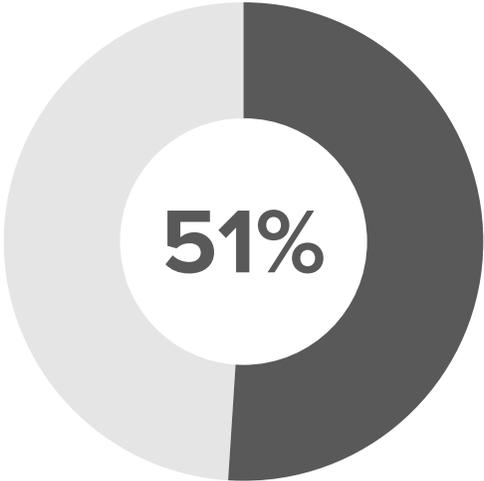
Choosers



Stoppers



Changelings



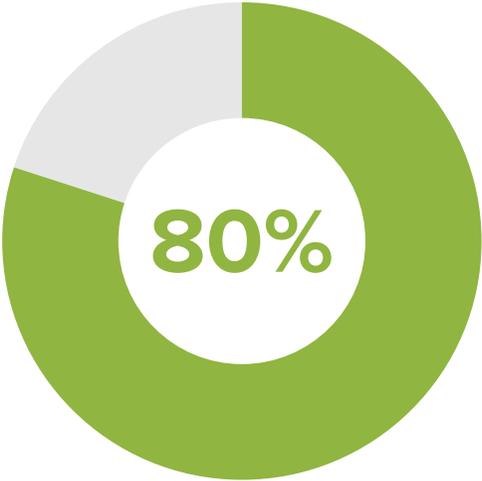
Others

Source: Good Company

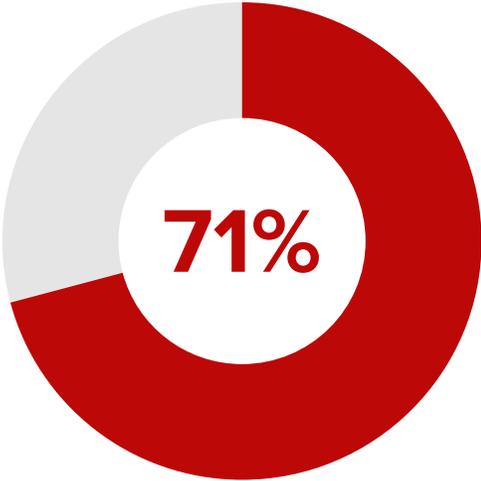
Seg5 - How much do you agree or disagree with the following statement: Global warming, or climate change, is occurring, and it is primarily caused by human activity n=2,000

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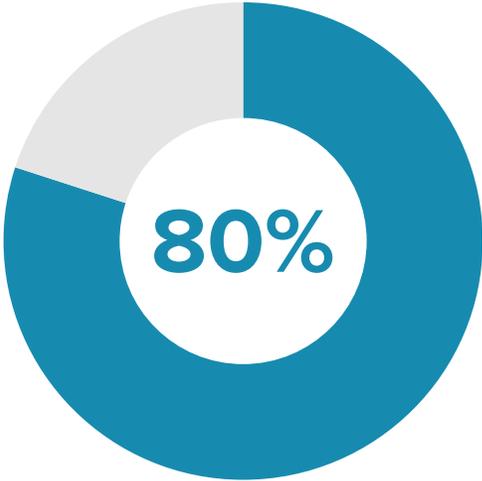
ALL the groups say *they feel personally responsible to change their daily habits and purchase practices to do something positive for the environment* more than those who haven't made changes to their purchasing



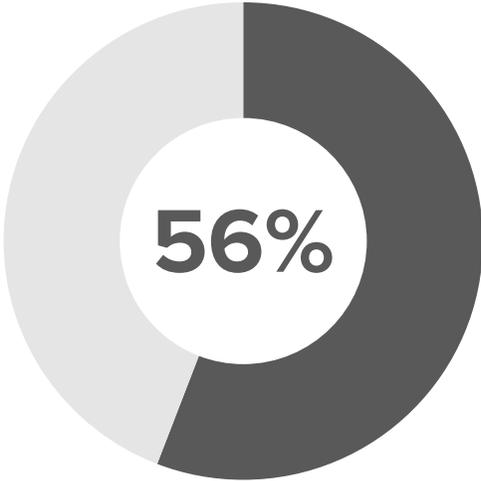
Choosers



Stoppers



Changelings



Others

Source: Good Company

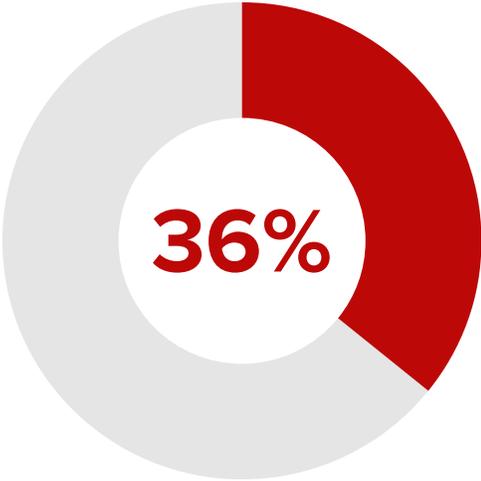
Q4 – Choose the statement below that best describes you: n=2,000

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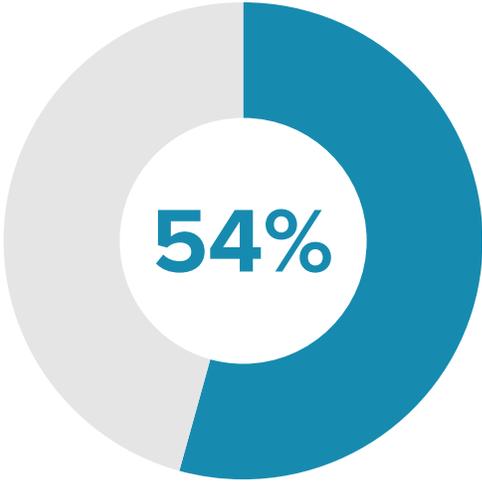
ALL the groups say *they would choose the environment over their own comfort or convenience* more than those who haven't made changes to their purchasing



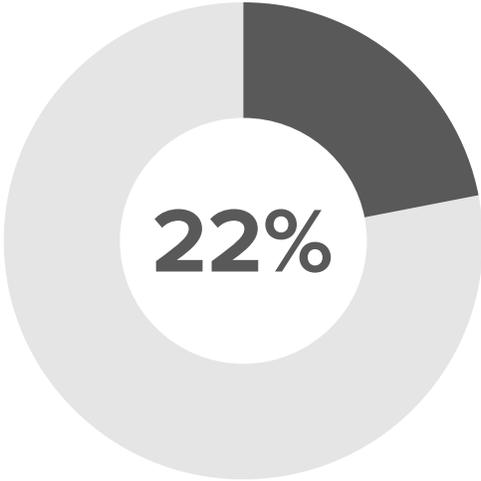
Choosers



Stoppers



Changelings



Others

Source: Good Company

Seg3 – Given a choice between your comfort, your convenience or the environment, which do you most often choose? n=2,000

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When choosing out of a list of things a “good” company has to do, all 3 groups have the same top 2 choices

1) Treat its employees well

(62% Choosers, 71% Stoppers, 86% Changelings)

1) Pay its employees a living wage

(53% Choosers, 73% Stoppers, 81% Changelings)

Source: Good Company

Q3 - In your opinion, what does a “good” company have to do (beyond take good care of customers and making a quality product/service at a fair price)? (Check all that apply.) n=2,000



What's different
among them?

Three Groups of People



Choosers

have chosen a product or service because of the social or environmental record of the brand



Stoppers

have stopped purchasing a product or service because of the social or environmental record of the brand



Changelings

have done both



CHOOSERS

Choosers

Have chosen a product or service because of the social or environmental record of the brand.

Millennials: More likely to be 25-44 years old

Social Media: Significantly more likely to spend 6+ hours on social media

Educated: Most likely to have a graduate or professional degree

Homeowners: More likely to be a homeowner

City-dwellers: More likely to be urban



As we've seen, when we're young – and buying more – we pick the brands that will become part of our lives



60%

of Choosers **trust the companies they buy from** to be environmentally and/or socially responsible
(as compared to 46% of Stoppers and 54% of Changelings)

Source: Good Company

Q22_4 - I trust the stores I buy from to be environmentally and/or socially responsible businesses. n=248

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For Choosers,
these brand choices
are influenced by
marketing and
messaging; they are
paying attention and
tend to trust what
companies say

45%

of Choosers **trust large companies**
more than small ones

(as compared to 15% of Stoppers
and 14% of Changelings)

Source: Good Company

Q22_1 - I place more trust in large companies than small companies. n=248

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And Choosers tend to be the most educated about sustainability-related issues



Source: Good Company

Q8Cmb - How familiar are you with the United Nations Sustainable Development Goals (UNSDGs)? n=248

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35%

of Choosers say they have read a
company's sustainability report

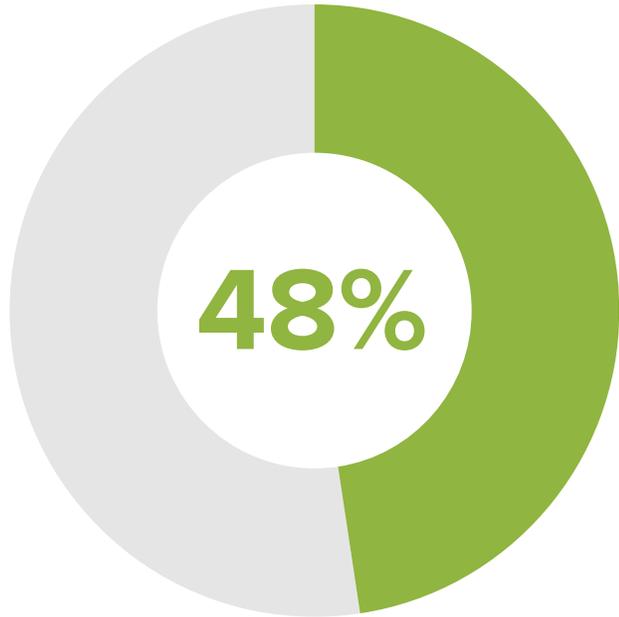
(as compared to 14% of Stoppers
and 27% of Changelings)

Source: Good Company

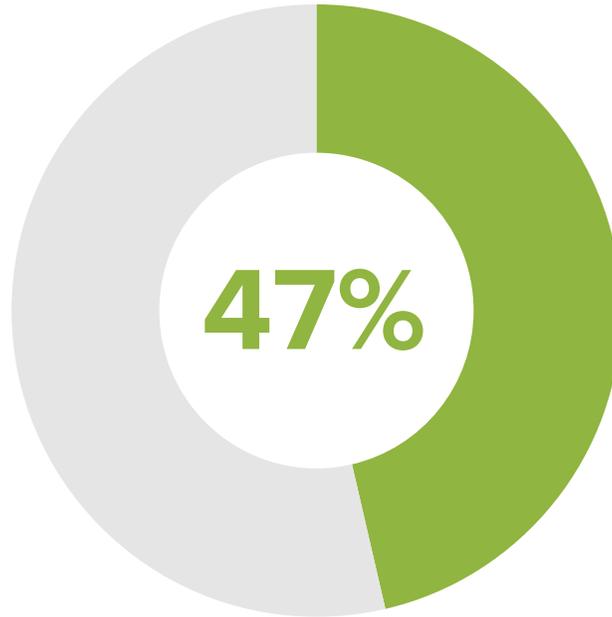
Q18 – Have you ever read a company's Sustainability report, Corporate Social Responsibility report, or ESG report? n=248

Choosers also care deeply about how businesses impact people & communities.

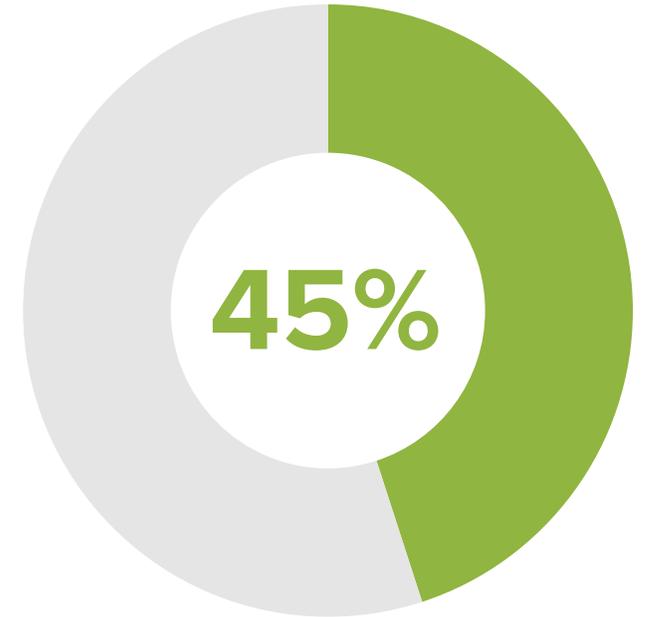
Choosers are very people-focused:



Donate money to charities, disaster relief, etc.



Make a concerted effort to eliminate its environmental impact



Make a significant impact for a community cause

Source: Good Company

Q3 - In your opinion, what does a “good” company have to do (beyond take good care of customers and making a quality product/service at a fair price)? (Check all that apply.) n=248

People + Environment are important to Choosers when picking a “good” company



Source: Good Company

Q3 - In your opinion, what does a “good” company have to do (beyond take good care of customers and making a quality product/service at a fair price)? (Check all that apply.) n=248

Let's look at how to message to this group, knowing they are very engaged in the sustainability stances of the companies from which they buy

WEIGH
YOUR
CONTAINERS
HERE

NUTS &
SEEDS

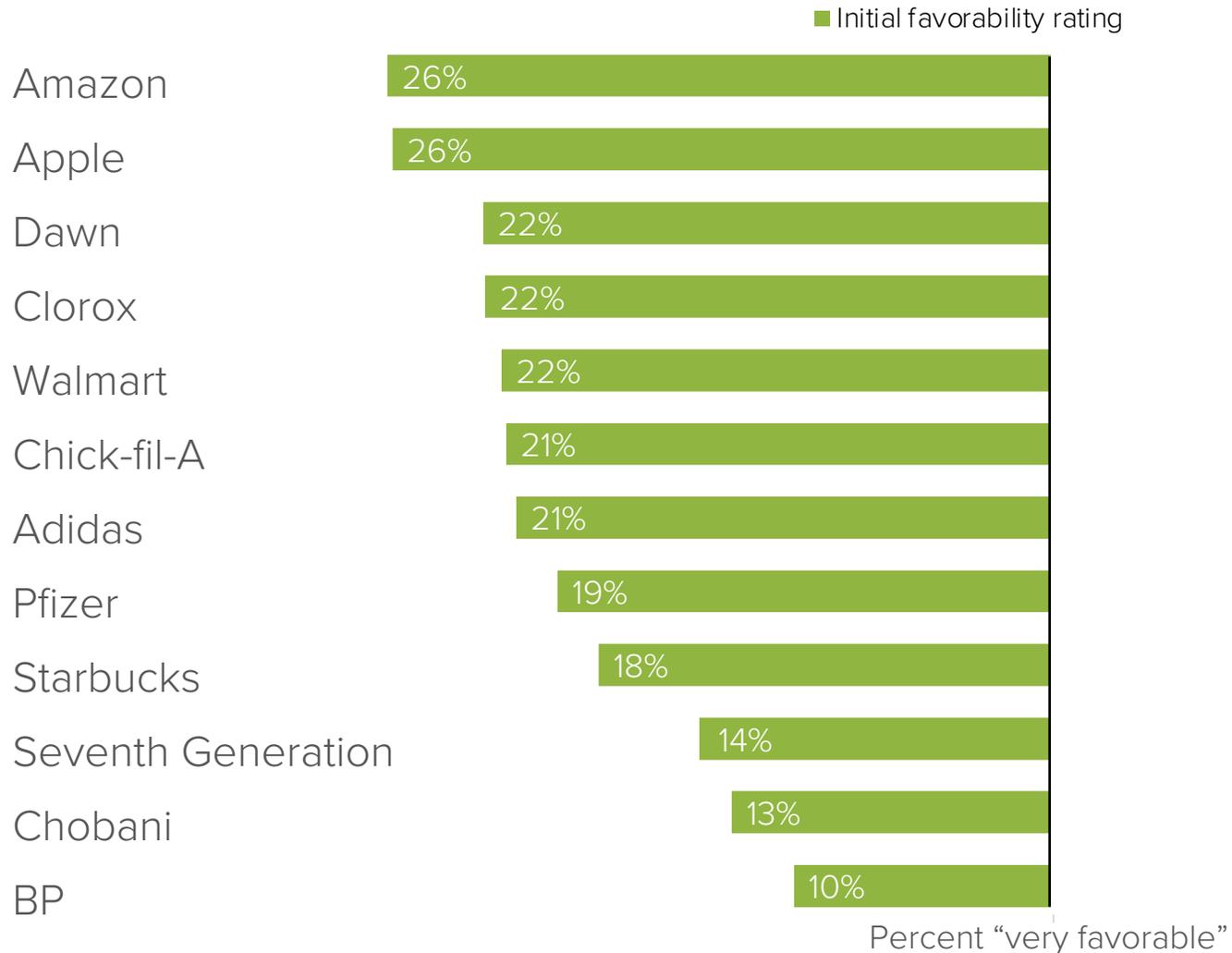
one of our containers
Shelton^{Grp}



Please drag the bar to indicate whether you have an overall unfavorable or favorable opinion of the following companies



Choosers preferred big, well-known brands when answering the favorability question unaided



Source: Good Company

Q23 - Please drag the bar to indicate whether you have an overall unfavorable or favorable opinion of the following companies. (0-10, Very unfavorable—Very favorable) n=248

Then we revealed each company's stand on a social or environmental issue

Charitable giving

 AmazonSmile donates 5% of the price of your eligible purchases to the charitable organization of your choice

 The Clorox® Brand donated \$1,000,000 to the ClearTheList Foundation to provide resources for teachers and students during an unprecedented back-to-school season

 The BP Foundation donated \$2 million to the World Health Organization's COVID-19 Solidarity Response Fund, which supports medical professionals and patients worldwide by providing critical aid and supplies

Humanitarian/people-oriented

 Starbucks committed to hire more than 10,000 refugees globally over five years

Chobani. Chobani has recently increased its starting hourly wage to a minimum of \$15 an hour, more than double the federal minimum wage

 Walmart has committed \$100 million over five years to create a new center to address systematic racism in society and accelerate change

Environmental

 Seventh Generation has committed that 100% of its products and packaging will use biobased or post-consumer recycled content by 2020

 Pfizer has committed to reduce its own greenhouse gas (GHG) emissions by 20% compared to a 2012 baseline

 Apple powers all of its offices and retail stores in China through solar panels mounted high off the ground, so the grass can grow and local yaks can eat it

 Adidas makes shoes out of ocean plastic in partnership with the non-profit Parlay for the Ocean, and has committed to using 100% recycled polyester by 2024

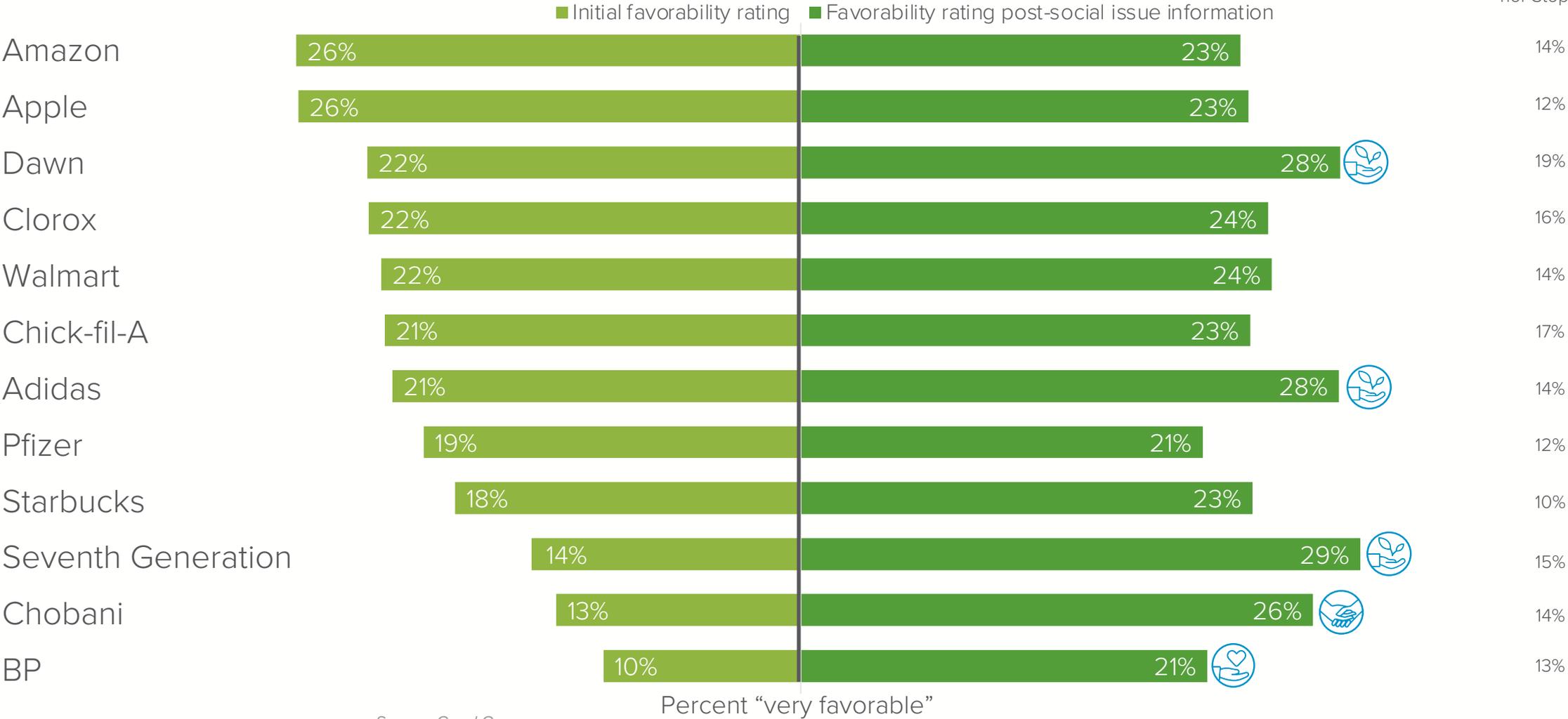
 Dawn dish detergent has donated thousands of bottles to wildlife rescue workers at The Marine Mammal Center and International Bird Rescue to help rescue and release wild animals affected by oil pollution

Religion

 Chick-fil-A is closed every Sunday to honor the founders' Christian faith

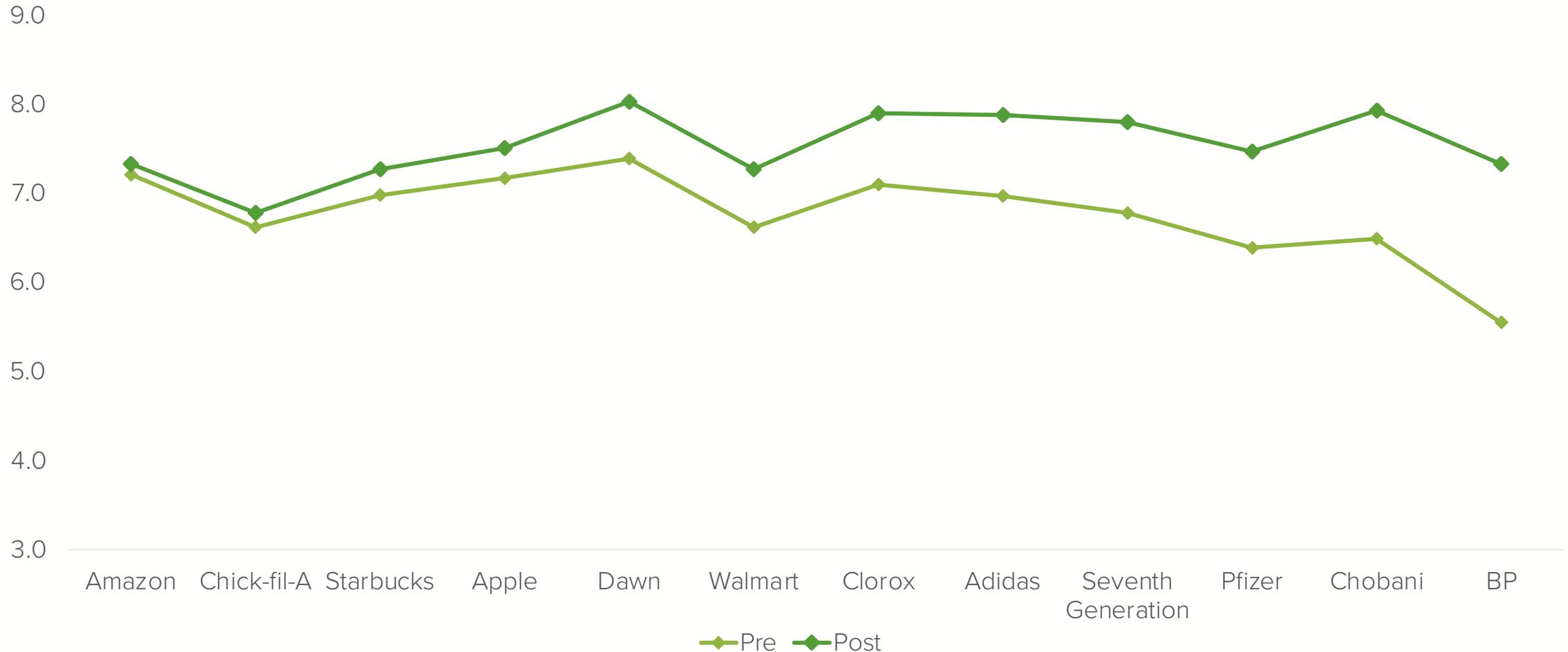
Once Choosers knew the stands of each of these major brands, their opinions shifted, and they preferred specific environment-related issues, despite choosing people-focused commitments in the abstract

Companies addressing the environment rose to the top for Choosers



Source: Good Company
 Q23 - Please drag the bar to indicate whether you have an overall unfavorable or favorable opinion of the following companies.
 Q24 - Now you'll see statements about brands and causes or stands that they support. Please drag the bar to indicate whether you have an overall unfavorable or favorable opinion of the following companies. n=248

Several of the bigger brands held steady in Choosers' estimation; it could be that their opinions of brands have reached "maturity" to some extent



Source: Good Company

Q23 - Please drag the bar to indicate whether you have an overall unfavorable or favorable opinion of the following companies. (0-10, Very unfavorable—Very favorable)

Q24 - Now you'll see statements about brands and causes or stands that they support. Please drag the bar to indicate whether you have an overall unfavorable or favorable opinion of the following companies. n=248

Choosers are engaged via many communication channels

- They are the most likely to spend a lot of time on social media
- They are the most likely of any group to learn about what companies are doing via in store displays and signage



- They are more likely than Stoppers and the general population to use
 - YouTube
 - Instagram
 - Twitter
 - Snapchat
 - Pinterest
 - TikTok
 - LinkedIn
 - Twitch
 - Tumblr



Source: Good Company

D6 - How much time do you spend on social media per week? Q19 - Where do you learn about what companies are doing - or not doing - to create a better society and environment? D6a - Which social platforms do you regularly use? n=248

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Choosers Summary

- They are believers in the system
- They are very engaged with companies
- They have a high level of trust in what companies tell them
 - Make the most of this by creating consumer-facing sustainability reports and engaging with these consumers on social media
- The best messages for Choosers include:
 - People first
 - Plus the environment
- They are looking to buy and create goodness in the world! So create product promotions tied to sustainability.



STOPPERS

Stoppers

Have stopped purchasing a product or service because of the social or environmental record of the brand.

Boomers: More likely to be 65+ years old

Retired: Most likely of any group to be retired

Out of the City: Most likely to be rural



As we age and begin downsizing, it's a time when brands and products get dropped out of consideration; we just don't need as much!



Also, Stoppers tend to display more apathy toward companies and their sustainability issues than either Choosers or Changelings

- They are more likely than either of the other groups to say a company's environmental sustainability efforts matter little to them
- They are more likely than either of the other groups to say a company's commitment to social causes/issues matters little to them

Source: Good Company

Q6 - When determining which companies or brands to buy from, how important are the following to you? n=214

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When it comes to trusting companies to do the right thing, Stoppers are usually less trusting than Choosers (but not as distrustful as Changelings, as you'll see)



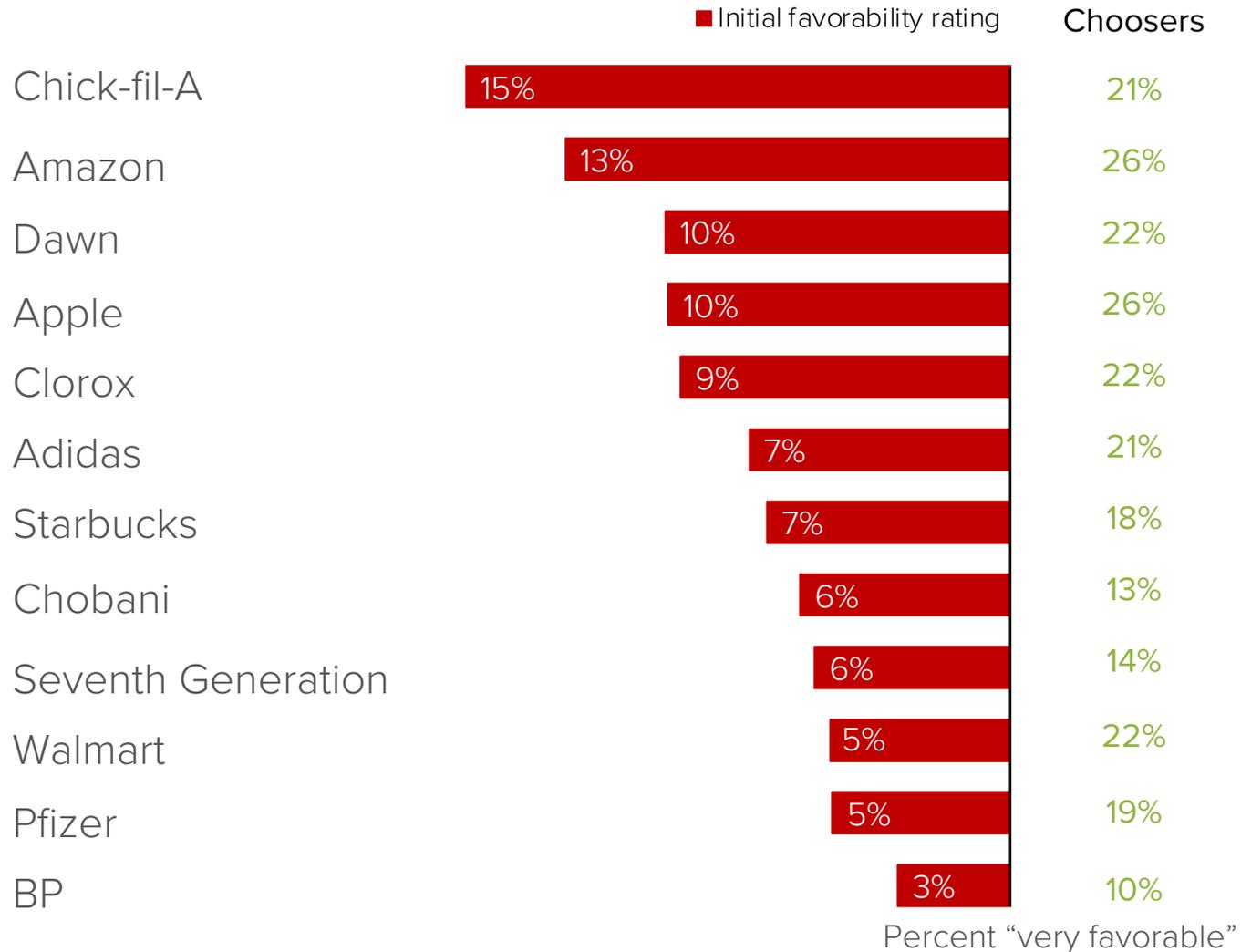
	Choosers	Stoppers
Place more trust in large companies than small	45% agree	36% neither agree nor disagree
Companies that do not communicate about their environmental or social initiatives are just as trustworthy as those who do	42% agree	34% neither agree nor disagree

Source: Good Company

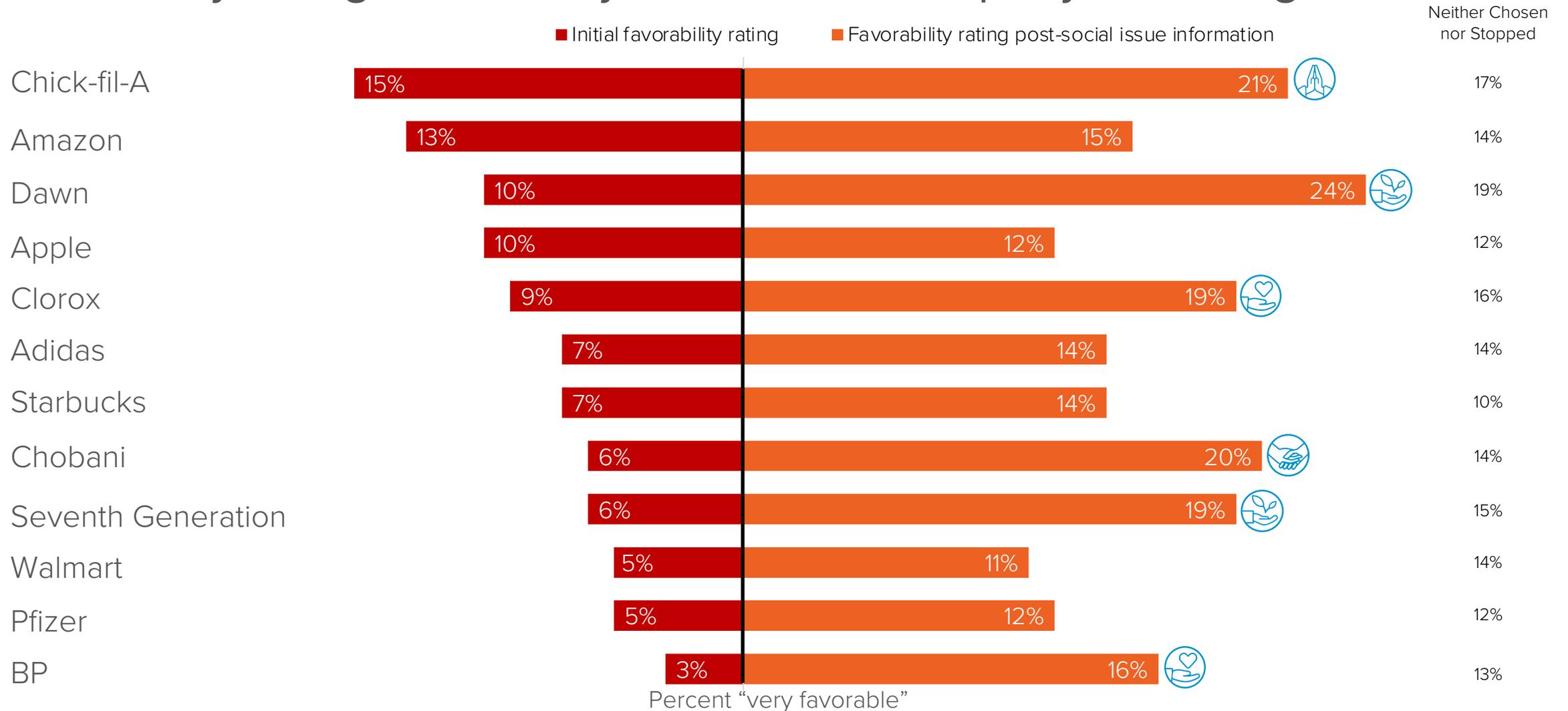
Q22 - To what extent do you agree or disagree with the following: n=214

- I place more trust in large companies than small companies
- Companies that do not communicate about their environmental or social initiatives are just as trustworthy as those who do

As such, Stoppers were initially less favorable overall toward all the brands on this list than were Choosers



But there was a dramatic uptick in several of their brand favorability ratings once they knew each company’s message



While Chick-fil-A's Christian stance continues to be well-liked by this group, but some other issues rise to the top once Stoppers know more



Rescuing wildlife

- #1: Dawn dish detergent has donated thousands of bottles to wildlife rescue workers at The Marine Mammal Center and International Bird Rescue to help rescue and release wild animals affected by oil pollution

Religion

#2 Chick-fil-A is closed every Sunday to honor the founders' Christian faith

Humanitarian/people-oriented

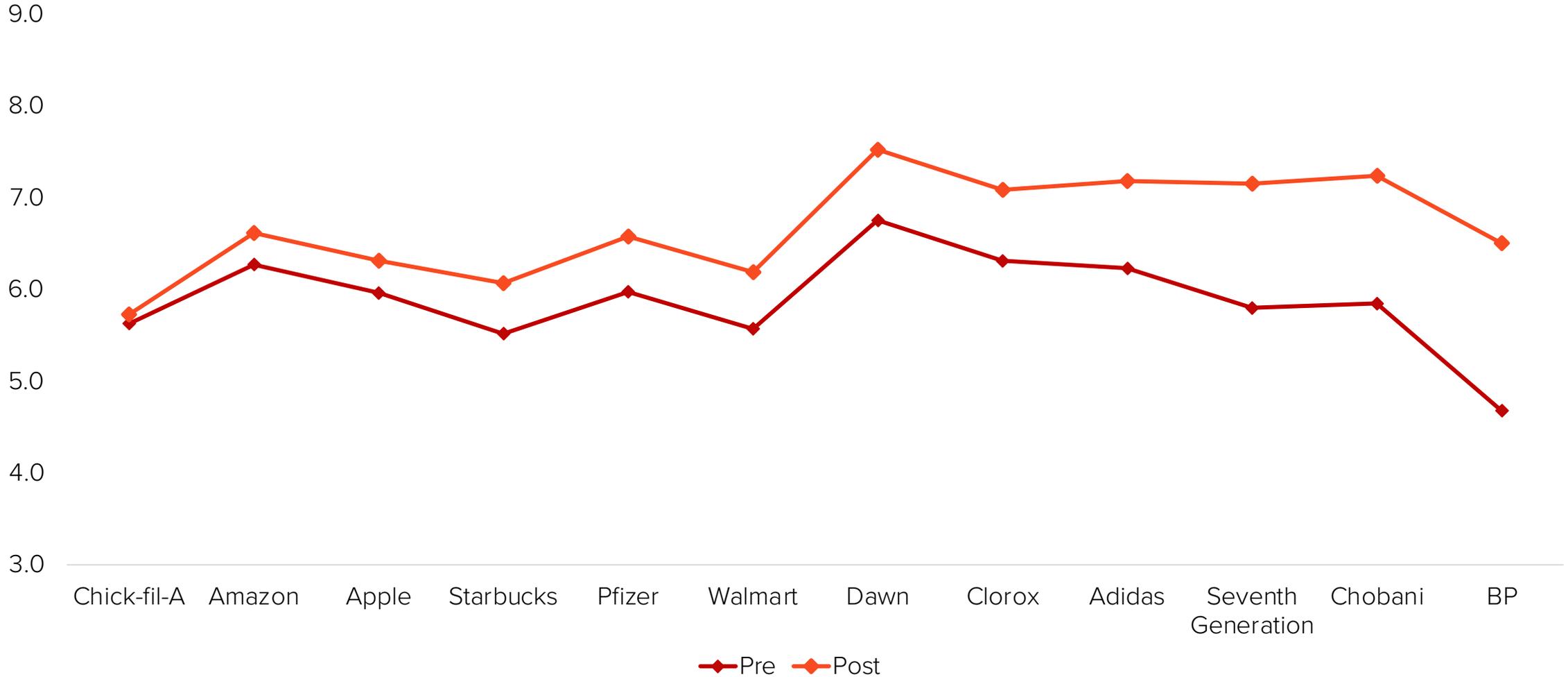
- #3 Chobani has recently increased its starting hourly wage to a minimum of \$15 an hour, more than double the federal minimum wage

Once Stoppers knew the stands these brands are taking, Chick-fil-A was superseded by Dawn's commitment to wildlife, and was followed closely by several other sustainability issues

Source: Good Company

Q24 - Now you'll see statements about brands and causes or stands that they support. Please drag the bar to indicate whether you have an overall unfavorable or favorable opinion of the following companies. n=214

Stoppers were more favorable toward all the brands once they knew more; messaging the right way can make an impact with this audience!



What are some of the key things Stoppers care about when choosing brands to buy from?



Employee treatment is one of the few areas in which Stoppers feel more strongly than Choosers



	Choosers	Stoppers	Changelings	Neither
Treat its employees well	62%	71%	86%	63%
Pay its employees a living wage	53%	73%	81%	52%
Donate money to charities, disaster relief, etc	48%	48%	56%	32%
Is transparent about and actively works to improve the environmental and human impacts of its supply chain	44%	44%	75%	30%
Work with other companies in their industry to make conditions better for all workers	43%	39%	61%	30%
Donate surplus goods or services to charities	36%	38%	54%	29%
Make a significant impact for a community cause	45%	34%	56%	28%
Make a concerted effort to eliminate its environmental impact	47%	40%	65%	25%
Sell eco-friendly products/services	34%	34%	51%	20%
Walk away from profits generated by products and services (e.g., cigarettes, fossil fuels, etc.) with known human or environmental costs	29%	28%	53%	19%
Have an overarching company purpose that focuses the company's processes and products on actively solving the biggest problems our world faces	30%	27%	45%	19%
Publicly take a stand on a social issue	35%	25%	48%	15%

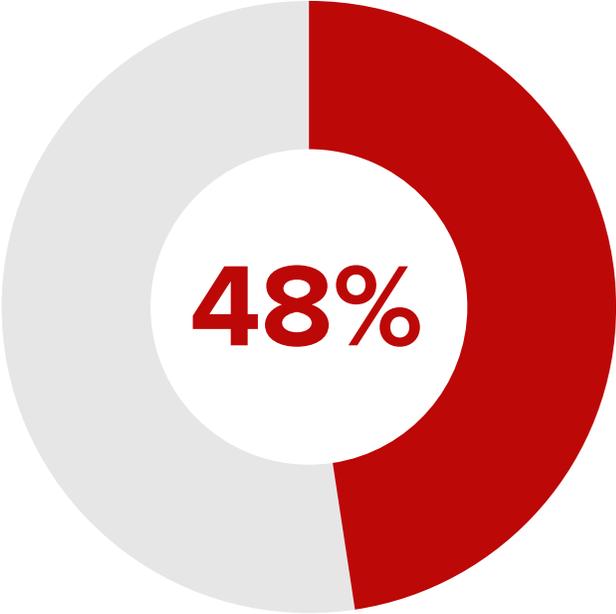
Source: Good Company

Q3 - In your opinion, what does a "good" company have to do (beyond take good care of customers and making a quality product/service at a fair price)?

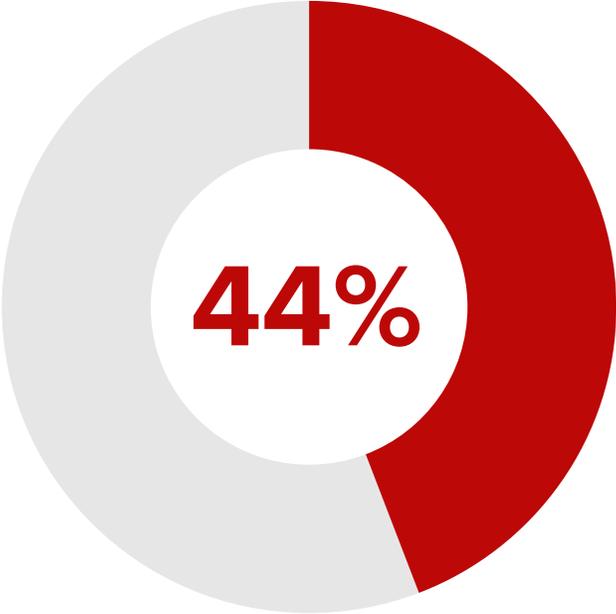
(Check all that apply.) n=214

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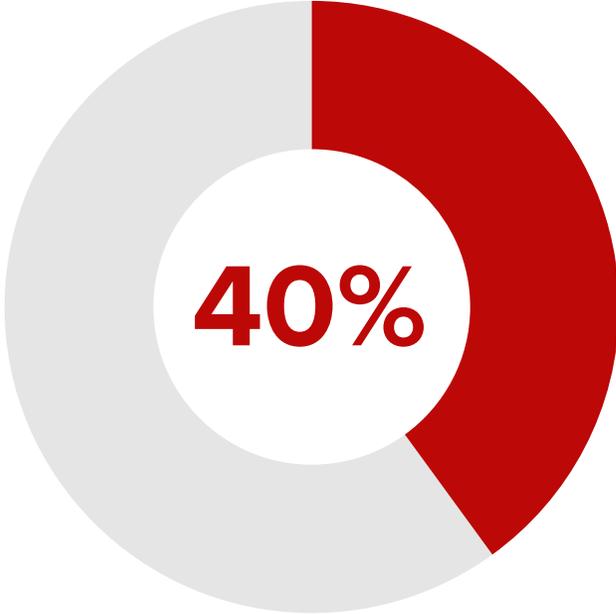
Remembering that all 3 groups have the same top 2 employee-related choices when choosing out of a list of things a “good” company has to do, for Stoppers, a “good” company is also one that cares for its people, its community, and the environment:



Donate money to charities, disaster relief, etc.



Is transparent about and actively works to improve the environmental and human impacts of its supply chain



Make a concerted effort to eliminate its environmental impact

Source: Good Company
Q3 - In your opinion, what does a “good” company have to do (beyond take good care of customers and making a quality product/service at a fair price)?
(Check all that apply.) n=214
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Knowing Stoppers may bow out of purchasing as much as they get older, showing a strong focus on employees and others in the community is essential to keep them buying



Stoppers gravitate toward traditional media

- **Television content** is their most common way to learn about what companies are doing – or not doing – to create a better society and environment, followed closely by **word of mouth**
- They're more likely to “rarely” spend time on social media
- **Facebook** is their preferred social platform, by a large margin over other social platforms

Source: Good Company

Q19 - Where do you learn about what companies are doing - or not doing - to create a better society and environment? D6 - How much time do you spend on social media per week? D6a - Which social platforms do you regularly use? n=214

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Stoppers Summary

- They are not particularly trusting of companies
- They tend to be apathetic toward many sustainability issues a company may commit to
- They are older, which means they aren't h means they're beginning to walk away from interested in carrying with them through retirement
- But when they care about something, they *really* care
 - They're the most passionate among the three groups about employee treatment
 - They want to see companies making charitable donations within the community
 - Environmental messages can also be appealing, once a company has covered the people aspect
- So if your brand wants to maintain relevancy – and purchase – with an aging demographic, run campaigns to communicate how you're taking care of employees and communities





CHANGELINGS

Changelings

Have both purchased AND stopped purchasing a product or service because of the social or environmental record of the brand.

Zoomers: Most likely to be Gen Z, 18 - 24 years old

Changelings care about the environment, even over their own comfort and convenience

- Changelings are more likely to **choose the environment over comfort or convenience** than the other groups
- They're significantly more likely than the overall population (72% vs. 61% overall) to say the reason to protect the environment is ultimately to protect nature, natural resources, plants and animals

Source: Good Company

Seg3 - Given a choice between your comfort, your convenience or the environment, which do you most often choose? Q16 - Which of these statements feels more true to you? The reason to protect the environment is ultimately to protect nature, natural resources, plants and animals. n=66



Source: Good Company

Q22_1 - To what extent do you agree or disagree with the following: I place more trust in large companies than small companies. n=66

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And regardless of company size, communication is key with Changelings:

55%

feel that companies who don't communicate about their environmental or social initiatives are **NOT as trustworthy** as those who do

Source: Good Company

Q22_3 - To what extent do you agree or disagree with the following: Companies that do not communicate about their environmental or social initiatives are just as trustworthy as those who do. n=66

Changelings have some preferred social media sites and ways of communicating

- While predominantly on Facebook, YouTube and Instagram, they are the **most likely to be on TikTok and Reddit**
- Surprisingly, they say they are the most likely to learn about what companies are doing – or not doing – to create a better society and environment via **print articles or advertisements** (magazines, newspapers, etc.)

[Shelton Group theorizes they mean the digital versions of magazines and articles]

Source: Good Company

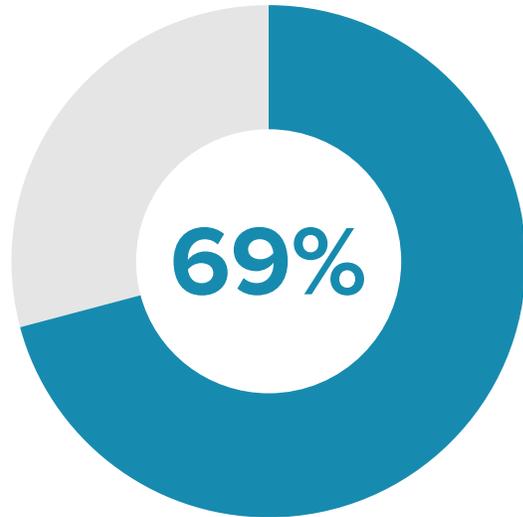
D6a - Which social platforms do you regularly use?

Q19 - Where do you learn about what companies are doing - or not doing - to create a better society and environment? n=66

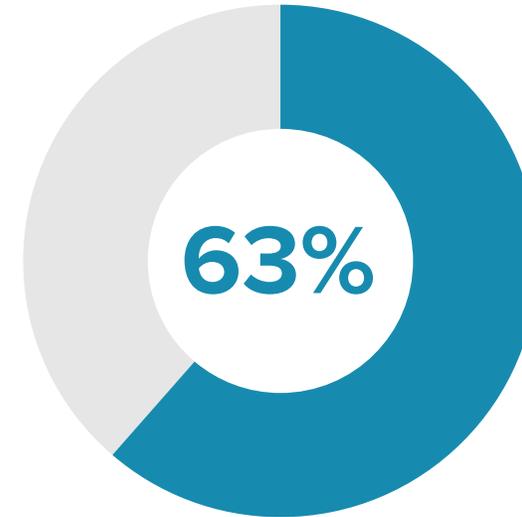
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They're the most likely of all groups to care about a company's commitment to environmental or social causes when deciding which companies or brands to buy from



say a company's environmental sustainability efforts are very/extremely important (64% for Choosers, 47% for Stoppers)



say a company's commitment to social causes/issues are very important (58% for Choosers, 40% for Stoppers)

Source: Good Company

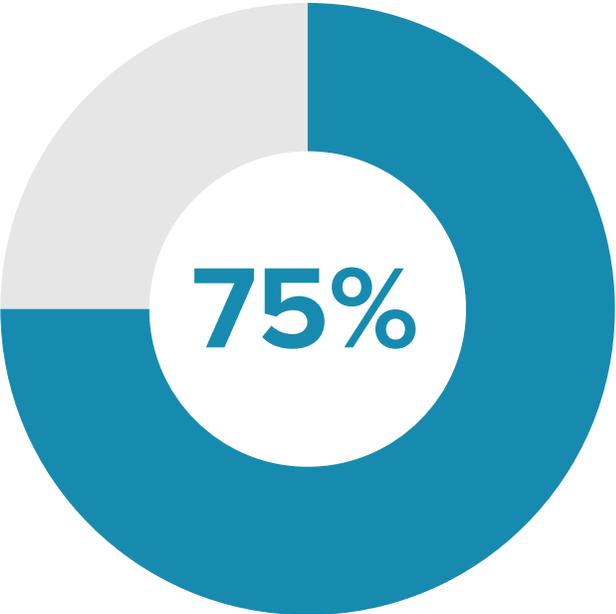
When determining which companies or brands to buy from, how important are the following to you?

Q6_1 - The company's environmental sustainability efforts

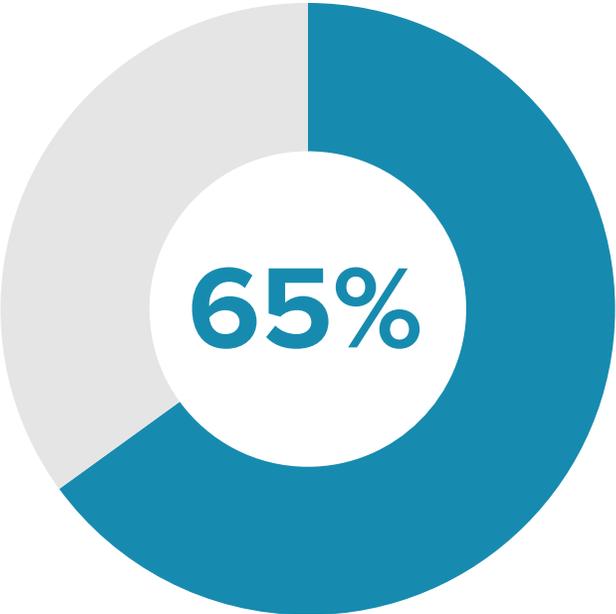
Q6_2 - The company's commitment to social causes/issues n=66

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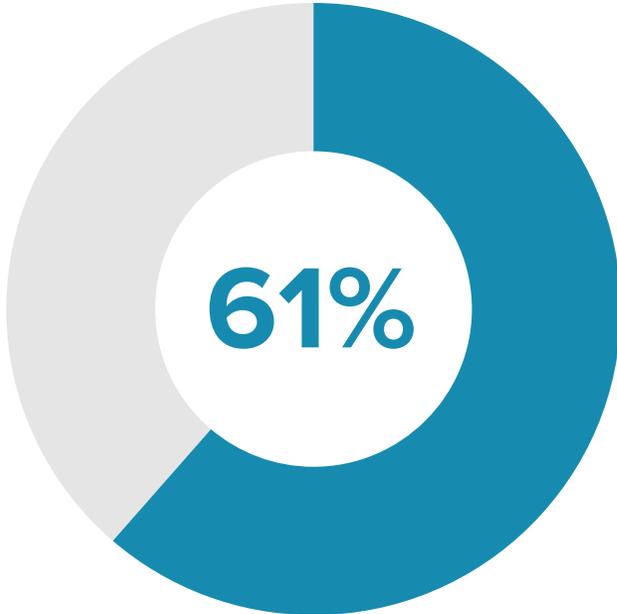
Changelings feel more strongly overall about many actions a “good company” should take, and are especially focused on environmental impact (after employee treatment, the same as the other two groups)



Is transparent about and actively works to improve the environmental and human impacts of its supply chain



Make a concerted effort to eliminate its environmental impact



Work with other companies in their industry to make conditions better for all workers

Source: Good Company
Q3 - In your opinion, what does a “good” company have to do (beyond take good care of customers and making a quality product/service at a fair price)? (Check all that apply.) n=66

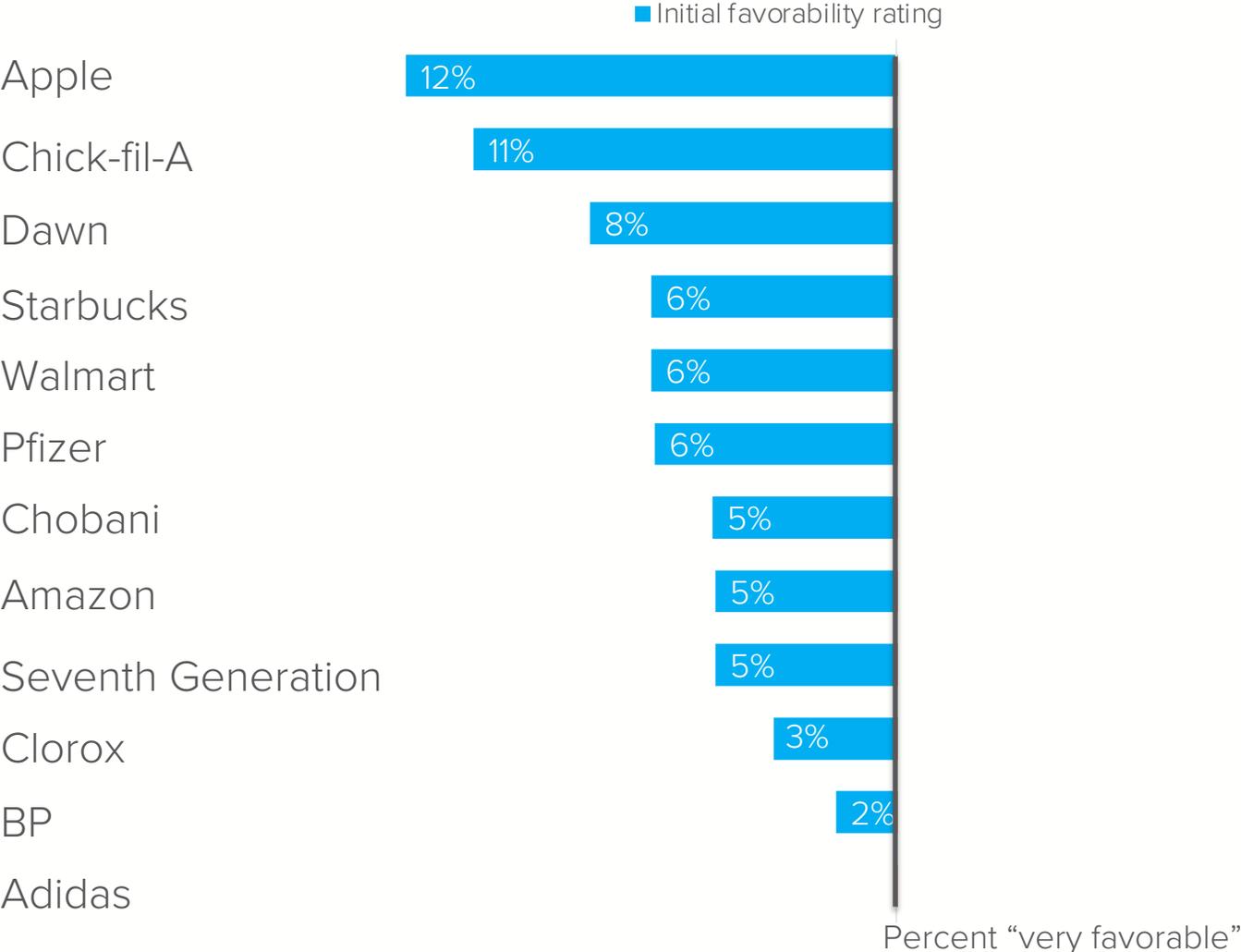
Changelings, more than any other group, are expecting good companies to address many environmental & social issues



Choosers	Stoppers	Changelings	Neither
62%	71%	86%	63%
53%	73%	81%	52%
48%	48%	56%	32%
44%	44%	75%	30%
43%	39%	61%	30%
36%	38%	54%	29%
45%	34%	56%	28%
47%	40%	65%	25%
34%	34%	51%	20%
29%	28%	53%	19%
30%	27%	45%	19%
35%	25%	48%	15%

Source: Good Company
 Q3 - In your opinion, what does a “good” company have to do (beyond take good care of customers and making a quality product/service at a fair price)? (Check all that apply.) n=66
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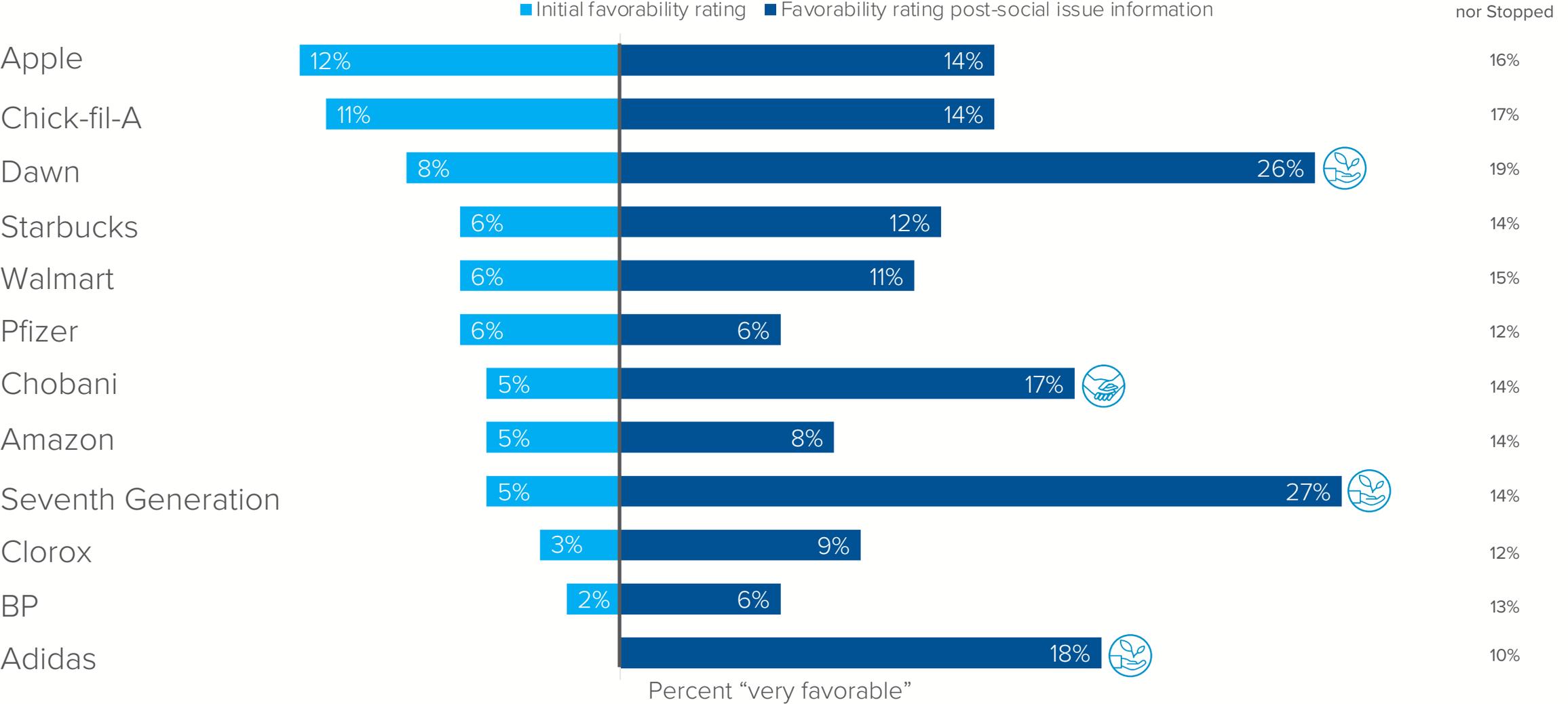
Changelings' skepticism shows through in the low favorability ratings they gave our list of companies initially



Q23 - Please drag the bar to indicate whether you have an overall unfavorable or favorable opinion of the following companies.

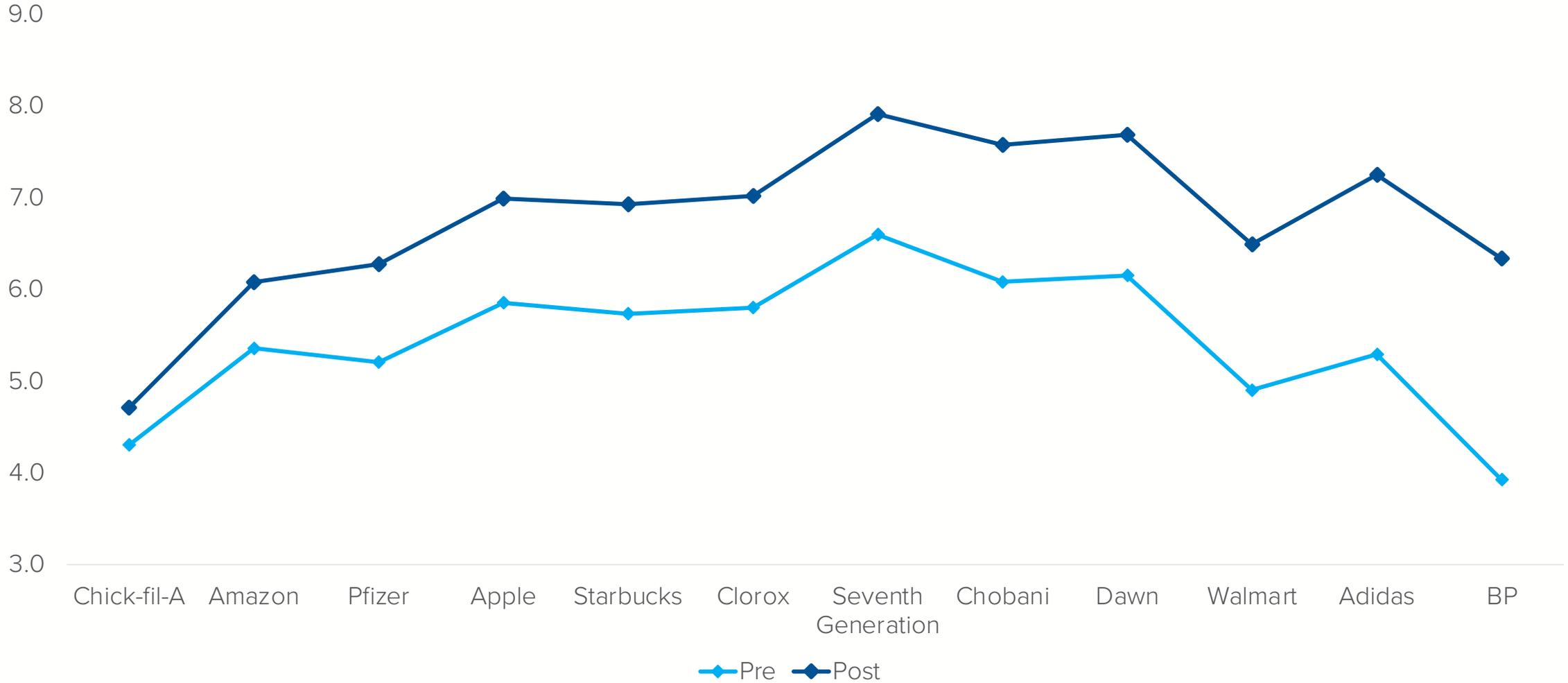
Q24 - Now you'll see statements about brands and causes or stands that they support. Please drag the bar to indicate whether you have an overall unfavorable or favorable opinion of the following companies. n=66

But as with Stoppers, it's possible to break through with the right messaging and stands



Q23 - Please drag the bar to indicate whether you have an overall unfavorable or favorable opinion of the following companies.
 Q24 - Now you'll see statements about brands and causes or stands that they support. Please drag the bar to indicate whether you have an overall unfavorable or favorable opinion of the following companies. n=66

Across all companies tested, favorability increased for Changelings once they knew the companies' stances



Changelings approve most of reducing human impact on wildlife and the environment

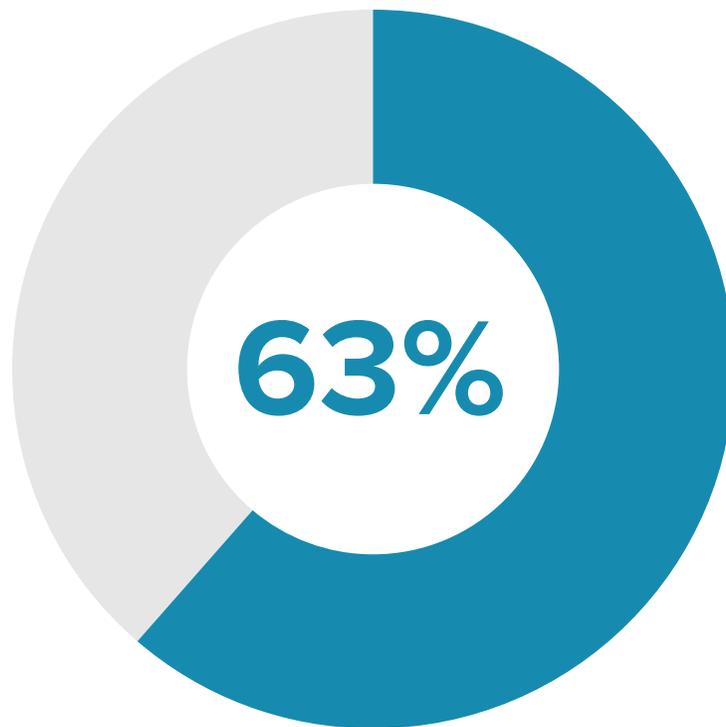
More sustainable packaging and materials

- #1 Seventh Generation has committed that 100% of its products and packaging will use biobased or post-consumer recycled content by 2020
- #3: Adidas makes shoes out of ocean plastic in partnership with the non-profit Parlay for the Ocean, and has committed to using 100% recycled polyester by 2024

Rescuing wildlife

- #2: Dawn dish detergent has donated thousands of bottles to wildlife rescue workers at The Marine Mammal Center and International Bird Rescue to help rescue and release wild animals affected by oil pollution

Does all this make a difference in Changelings' actual purchase behavior? It looks like it!



say a company's social or environmental reputation has a strong impact on their decision to **buy its products**, the *highest* among all groups

Changelings Summary

- This younger group is already making decisions about which brands will be part of their lives
- They have some skepticism about whether they can trust what companies say, especially big companies
 - They're also more pragmatic than older generations
 - Companies don't have to be perfect; they just have to believe in something and follow through
- They want to see companies getting involved in a very wide variety of social and economic issues
- TikTok and Reddit are especially favored
- The right messages will result in increased spending

WHAT DOES ALL THIS MEAN FOR YOUR COMPANY?



Knowing that sustainability is influencing the choosing and stopping behaviors of all generations, you can focus your sustainability efforts and messaging in a way that appeals most to your core consumers

Appealing to Choosers

They look like

Educated Millennial homeowners, more likely to live in the city

They research companies by

Spending lots of time on social media, and even engaging with companies' sustainability reports and other communications

They believe

- Companies are basically trustworthy
- They need to get involved and know a lot about the brands in their lives
- It's really important how companies impact people and the environment

They will respond to messages about

- How a company reduces environmental impact
- How a company cares for not only its employees, but everyone in its communities
- How they themselves can join in and make a positive impact

Appealing to Stoppers

They look like

Older, most likely to be retired, and probably living in a rural area

They research companies by

Taking a more passive approach, and getting messages through traditional routes like television and Facebook

They believe

- Companies aren't particularly trustworthy
- Environmental and social issues aren't of huge importance, with the exception of employee treatment and donations to communities, which they care deeply about
- The environment, while not top of mind, is a secondary concern

They will respond to messages about

- How a company cares for employees
- How a company cares for communities
- Possibly how a company helps the environment, but only if the company has covered the other two

Appealing to Changelings

They look like

Mostly Gen Z consumers, with a lot of strong opinions

They research companies by

Engaging very actively on a wide variety of social media platforms and digital magazine and/or newspaper stories

They believe

- Companies are deserving of some skepticism, but as long as the company has a stand and commits to it, that's all they ask
- The environment is more important than their own comfort or convenience
- Social and environmental commitments are extremely important and should be considered when making purchase decisions
- Companies should address MANY sustainability issues
- They should be ready to pay more for “green” products and services

They will respond to messages about

- Transparent and honest handling of tough social and environmental issues
- How a company is addressing serious environmental problems throughout its supply chain