'S' matters more to younger consumers - companies' social impact is increasingly important to consumers, compared to their environmental impact and governance.

Social media presence is more important than ever for companies, as younger age groups flock online to follow issues. However, companies also need to back up their positions with tangible contributions.

Rising inflation and recessionary fears slightly dampen consumers' willingness to pay a premium for green products.
### Do you think companies today have a mostly positive or negative impact on society?

**Q:** Do you think companies today have a mostly positive or negative impact on society?

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Mostly Positive</th>
<th>Neither Negative nor Positive</th>
<th>Mostly Negative</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>US</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>18 - 34</td>
<td>44%</td>
<td>26%</td>
<td>30%</td>
</tr>
<tr>
<td>35 - 64</td>
<td>39%</td>
<td>38%</td>
<td>22%</td>
</tr>
<tr>
<td>65 and up</td>
<td>48%</td>
<td>34%</td>
<td>17%</td>
</tr>
<tr>
<td><strong>UK</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>18 - 34</td>
<td>51%</td>
<td>30%</td>
<td>19%</td>
</tr>
<tr>
<td>35 - 64</td>
<td>42%</td>
<td>41%</td>
<td>16%</td>
</tr>
<tr>
<td>65 and up</td>
<td>41%</td>
<td>45%</td>
<td>13%</td>
</tr>
<tr>
<td><strong>IE</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>18 - 34</td>
<td>53%</td>
<td>26%</td>
<td>21%</td>
</tr>
<tr>
<td>35 - 64</td>
<td>48%</td>
<td>34%</td>
<td>17%</td>
</tr>
<tr>
<td>65 and up</td>
<td>62%</td>
<td>25%</td>
<td>12%</td>
</tr>
<tr>
<td><strong>NL</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>18 - 34</td>
<td>56%</td>
<td>23%</td>
<td>21%</td>
</tr>
<tr>
<td>35 - 64</td>
<td>42%</td>
<td>39%</td>
<td>18%</td>
</tr>
<tr>
<td>65 and up</td>
<td>29%</td>
<td>47%</td>
<td>22%</td>
</tr>
</tbody>
</table>

**Sample size:**
- United States: 1,514
- United Kingdom: 1,513
- Ireland: 1,524
- Netherlands: 1,514

**Fielding date:**
- United States: 7/23/2022
- United Kingdom: 7/23/2022
- Ireland: 7/23-26/2022
- Netherlands: 7/23-25/2022

**Younger consumers are increasingly skeptical of companies’ role in society, especially in the US, UK, and Ireland**
‘S’ matters more to younger consumers

Companies’ social impact is increasingly important to consumers, compared to their environmental impact and governance.

Environment impact: climate change, waste and pollution, carbon emissions
Social impact: inclusion/diversity, community impact, workplace conditions, human rights
Governance: leadership structure, accountability and transparency, management

When it comes to how companies are run, which of the following areas is most important to you?

- Environment impact
- Social impact
- Governance

United States
- Sample size: 1,514
- Fielding date: 7/23/2022

United Kingdom
- Sample size: 1,513
- Fielding date: 7/23/2022

Ireland
- Sample size: 1,524
- Fielding date: 7/23-26/2022

Netherlands
- Sample size: 1,514
- Fielding date: 7/23-25/2022

Q: When it comes to how companies are run, which of the following areas is most important to you?
Workers care about working at companies that support social and environmental causes

How important is it to work at a company that prioritizes social and environmental causes?

- **US**: 67%
- **UK**: 76%
- **IE (Ireland)**: 82%
- **NL (Netherlands)**: 73%

How willing are you to work for a company that prioritizes social and environmental causes, even if it means making less money compared to other companies?

- **US**: 59%
- **UK**: 67%
- **IE (Ireland)**: 73%
- **NL (Netherlands)**: 69%

---

**Table:**

<table>
<thead>
<tr>
<th>Country</th>
<th>Sample size</th>
<th>Fielding date</th>
</tr>
</thead>
<tbody>
<tr>
<td>United States</td>
<td>1,514</td>
<td>7/23/2022</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>1,513</td>
<td>7/23/2022</td>
</tr>
<tr>
<td>Ireland</td>
<td>1,524</td>
<td>7/23-26/2022</td>
</tr>
<tr>
<td>Netherlands</td>
<td>1,514</td>
<td>7/23-25/2022</td>
</tr>
</tbody>
</table>

Q: How important is it to work at a company that prioritizes social and environmental causes?

Q: How willing are you to work for a company that prioritizes social and environmental causes, even if it means making less money compared to other companies?
Social media presence is more important than ever for companies, as younger age groups flock online to learn about issues.

Which of the following sources do you use to learn about topics related to social or environmental causes?

<table>
<thead>
<tr>
<th>Top source by age group</th>
<th>United States</th>
<th>United Kingdom</th>
<th>Ireland</th>
<th>Netherlands</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>18-34</strong></td>
<td>Social media (49%)</td>
<td>Social media (58%)</td>
<td>Social media (61%)</td>
<td>Social media (49%)</td>
</tr>
<tr>
<td><strong>35-64</strong></td>
<td>TV/media (51%)</td>
<td>TV/media (62%)</td>
<td>TV/media (60%)</td>
<td>TV/media (49%)</td>
</tr>
<tr>
<td><strong>65+</strong></td>
<td>TV/media (65%)</td>
<td>TV/media (70%)</td>
<td>TV/media (77%)</td>
<td>TV/media (63%)</td>
</tr>
</tbody>
</table>

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Talk is cheap; despite the need to be on social media, companies need to back up their positions with tangible contributions.

Consumers are taking notice of how companies can make a tangible impact, such as donations, partnerships, and outreach - rather than stopping at social media statements or advertising campaigns.

Which of the following do you find to be the most effective ways that companies can contribute to social and environmental causes?

- Donations to sustainable causes
- Community outreach
- Partnerships with organizations
- Publicizing stance in advertisements
- Company reports and publications
- Statements on social media platforms
- Companies should not contribute to social and environmental causes

<table>
<thead>
<tr>
<th>United States</th>
<th>United Kingdom</th>
<th>Ireland</th>
<th>Netherlands</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sample size</td>
<td>1,514</td>
<td>1,513</td>
<td>1,524</td>
</tr>
</tbody>
</table>

Q: Which of the following do you find to be the most effective ways that companies can contribute to social and environmental causes? (Select all that apply)
Rising inflation and recessionary fears slightly dampen consumers’ willingness to pay a premium for green products.

How willing are you to pay higher prices for “green” or sustainable products and services?

(%) very/ somewhat willing

<table>
<thead>
<tr>
<th></th>
<th>United States</th>
<th>United Kingdom</th>
<th>Ireland</th>
<th>Netherlands</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sample size</td>
<td>1,514</td>
<td>1,513</td>
<td>1,524</td>
<td>1,514</td>
</tr>
</tbody>
</table>

Q: In light of rising inflation and news surrounding the possibility of a global recession, how willing are you to pay higher prices for “green” or sustainable products and services?

Q: Now imagine that we had asked you this question before fears of rising inflation and a global recession. How would you have answered the question: how willing are you to pay higher prices for “green” or sustainable products and services?
Recycling is the leading sustainable practice across all markets, the UK and Ireland take the lead in reducing single-use plastic usage.
Most consumers are still reliant on product labels to inform sustainable purchases

Which of the following sources do you rely on when looking to purchase sustainable products?

- Product labels
- Friends and family
- Company website
- Social media
- Online forums
- Blogs

United States: 51%
40%
34%
29%
22%
12%

United Kingdom: 59%
36%
37%
29%
20%
9%

Ireland: 57%
40%
41%
39%
24%
12%

Netherlands: 45%
35%
32%
30%
25%
12%

Q: Which of the following sources do you rely on when looking to purchase sustainable products? (Select all that apply)
Few consumers regularly purchase second-hand goods; most categories, especially appliances, electronics, and accessories have room to grow.

**How often do you try to purchase used or secondhand products instead of new? (% always)**

- **United States**: 16%
- **United Kingdom**: 12%
- **Ireland**: 13%
- **Netherlands**: 12%

**Which of the following types of products have you ever bought used or secondhand?**

- **Clothing**:
  - United States: 61%
  - United Kingdom: 54%
  - Ireland: 56%
  - Netherlands: 40%

- **Books**:
  - United States: 53%
  - United Kingdom: 59%
  - Ireland: 62%
  - Netherlands: 49%

- **Automotive**:
  - United States: 50%
  - United Kingdom: 42%
  - Ireland: 50%
  - Netherlands: 32%

- **Furniture**:
  - United States: 48%
  - United Kingdom: 48%
  - Ireland: 52%
  - Netherlands: 39%

- **Electronics**:
  - United States: 43%
  - United Kingdom: 33%
  - Ireland: 39%
  - Netherlands: 35%

- **Appliances**:
  - United States: 38%
  - United Kingdom: 26%
  - Ireland: 28%
  - Netherlands: 16%

- **Accessories**:
  - United States: 35%
  - United Kingdom: 24%
  - Ireland: 28%
  - Netherlands: 21%

Q: How often do you try to purchase used or secondhand products instead of new?
Q: Which of the following types of products have you ever bought used or secondhand?
Ebay is dominant platform for used goods, but younger consumers are flocking to other online and mobile apps for their thrifting needs.

Which of the following used good or secondhand marketplaces have you heard of?
Ebay remains the top destination for used goods, while Vinted and Etsy vie for second place

<table>
<thead>
<tr>
<th>Age</th>
<th>Ebay</th>
<th>Vinted</th>
<th>Etsy</th>
<th>Local thrift / charity shop</th>
<th>Local listings</th>
<th>Depop</th>
<th>Company websites</th>
<th>Thrift+</th>
<th>Vestiaire Collective</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-34</td>
<td>67%</td>
<td>53%</td>
<td>52%</td>
<td>41%</td>
<td>48%</td>
<td>46%</td>
<td>11%</td>
<td>13%</td>
<td>9%</td>
</tr>
<tr>
<td>35-64</td>
<td>86%</td>
<td>60%</td>
<td>53%</td>
<td>51%</td>
<td>54%</td>
<td>23%</td>
<td>11%</td>
<td>8%</td>
<td>5%</td>
</tr>
<tr>
<td>65+</td>
<td>90%</td>
<td>56%</td>
<td>62%</td>
<td>69%</td>
<td>40%</td>
<td>9%</td>
<td>8%</td>
<td>2%</td>
<td>1%</td>
</tr>
</tbody>
</table>

Which of the following used good or secondhand marketplaces have you heard of?

Q: Which of the following used good or secondhand marketplaces have you heard of? (Select all that apply)
Ebay maintains a lead among online sellers, but sees a rising challenger in Depop among younger consumers

Which of the following used good or secondhand marketplaces have you heard of?

<table>
<thead>
<tr>
<th>Age</th>
<th>Ebay</th>
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<tbody>
<tr>
<td>18-34</td>
<td>62%</td>
<td>61%</td>
<td>58%</td>
<td>52%</td>
<td>29%</td>
<td>13%</td>
</tr>
<tr>
<td>35-64</td>
<td>72%</td>
<td>72%</td>
<td>62%</td>
<td>28%</td>
<td>19%</td>
<td>5%</td>
</tr>
<tr>
<td>65+</td>
<td>70%</td>
<td>76%</td>
<td>40%</td>
<td>4%</td>
<td>12%</td>
<td>3%</td>
</tr>
</tbody>
</table>

N = 1,524 Adults 18+ | July 23-26, 2022 | Ireland

Q: Which of the following used good or secondhand marketplaces have you heard of? (Select all that apply)
Most consumers in the Netherlands rely on local listings for used goods

Which of the following used good or secondhand marketplaces have you heard of?

- Local listings: 61%
- Vinted: 54%
- Local thrift shop: 35%
- Company websites: 24%

<table>
<thead>
<tr>
<th>Age</th>
<th>Local listings</th>
<th>Vinted</th>
<th>Local thrift shop</th>
<th>Company websites</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-34</td>
<td>53%</td>
<td>51%</td>
<td>37%</td>
<td>29%</td>
</tr>
<tr>
<td>35-64</td>
<td>64%</td>
<td>57%</td>
<td>35%</td>
<td>24%</td>
</tr>
<tr>
<td>65+</td>
<td>67%</td>
<td>50%</td>
<td>31%</td>
<td>14%</td>
</tr>
</tbody>
</table>
**Agreeable Allies**

Agreeable advocates support both individual contribution and institutional accountability when it comes to bringing about societal impact. While not very proactive in working toward environmental and social progress, they show a high degree of willingness to learn and grow.

---

**Doubtful Devotees**

Doubtful devotees value companies' social impact over the environment or governance. Skewing younger, they generally participate in sustainable practices, but are more skeptical of larger-scale change and harbor little urgency in holding companies accountable.

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**Climate Champions**

Climate champions prioritize environmental impact. On the younger side, they lead the charge in working toward environmental and social change. Highly committed to pursuing a sustainable lifestyle, they are willing to invest their time and money to hold themselves and companies accountable.

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**Passive Promoters**

Passive promoters emphasize companies' social impact more than the environment or governance. While supportive of sustainable practices and open to learning more about social and environmental causes, they will rarely go out of their way to personally participate in sustainable practices or contribute to social change.

---

**Sustainability Skeptics**

Sustainability skeptics skew older and place little value on environmental issues. They are skeptical toward climate concerns, fairly content with the status quo, and are resistant toward changing their behavior or pursuing sustainable practices or social change.
All markets see wide support for ESG initiatives, especially the UK, Ireland, and the Netherlands.

<table>
<thead>
<tr>
<th>Country</th>
<th>Sample size</th>
<th>Fielding date</th>
</tr>
</thead>
<tbody>
<tr>
<td>United States</td>
<td>1,514</td>
<td>7/23/2022</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>1,513</td>
<td>7/23/2022</td>
</tr>
<tr>
<td>Ireland</td>
<td>1,524</td>
<td>7/23-26/2022</td>
</tr>
<tr>
<td>Netherlands</td>
<td>1,514</td>
<td>7/23-25/2022</td>
</tr>
</tbody>
</table>

Sustainability skeptics, largely opposed to environmental, social, and governmental change, only make up a small minority of adults in each country.
Methodology

Study methodology:
This study was conducted between July 23-26, 2022 among a national sample of 1,514 adults in the US, 1,513 in the UK, 1,514 in Ireland, and 1,514 in the Netherlands. Respondents for this survey were selected from the more than 2 million people who take surveys on our platform each day. The modeled error estimate for this survey is plus or minus 3.5 percentage points. Data were balanced via quotas for age, gender, and geography using data provided by the United Nations.

Segmentation Methodology:
We aimed to understand consumer attitudes surrounding ESG (environmental, social, and governance), using segmentation analysis to establish distinct profiles among the general population. Hierarchical clustering was used to determine the number of clusters, and K-means cluster analysis was used to segment the general population into five segments across the four markets. Segmentation was based on respondents’ behavioral and psychographic profile, including:
- Perceptions of companies’ impact on society
- Participation in sustainability measures
- Attitudes toward companies’ environmental, social, privacy, and labor practices