

# Divided We Stand: Decoding the Citizen Shopper

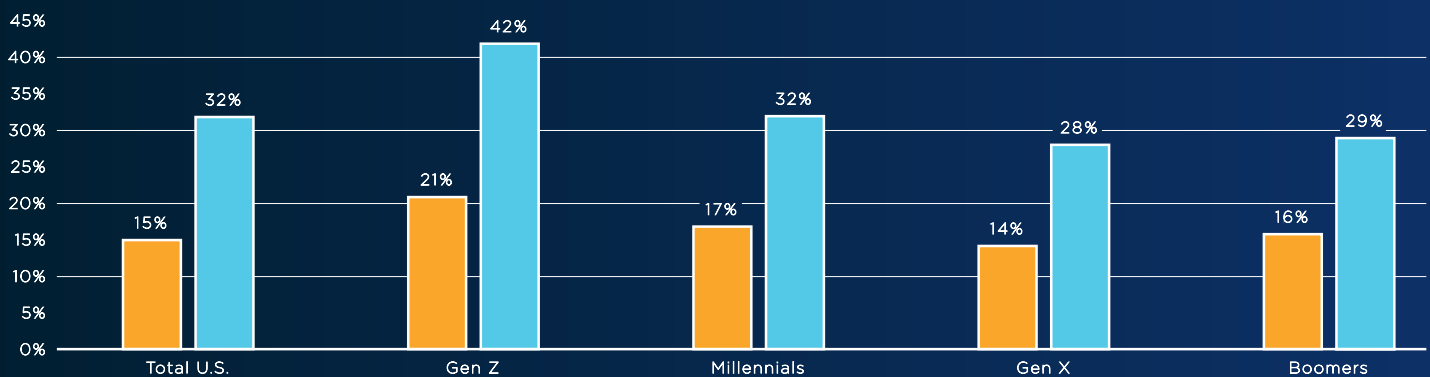
The past year of social, economic and personal upheaval has amplified the voice of the consumer and heightened their influence on how businesses operate, communicate on topical issues, and align their products and services to appeal to consumer values. At the same time, the conversation around values and how they translate into consumer choice has become increasingly fragmented and complex.

Those looking to engage with today’s consumer — whether as constituents or as customers — are being challenged to react to issues more quickly, keep a closer pulse on what their consumers care about, and understand the role they, themselves, play both passively and actively in key social issues.

To get a better understanding of the mindset of this citizen shopper, NRF partnered with GfK Consumer Life to dig deeper into what is driving consumers’ values and choices, and what it means for organizations and individuals operating in a post-pandemic environment.

**Green issues are on the rise:** Climate change is currently the No. 3 concern in the United States and has risen dramatically among consumers of all ages.

## Percent who are concerned about climate change - U.S.



Americans are increasingly paying attention to socioeconomic issues including equality and inclusion



**Equality:**

+4 ranks from 2018-2020



**Social Tolerance:**

+8 ranks from 2016-2020

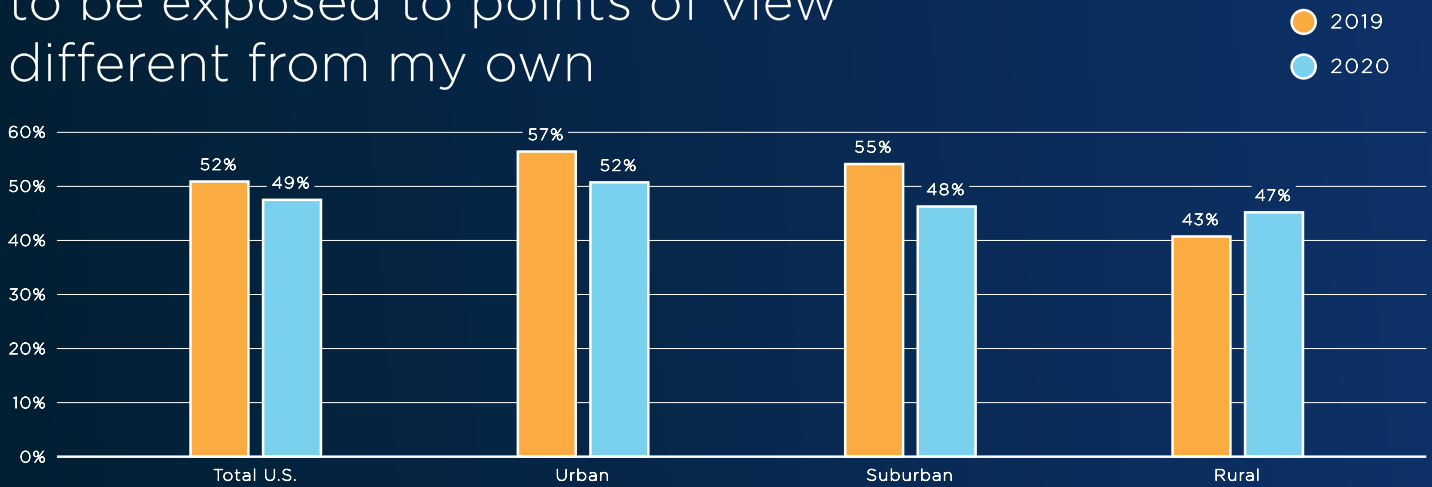
This is in addition to consumers’ on-going anxiety around issues such as the economy and the rising cost of living

- **“Cost of health care”** and **“enough money to live right and pay the bills”** have been the top two concerns in the US for many years
- **“Inflation and high prices”** is the No. 5 concern, and has been in the top 5 for many years

# At the same time, however, Americans are becoming more fragmented and siloed in their beliefs than ever before.

Less than half (49%) of Americans agree **“it’s important to be exposed to points of view different from my own.”** And interest in others’ viewpoints has declined in the most populated areas of the country.

## Percent who agree that it’s important to be exposed to points of view different from my own



Even the momentum around values like social tolerance breaks down differently among some segments of the country.

## Value Shifts

▲ Increase ▼ Decrease

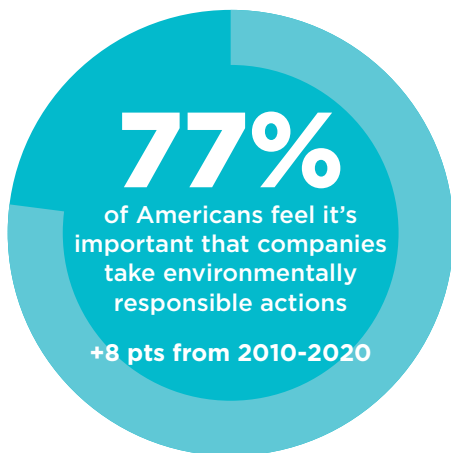
SOCIAL TOLERANCE (rank on a list of 57)	Total U.S.	Gen Z	Millennials	Gen X	Boomers	Urban	Suburban	Rural
2016	22	13	18	17	23	17	18	29
2020	14 ▲	14 ▼	14 ▲	21 ▼	19 ▲	13 ▲	20 ▼	11 ▲

# Brands and retailers see these values play out in real time as conscience-driven consumers vote with their wallets and their beliefs.

**67% of Americans would avoid buying certain brands** based on the organizations' stance on political or social positions.

## Spotlight on sustainability

- Escalating environmental threats have pushed Americans to be more conscious about how green they are in their daily lives, ultimately making them more discerning about the brands they choose to support.
- The seriousness of climate change and other environmental concerns have not been disrupted by the pandemic. In fact, a recent survey found that more than half (53%) of consumers report being more concerned about the environment and nature than they were a year ago and 44% say the pandemic has spurred them to take a more active stance on environmental causes.



### The top five environmental areas consumers want brands to focus on right now are:

 **42%** Avoiding plastic waste

 **40%** Recyclable packaging

 **35%** Minimizing air/water pollution in manufacturing

 **31%** Conserving natural resources

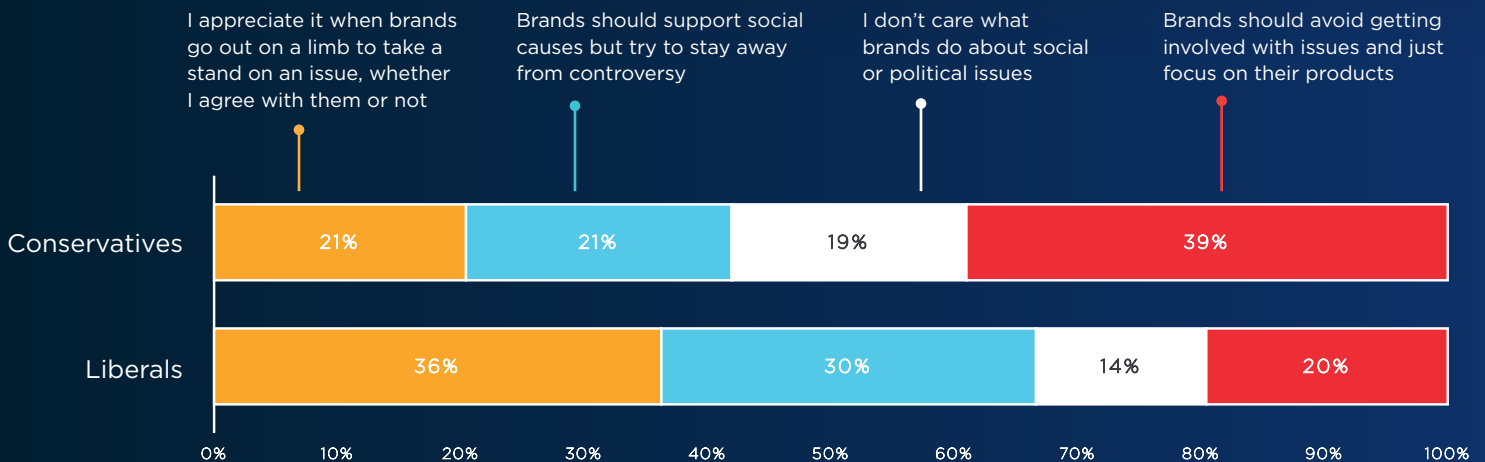
 **29%** Reducing food waste

# This emergence of the citizen shopper creates new challenges, previously reserved for political actors in the public sector, for retailers and other consumer-facing industries.

Consumer expectations for brands vary widely across ideologies. Those who self-identify as conservative are more likely to say they expect brands to take a more passive approach to issues compared with those on the liberal side of the spectrum who look for brands to take an active stance.

## Ideological alignment

**A challenging landscape for brands:** Consumer expectations vary widely across ideologies and other segments.



### The path forward

Success in retail has always been linked to understanding what attracts and motivates your customer. But today's shopper does not fit neatly into a single mold. In addition to well-known segments like Soccer Moms or NASCAR Dads, today's citizen shopper also encompasses Zoom Moms, Geriatric Millennials and Zoomers, among others. And, even within these groups there are nuances and competing concerns. Further complicating this is the episodic

nature of the values conversation as well as the tension that many organizations face as they re-examine their own stance on social and political issues.

While there is not yet a firm answer on how partisan or "divided" the future of shopping will be, it is clear the playbook for customer-centricity has been forever changed. Navigating the evolving consumer landscape requires moving beyond the realm of goods and services and building a deeper understanding of the individual issues, motivations and values of the citizen shopper.

# Divided We Stand: Decoding the Citizen Shopper was produced by the National Retail Federation and GfK in June 2021.

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## About GfK Consumer Life

GfK Consumer Life is the largest, longest standing, and most robust consumer trends study worldwide. Based on more than 30,000 interviews globally each year, it has been capturing consumer values, attitudes, and behavioral insights in the U.S. since 1973 and globally since 1997.



## About NRF

The National Retail Federation, the world's largest retail trade association, passionately advocates for the people, brands, policies and ideas that help retail thrive. From its headquarters in Washington, D.C., NRF empowers the industry that powers the economy. Retail is the nation's largest private-sector employer, contributing \$3.9 trillion to annual GDP and supporting one in four U.S. jobs — 52 million working Americans. For over a century, NRF has been a voice for every retailer and every retail job, educating, inspiring and communicating the powerful impact retail has on local communities and global economies. [NRF.com](https://www.nrf.com)

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