

RESEARCHERS









Kayla Ahrem

B.A. Environmental Sustainability and Policy & Policy Studies Email: krahrem@syr.edu
In: www.linkedin.com/ln/kaylaahrem

Harrison Vogt

M.S. Sustainability Organizations and Policy
Email: hevogt@syr.edu
In: www.linkedin.com/in/harrisonvogt

Savanna Capdeville

M.A. Public Administration & International Relations
Email: srcapdev@syr.edu
In: http://www.linkedin.com/in/savanna-capdeville

Dr. Jay Golden

Project Advisor Director Dynamic Sustainability Lab Pontarelli Professor of Environmental Sustainability and Finance



The **Dynamic Sustainability Lab** is a non-partisan think tank and research lab **supporting both industry and governments** by developing system-scale strategies to reduce risks and unintended consequences while realizing opportunities of sustainability transitions.



Partnership: Leader in Forced Labor Research



Thomson Reuters is often known for their news, but they also have a focus on legal information and trade and supply chains.

Teams focusing on everything from social impact and Environmental Social Governance to tax and accounting are at Thomson Reuters.

"Thomson Reuters Foundation plays a thought leadership role in the fight against slavery and trafficking" [1].

We also want to say a quick thank you to our interviewees, for providing detailed insight to modern slavery and supply chains within industry.



FAST FACTS

\$236 Billion

is generated from modern slavery every year_{[2].}

27.6 million

people are in modern slavery. That is over 3 times the amount of people who live in New York **City** [3,4].

The US Imports 1/5 of the world's products suspect ed to be made with forced labor

4.

Gen Z will represent 17% of retail spending by 2030 [6].

5.

81% of Gen Z have changed their decision to buy a product based on brand actions or overall reputation [DSL survey].

CONTENTS

06

Introduction

10

Modern slavery: understanding the problem 23

Gen Z: understanding the solution

26

Survey Results

48

Next Steps

52

References

OVERVIEW

As Gen Z increases their discretionary funds over the next several years, they have the potential to be the driving force for a transition to ethical labor.

This technical bulletin provides an insight to Gen Z's purchasing power and opinions on modern slavery while showcasing the risks their habits may pose to brands and producers of apparel, footwear, tea, and coffee with forced labor within their supply chain.

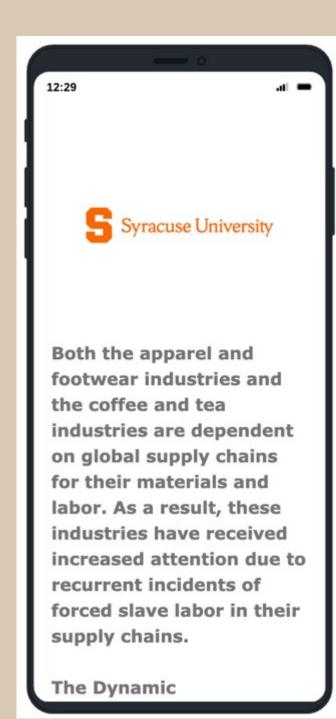


RESEARCH METHODOLOGY

Question: How will Gen Z change supply chains with their purchasing power, specifically as it pertains to modern slavery in the coffee and tea industry and the apparel and footwear industry?

Steps:

- 1. Literature Review
- 2. Web-based survey development and deployment
- 3. Interviews
- 4. Data Analysis





INTRODUCTION TO MODERN SLAVERY IN THE SUPPLY CHAIN

Modern slavery occurs when individuals are compelled to provide work or service against their will through threats, coercion, or deception. This includes situations where workers face dangerous conditions, unfair wages, or restrictions on their freedom [7].

In 2021, it was estimated that 49.6 million people are in modern slavery on any given day. Forced labor accounts for 27.6 million of those in modern slavery. The other 22 million are those in forced marriages [3].

\$236 Billion is generated from modern slavery every year [2].



INTRODUCTION TO GEN Z

Gen Z, born between 1997 and 2012, are currently between 13 and 28 years old_[8] and as of 2021 **they already had \$360 billion in disposable income** [9]. By 2030, they will represent 17% of global retail spending [6].

By 2031, Gen Z will make up 31% of the work force_[10]. As their budgets increase, they have the capability to make purchasing decisions that impact brand profit, therefore will impact brand actions. Nearly ¾ of Gen Z will pay more for products that are environmentally sustainable, if they feel the same about products that are made without forced labor, they can have a real impact on supply chains [11]. Our research is an attempt to fill that gap and to see if their sentiments are the same for forced labor.





INDUSTRIES WITH FORCED LABOR

FORCED LABOR AREAS RECOGNIZED BY THE U.S. DEPARTMENT OF LABOR

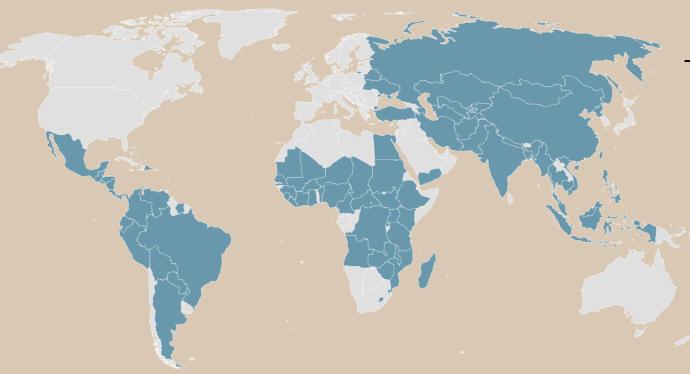


Figure 1: Forced and Child Labor Areas recognized by the U.S. Department of Labor. [12]. 2024

- The U.S. Department of Labor recognizes 478 instances of forced and child labor among different goods and nations.
- This list includes coffee, tea, footwear, and components of apparel [12].
 - The apparel and footwear industry was valued at USD 1.79 Trillion in 2024 [13]
 - Coffee and tea industry was valued at USD 124.72 billion in 2024 [14].

For this project, the U.S. Department of Labor data was used. It is important to note that there have been reports in the U.S., South Africa., and Western Europe that are not reported by the DOL [15,16,17].



FORCED LABOR FAST FACTS



The number of people in modern slavery is larger than the amount of people in the entire state of California or more than the number of Apple Music subscribers [1]



Freeing people from forced labor and bringing them into formal employment could generate US\$611 billion in additional global GDP



THE FASHION INDUSTRY

The fashion industry is worth \$1.7 trillion [19]. An estimated \$161 billion worth of apparel and textile goods are at risk of being produced with forced labor [20]. That means 9.4% of all apparel sales could have forced labor involved.

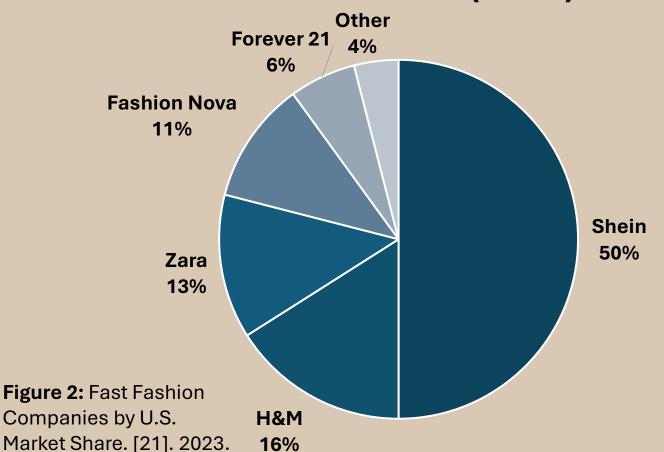
WHY?

As trend cycles pick up pace, the fast fashion industry grows. Fast fashion companies moves in a quicker cycle than their counterparts, and they need to operate fast and cheaply [19]. A focus on low prices and a faster clothing cycle opens the door for ethical labor issues.



THE THREAT OF FAST FASHION

Fast Fashion Companies By U.S. Market Share (2023)



The top 5 companies all have accusations of forced or severely underpaid labor [22,23,24,25,26]

Fast fashion accounts for \$150.82 billion of the fashion industries revenue and is estimated to reach \$291.1 billion by 2032, with **62% of Gen Z shopping** fast fashion monthly [21].



FORCED LABOR IN THE APPAREL AND FOOTWEAR SUPPLY CHAIN





THE COFFEE INDUSTRY

- 1. The Coffee market was estimated at **223.78 USD** billion in 2023 [27].
- 2. Over 2.2 billion cups of coffee are consumed everyday [28].
- 3. Most consumption is in wealthier countries, which causes production demand in developing countries [28].

- 4. Only **7-10% of the**profits are usually seen
 by the coffee farmers,
 meaning that cheap labor
 is a big part of their system
 [28].
- 5. This leads to child labor, human trafficking, and coercion to meet profit expectations [28].



TOP 10 U.S. COFFEE IMPORTERS(2023)

Red Indicating Forced Labor in Coffee Production

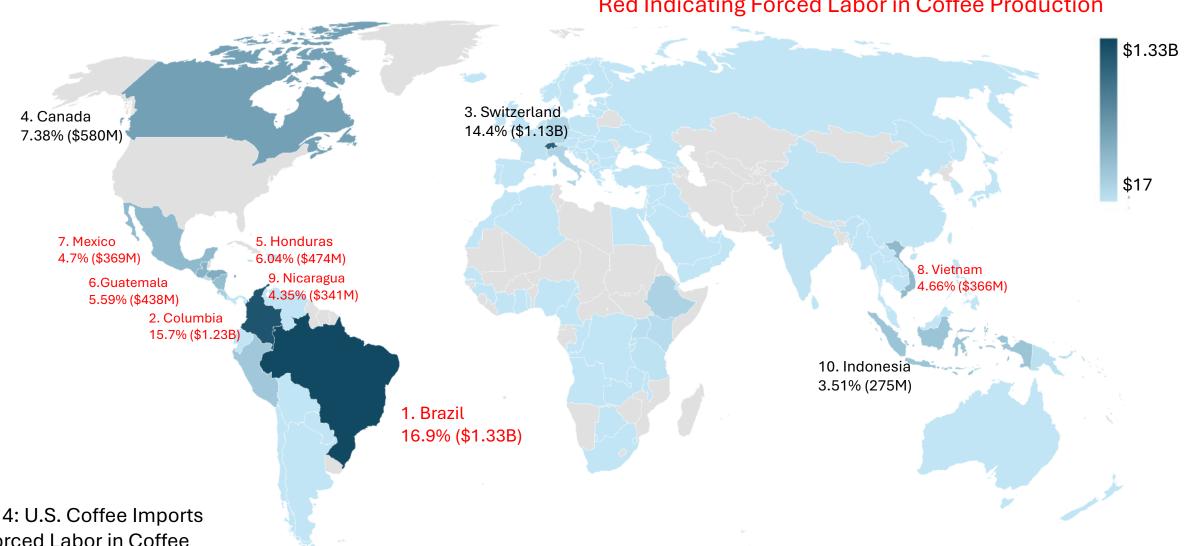


Figure 4: U.S. Coffee Imports and Forced Labor in Coffee Industry. [12,29].2023.



THE TEA INDUSTRY

Projected Global Tea Market Size 2023-2030 (USD Billions)

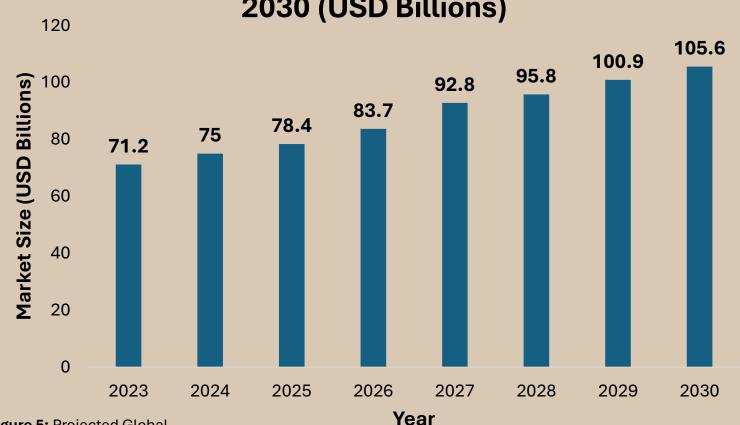


Figure 5: Projected Global Tea Market Size 2023-2030 in USD Billions. [30]. 2024.

Over 3 billion cups of tea are consumed everyday

With demand for tea increasing, issues surrounding forced labor are only set to get worse unless safe-guards are quickly put into place [32].



FORCED LABOR IN TEA

Countries with Forced Labor in the Tea Industry (2024)

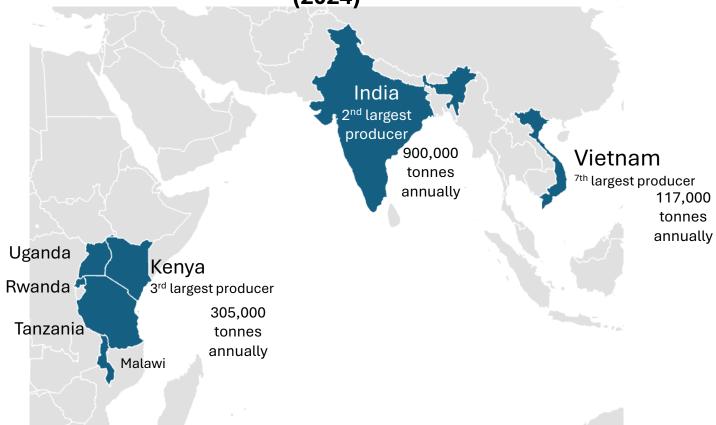


Figure 6: Countries with Forced Labor in the Tea Industry. [12,33]. 2024.

Tea plantations often have issues with human trafficking, and workers are put into domestic servitude, sexual slavery or forced labor [32].

47% of tea workers do not have access to potable water [32].

40% of tea workers have had unfair deductions from their wages [32]

In Assam, one of the largest tea producing regions in India, workers are paid less than a quarter of livable wage [32].



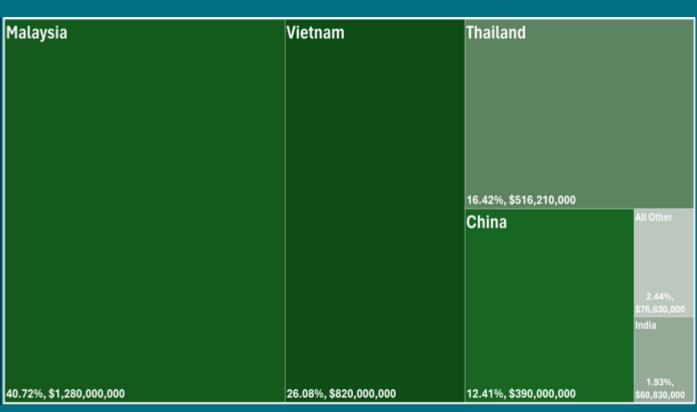
Forced Labor and Compliance

19 U.S.C. 1307: Value of CBP Shipment Seizures: By Country Totals 2023-2024

19 U.S. Code § 1307 : Convict-made goods; importation prohibited:

"All goods, wares, articles, and merchandise mined, produced, or manufactured wholly or in part in any foreign country by convict labor or/and forced labor or/and indentured labor under penal sanctions shall not be entitled to entry at any of the ports of the United States" [36].

US CBD is tasked with **enforcing** this ruling and maintains dashboards with confiscated imports



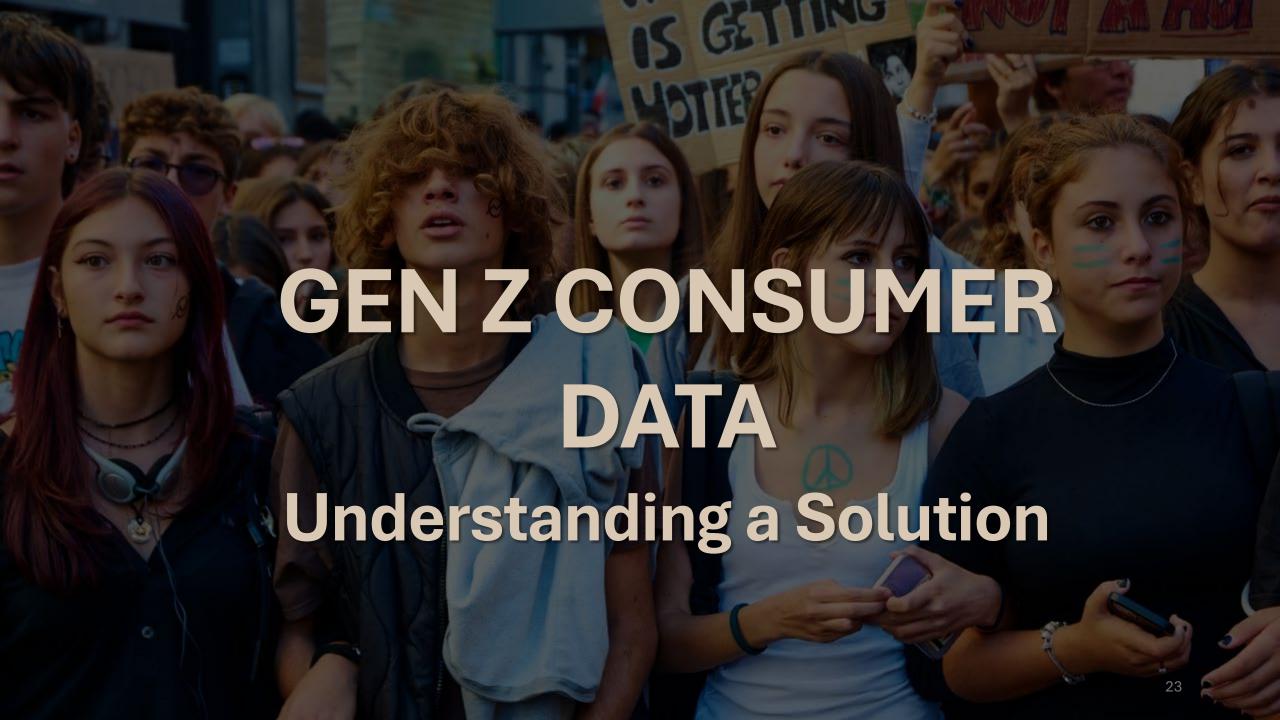
\$80.42m worth in confiscated imported goods in 2025[37]

Figure 8: US CBP Forced Labor Import Seizure Statistics. [37]. 2025



\$3.66 BILLION WORTH OF GOODS
have been seized by U.S. Customs because of Uyghur
Forced Labor Prevention Act violations
That is worth more than the yearly GDP of Aruba

Actions are being taken to stop modern slavery, **but the ending of forced labor will rely on consumer habits.** That is where Gen Z can drive change.



DYNAMIC SUSTAINABILITY LAB™ AT SYRACUSE UNIVERSITY



CONSUMER POWER

Consumer power is the ability of individuals and groups to influence corporate behavior through their purchasing habits, collective action, and information sharing [40].

Consumers signal more than just their buying interests with their purchases. They signal **their values—and businesses respond.**

The exercise of consumer power is an American tradition. From the Boston Tea Party (1773) to the #PayUp movement at the height of the COVID-19 pandemic (2020), action by U.S. consumers has successfully influenced labor practices globally [41,42,43].

72% of Gen Z consumers make purchases based on values, more than any other generation [44]. Gen Z's consumer power could drive change, including **the elimination of forced labor** in the global supply chains.



GEN Z IS A KEY DEMOGRAPHIC FOR RETAILERS

As 69% of Gen Z consumers report making purchases based on social media influencer content, brands are increasingly allocating parts of their budget for influencer marketing.

76% of US brands planned to dedicate parts of their budget for influencer marketing in 2025_[45,46]. In 2022, brands spent 9.9 Billion on advertising for TikTok, where the majority of users are Gen-Z_[47].



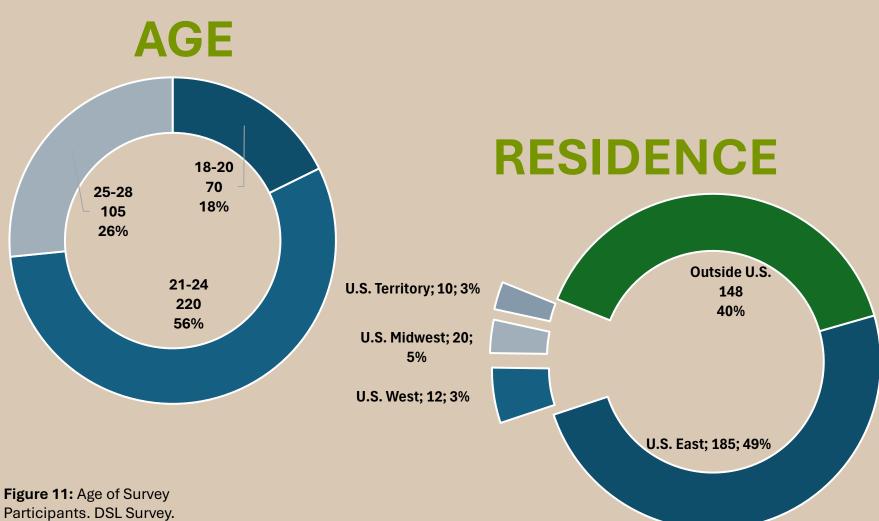
SURVEY DATA

Our project surveyed 395 Gen Z individuals around the globe to assess their purchasing habits, specifically as it pertains to ethical labor considerations.

It was spread through word of mouth, campus fliers, social media, and through Prolific, a survey distribution platform that pays global respondents to take surveys. 100 respondents were from Prolific, which was funded by the Dynamic Sustainability Lab to get a more representative sample.



SURVEY DEMOGRAPHICS



2025

GENDER

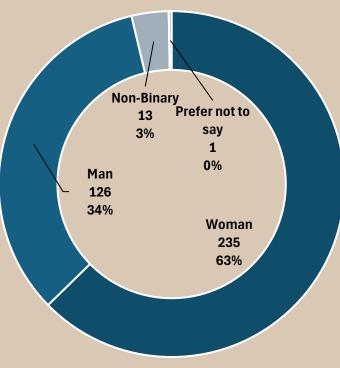
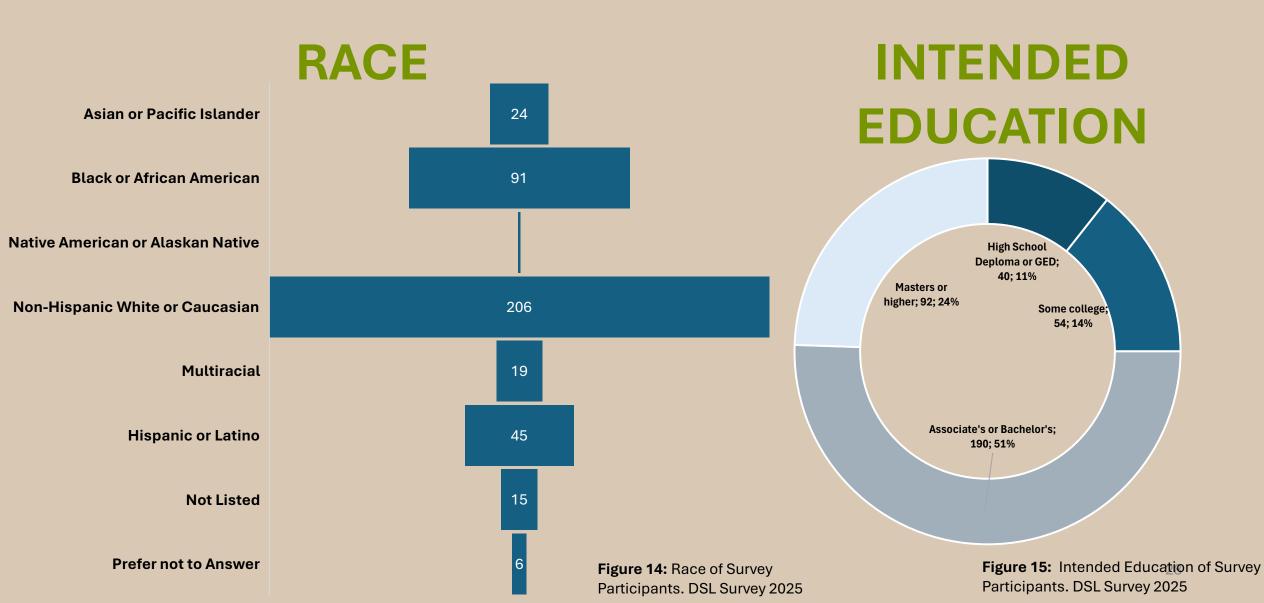


Figure 13: Gender of Survey Participants. DSL Survey 2025

Figure 12: Residence of Survey Participants. DSL Survey 2025



SURVEY DEMOGRAPHICS





Gen Z Survey Fast Facts

- 1. Gen Z consumers value ethical considerations in their purchases of apparel, tea, and coffee.
- 2. Many Gen Z respondents' top purchased brands are accused of forced labor.
- 3. Gen Z consumers rank cost, affordability, and the quality of their products as the top factors influencing their purchasing decisions.
- 4. 80% of participants who ranked cost and affordability as the top factor in purchasing decisions also responded "yes" when asked if they were willing to pay more, but not as much as double the price for products made without forced labor.

Key Insight:

Gen Z consumers value purchasing products produced without forced labor.

However, they still purchase apparel, tea and coffee within financial and accessibility constraints.



Top 30 Brands and Retailers by Gen Z Respondents

Footwear and Apparel Brands and Retailers by Occurrence



Figure 17: Top apparel and footwear brands purchased by Gen Z. DSL Survey. 2025.

Nike was mentioned **149 times** out of 418 unique responses.

Starbucks was mentioned **150 times** out of 418 unique responses.

Tea and Coffee Brands and Retailers by Occurrence



Figure 18: Top coffee and tea brands purchased by Gen Z. DSL Survey. 2025.



About half of the apparel brands and retailers mentioned in the survey face accusations of forced labor.

This group includes the top brands mentioned, including Nike, Adidas, and Puma.



GEN Z WILLINGNESS TO PAY FOR ETHICAL BRANDS

FOOTWEAR AND APPAREL

TEA AND COFFEE

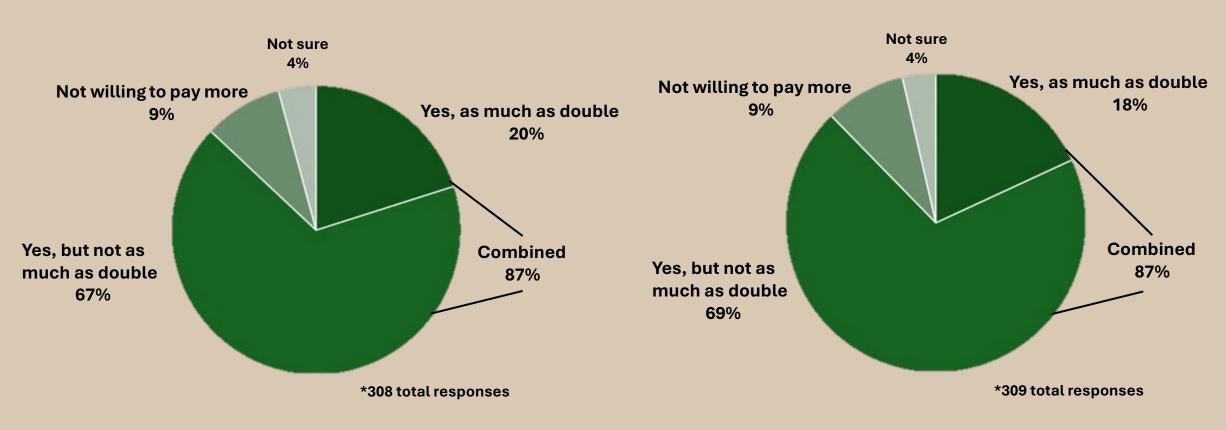
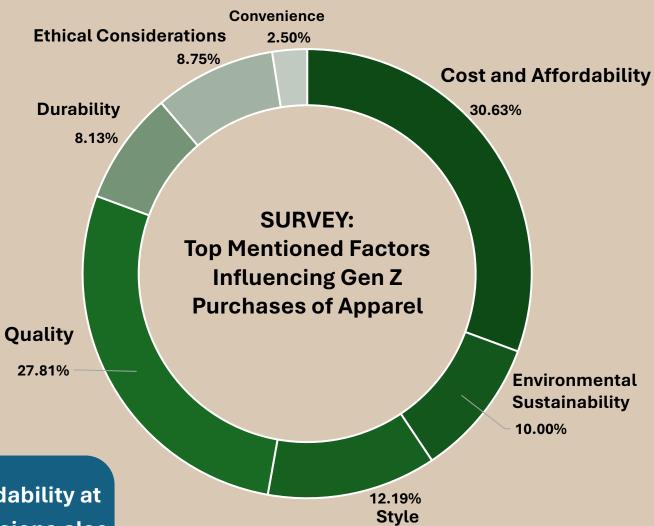


Figure 19: Gen Z's willingness to pay more for apparel and footwear. DSL Survey. 2025.

Figure 20: Gen Z's willingness to pay more for coffee and tea. DSL Survey. 2025.



Gen Z consumers rank cost and affordability as the top factors influencing their purchasing decisions for apparel.

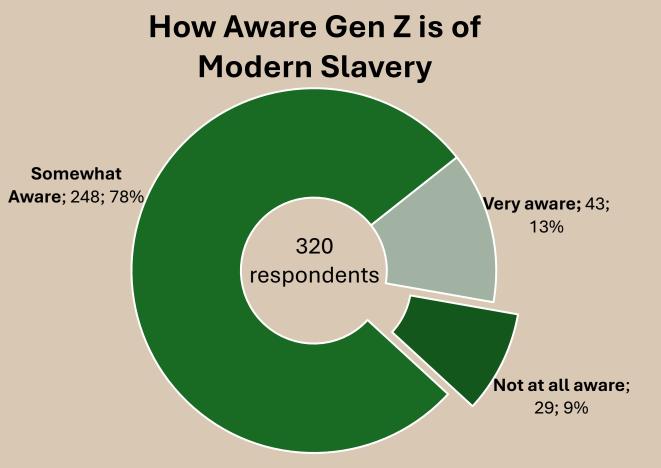


80% of participants who ranked cost and affordability at the top factor influencing their purchasing decisions also said they are willing to pay more for products with ethical considerations.

Figure 21: Top Factors Influencing Gen Z Purchasing Decisions. DSL Survey 2025. 33



GEN Z ALREADY KNOWS MODERN SLAVERY IS A PROBLEM



How Big of a Problem does Gen Z think forced labor is in...

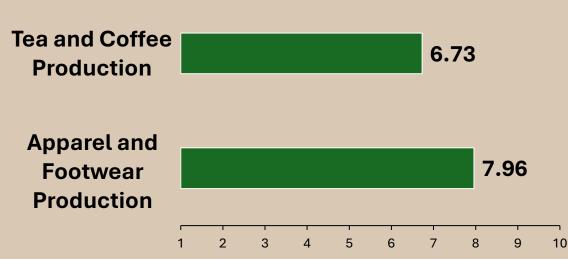


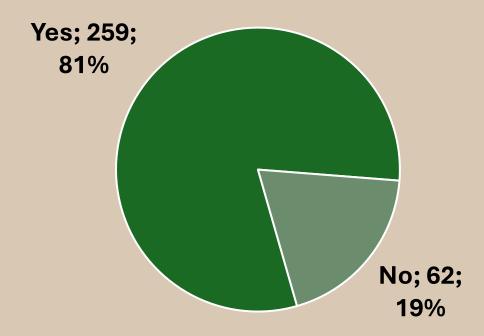
Figure 23: How big of a problem does Gen Z think that forced labor is? DSL Survey.2025.

Figure 22: How Aware is Gen Z of Modern Slavery? DSL Survey. 2025.



GEN Z PURCHASING DECISIONS

Has Gen Z changed a purchasing decision because of brand action or reputation?



Of those who said yes 181 participants (69.8%) said it was entirely or partly because of ethical labor considerations.

What does this show?

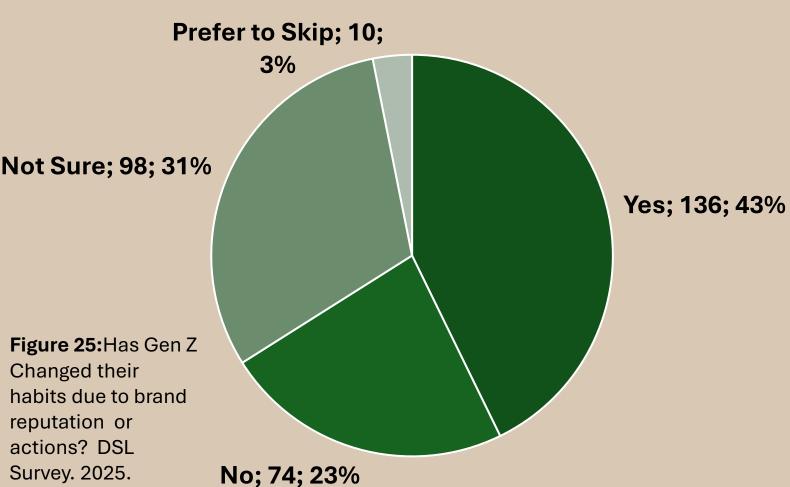
Gen Z is willing to change their habits to protect workers

Figure 24: Has Gen Z Changed their habits due to brand reputation or actions? DSL Survey. 2025.



GEN Z BRAND AWARENESS

Can Gen Z name a brand who has used forced labor in their supply chain?



We just saw on the last slide that 259 participants have changed purchasing habits because of an ethical labor issue, but only 136 respondents can name a brand using forced labor.

Why the discrepancy?

We think that some some respondents are not confident in their knowledge about forced labor.



DO THEY KNOW WHERE TO LOOK?

Does Gen Z know of any resources that exist to check if a product is ethically made?

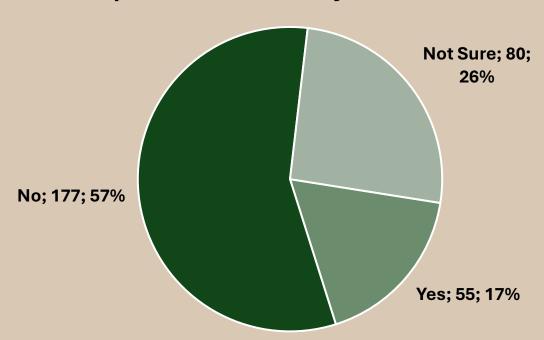


Figure 26: Can Gen Z check to see if a product is ethically made? 2025.

How often does Gen Z check Fair Trade certifications?

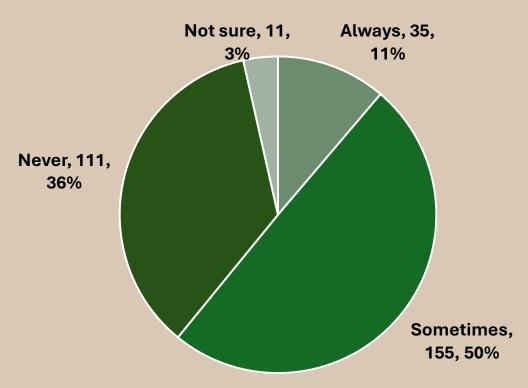
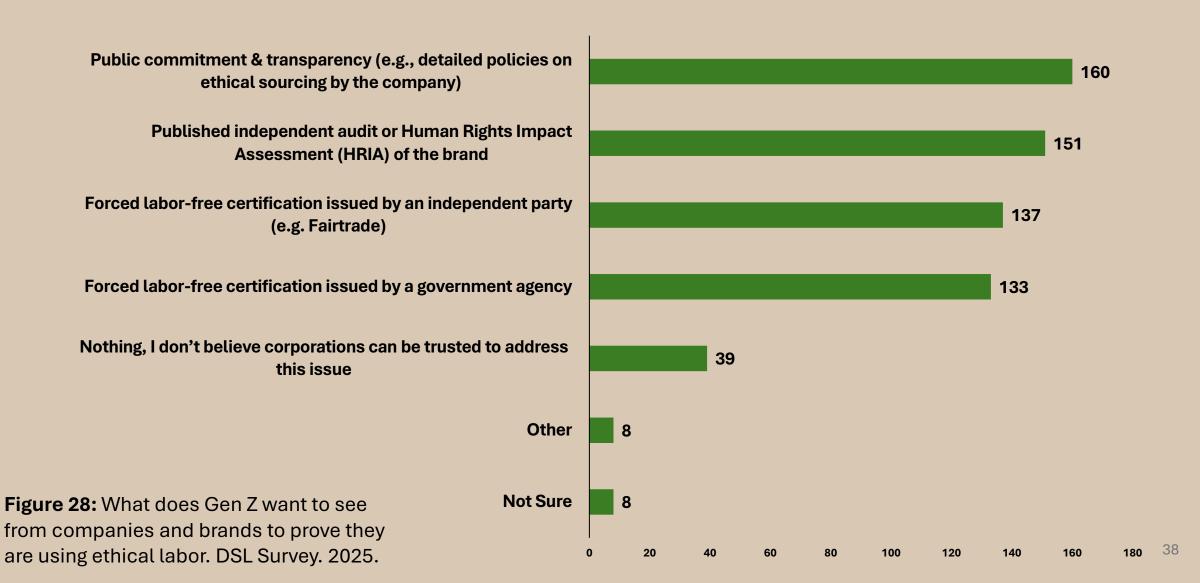


Figure 27: How often dos Gen Z look at certifications. 2025.



WHAT GEN Z WANTS TO SEE FROM BRANDS





GEN Z BELIEVES IN THEIR POWER TO MAKE CHANGE

96% of Gen Z believe their generation can drive corporate change through consumer power.

Do you believe Gen Z consumers can influence company practices through purchasing choices?

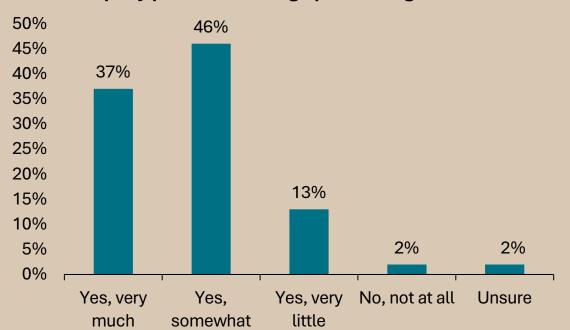


Figure 29: Does Gen Z believe that their generation can drive change through consumer power? DSL Survey. 2025.

89% of Gen Z believes their generation purchase with ethics in mind. Consume education could help move Gen Z from occasional to consistent consideration.

When purchasing, how often do you think Gen Z considers ethical issues like forced slave labor?

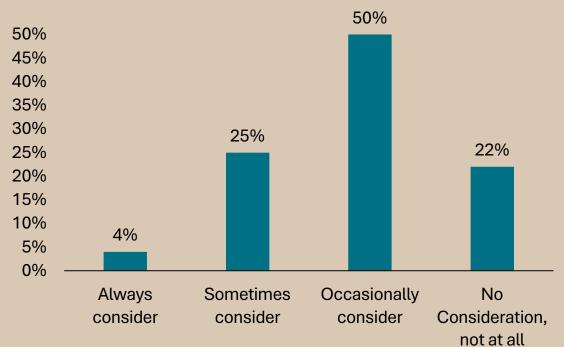


Figure 30: How often does Gen Z think their peers are considering forced labor and ethical labor considerations. DSL Survey. 2025.



GENERATION Z IS WILLING TO PAY MORE EVEN WHEN COST IS A PRIORITY

Importance of Factors in Willingness to Pay More for Ethically Produced Apparel

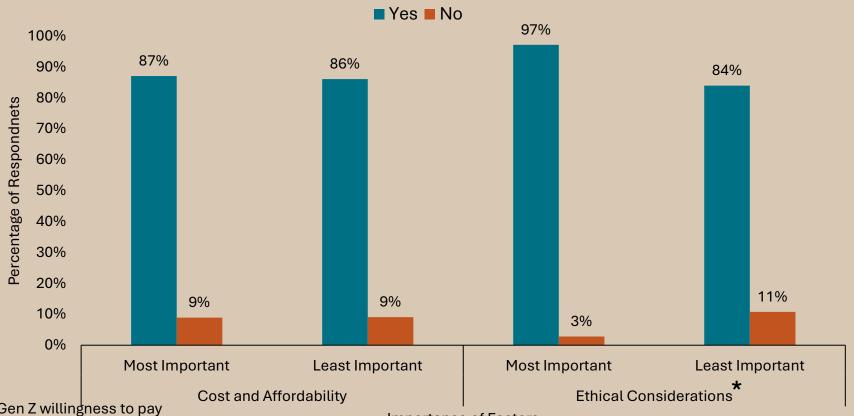


Figure 31: Gen Z willingness to pay more cross-tabulated with what influences their purchasing decisions. DSL Survey. 2025.

Importance of Factors

For Gen Z, ethical principles often outweigh price-even when cost is a top purchasing priority.

Convenience and environmental sustainability were statistically significant predictors, while style/trends & quality were not.

Note: Percents may not add up to 100% reflecting 'Not Sure' responses excluded for clarity. (Asterisk indicates statistical significance)



GEN Z EXERCISE OF CONSUMER POWER BY REGION & ETHICAL AWARENESS LEVEL

Reported Gen Z Change in Buying Habits Due to Brand Decisions, By Region

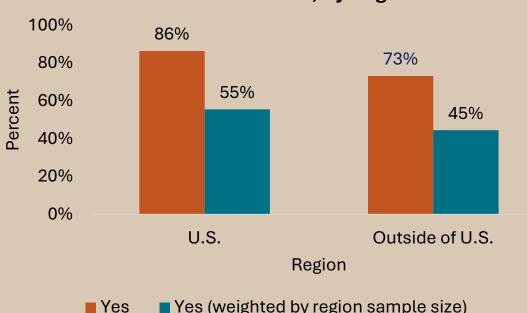


Figure 32: Gen Z Changes in Buying Habits Due to Brand Reputation or Action Cross-Tabulated With Their region. DSL Survey. 2025.

Reported Gen Z Change in Buying Habits Due to Brand Decisions, By Modern Slavery Awareness Level

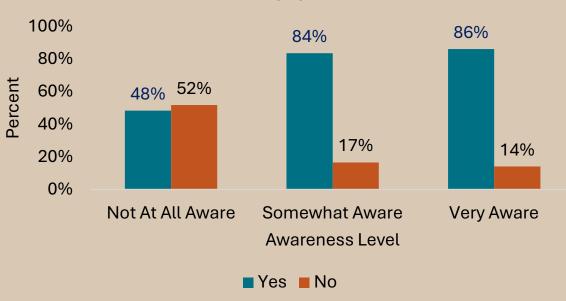


Figure 33. Gen Z Changes in Buying Habits Crosstabulated By Their awareness About Modern slavery. DSL Survey. 2025.



DOES GEN Z HAVE TRUST IN CORPORATIONS?

Gen Z Perceptions of Corporate Awareness of Forced Labor In Their Supply Chain



How Much Trust Do Gen Z Have That Corporations Are Working to End Forced Labor In Their Supply Chains

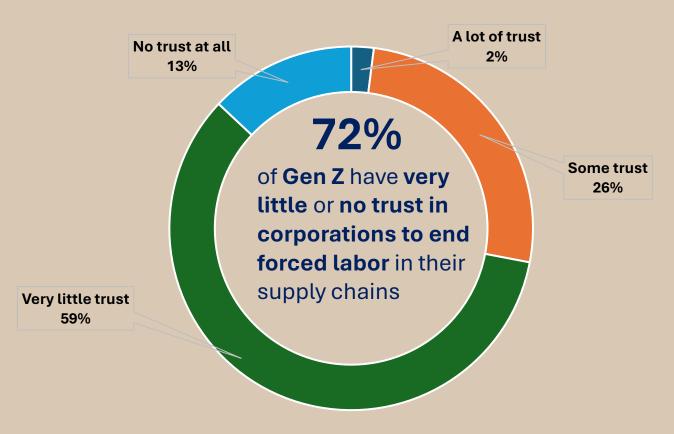


Figure 34: Does Gen Z Believe Corporations are aware of forced labor in their supply chains. DSL Survey. 2025.

Figure 35: How much trust does Gen Z have in corporations that they are working to end forced labor in their supply chains. DSL Survey. 2025.



Driving Change:

Tapping into Gen Z

The Generation Z consumer segment is one of the largest consumer segments for brands to engage with regarding forced labor progress.

While Gen Z cares about how their product is made and is willing to pay more for ethically made products, they are left unaware and unable to purchase products with full confidence in their ethical integrity. This leaves steps for brands to take advantage of for progress.

FUTURE RESEARCH AND NEXT STEPS



Future Research and Diving Deeper

What is the economic value of the Gen Z consumer segment as it pertains to Forced Labor and purchases?

How can the public and private sectors work to fill gaps in forced labor prevention?

What are the steps for strengthening awareness programs and brand transparency for ethical consumption?

What are the barriers to brands in their due diligence processes?

What is needed from consumers for brands to respond to their demands?

Our research provides a basis for understanding the Generation Z consumer segment and its sentiments, actions and challenges to an ethical market. For further information regarding our research, please see the technical bulletin appendix.

References

- 1. Thomson Reuters. (n.d.). Modern slavery. https://www.thomsonreuters.com/en/reports/modern-slavery
- 2. International Labour Organization. (2024, March 19). *Annual profits from forced labour amount to US\$ 236 billion, ILO report finds*. https://www.ilo.org/resource/news/annual-profits-forced-labour-amount-us-236-billion-ilo-report-finds
- 3. International Labour Organization. (2021). *Ending child labour by 2025: A review of policies and programmes*. https://www.ilo.org/sites/default/files/wcmsp5/groups/public/%40ed_norm/%40ipec/documents/publication/wcms_854795.pdf
- 4. U.S. Census Bureau. (2024). *QuickFacts: New York City, New York*. https://www.census.gov/quickfacts/fact/table/newyorkcitynewyork/PST045223
- 5. RAND Corporation. (2023). Assessing the impact of forced labor in global supply chains. https://www.rand.org/pubs/research_reports/RRA2534-1.html
- 6. Afterpay. (2022). *Gen Z US Report 2022*. https://afterpay-newsroom.yourcreative.com.au/wp-content/uploads/2022/11/Afterpay-Gen-Z-US-Report-2022.pdf
- 7. U.S. Department of Homeland Security. (n.d.). Forced labor. https://www.dhs.gov/blue-campaign/forced-labor
- 8. Beresford Research. (n.d.). Age range by generation. https://www.beresfordresearch.com/age-range-by-generation/
- 9. Pollard, A. (2021, November 17). *Gen Z has \$360 billion to spend, trick is getting them to buy*. Bloomberg. https://www.bloomberg.com/news/articles/2021-11-17/gen-z-has-360-billion-to-spend-trick-is-getting-them-to-buy
- 10.Oliver Wyman. (n.d.). A Gen Z report. https://www.oliverwyman.es/content/dam/oliver-wyman/lberia/reports/A-Gen-Z-Report.pdf

- 11. O'Connell, J. (2023, November 16). *Slave labor and trafficking: What's behind your clothing label?* America Magazine. https://www.americamagazine.org/politics-society/2023/11/16/slave-labor-trafficking-clothing-labels-246482
- 12. U.S. Department of Labor. (n.d.). List of goods produced by child labor or forced labor. https://www.dol.gov/agencies/ilab/reports/child-labor/list-of-goods
- 13. Verified Market Research. (n.d.). Apparel and footwear market. https://www.verifiedmarketresearch.com/product/apparel-and-footwear-market/
- 14. The Business Research Company. (n.d.). Coffee and tea global market report. https://www.thebusinessresearchcompany.com/report/coffee-and-tea-global-market-report
- 15. International Labour Organization. (n.d.). South Africa's fight against child labour. https://www.ilo.org/resource/article/south-africa%E2%80%99s-fight-against-child-labour
- 16. The Exodus Road. (n.d.). Forced labor in the United States. https://theexodusroad.com/forced-labor-in-the-united-states/
- 17. Anti-Slavery International. (n.d.). Slavery in the UK. https://www.antislavery.org/slavery-today/slavery-uk/
- 18. International Labour Organization. (n.d.). *Global efforts to end forced labour could increase global GDP by US\$611 billion*. https://www.ilo.org/resource/news/global-efforts-end-forced-labour-could-increase-global-gdp-us611-billion
- 19. McKinsey & Company. (n.d.). What is fast fashion? https://www.mckinsey.com/featured-insights/mckinsey-explainers/what-is-fast-fashion
- 20. Northeastern University. (2024, March 21). Fashion supply chain and forced labor. https://news.northeastern.edu/2024/03/21/magazine/fashion-supply-chain-forced-labor/

- 21. UniformMarket. (2025). Fast fashion statistics 2025. https://www.uniformmarket.com/statistics/fast-fashion-statistics
- 22. Global Freedom of Labour Coalition. (n.d.). Zara and the Uyghur crisis: Is there forced labour in Inditex's supply chains? https://gflc.ca/zara-and-the-uyghur-crisis-is-there-forced-labour-in-inditexs-supply-chains/
- 23. Al Jazeera. (2023, August 16). *H&M probes alleged Myanmar factory abuses as pressure intensifies*. https://www.aljazeera.com/economy/2023/8/16/hm-probes-alleged-myanmar-factory-abuses-as-pressure-intensifies
- 24. BBC News. (2024, August 10). Shein reveals child labour cases at suppliers. https://www.bbc.com/news/articles/c4glzzdd88lo
- 25. Kitroeff, N. (2019, December 16). Fashion Nova clothing is made by underpaid factory workers, according to a new report. The New York Times. https://www.nytimes.com/2019/12/16/business/fashion-nova-underpaid-workers.html
- 26. Good On You. (n.d.). How ethical is Forever 21? https://goodonyou.eco/how-ethical-is-forever-21/
- 27. Grand View Research. (2024). Coffee market size & trends. https://www.grandviewresearch.com/industry-analysis/coffee-market
- 28. The Borgen Project. (n.d.). Bitter origins: Labor exploitation in coffee production. https://borgenproject.org/labor-exploitation-in-coffee-production/
- 29. Observatory of Economic Complexity. (n.d.). Coffee and tea extracts in United States. https://oec.world/en/profile/bilateral-product/coffee-and-tea-extracts/reporter/usa
- 30. MarketResearch.biz. (2024). *Tea market projected to grow at 5.3% CAGR, crossing USD 117.8 billion by 2033*. https://www.thebusinessresearchcompany.com/report/coffee-and-tea-global-market-report

- 31. The Freedom Cafe. (n.d.). Tea. https://thefreedomcafe.org/tea
- 32. LeBaron, G. (2018). *The global business of forced labour: Report of findings*. University of Sheffield. https://respect.international/wp-content/uploads/2018/06/The-Global-Business-of-Forced-Labour-Report-of-Findings-University-of-Sheffield-2018.pdf
- 33. Times of India. (2024, July 10). *Top 10 tea-producing countries in the world*. https://timesofindia.indiatimes.com/world/top-10-tea-producing-countries-in-the-world/articleshow/111838663.cms
- 34. International Labour Organization. (2014). *Protocol of 2014 to the Forced Labour Convention, 1930 (P029).* https://normlex.ilo.org/dyn/nrmlx_en/f?p=1000:11300:0::NO:11300:P11300_INSTRUMENT_ID:3174672
- 35. International Labour Organization. (n.d.). From protocol to practice: A bridge to global action on forced labour (Bridge Project II). https://www.ilo.org/projects-and-partnerships/projects/protocol-practice-bridge-global-action-forced-labour-bridge-project-ii
- 36. U.S. Government Publishing Office. (n.d.). 19 U.S. Code § 1307 Convict-made goods; importation prohibited. https://uscode.house.gov/view.xhtml?req=(title:19%20section:1307%20edition:prelim)
- 37. U.S. Customs and Border Protection. (n.d.). Forced labor. https://www.cbp.gov/trade/forced-labor
- 38. United Nations Statistics Division. (n.d.). National accounts. https://unstats.un.org/unsd/nationalaccount/
- 39. The World Bank. (n.d.). GDP (current US\$) Aruba. https://data.worldbank.org/indicator/NY.GDP.MKTP.CD?locations=AW
- 40. Noah NY. (n.d.). Consumer power. https://noahny.com/blogs/news/consumer-power-1

- 41. YES! Magazine. (2013, July 5). American rebellions. https://www.yesmagazine.org/issue/democracy/2013/07/05/american-rebellions
- 42. Organization of American Historians. (n.d.). The American tradition of consumer politics. https://www.oah.org/tah/may-3/the-american-tradition-of-consumer-politics/
- 43. Remake. (n.d.). PayUp: Two years later. https://remake.world/stories/payup-two-years-later/
- 44. First Insight. (2020, January 14). The state of consumer spending: Gen Z shoppers demand sustainable retail. https://160569.fs1.hubspotusercontent-na1.net/hubfs/160569/1.14.2020%20The%20State%20of%20Consumer%20Spending%20Gen%20Z%20Shoppers%20Demand%20Sustainable%20Retail.pdf
- 45. Shopify. (n.d.). TikTok ad spending. https://www.shopify.com/blog/tiktok-ad-spending
- 46. Influencer Marketing Hub. (n.d.). Influencer marketing benchmark report. https://influencermarketinghub.com/influencer-marketing-benchmark-report/
- 47. Forbes. (2020, July 7). What the rise of TikTok says about Generation Z. https://www.forbes.com/sites/forbestechcouncil/2020/07/07/what-the-rise-of-tiktok-says-about-generation
- 48. First Insight. (2020, January 14). *The state of consumer spending: Gen Z shoppers demand sustainable retail*. https://160569.fs1.hubspotusercontent-na1.net/hubfs/160569/1.14.2020%20The%20State%20of%20Consumer%20Spending%20Gen%20Z%20Shoppers%20Demand%20Sustainable%20Retail .pdf
- 49. The Guardian. (2025, March 22). Why people are boycotting companies like Tesla and Trump-linked brands. https://www.theguardian.com/us-news/2025/mar/22/boycott-companies-tesla-trump-musk
- 50. Savers. (2024). Thrift Report 2024: North America edition.

 https://assets.ctfassets.net/312853a4ptgv/6McNOdFm04UiNDH0zStakt/f7be0c2ddcdbc28a45be85bfd27b00c7/Savers_Thrift_Report_2024_NA_0918202
 4_2.pdf

- 51. Mattei, F., & D'Adamo, I. (2024). Sustainable behaviors in second-hand purchasing: An empirical study. Sustainability, 16(8), 3129. https://www.mdpi.com/2071-1050/16/8/3129
- 52.Davies, R. (2020, July 6). *Boohoo: Leicester factory conditions in spotlight amid coronavirus. The Guardian*. https://www.theguardian.com/business/2020/jul/06/boohoo-leicesterfactory-conditions-covid-19
- 53.University of Bath. (2023, July). Response to Boohoo scandal: Failed workers it should have protected, shows new report. https://www.bath.ac.uk/announcements/response-to-boohoo-scandal-failed-workers-it-should-have-protected-shows-new-report/
- 54.BBC. (2024). *Panorama The dark side of the fashion industry*. https://www.bbc.co.uk/programmes/m001s74g
- 55. Auburn University. (n.d.). *Nike: Managing ethical missteps Case study*. Harbert College of Business. https://harbert.auburn.edu/binaries/documents/center-for-ethical-organizational-cultures/cases/nike.pdf
- 56.Greenhouse, S. (1998, May 13). *Nike pledges to end child labor and apply U.S. rules abroad. The New York Times*. https://www.nytimes.com/1998/05/13/business/international-business-nike-pledges-to-end-child-labor-and-apply-us-rules-abroad.html

Photo Resources in order of Appearance

- Slide 4: https://unsplash.com/photos/person-harvesting-lfRW_BjD94M
- Slide 6: https://unsplash.com/s/photos/coffee-beans?license=free
- Slide 8: https://unsplash.com/photos/person-fixing-machine-grQh x vZKM
- Slide 9: https://unsplash.com/photos/person-wearing-white-low-top-sneakers-GILIG9XVfo4
- Slide 10: https://unsplash.com/photos/brown-printed-sack-lot-c9Auglighes
- Slide 22: https://www.commerce.gov/images/photo-us-port-0
- Slide 23: https://unsplash.com/photos/DnkVlqi97nc
- Slide 24: https://unsplash.com/photos/aerial-view-of-people-walking-on-raod-IBaVuZsJJTo
- Slide 25: https://unsplash.com/photos/three-person-pointing-the-silver-laptop-computer-2FPjlAyMQTA
- Slide 28: https://unsplash.com/photos/a-rack-of-clothes-and-shoes-in-a-store-JGtPrdnMgQc
- Slide 26: https://unsplash.com/photos/green-textile-Th_WZMUPnO4
- Slide 31: https://unsplash.com/photos/hanged-top-on-brown-and-white-clothes-horse-TS--uNw-JqE
- Slide 34: https://unsplash.com/photos/person-walking-inside-building-near-glass-2TLREZi7BUg
- Slide 47: https://www.weforum.org/stories/2022/03/generation-z-sustainability-lifestyle-buying-decisions/
- Slide 48: https://unsplash.com/photos/person-in-blue-shirt-writing-on-white-paper-8mikJ83LmSQ
- Slide 56: https://unsplash.com/photos/a-rack-of-clothes-and-shoes-in-a-store-JGtPrdnMgQc
- Slide: 58,59,60: https://www.flickr.com/photos/unwomenasiapacific/50038117337

APPENDIX



FINANCIAL ACCESSIBILITY AS A BARREIR TO GEN Z SHOPPING ETHICALLY

"I think as a student with limited funds, it can be difficult to navigate these types of systems...I try to never purchase from or extremely limit my purchasing from companies I believe are unethical in some way" [DSL Survey].

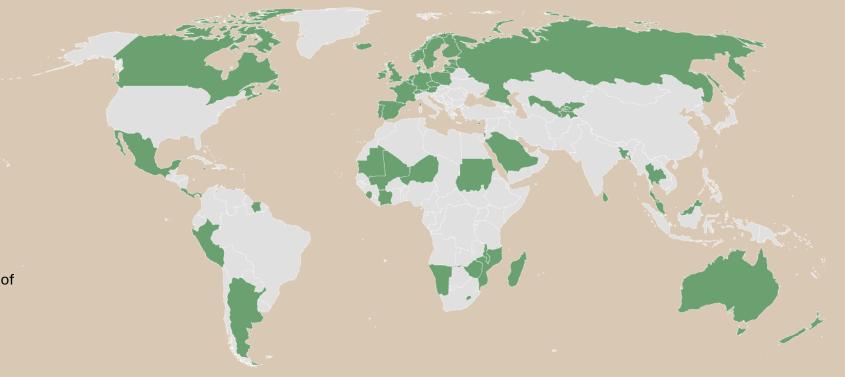
"I wish that shopping ethically was more accessible financially... I want every purchase to be ethical, but with the growing income and wealth gap in the U.S., it is increasingly difficult for a lot of the population to do so" [DSL Survey].



The Fight to End Forced Labor

In 2014 the International Labor Protocol was adopted to include the Forced Labour Convention [35]. Since then, 60/196 countries have ratified the protocol. It requires that states must take action to prevent forced labor [35].

Countries that have ratified the Forced Labor Addendum as of 2025





GEN Z AS A DRIVER OF SUSTAINABLE CONSUMPTION

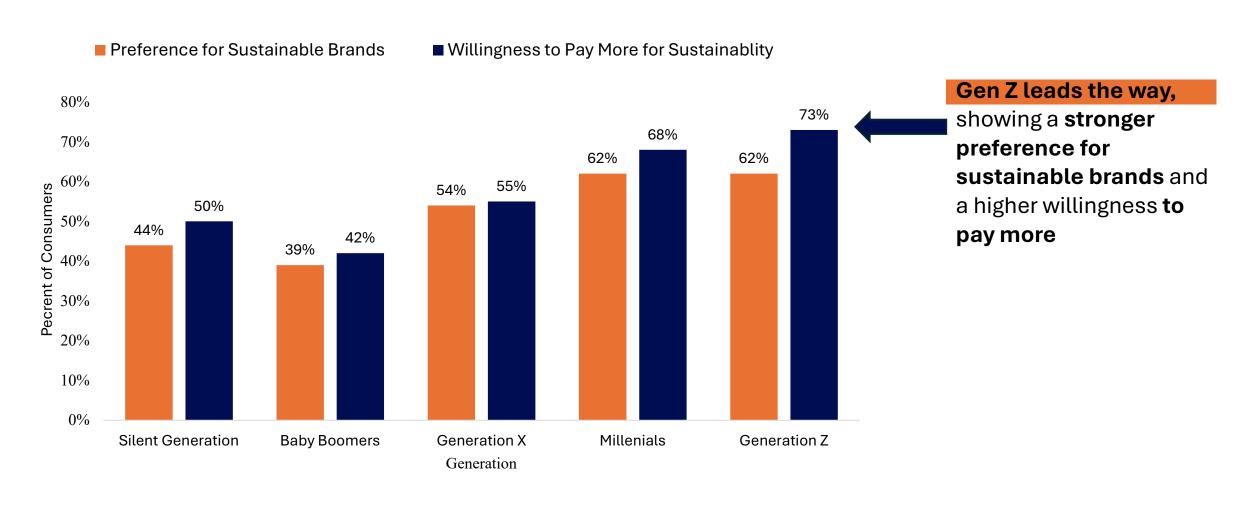
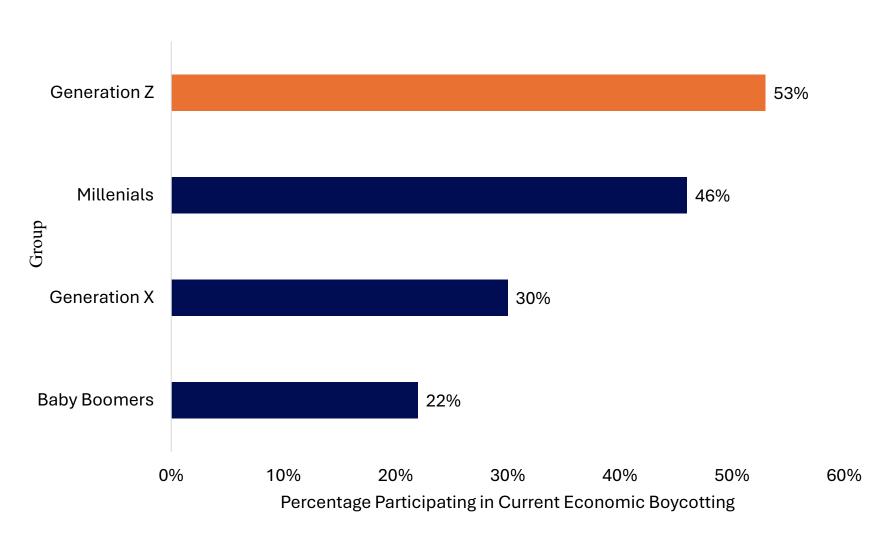


Figure 9. Preferences and Willingness to Pay for Sustainable Brands by Generation. Source: First Insight (2019).



GEN Z AS A DRIVER OF CONSUMER POWER TODAY



53% of Gen Z
consumers have, will, or
are participating in a
current economic
boycott – the most of any
generation in the U.S.

Top Reasons for Boycotting:

- Demonstrate consumer and economic power to companies (53%)
- Express dissatisfaction with current government policies (49%)
- DEI **Policy** Rollback (46%)

Figure 10. Boycott Participation by Generation. Source: Harris Poll (2025).

GEN Z ETHICAL CONSUMER CHOICE: SECOND-HAND APPAREL MARKET

The global secondhand clothing market is projected to reach \$367 billion by 2029, growing 15 times faster than the broader retail market in 2023.

In the United States, **60% of Gen Z** report that over a quarter of their wardrobe is secondhand—more than double the rate of the general consumer population [50].

This shift is driven by a mix of **affordability** and **values-based concerns**, particularly around **environmental sustainability** [50, 51].

Gen Z is helping to shape the retail market by buying in ways that reflect their values.



DYNAMIC SUSTAINABILITY LABT STRACUSE UNIVERSITY SURVEY DEMOGRAPHICS 24 NON-U.S. COUNTRIES REPRESENTED

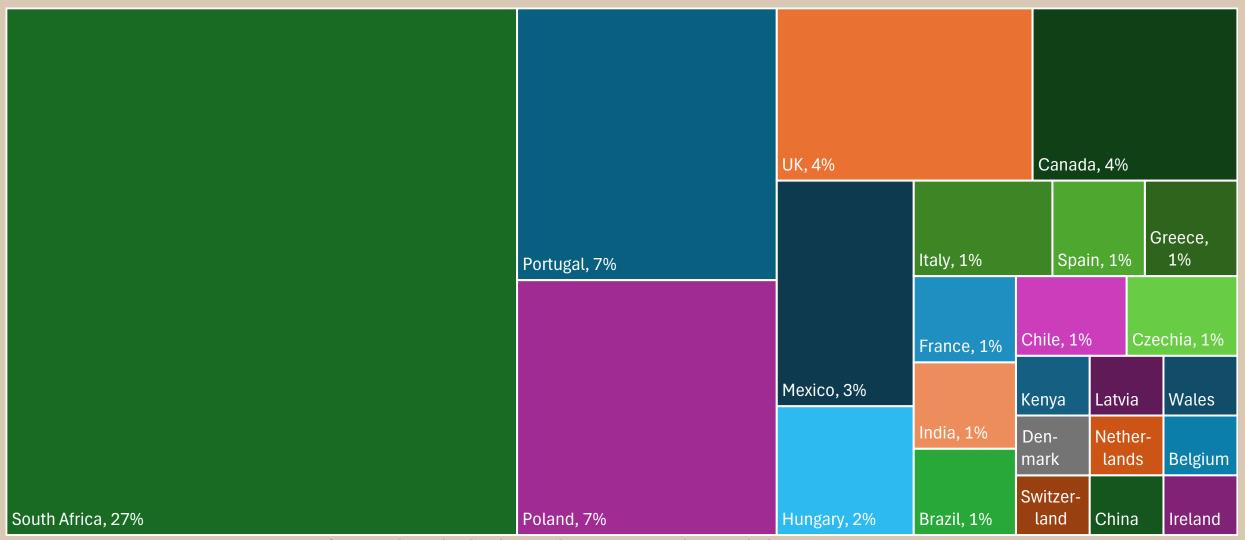


Figure 16: Countries Outside of U.S. Represented In Survey. DSL Survey 2025



80% of participants who ranked cost and affordability at the top factor influencing their purchasing decisions also said they are willing to pay more for products with ethical considerations.

Key Questions:

- 1. Why is this discrepancy occurring between Gen Z values and the actual purchasing of products?
- 2. What are the key barriers to purchasing ethically made products?



The 2020 Boohoo Controversy

Following reports of extensive wage violations and modern slavery in Leicester, UK Garment Factories, Boohoo faced significant backlash.

Within months, Boohoo lost **£1 Billion** (\$1.29Bn USD) in market value.[52]

In response, Boohoo shifted its supply chain overseas and pledged its **Agenda to Change** aimed at overhauling its scrutinized practices.[53]

A 2023 investigative report by BBC Panorama revealed that Boohoo's pledges were habitually "undermined".[54]

Today, Boohoo stock has not recovered since its prescandal high.





The Nike Controversy

In 1998, Nike faced multiple allegations **of forced labor and poor working conditions** in its factories in Asia.

These violations resulted in public outcry and increased scrutiny from regulators.

Nike shares dropped by 50%[55]

In response, Nike launched a significant public relations campaign and consulted with third parties to implement mitigation strategies.





The Nike Initiative

- In response to its 1998 controversy, Nike CEO Phil Knight launched **four new strategies**_[56] aimed at increasing Nike's social performance at its factories throughout the globe.
- 1. The **elimination** of the adhesive **Toulene** which its workers were unsafely exposed to during the production process and that all of its factories met **1998 US OSHA standards.**
- 2. The second initiative focused on **raising the minimum age** to work at its footwear and apparel factories.
- 3. An **expansion** of Nike's education program which included middle and high school course equivalencies for its workers.
- **4. Increased** support to its Micro Enterprise Loan Program-aimed at increasing support to Nike families who sought to open businesses.

Corporate Performance and ESG Standardization

Mitigation of forced labor in supply chains **lowers** risk and **increases** corporate performance.

The Morgan Stanley World Index ranks firms by comprehensive social and environmental criteria.

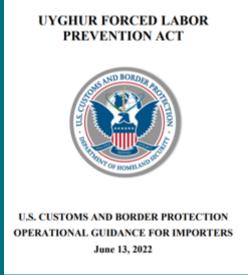
The highest-ranked companies listed on the Morgan Stanley World Index **outperformed** the lowest-ranked by **23.4**% [x]

RECOMMENDATIONS FOR CHANGE

What should Gen Z do if they care about these issues?

- 1. Support ethical brands (licensed or traceable)
- 2. Educate peers on Fast Fashion labor practices
- 3. Put pressure on their Universities to associate with the Fair Labor Association, so all merchandised items are ethically sourced
- 4. Support legislation aimed at combatting forced labor







BRAND NEXT STEPS

1.

Partner with Organizations that can help

Gain an accreditation and eventually become a licensee with a certification organization such as Fair Labor Association or become Fair Trade Certified

2.

Show consumers that your goods are ethically produced.

This can be a variety of things.
The Nepal Tea Collective has a
QR code attached to each tea
bag that allows consumers to
learn about the tea farmers who
produce.

