SB Socio-Cultural Trends Research™ Highlights Report

FALL 2024

Consumer Sustainability Attitudes & Actions

SUSTAINABLE BRANDS

Ipsos

Executive Summary

- This report explores the nuanced landscape of consumer attitudes and actions towards sustainability, highlighting motivations, barriers, and perception gaps that shape behavior. Findings reveal that while Americans generally recognize the interconnected nature of social and environmental challenges, significant gaps remain between their intentions and actions—particularly in reducing food and water waste.
- Interestingly, Americans tend to prioritize actions they perceive as impactful; however, expert analysis suggests that some of the most effective actions, such as supporting equity + inclusion and adopting plant-based diets, are often deprioritized. Despite indicating that societal issues are a higher priority than environmental ones, Americans still tend to focus less on these areas.
- Barriers like cost and lack of knowledge continue to impede sustainable choices, particularly among older generations, while younger consumers, including Gen Z and Millennials, lead in sustainable adoption. Although many remain skeptical of corporate sustainability claims, a large portion are willing to switch to more sustainable brands, underscoring the need for authenticity and transparency from companies. These insights offer actionable guidance for brands seeking to engage consumers more effectively in sustainable practices.

About SB Socio-Cultural Trends Research™

What Are Consumers Saying And Doing When It Comes To Sustainable Behaviors?

SB Socio-Cultural Trends Research™ is designed to assess consumer values around sustainability, their supporting behaviors, and understand the gap between intentions and actions through the lens of the SB Nine Sustainable Behaviors™.

Ipsos is the research partner for SB Socio-Cultural Trends Research™.
This research was conducted as part of Ipsos Essentials, a global behavioral tracking study.

As part of this partnership, this report includes Ipsos' newly updated ESG Segmentation to better understand nuances in consumer behavior.

Methodology

Survey of the U.S. general public (n=2,007), fielded August 6–9, 2024.

Where global insights are referenced, the markets tested include: Italy, China, Spain, Germany, South Korea, Brazil, Mexico, South Africa, France, United Kingdom, Japan, India, Australia, and Canada.

Significant increases and decreases from previous waves indicated with ▲ and ▼ markers on charts.

Note: the last wave was fielded in Feb. 2024.

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US respondents continue to recognize the interconnectedness of social and environmental challenges; many struggle to know what to focus on.

WHICH IS MORE IMPORTANT TO ADDRESS:

Environmental Issues such as climate change and pollution or Social Challenges like racial or gender inequality?

18%
Environmental

53%
Both Equally

29%
Social

68%
agree that there are so many critical problems in the world, they struggle to decide what to focus on

63%
agree that solving environmental issues will also require solving social issues, and vice versa

Similarly to the US, globally, there is a skew toward social issues
(17% Environmental, 30% Social)

Q: Some people say that environmental challenges, such as climate change and pollution are the most important for society to address. Other people say that social challenges like racial or gender inequality are the most important for society to address. Which of the following is closest to your point of view?
Base: 1004

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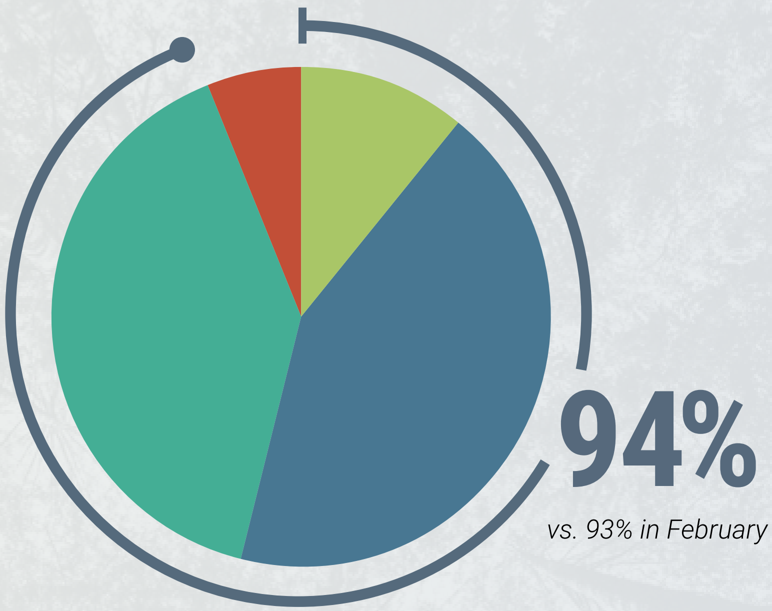
Most Americans – 94% – are behaving in ways that protect the planet, the people and its resources.

How often do you behave in ways that protect the planet, its people, and its resources?



11% all of the time
43% most of the time
40% occasionally
6% never

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Prior research identified the SB Nine Sustainable Behaviors™ that brands and consumers can take together to have the greatest impact.

SB NINE SUSTAINABLE BEHAVIORS™

ADDRESS CLIMATE CRISIS

EAT MORE PLANTS
Moderate meat consumption and eat mostly plant-based foods.

BE ENERGY SMART
Conserve energy and use renewable energy sources where possible.

THINK DURABLE
Purchase durable, reusable products and use fewer disposable ones.

PRESERVE RESOURCES FOR LIFE

REDUCE FOOD + WATER WASTE
Use only what you need and find ways to reduce water and food waste.

GO CIRCULAR
Choose products made with recycled content and recycle, rent, share, and buy used over new products.

CHOOSE NATURE-FRIENDLY
Buy products with clean ingredients and products that protect habitats and biodiversity.

FOSTER RESILIENT SOCIETIES

SUPPORT WOMEN & GIRLS
Support causes and products that support women and girls, that includes purchasing from women-owned businesses.

EXPAND EQUITY & OPPORTUNITY
Support brands offering inclusive and equitable products, policies and practices.

SHOW UP
Actively participate in organizations, buy from companies that support sustainable living, and vote.

Only the behavior descriptions were shown to respondents, not behavior names.

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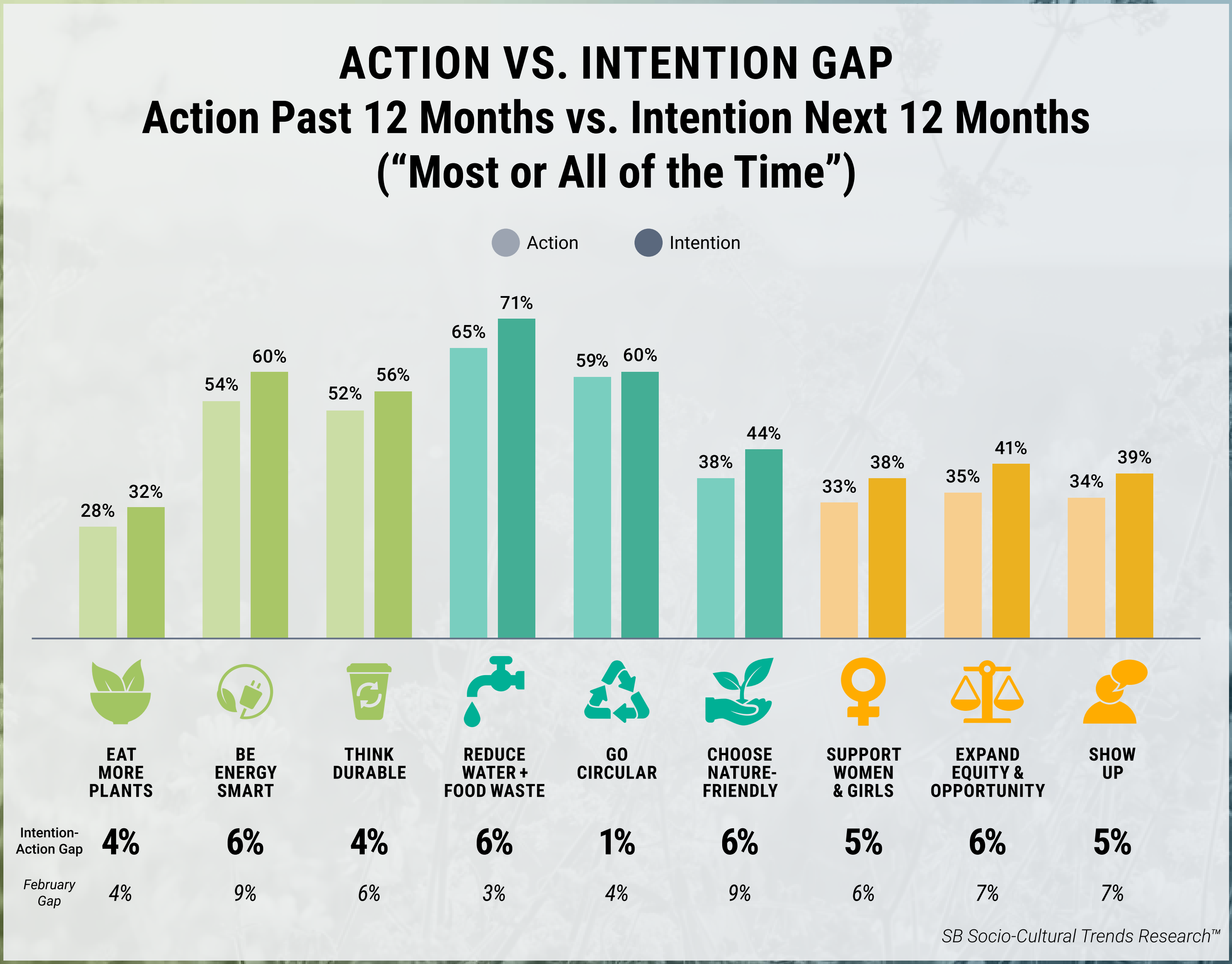
The gap between intention and past action has widened for reducing water + food waste; however, this is a result of more people intending to conduct these actions (i.e., intention has increased).

Younger generations are most likely to act 'most or all of the time.' Fewer Americans say they 'never' act in ways that protect the planet, its people and its resources, resulting in a slight decrease in guilt about individuals' impact of the environment.



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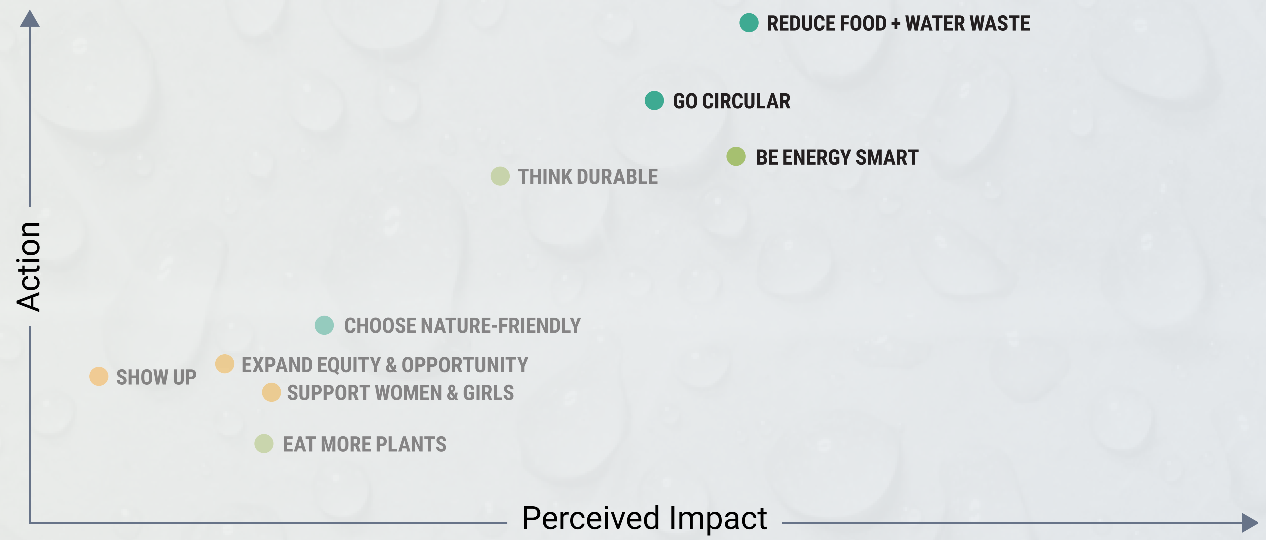
Americans are doing what they perceive to be the most impactful.

Reducing water + food waste is the most impactful action according to both Americans and science.

However, the second and third most impactful actions according to experts (supporting women + girls and eating more plants) are amongst the ones that average Americans feel have the least amount of impact and are therefore supported the least.

PERCEIVED IMPACT VS. ACTION (Impact Average Rank, Past 12 Month Action All or Most of the Time)



ACTUAL IMPACT RANKING

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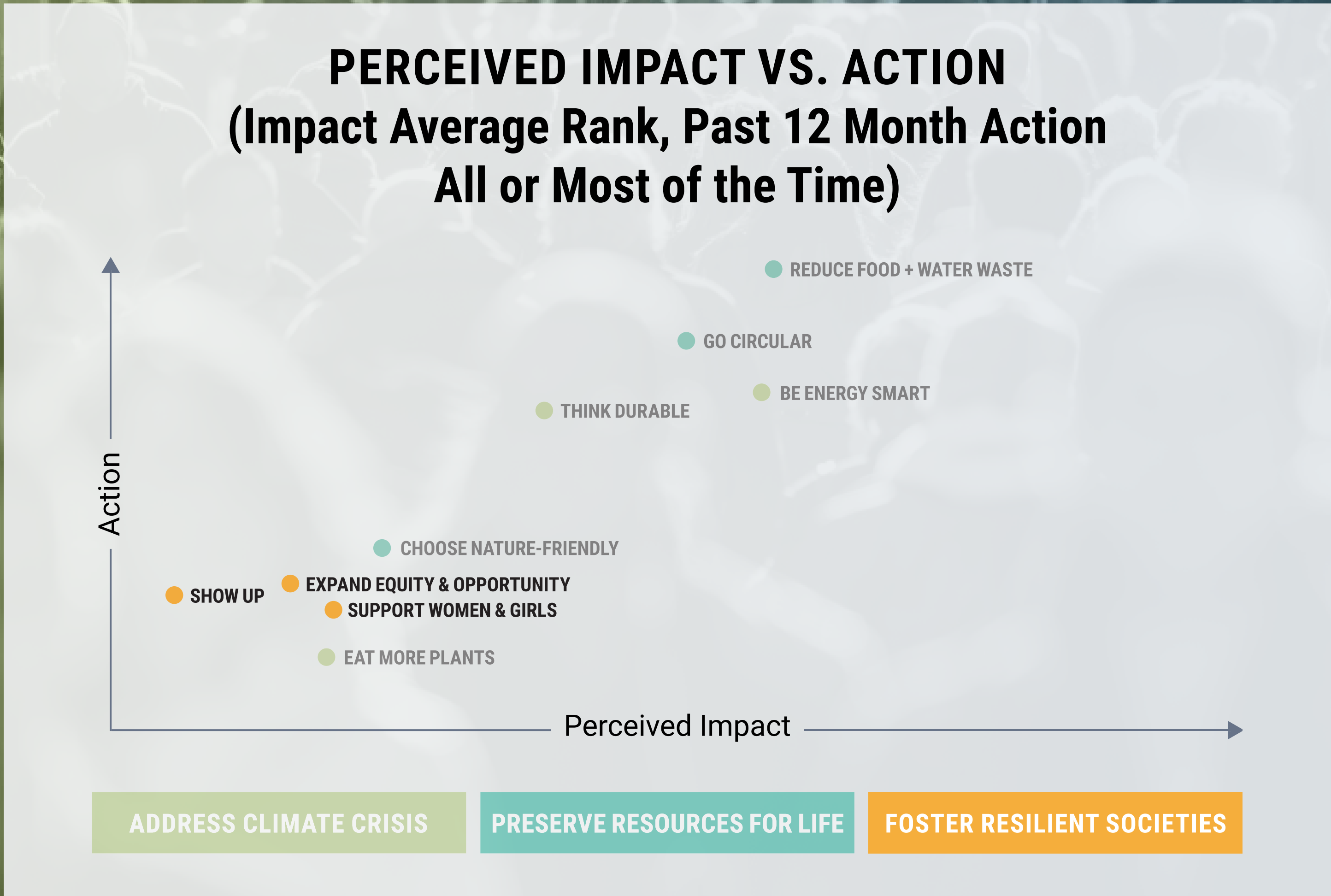
Despite citing that societal issues are more important to address than environmental ones, Americans continue to deprioritize them.

Barriers to greater action on fostering a resilient society include feeling like those actions won't make a difference, as well as simply not knowing enough about how to go about pursuing these actions.

Brands have an opportunity to lead their consumers toward making more impactful, sustainable behavior change through increased education and making options to participate more readily available.



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Brands that fall behind on sustainability are at risk of losing share to more purpose-driven competitors; especially for apparel, beauty, and food products.

75% agree companies can adopt impactful environmental and social initiatives while still generating profit.

60% support companies that act sustainably by purchasing their products or services, and 42% are willing to pay more for brands and products that are ethical and sustainable.

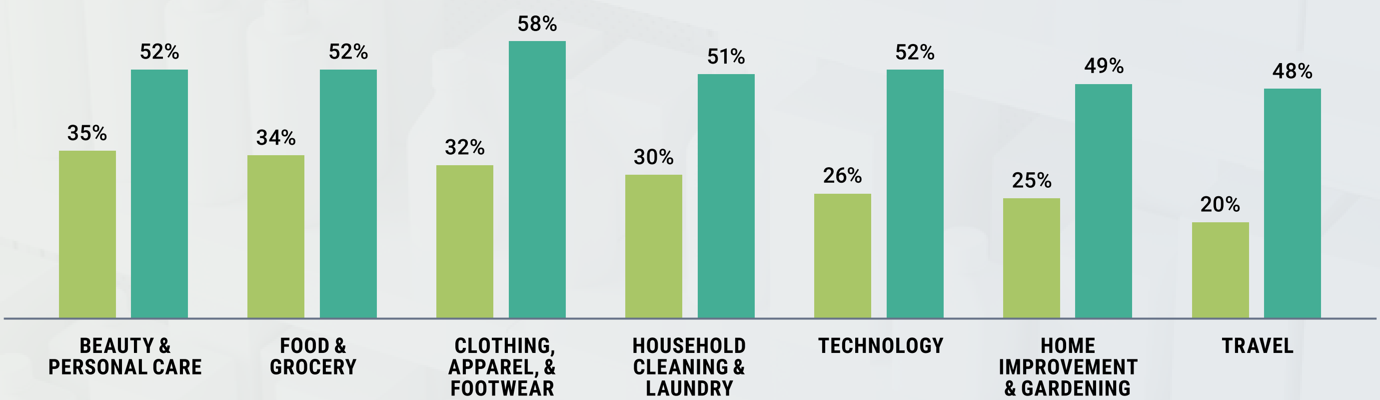
However, brands need to be careful as 56% of Americans are suspicious of companies using environmental and social messages to get them to buy.

ATTITUDES TO SWITCHING BRAND FOR A MORE ENVIRONMENTALLY RESPONSIBLE/SUSTAINABLE OPTION

(Top-2 Box Agreement)

29% have switched from a brand they usually buy from because another one was more environmentally responsible

52% would switch to a different brand for a more sustainable option



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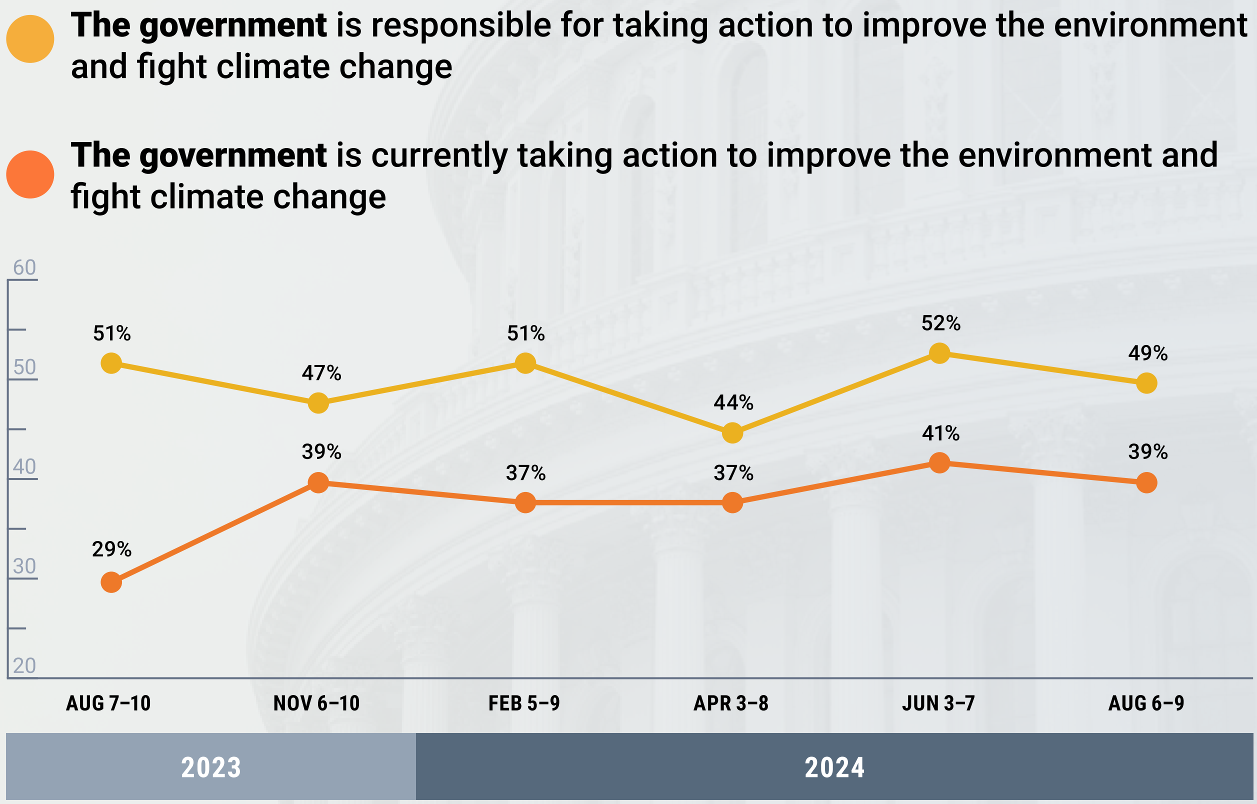
Since last year, the gap between responsibility for acting and perceived action has narrowed for the government.

Since August 2023, the perception that the government has been taking action has increased by 10%.

As inflation worry has decreased in America, fewer citizens are feeling like the government should focus on helping the economy at the expense of the environment.

RESPONSIBILITY FOR ACTING ON CLIMATE CHANGE VS PERCEPTION OF ACTION



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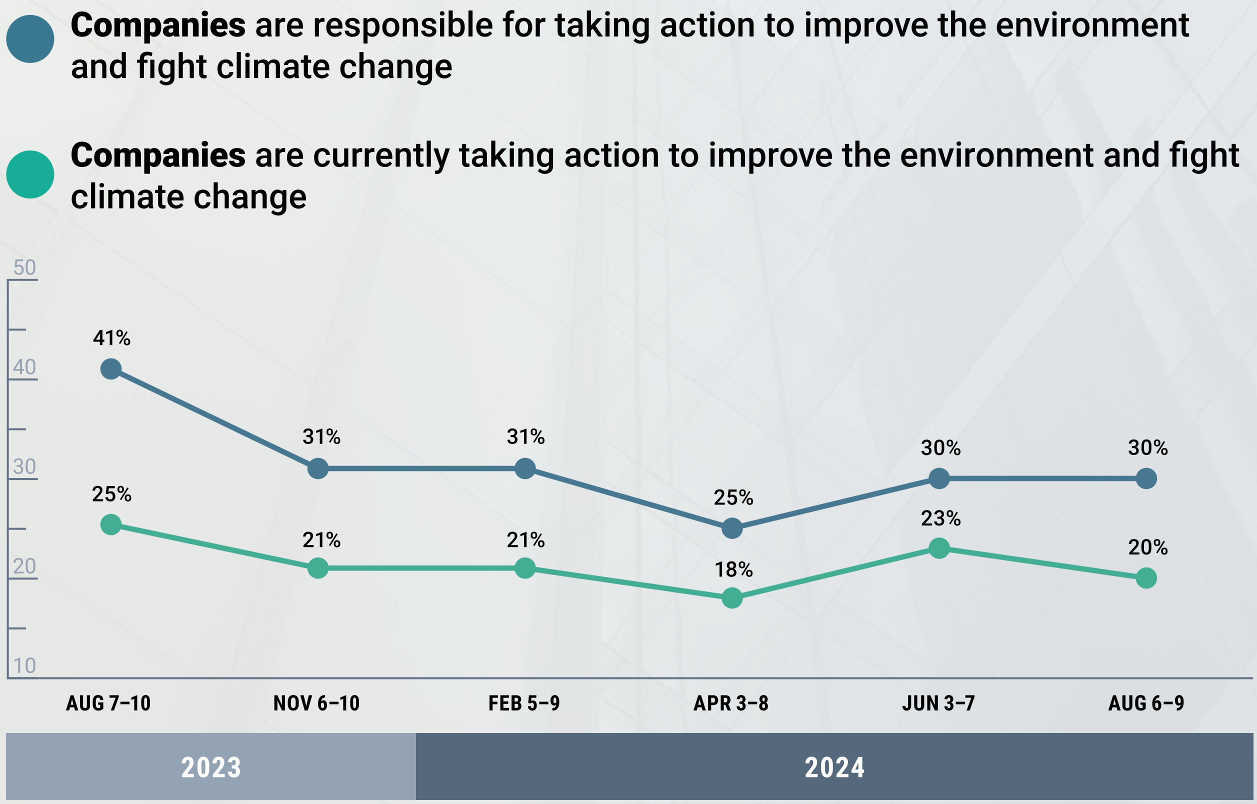
At the same time, the bar for action among companies is lower.

Compared to last year, fewer Americans feel that companies are acting to support climate issues. However, fewer citizens also feel that responsibility lies with companies to act, so the actions-expectation gap has actually narrowed.

RESPONSIBILITY FOR ACTING ON CLIMATE CHANGE VS PERCEPTION OF ACTION



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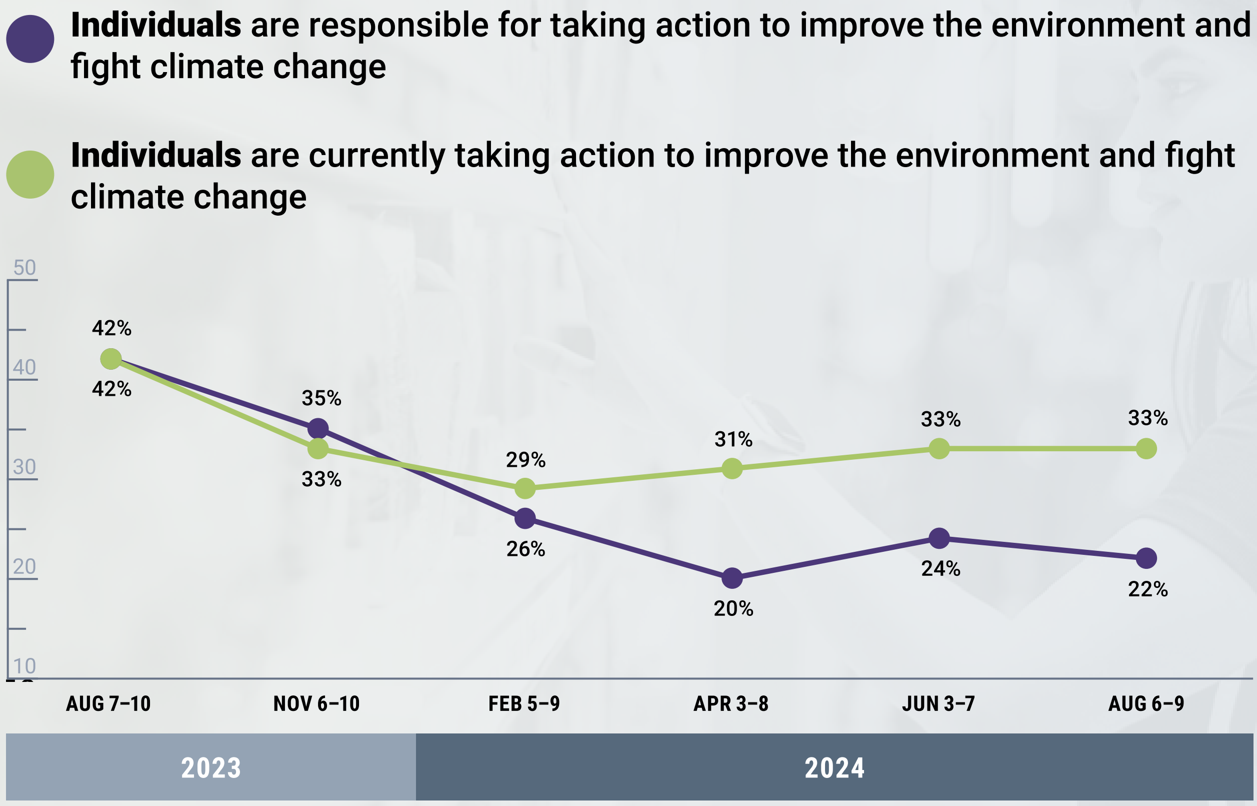
While Americans are expecting less from themselves to combat climate change, the perception of action has fallen so dramatically that they are still falling short of these lower expectations.

42% of Americans feel guilty about their impact on the environment. However, there are many barriers for individuals to act sustainably.

RESPONSIBILITY FOR ACTING ON CLIMATE CHANGE VS PERCEPTION OF ACTION



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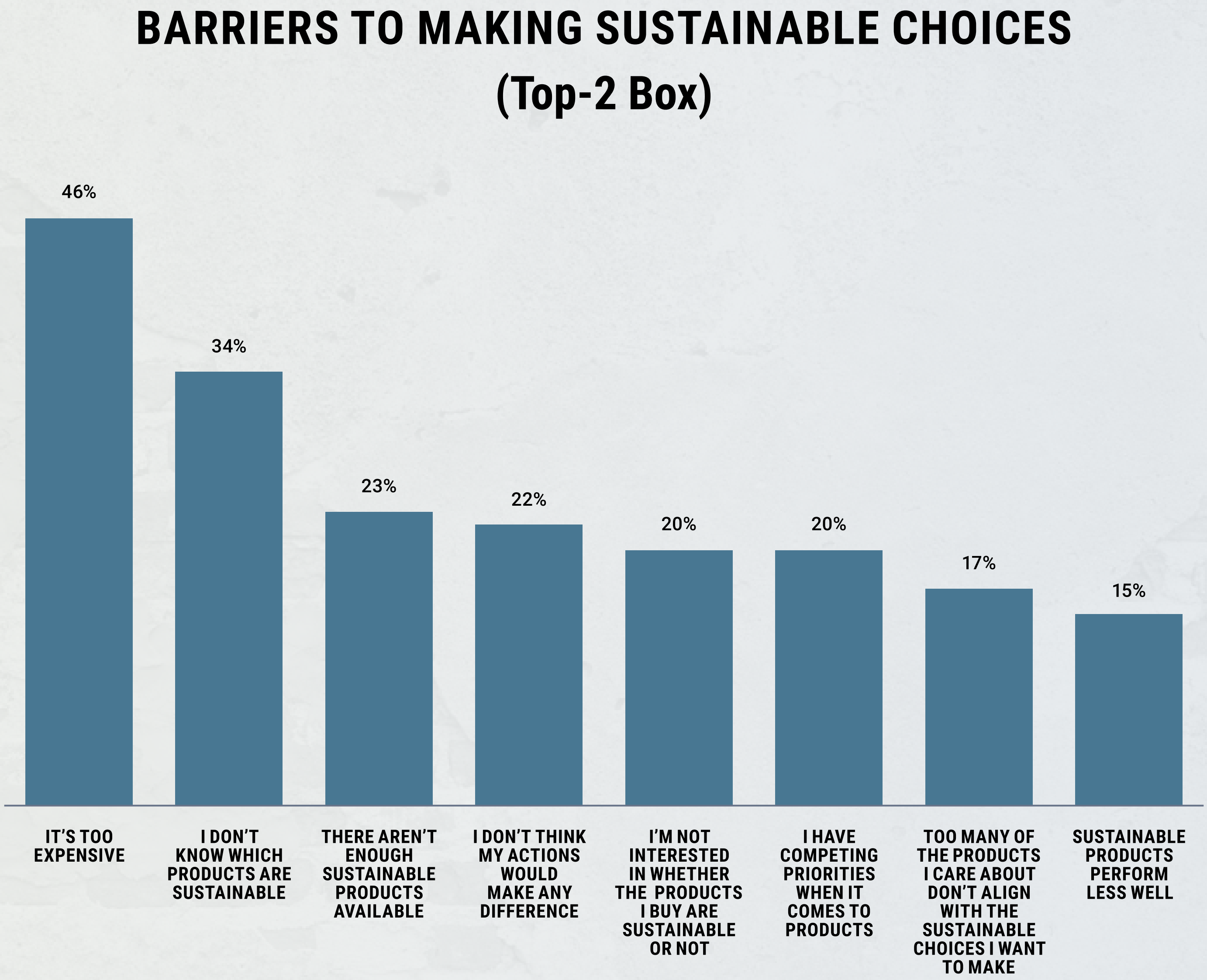
Price is the largest barrier to Americans making sustainable choices, especially for older generations; lack of knowledge is the second largest barrier.



Q: Q. When shopping for ... products, which of the following barriers do you think most often stops you from making more sustainable choices?
Base: 1720, Gen Z: 241, Millennials: 558, Gen X: 475, Boomers: 446

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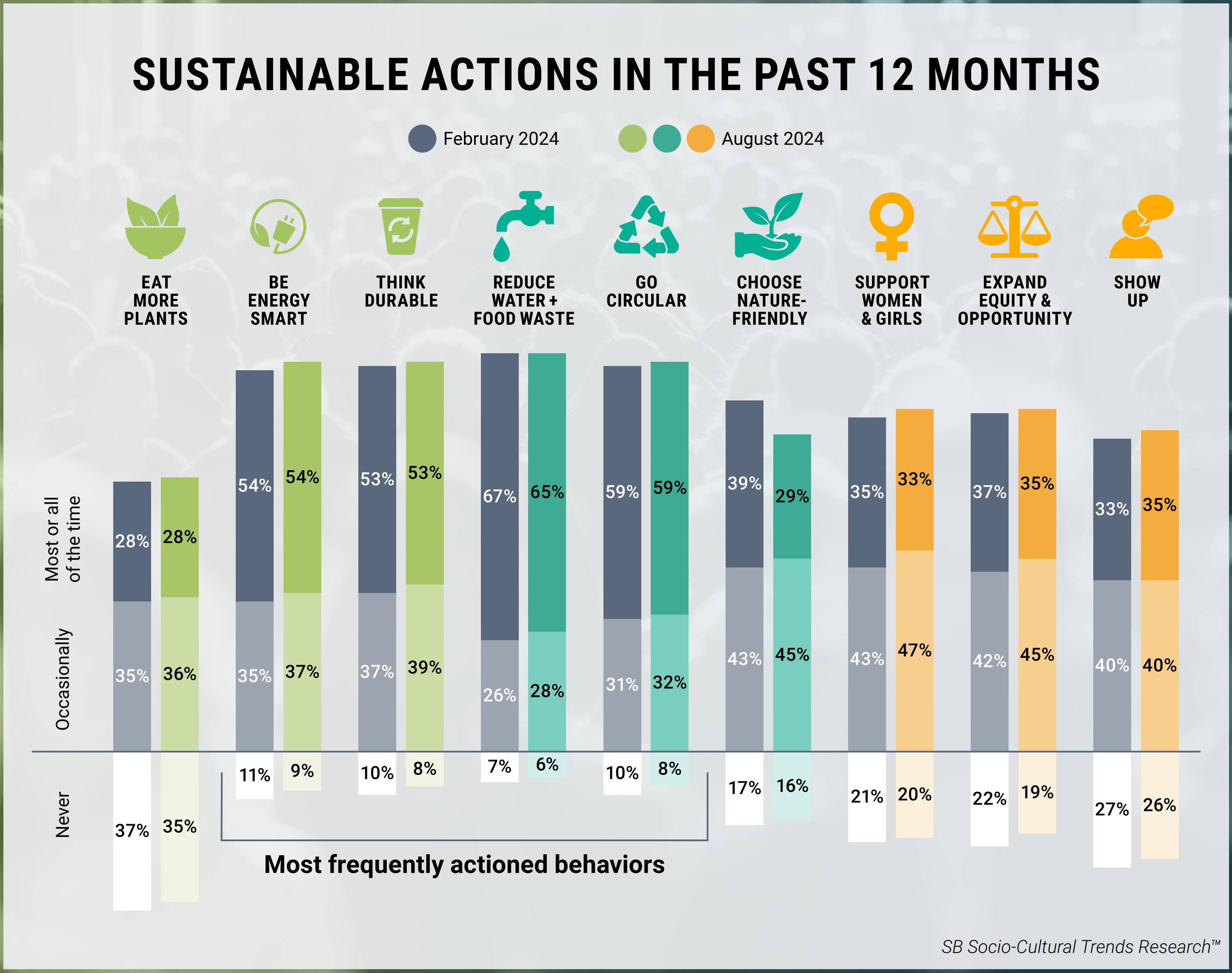
Compared to February, Americans are matching the frequency of action taken across the SB Nine Sustainable Behaviors™.

However, it is hard for consumers to do more. With inflation and rising cost of living, price has been the largest barrier consumers face when trying to make sustainable choices (46%). The second largest barrier is not knowing what is sustainable (34%) – brands can help consumers by increasing awareness of sustainable products.



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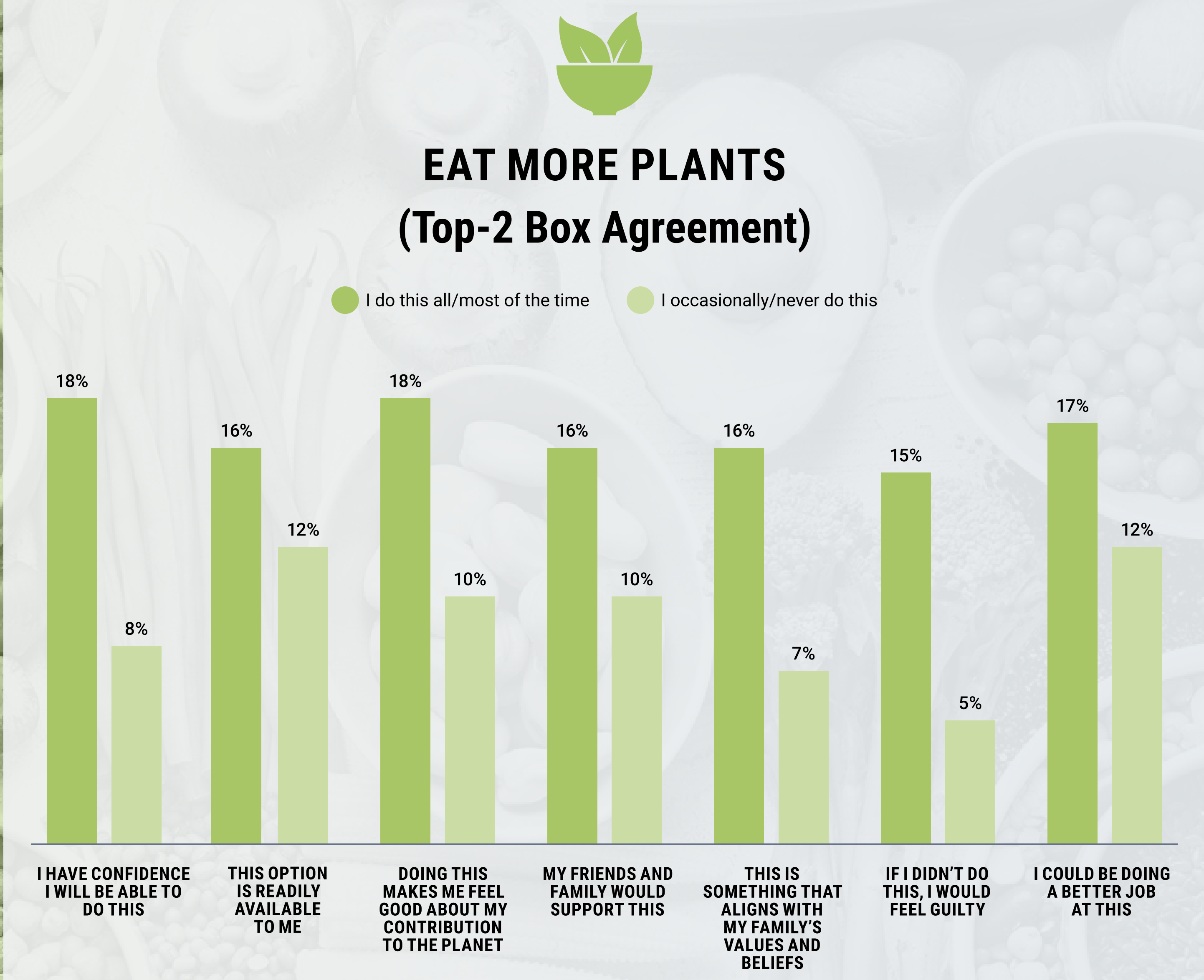
Adopting a more plant-based diet is motivated by feelings of confidence and contribution, as well as receiving support from friends and family, and having options readily available.



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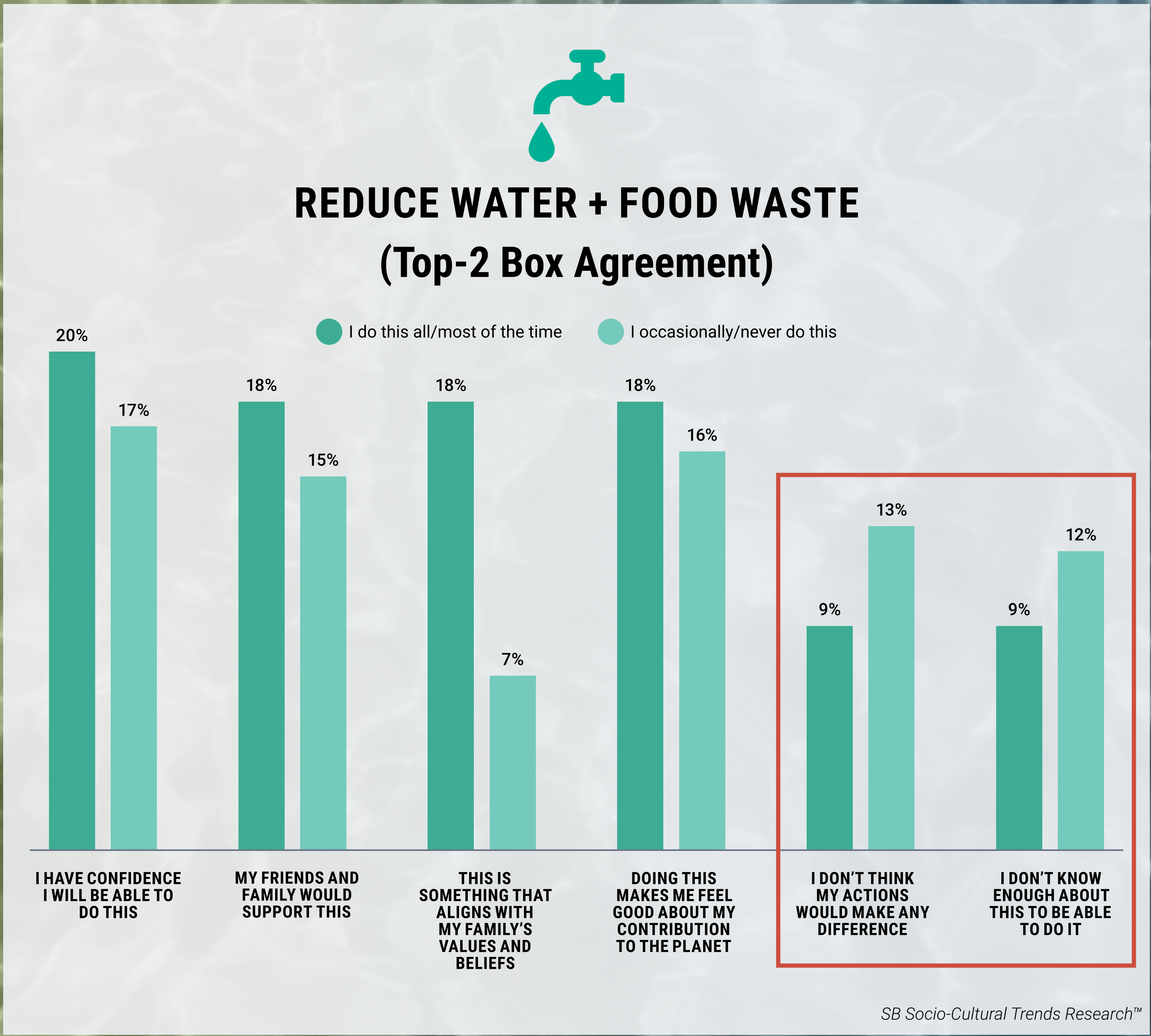
Confidence in action and social dynamics act as drivers to reduce food and water waste; lack of knowledge and belief that it won't make a difference are large barriers.



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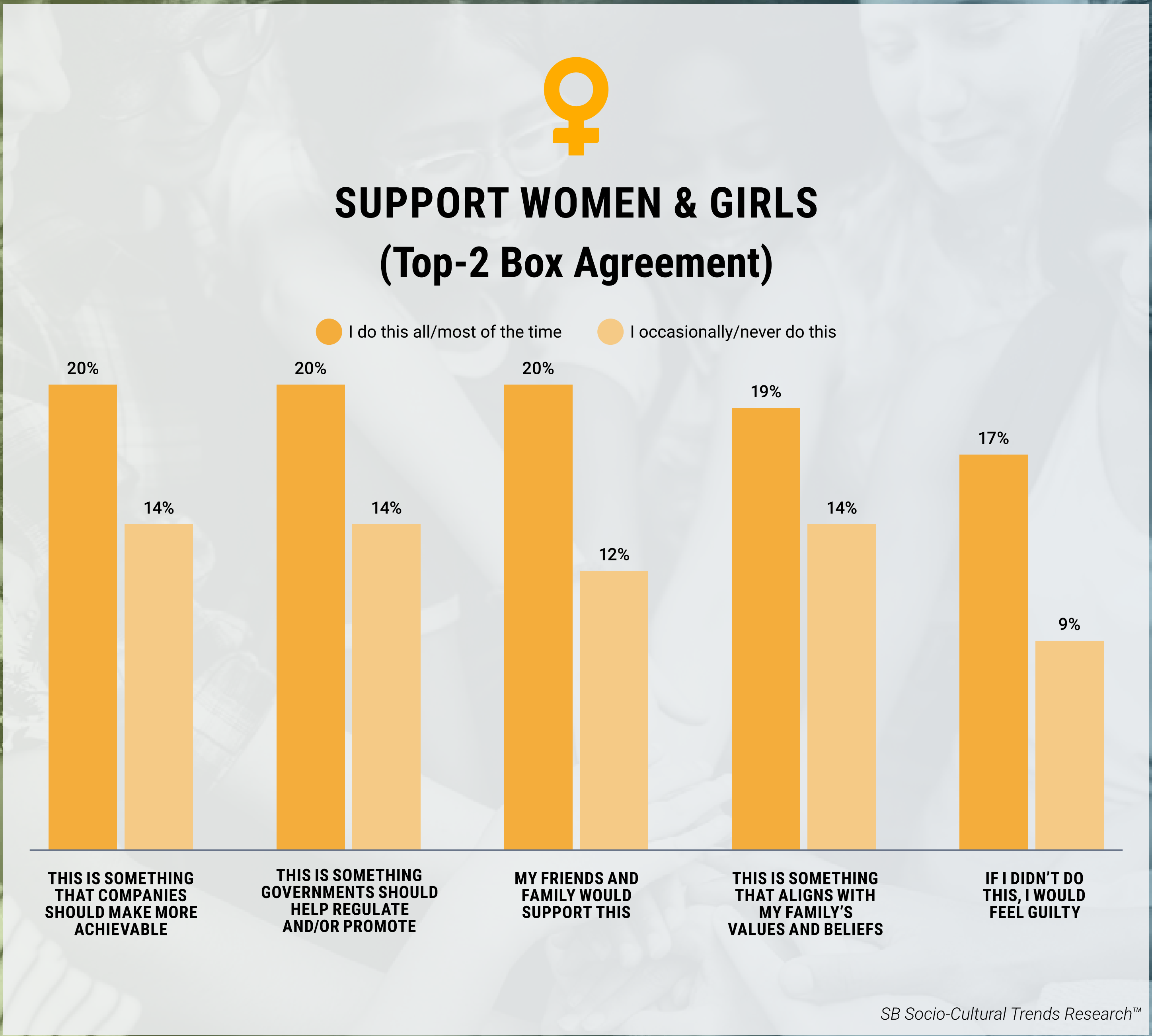
Those most engaged with supporting women and girls feel the government and companies should support their efforts and are motivated by the support of their friends and family.



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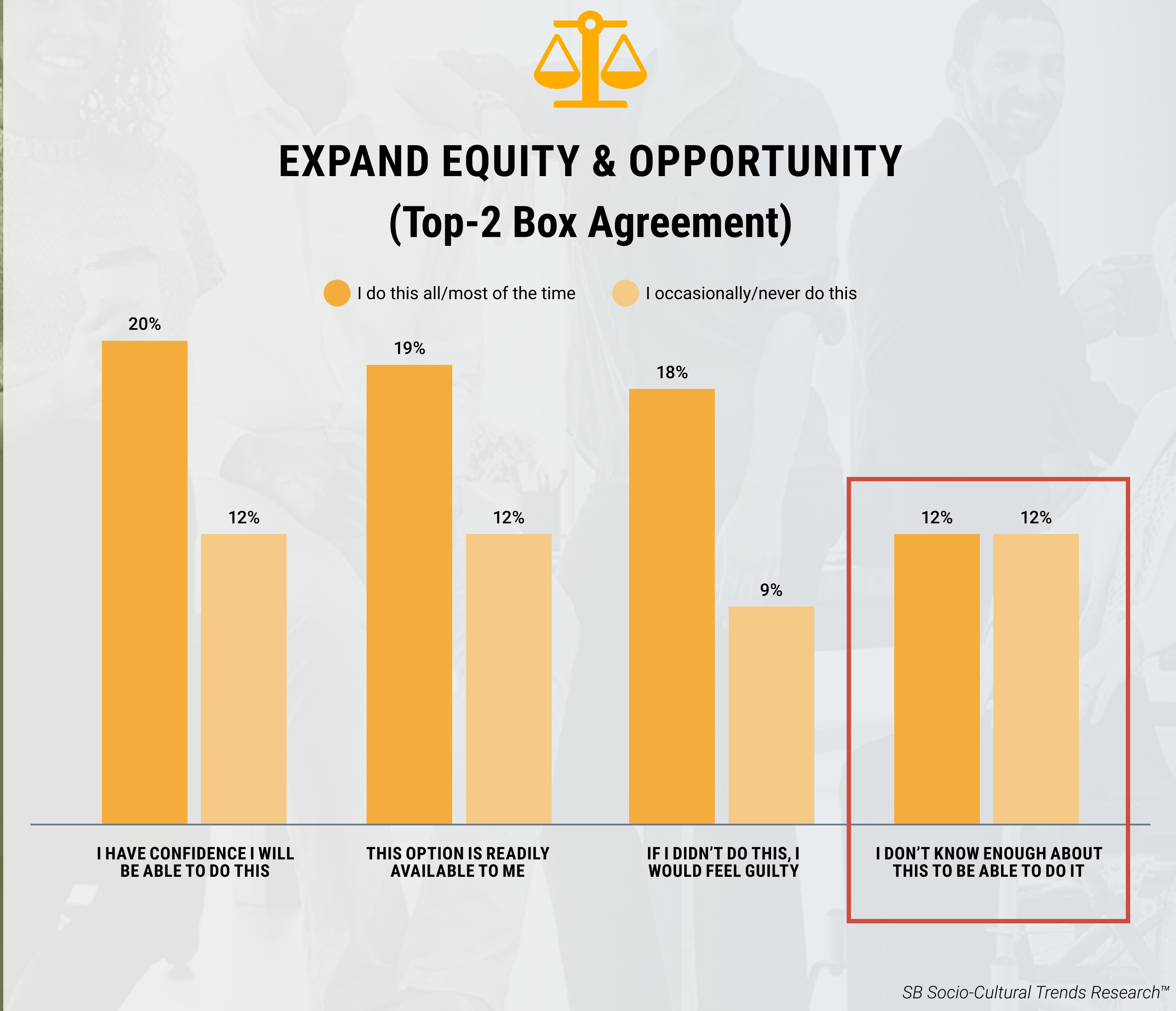
Those who often ‘expand equity and opportunity’ are motivated by feelings of confidence and ease of options, followed by combating a sense of guilt; however, lack of education is a barrier.



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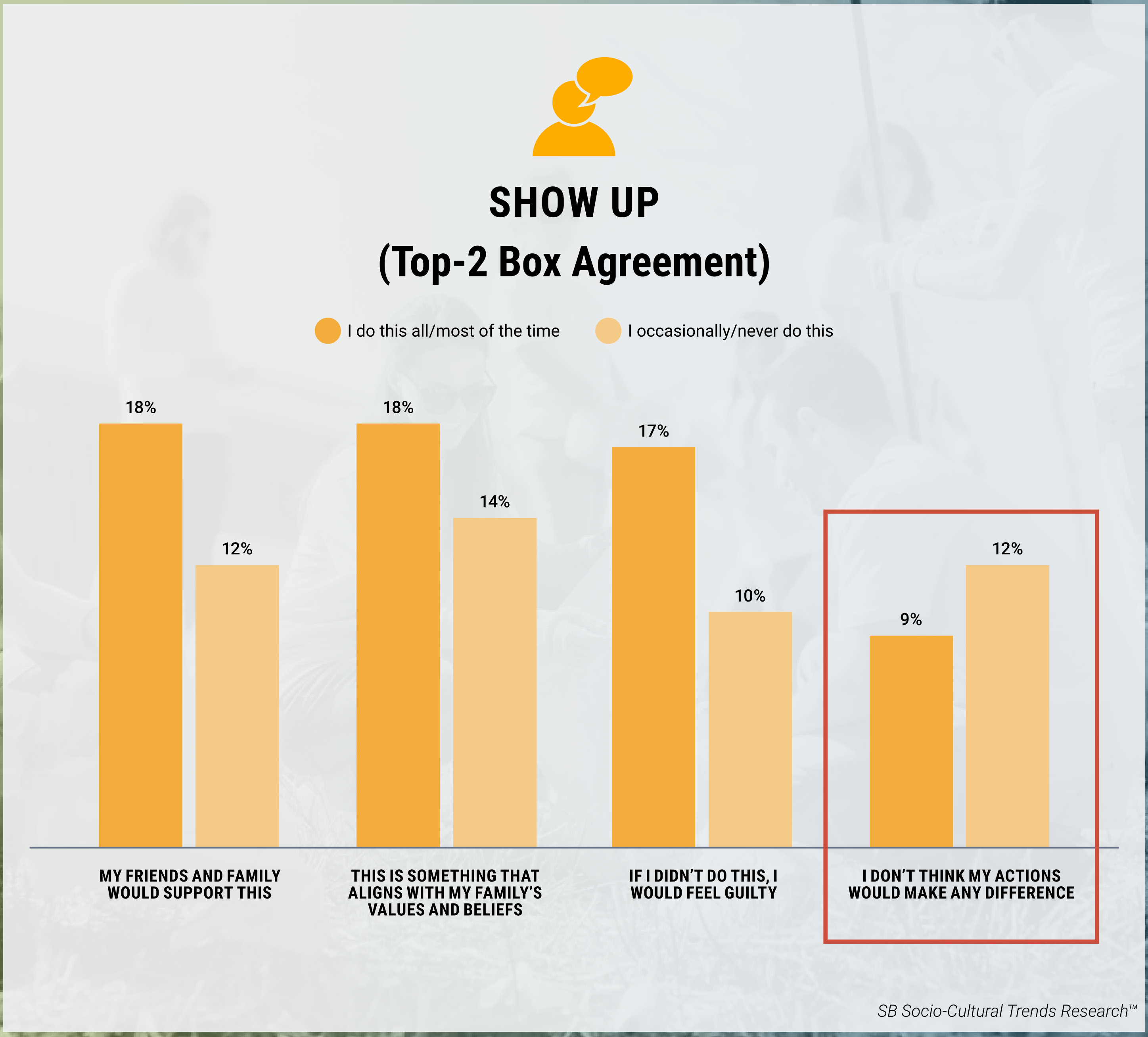
Those least likely to 'show up' feel that their actions won't make a difference; those who 'show up' more often are motivated by friends and family support followed by combating feelings of guilt.



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UNCOVER CUSTOMER PERCEPTIONS OF YOUR SPECIFIC BRAND

Submit any brand into the 2025 annual study and receive unparalleled insights on customer perception of that brand's performance. Benchmark how your customers rate your brand on social and environmental sustainability and overall brand trust, while also seeing how your brand compares to others included in the study.

60%
of U.S. consumers surveyed **support companies that act sustainably** by purchasing their products or services

52%
would **switch to a different brand** for a more **sustainable option**

29%
have **already switched** from a brand they usually buy from because another one was **more environmentally responsible**

Submit your brands **by January 15, 2025** to be included in this unparalleled sustainability-centric consumer research. Space is limited and will be filled on a first-come, first-served basis.

SUBMIT YOUR BRANDS TODAY!

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