SB SOCIO-CULTURAL TRENDS RESEARCH™

Consumer Sustainability Attitudes & Actions

Spring 2025

SUSTAINABLE BRANDS

Ipsos

About the SB Socio-Cultural Trends Research™

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

The 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™.

This research was conducted as part of Ipsos Essentials, a global behavioral tracking study.

As part of this partnership, we have also included Ipsos' ESG Segmentation to better understand nuances in consumer behavior.

Methodology

- **Survey of the US general public (n=2,003), fielded February 3rd – 7th, 2025**
- **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, Canada**
- **Significant increases and decreases from previous waves indicated with ▲ and ▼ markers on charts**
- **Ipsos is the research partner for SB Socio-Cultural Trends Research™**

Executive Summary

Awareness of environmental risk remains high, with 80% of Americans feeling that natural disasters and major climate events pose a moderate or high risk to the US. Simultaneously, attitudes and actions related to embracing environmental and social behaviors has decreased or remained flat year-over-year

- Intentions and actions against the SB Nine Sustainable Behaviors™ are largely flat from February 2024.
- Guilt about impact on the environment has significantly decreased YoY, especially for Millennials and Democrats, who are historically more engaged in sustainability.

US respondents do see making more sustainable purchases as an impactful action

- Despite indicating no increase in sustainable behaviors, 37% do say that they've switched brands for one that is more environmentally or socially responsible.
- Over 70% of respondents agreed that "looking for more sustainable products and services while I shop" is impactful, more so than buying fewer things, donating money, or activism.

The increase in the size of the Discerning Realist segment is a positive indicator for the US

- Discerning Realists have the most disposable income and buying power. They lead the pack among ESG segments in consistently adopting behaviors that protect the planet, its people, and resources.
- 74% say they have already switched a brand they usually buy from in the past 6 months because it's not environmentally and/or socially responsible.

Half of US respondents feel personally at high or moderate risk from severe weather

Perceived Level of Risk of Natural Disasters and Major Climate Events

(High/Moderate Risk, Trended)

▲▼ Significant change vs. previous wave at 95% confidence

Q: What level of risk do you think natural disasters and major climate events (e.g. hurricanes, forest fires, floods, tornados, etc.) pose to each of the following?

Base: US:2003 varies by wave: 1002-2006

*Losses data source: NOAA

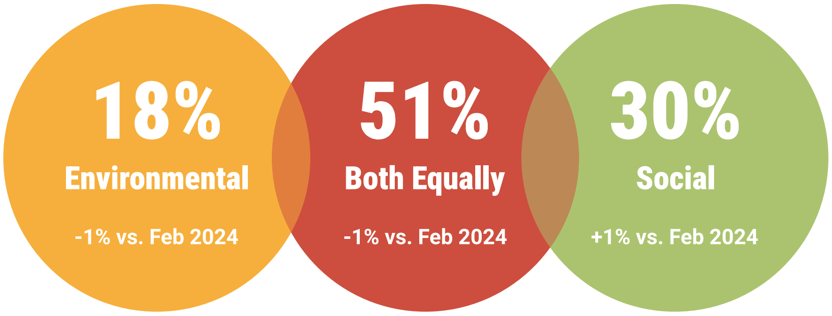
While environmental risk awareness is high, guilt about personal impact has decreased

Over one-third experience guilt over their perceived environmental impact and lack of societal contribution.

However, feelings of guilt over impact on the environment have declined since February 2024, especially among the groups most likely to be feeling guilty – Gen Z, Millennials, Democrats and the Discerning Realists segment.

Which is More Important to Address:

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



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: 2003

37%

"I feel guilty about my impact on the environment"

Top-2 Box Agreement

(-5%▼ vs. Feb 2024)

35%

"I feel bad about how little I contribute to society"

Top-2 Box Agreement

(-2% vs. Feb 2024)

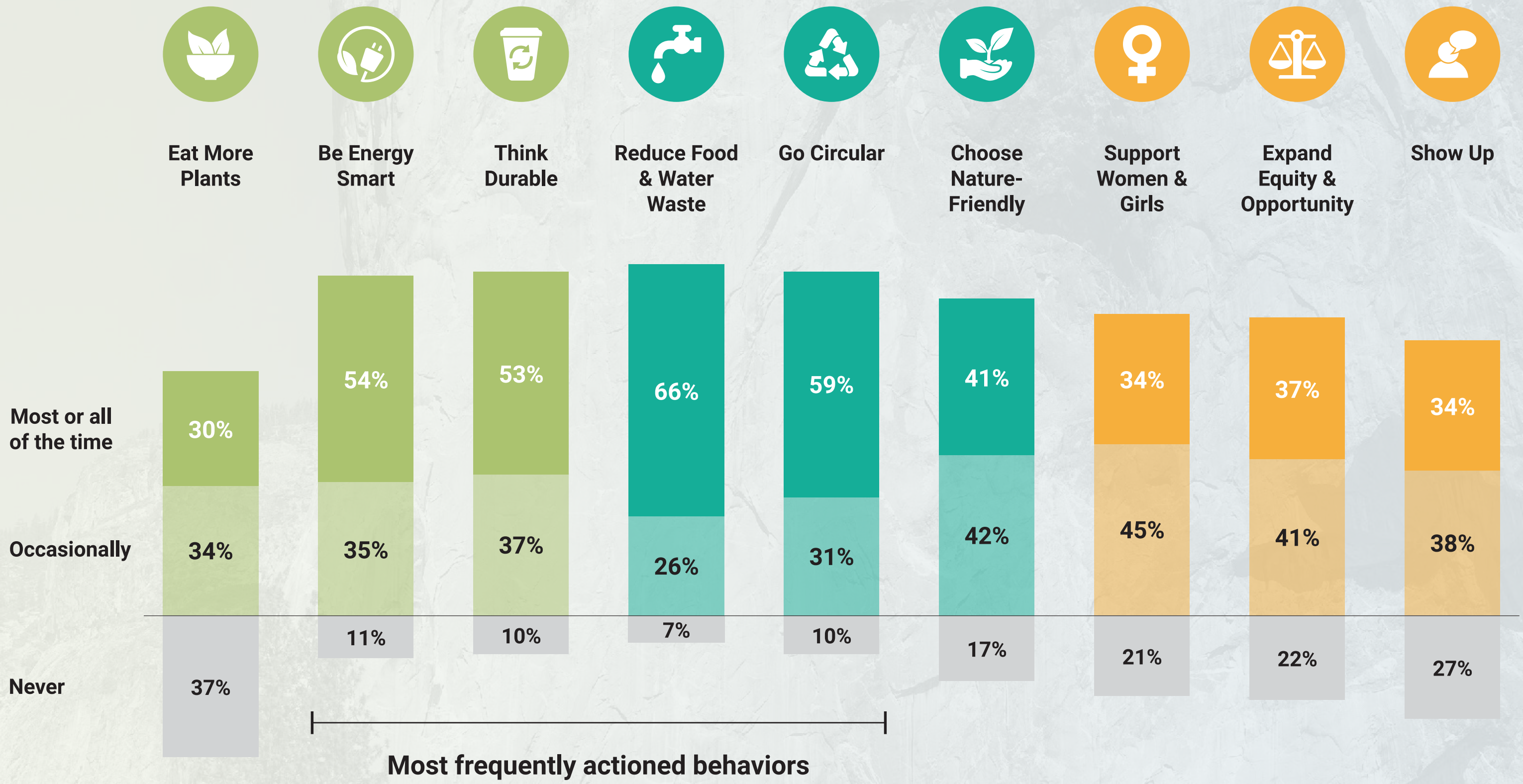
Respondents were shown the descriptions below when asked about their previous actions and future intentions around the SB Nine Sustainable Behaviors™

Address Climate Crisis	Preserve Resources For Life	Foster Resilient Societies
Eat More Plants Eat mostly plant-based foods	**Reduce Food & Water Waste** Minimize water or food waste	**Support Women & Girls** Support causes and products that support women and girls, that includes purchasing from women-owned businesses
Be Energy Smart Conserve energy and use renewable energy sources where possible	**Go Circular** Recycle or choose products made with recycled content whenever possible	**Expand Equity & Opportunity** Support brands offering inclusive and equitable products, policies and practices
Think Durable Purchase durable, reusable products or use fewer disposable ones	**Choose Nature-Friendly** Choose nature-friendly products that protect habitats and biodiversity	**Show Up** Actively participate in organizations, buy from companies that support sustainable living, and vote

Using proprietary SB research conducted with US consumers, combined with learnings from the United Nations Sustainable Development Goals (UNSDG), data from the World Economic Forum Risk Report, and insights from Project Drawdown, Sustainable Brands mapped where brands and consumers can join together to make the greatest impact through their own behaviors. These actions resulted in the SB Nine Sustainable Behaviors™.

While globally we see a dip in both intention and action across the SB Nine Sustainable Behaviors™, US consumers hold steady, closely matching last year for both action and intention

Actions Over the Past 12 Months



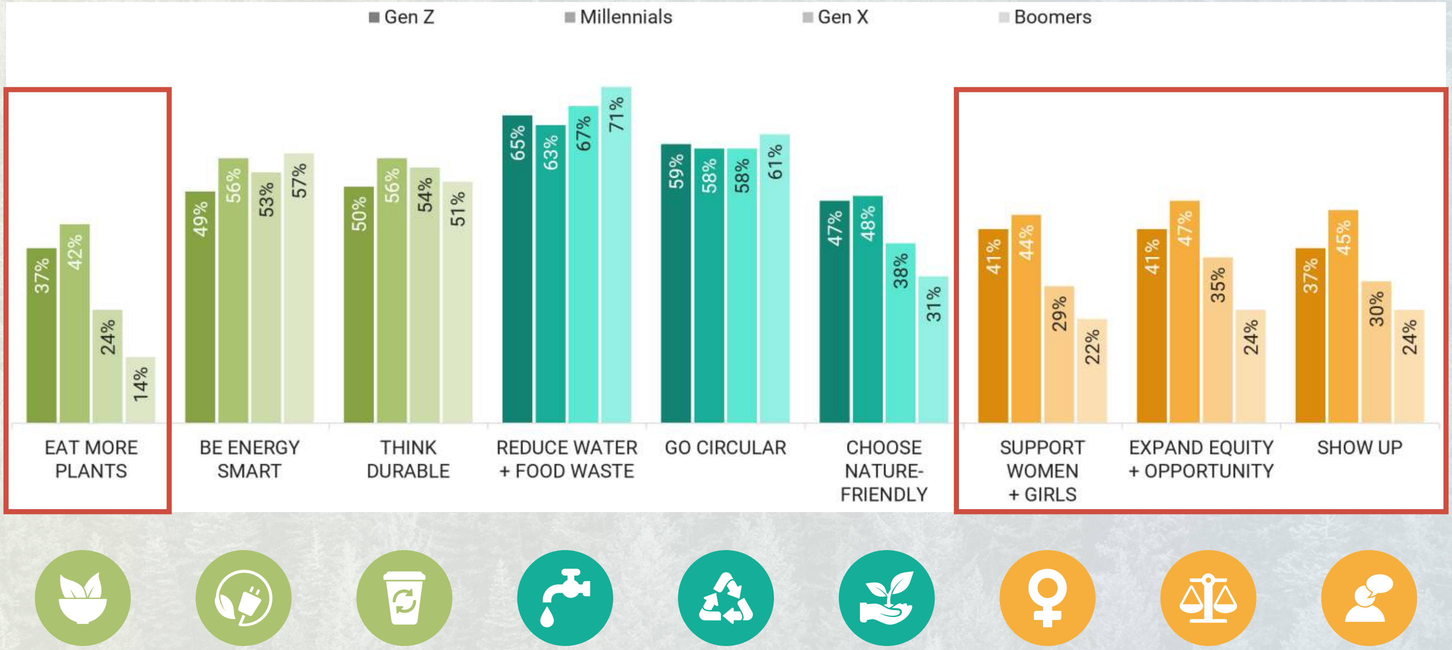
No Significant change vs. February 2024 at 95% confidence

Q: When given the opportunity, how often (if at all) did you personally do each of the following in the past 12 months?
Base: 2003

The generational divide is seen most in prioritizing plant-based diets, choosing nature-friendly products and services, and across all three societally-focused actions

Actions Over the Past 12 Months

(All/Most of the Time (Top-2 Box), by Generation)



No Significant change vs. February 2024 at 95% confidence

Q: When given the opportunity, how often (if at all) did you personally do each of the following, in the past 12 months?
Base: Gen Z: 297, Millennials: 638, Gen X: 570, Boomers: 498

Intentions are higher for Gen Z, but the Intention-Action gap is also wider

Heightened environmental and social awareness translates into higher sustainability goals. However, their actions lag significantly behind their aspirations, creating the widest divide between intention and action across age groups.

For marketers and policymakers, Gen Z presents both a challenge and an opportunity. Their strong intentions signal a receptive audience for sustainability initiatives. Yet, the wide intention-action gap underscores the need for targeted strategies to help this generation turn their sustainability aspirations into reality.

Intention - Action Gap - GEN Z

	Eat More Plants	Be Energy Smart	Think Durable	Reduce Water & Food Waste	Go Circular	Choose Nature-Friendly	Support Women & Girls	Expand Equity & Opportunity	Show Up
Action Intention Gap	8%	11%	11%	1%	4%	12%	11%	13%	15%
vs. US Gen. Pop.	*+6pts*	*+2pts*	*+5pts*	*-3pts*	--	*+5pts*	*+4pts*	*+6pts*	*+9pts*

Q: When given the opportunity, how often (if at all) did you personally do each of the following, in the past 12 months Q: Over the next 12 months, how often do you intend to do each of the following? Base: Feb 5-9, 2024: 264, Feb 3-7, 2025: 297

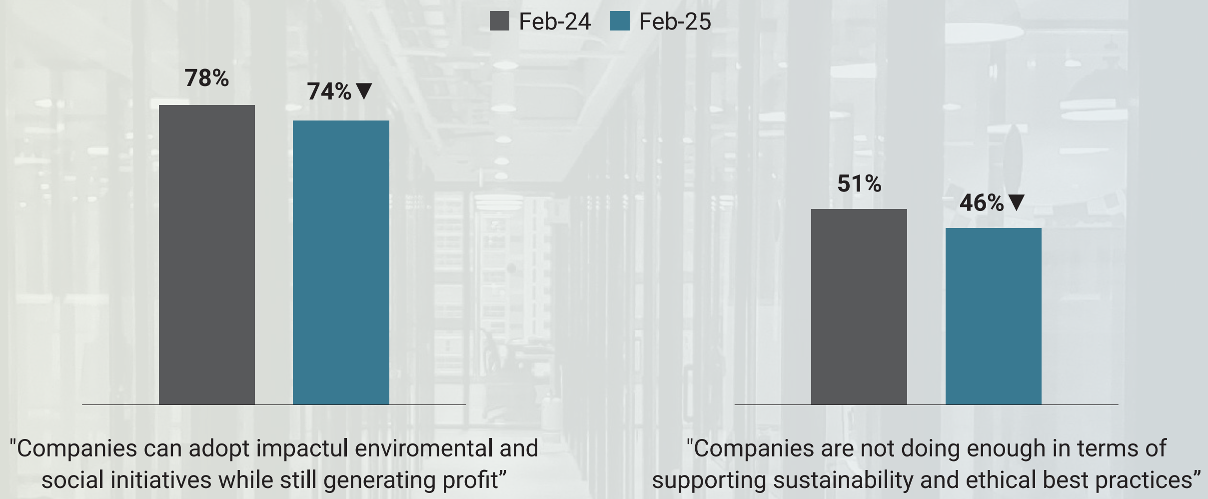
Expectations of companies remain high, but are tempered

Given the economic climate, consumers across groups are tempering their expectations of companies and giving them more leeway.

Still, 80% continue to expect transparency in corporate sustainability efforts. Although, down vs. last year, there's a strong belief (74%) that profitability and environmental responsibility can coexist, leaving companies with less excuse to avoid impactful initiatives.

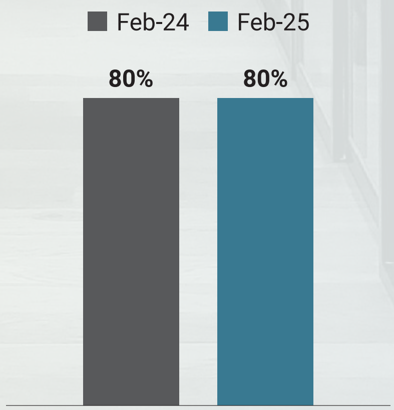
Perceptions of Companies and Sustainability Practices

(Top-2 Box Agreement)



It's important for companies to share their sustainability efforts with their customers

(Top-2 Box Agreement)



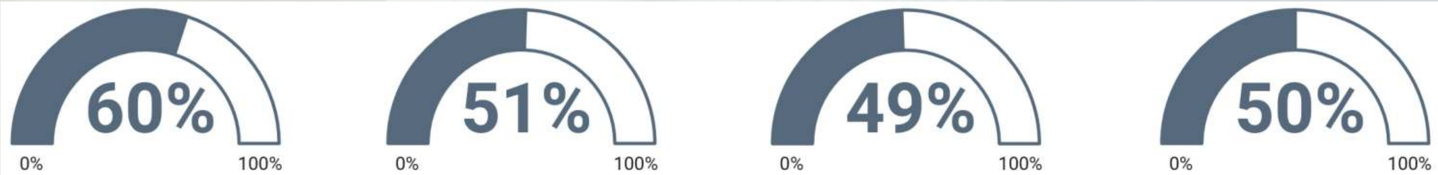
▲▼ Significant change vs. February 2024 at 95% confidence

Americans recognize that their shopping behavior has a crucial role to play - half are choosing sustainable options and taking a stand

72% of consumers believe looking for more sustainable products and services when they shop is impactful in terms of protecting the planet, its people and its resources.

Brand Impact

(Top-2 Box Agreement)



"I support companies that act sustainably **by purchasing their products and services"**

"I actively **look** for products or services that are **more sustainable"**

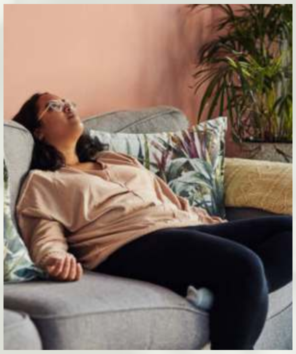
"When **buying products** that are new to me, **I choose a brand with a sustainable product option rather than defaulting to a familiar brand"**

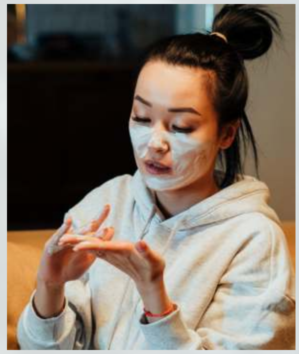
"I won't buy from companies that **support causes I don't agree with"**

Q: To what extent do you agree or disagree with the following statements?

Base: 2003

Ipsos’ ESG segments have shifted in the opposite way of perceived risk - a decrease in ‘Activists’ and an increase in ‘Disengaged Distancers’





Disengaged Distancers	Passive Compliers	Discerning Realists	Willing Contributors	Activists
“I am not the one to save the world”	“I will do enough to not be called out”	“I’m focused on proven solutions that fit into my busy lifestyle”	“I’m pragmatic about the contributions I’m willing to make”	“It is upon me to accelerate change and wake up the world”
29%	22%	22%	9%	19%
vs. Feb 2024 +4%▲	-3%▼	+3%▲	-1%▼	+4%▲

LESS active ←→ MORE active

▲▼ Significant change vs. February 2024 at 95% confidence

The increase in the size of the Discerning Realist segment is a silver lining for the US

Discerning Realists have the most disposable income and buying power. They lead the pack among ESG segments in consistently adopting behaviors that protect the planet, its people, and resources. These consumers are more likely to have children, a potential driver of their heightened sense of guilt and drive to protect the planet for future generations.

Discerning Realists:

(Top-2 Box Agreement)

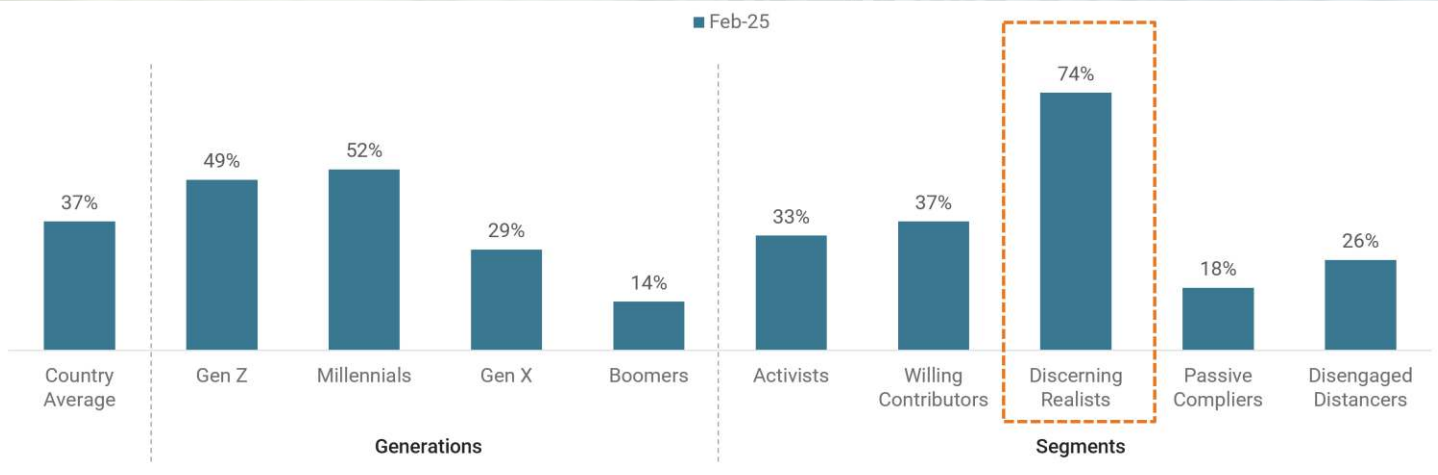
55%	**57%**	**75%**	**64%**	**69%**
"I feel pressure to behave in sustainable/ethical ways."	**"I feel guilty about my impact on the environment."**	**"When buying products that are new to me, I choose a brand with a sustainable product option rather than defaulting to a familiar brand."**	**"I actively look for products or services that are more sustainable."**	**"I support companies that act sustainably by purchasing their products or services."**
vs. US Gen Pop				
+15 pts	**+20 pts**	**+26 pts**	**+13 pts**	**+9 pts**

Q: How much do you agree or disagree with each of the following statements? To what extent do you agree or disagree with each of the following? Base: 2003

A growing Discerning Realist segment leads to an uptick in brand switching behaviour; three quarters of these consumers have switched in the past six months

In the past 6 months, have switched a brand they usually buy from because another one was more environmentally and/or socially responsible (NET)

(Top-2 Box Agreement)



Q: How much do you agree or disagree with each of the following statements?

Base: 2003, Gen Z: 297, Millennials: 638, Gen X: 570, Boomers: 498, Activists: 383, Willing Contributors: 182, Discerning Realists: 413, Passive Compliers: 451, Disengaged Distancers: 573

To maximize impact, brands should target Discerning Realists, with the goal of having a halo effect on Passive Compliers

Principles to Win

Discerning Realists

Convenient Proven Solutions
Family-Oriented

Passive Compliers

Functional Co-Benefit
Value-Oriented

Discerning Realists are the most receptive to brand switching and seeking out sustainable products; they also offer greater growth potential than activists who tend to have less disposable income. Passive compliers have some overlapping needs as Discerning Realists, making them a productive secondary target

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The Full Socio-Cultural Trends Research report is available to SB Members.

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