

# SUSTAINABILITY SENTIMENT TRACKER



**BRODIE** | **PUBLICFIRST** 

**Welcome** to the BRODIE Public First Sustainability Sentiment Tracker.

This report offers key insights into what consumers in the UK and US think about sustainability and business. We have used these insights to identify six types of consumers, defined by their beliefs and actions regarding sustainability. And we offer five key recommendations for sustainability business leaders.

This research differs from current research available to corporate leaders making sustainability decisions on behalf of brands or businesses, and we explain more about this on page 3.

But first let us introduce ourselves to you...

## **BRODIE**

BRODIE is an international responsible business and sustainability advisory firm, working with some of the largest, most advanced companies in the world, across many sectors. BRODIE helps clients to successfully transform their business in the age of sustainability. With deep expertise in strategy development and implementation, BRODIE supports clients along the full sustainability journey, from prioritisation and goal setting, to communication. The BRODIE team is based in the UK and the US, and has a unique blend of experience and expertise, unified through a passion to make business thrive.

## **Public First**

Public First is a research and policy agency with specialisms in energy, climate change and sustainability. As well as policy recommendations packaged as compelling content, we offer the economic modelling and opinion research that prove a proposal can and will work. This combination of skills also informs our campaigning work: we know what changes the minds of the public and legislators – and we help you turn that into reality. The Public First team is based in the UK and North America and works in a broad range of international markets.

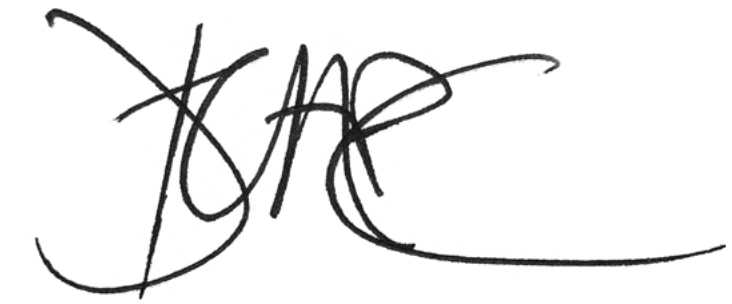
Using BRODIE and Public First's combined expertise of consulting and research, in this report we share our insights into consumers and sustainability, as well as their perceptions of business and sustainability. The report includes just a snapshot of our findings, so please do get in touch if you would like to hear more.

With best wishes,



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# INTRODUCTION

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## The BRODIE Public First Sustainability Sentiment Tracker

The BRODIE Public First Sustainability Sentiment Tracker answers a series of key questions on what consumers in the UK and the US think about sustainability and business. Some of those key questions include:

1. Which sustainability issues are most important to consumers?
2. Which companies are perceived as sustainability leaders?
3. How optimistic are consumers about the future?
4. How well do the public understand the language of sustainability?
5. What are the key differences between consumers in the US and UK?
6. Who is responsible for progress on key topics: business, government or the consumer?
7. Are consumers willing to pay more for more sustainable products?

The Sustainability Sentiment Tracker also establishes a market segmentation. This categorises consumers in the UK and US into six groups, which provide a framework to consider how best to engage with consumers, as well as colleagues. It is intended to support better decision making in companies with operations in the UK and/or US.

## The need for the BRODIE Public First Sustainability Sentiment Tracker

There is a growing body of research and insights available to corporate leaders making sustainability decisions on behalf of brands or businesses. However, much of this research faces two common problems:

- Frequently the research is designed to substantiate a pre-determined outcome. This means that companies cannot have full confidence in the robustness of the findings.
- Often the research is too narrow (e.g. looking at just one issue, like climate change, or one demographic group, such as millennials). This doesn't enable businesses to determine the importance of sustainability issues in the real world.

The BRODIE Public First Sustainability Sentiment Tracker overcomes these challenges by seeking to be as objective and as broad as possible. We start from a position of professional curiosity. It is our belief that companies are best served by knowing what consumers actually think about sustainability. Poor quality consumer insight will lead companies to over, or under, invest in social and environmental programmes, or simply to invest in the wrong areas.

## Summary of Methodology

In April and May 2021, we interviewed 2,000 consumers in the UK, and another 2,000 in the US, asking more than 150 questions to each person.

We then conducted twelve focus groups across the two countries, building on the quantitative work to develop a more nuanced picture of how the public feels about sustainability and corporate behaviour.

## SECTION 1.

# KEY FINDINGS

1. Which sustainability issues are most important to consumers?
2. Which companies are perceived as sustainability leaders?
3. How optimistic are consumers about the future?
4. How well do the public understand the language of sustainability?
5. What are the key differences between consumers in the US and UK?
6. Who is responsible – business, government or the consumer – for progress on key topics?
7. Are consumers willing to pay more for more sustainable products?

# 1. Which sustainability issues are most important to consumers?

In both the US and the UK, our participants identified social issues as requiring the most urgent action, with employee health, safety and wellbeing, as well as job creation, ranking among the top three in both countries. While environmental issues did not appear within the top five across our US poll, efforts to address climate change and reduce waste to landfill featured in the top five areas for action in our poll in the UK. UK participants also placed higher importance on environmental issues overall, compared to the US.

However, simply stating that social issues are of higher importance to consumers than environmental topics misses two crucial elements. First, consumers don't segregate issues between themes when it comes to business. A responsible business in the mind of the consumer is one that is actively taking positive steps from both a social and environmental perspective. Second, consumers are more likely to take proactive steps to support or criticise a company for their environmental performance.

**//**  
**[A responsible business is]  
 One that gives back at least  
 as much as they take**

**//**  
 Male, 71, US

**//**  
**I think everyone focuses on  
 environment at first, but I think it's  
 about other things as well, building  
 long term relationships with the  
 suppliers and the customers**

**//**  
 Male, 37, US

**Consumers are concerned about pay standards for employees and workers in supply chains**

The responses we received identified a strong awareness, and need for action, to improve minimum pay standards for employees and workers in the supply chain. This high level of awareness, and concern, signals a potential reputational risk for any company not taking action to improve supply chain conditions. It also highlights an opportunity for consumer engagement and communication. Companies should be encouraged to highlight how they have taken positive action to improve pay standards for employees, as well as in the supply chain.

**A higher proportion of people in the UK believe climate change is an emergency compared to the US**

In the UK, the urgency placed on climate change aligns with the findings of the UN Development Programme's (UNDP) People's Climate Vote, which was conducted in 2020. Across all 50 countries, 64% of people said that climate change was an emergency. The UK ranked highest overall, with 81% of participants believing climate change is an emergency, while the USA ranked 21st, with 65% of participants. This is also notably lower than the rest of the G7 nations.

MOST IMPORTANT	US		UK	
	FEMALE	MALE	FEMALE	MALE
ENVIRONMENT	20%	18%	28%	26%
SOCIAL	60%	51%	50%	44%
GOVERNANCE	20%	30%	22%	31%

TOP FIVE ISSUES FOR US	US
EMPLOYEE HEALTH, SAFETY, AND WELLBEING	44%
JOB CREATION	33%
HUMAN RIGHTS	29%
MINIMUM PAY STANDARDS FOR EMPLOYEES AND WORKERS IN SUPPLY CHAIN	24%
PREVENTING CORRUPTION AND BRIBERY	23%

TOP FIVE ISSUES FOR UK	UK
EMPLOYEE HEALTH, SAFETY, AND WELLBEING	38%
MINIMUM PAY STANDARDS FOR EMPLOYEES AND WORKERS IN SUPPLY CHAIN	29%
JOB CREATION	29%
CONTRIBUTING TO EFFORTS TO ADDRESS CLIMATE CHANGE	28%
REDUCING LANDFILL WASTE	28%

## 2. Which companies are perceived as sustainability leaders?

38% of respondents were unable to name a sustainability leader. This highlights an exciting opportunity for brands to position themselves in this space. The idea that consumers have already decided who the sustainability leaders are is just not true.

Of those who could name a sustainability leader, Amazon, followed by Apple, ranked as the top companies in unprompted responses from both the US and UK public. The main brands featured, who clearly embed sustainability in their core purpose, were Lush and Body Shop in the UK, and Patagonia and Tesla in the US.

The main reason given for the brands specified was that they protected and nurtured the environment (35% UK, 30% US). Good governance (25% UK, 28% US), nurturing people (22% UK, 26% US) and promoting virtues like tolerance (23% UK, 27% US) were mentioned less often.

//  
**H&M which recycles clothes ... are encouraging everyone to recycle because they are giving 20 or 30% off coupons**

//  
 Female, 40, US

### Prominent brands have the biggest platform for consumer engagement in sustainability

Brands that feature prominently in peoples' lives have a great platform to communicate their sustainability credentials. Amazon's recent advertising on climate change and electric vehicles was commented on, but consumers are also nuanced, noting concerns about workers' rights and packaging. Other brands featuring on this list have longstanding and public facing sustainability plans (M&S Plan A), clear and engaging messaging on a small number of sustainability issues (Lush), and offer very clear solutions to the climate crisis (Tesla). The recognition of brands, such as Amazon, as sustainability leaders also signals that it is possible for brands to influence consumer perceptions positively, where some steps are being taken to improve sustainability performance.

### Expert view on sustainability leaders differs from consumers

Other surveys that investigate which companies are perceived as leading in sustainability, include the GlobeScan Sustainability Leaders survey of 700 experts across 71 countries. However, there are three notable differences between consumer and expert perception on sustainability leadership. First, experts cluster their responses around a small number of brands. In the GlobeScan survey, Unilever was cited the most sustainable company (for the 10th year in a row) by 42% of experts. This compares to the leader of the consumer survey, Amazon, which was named by 10% of the US public. Second, while there is some overlap (e.g. Patagonia, Microsoft, Tesla), companies should be wary of conflating expert stakeholder support with widespread consumer support. Third, consumers think in terms of brand e.g. The Body Shop not Natura &Co, which presents a challenge for companies like Unilever that are a masterbrand.

	US		UK
AMAZON	10%	AMAZON	7%
APPLE	4%	APPLE	4%
COCA-COLA	4%	TESCO	3%
WALMART	4%	M&S	2%
TESLA	3%	COCA-COLA	2%
NIKE	3%	LUSH	2%
GOOGLE	2%	THE BODY SHOP	2%
PEPSI	2%	CO-OP	2%
PATAGONIA	1%	JOHN LEWIS	1%
MICROSOFT	1%	H&M	1%
<b>DON'T KNOW</b>	<b>19%</b>	<b>DON'T KNOW</b>	<b>25%</b>
<b>NONE</b>	<b>16%</b>	<b>NONE</b>	<b>15%</b>



# 3. How optimistic are consumers about the future?

Despite the various corporate and government commitments being made on climate change, consumers are not optimistic about this issue. The area of least optimism in the UK was around climate change (-33%), which ranked second in the US (-17%) after political divisions (-25%). Participants in both countries were most optimistic about the impact of technology on the world over the next ten years. This is good news for companies in the tech sector.

On balance, those in the US were also slightly optimistic about inequality within the country, the behaviour of companies getting better, and the impact of global pandemics reducing. Participants in the UK were, on balance, more pessimistic. As a collective, the only optimistic view was on the impact of technology. A small, but notable, element of our research showed that, in general, men are slightly more optimistic about the future than women. On the impact of the pandemic, our research showed a notable difference between men and women, with men being more optimistic.

//  
*I'm more worried for the future, I've got a daughter, she's 12, she's worrying herself about the state of the world*

//  
Male, 45, UK

//  
*I don't think this is the right time for companies to promote sustainability in any realistic way*

//  
Male, 84, UK

//  
*I have two daughters, I do worry [about] the future*

//  
Male, 41, UK

**Companies should show they understand the problem, and offer a solution to match**

Our findings corroborate the recently documented rise in 'climate anxiety'. When companies consider how they communicate to consumers about this topic, presenting a very optimistic position is likely to be met with disbelief and distrust. Conversely, further reinforcing peoples' feelings of climate anxiety by focussing on the devastating impacts

of climate change, may do little to help consumers see a way forward. For effective communications, a careful balance is required between an acknowledgement of the challenge and the solutions, and positive alternatives that will help to avert catastrophic climate change. Just as any company would rigorously test key brand messages, topics such as climate change also need rigorous testing to ensure optimal engagement with consumers.

BETTER - WORSE	US NET OPTIMISM	UK NET OPTIMISM
CLIMATE CHANGE	-17%	-33%
INEQUALITY AROUND THE WORLD	-1%	-19%
INEQUALITY IN MY COUNTRY	4%	-7%
POLITICAL DIVISIONS IN MY COUNTRY	-25%	-28%
THE BEHAVIOUR OF COMPANIES	2%	-3%
IMPACT OF GLOBAL PANDEMICS	8%	-10%
IMPACT OF TECHNOLOGY ON THE WORLD	35%	36%
<b>AVERAGE</b>	<b>1%</b>	<b>-9%</b>

BETTER - WORSE	US FEMALE NET OPTIMISM	US MALE NET OPTIMISM	UK FEMALE NET OPTIMISM	UK MALE NET OPTIMISM
CLIMATE CHANGE	-23%	-11%	-37%	-28%
INEQUALITY AROUND THE WORLD	-2%	0%	-16%	-21%
INEQUALITY IN MY COUNTRY	-3%	11%	-6%	-9%
POLITICAL DIVISIONS IN MY COUNTRY	-22%	-28%	-28%	-28%
THE BEHAVIOUR OF COMPANIES	-2%	6%	-2%	-4%
IMPACT OF GLOBAL PANDEMICS	2%	14%	-17%	-3%
IMPACT OF TECHNOLOGY ON THE WORLD	31%	39%	33%	39%
<b>AVERAGE</b>	<b>-3%</b>	<b>5%</b>	<b>-9%</b>	<b>-7%</b>

# 4. How well do the public understand the language of sustainability?

The results of the poll revealed that much of the language of sustainability is a mystery to consumers. Confidence in explaining sustainability terms is higher in the UK, compared to our participants in the US. Some terms are well understood, but many are not.

- **Terms that are perceived to be well understood:** Human rights, climate change and plant-based
- **Terms that resonate in the UK, but not the US:** Fair trade, modern slavery
- **Terms that are little understood by any consumer:** Circular economy, value chain, SDGs

Even the term ‘sustainability’ is one that means different things to consumers. Overwhelmingly, it is perceived as a term referring to environmental topics, particularly by UK consumers. When asked which issues consumers felt were sustainability issues, responsible water use, waste, packaging, responsible sourcing of materials and climate change were identified the most. Issues such as job creation and community relations were not identified by many consumers as sustainability issues.

//  
*[Fair trade] just means it's more expensive ... it's just jargon*

//  
 Female, 45, US

## There is a lack of confidence in explaining more specific terms

While climate change was a term people felt well equipped to explain, associated phrases, such as greenhouse gas, net zero and carbon neutral, were associated with much lower levels of confidence. Similarly, while human rights could be explained by many with a degree of confidence, there was a lack of confidence in explaining more specific terms, such as modern slavery, value chain and social mobility.

Both social grade and age bracket were important factors in the degree of confidence expressed by our participants. In the UK, almost half the highest social grade (47%) were confident in being able to explain the meaning of ‘net zero’ to a stranger, but only a quarter (25%) of the lowest social grade were. A fifth (21%) had never heard the phrase before. While 18% of US respondents earning between \$25,000 and \$49,999 were confident with the term, for those earning more than \$150,000 dollars, it was 45%.

## There is confusion on how to judge a product

There was a lot of confusion about words commonly found on food and clothing labels. For example, does the word ‘organic’ mean the same when used in one supermarket compared to another? More motivated and engaged groups felt slightly less bewildered by the language, but were overwhelmed by which criteria should then be used to judge a product. Trying to decide between performance, and locally made, social value and organic was a cause of consternation and stress.

NET CONFIDENCE	US	UK
HUMAN RIGHTS	39%	46%
CLIMATE CHANGE	29%	45%
PLANT-BASED	23%	39%
FAIR TRADE	0%	41%
SUSTAINABILITY	7%	28%
SUPPLY CHAIN	5%	25%
MODERN SLAVERY	-20%	22%
GREENHOUSE GAS (GHG)	-7%	9%
CARBON NEUTRAL	-23%	5%
BIODIVERSITY	-25%	-13%
SOCIAL MOBILITY	-29%	-18%
NET ZERO	-45%	-31%
REGENERATIVE	-39%	-40%
SUSTAINABLE DEVELOPMENT GOALS (SDGs)	-45%	-48%
VALUE CHAIN	-44%	-59%
CIRCULAR ECONOMY	-50%	-61%

//  
***Sustainability is a nebulous term, means different things to different people***

//  
 Female, 45, US

//  
***As a consumer you see packaging, this is recyclable, this is FairTrade or whatever. To me, those are just labels and half the time you don't know how genuine it is, or what the impact is***

//  
 Female, 42, UK

//  
***They are very hard to define, they are thrown about by different people who have different ideas of what they mean – I don't listen to them at all***

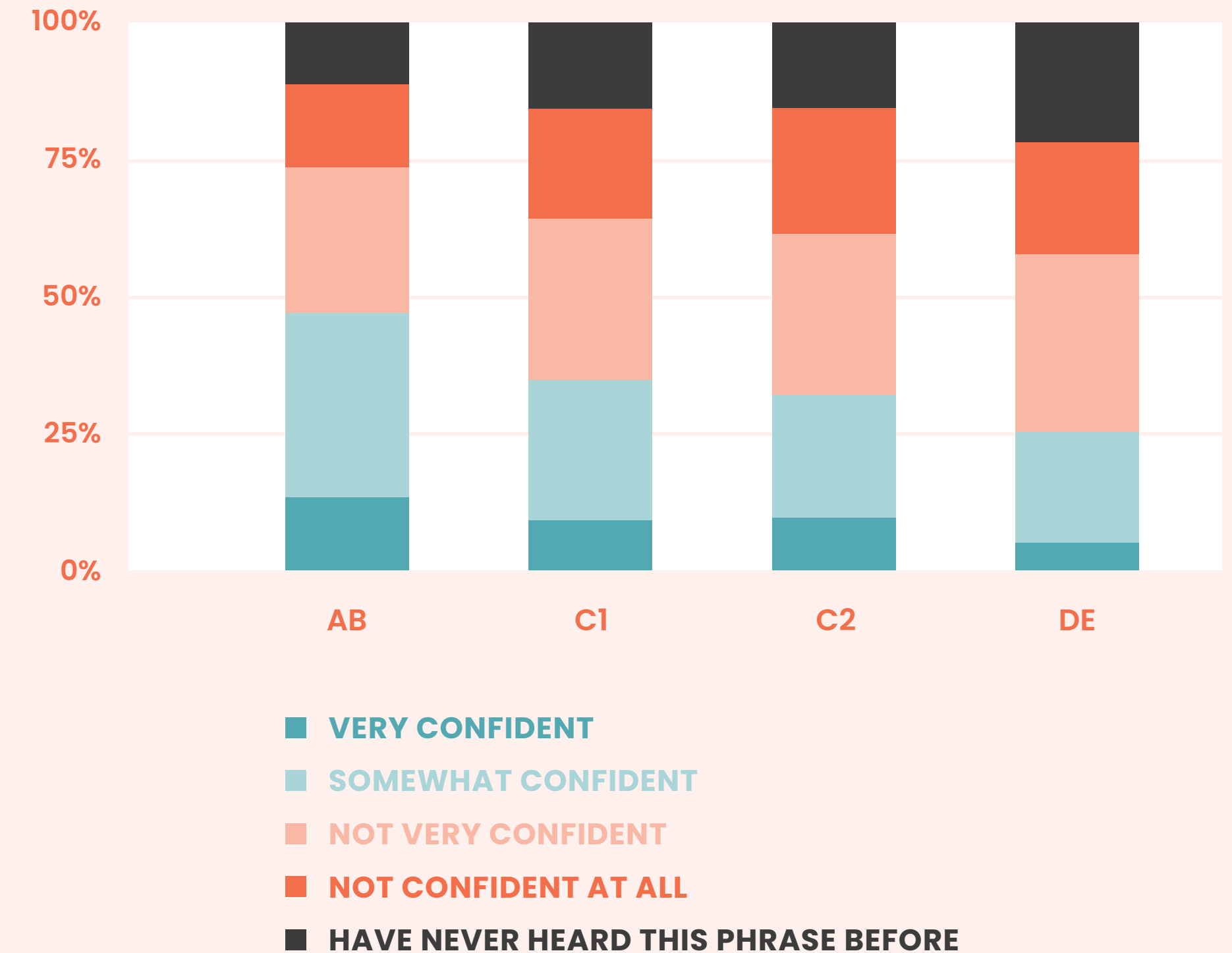
//  
 Male, 71, US

**Subtlety and jargon do not resonate with consumers**

They do not know enough to pick up nuanced differences and do not understand technical jargon. Many customers are willing to pay a small amount more for products with good credentials. However, in order for them to be willing to pay more, consumers must understand and trust that an item is truly more sustainable.

To help consumers better understand the issues, we need to bring the challenge to life and present them with solutions. IKEA, for example, recently launched its 'Buy Back' service as part of a wider commitment to transition towards the circular economy. While its communications about this initiative reference the phrase 'circular economy', this is given meaning by the context of an easy to grasp 'Buy Back' service.

**HOW CONFIDENT, IF AT ALL, WOULD YOU FEEL EXPLAINING THE MEANING OF THE FOLLOWING TERMS TO A STRANGER? NET ZERO (UK)**



## 5. What are the key differences between consumers in the US and UK?

There is more that unites the UK and US than divides us. Indeed, the number of areas where responses were broadly the same are too many to mention. However, it is worth paying attention to the following points of difference...

**1.** UK participants placed higher importance on environmental issues overall – climate change and reducing waste to landfill ranked as top 5 issues, while neither appeared in the US top 5.

**2.** Beyond the two major issues of the pandemic and economy, among issues offered, healthcare was the third highest area of concern for adults in the US (27%). In the UK, Brexit (26%), healthcare (25%) and the threat of climate change (23%) were of similar concern.

**3.** Consumers in the US and UK were aligned in which sustainability terms they understood the most. However, **consumers in the UK expressed greater confidence in explaining sustainability** issues overall. 45% of UK consumers would be confident explaining climate change, for example, compared to 29% of consumers in the US.

**4.** Consumers in the US and UK were aligned in which issues they felt would get better, such as the impact of technology on the world, and which would get worse, such as climate change. However, **consumers in the US expressed a higher level of optimism** overall (1%), compared to UK consumers (-9%), when scored across a range of issues.

**5.** Consumers in the US were almost twice as likely as their UK counterparts to be disenfranchised, demonstrating a low level of public understanding on many topics.

**6.** In both the UK and the US, consumers who thought jobs and livelihoods should be prioritised over the environment, were among the least likely to have made personal changes to their own lives. Britons were almost twice as likely to be in this section than Americans.

**7.** A significant proportion of consumers in the UK (42%) and the US (47%) have taken some form of action to protest against a company whose political or social actions they disagreed with. However, **there were significantly fewer US consumers among the section most likely to take action.**

**8.** Trusted British brands (Tesco, M&S, Lush, Co-op, etc) dominate in the UK, but not the US.

**9.** In the UK, consumers are more likely to have taken action to improve their environmental impact, such as through more recycling (72%) than people in the US (49%). This reflects the lower availability of services, such as recycling, and relative level of importance placed on environmental issues.

# 6. Who is responsible – business, government or the consumer – for progress on key topics?

Consumers have a nuanced view of responsibility that largely aligns with who possesses the ability to drive change.

Businesses were often identified as most responsible for addressing social and governance issues, such as employee health, safety and wellbeing, job creation, diversity and inclusion, and the use of customer data. The social and governance issues which governments are viewed as being responsible for included ensuring taxes are paid and ensuring minimum pay standards for workers in supply chains.

Governments were chosen as most responsible for addressing the majority of environmental issues in the survey, including biodiversity/improving nature, contributing to climate change, and enhancing animal welfare. A key exception, where consumers felt overwhelmingly that businesses should be held most responsible for an environmental issue, was ensuring responsible sourcing of materials.



*If businesses and consumers aren't going to do it by themselves, perhaps legislation should be used*



Female, 48, UK



*Government should set minimum standards and/or red lines ... and as voters, you have the chance to influence those*



Male, 64, UK

## Companies can surprise consumers by taking action on government-led issues

Holding governments responsible for tackling key environmental issues shows that consumers understand that policies and regulation have important roles to play. They also see an important role for governments in improving minimum pay standards and working conditions for people working in the supply chain. These are areas where businesses can take action and show leadership and, in turn, positively surprise consumers.

## Consumers are putting businesses under increasing pressure to improve social inclusion

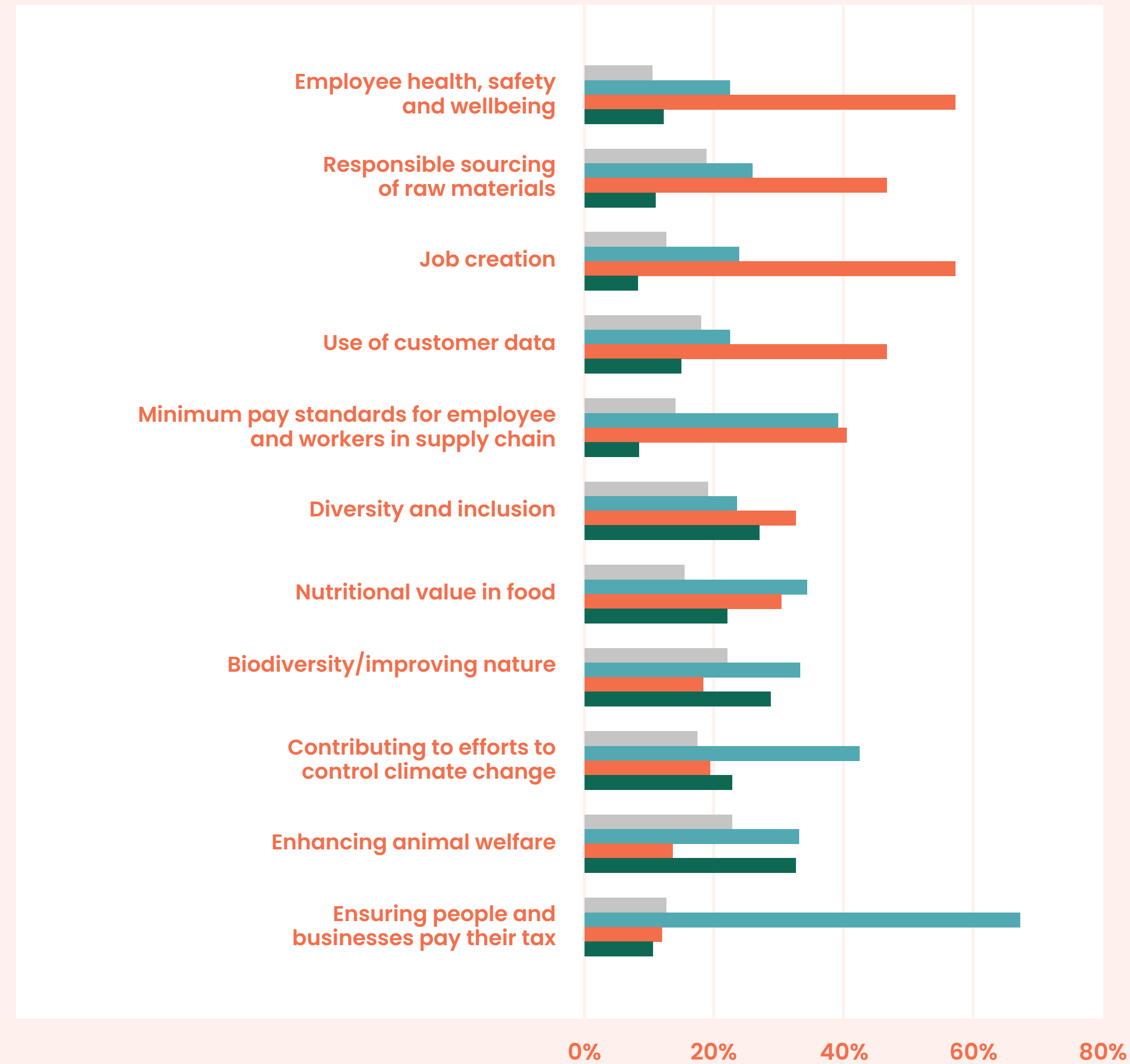
Campaigns such as Black Lives Matter have highlighted the critical role of businesses in improving representation of Black people, particularly at the most senior levels of business. A recent poll by Just Capital found that 95% of Black Americans agree that it is important for companies to promote racial equity. 80% believe they can do more.



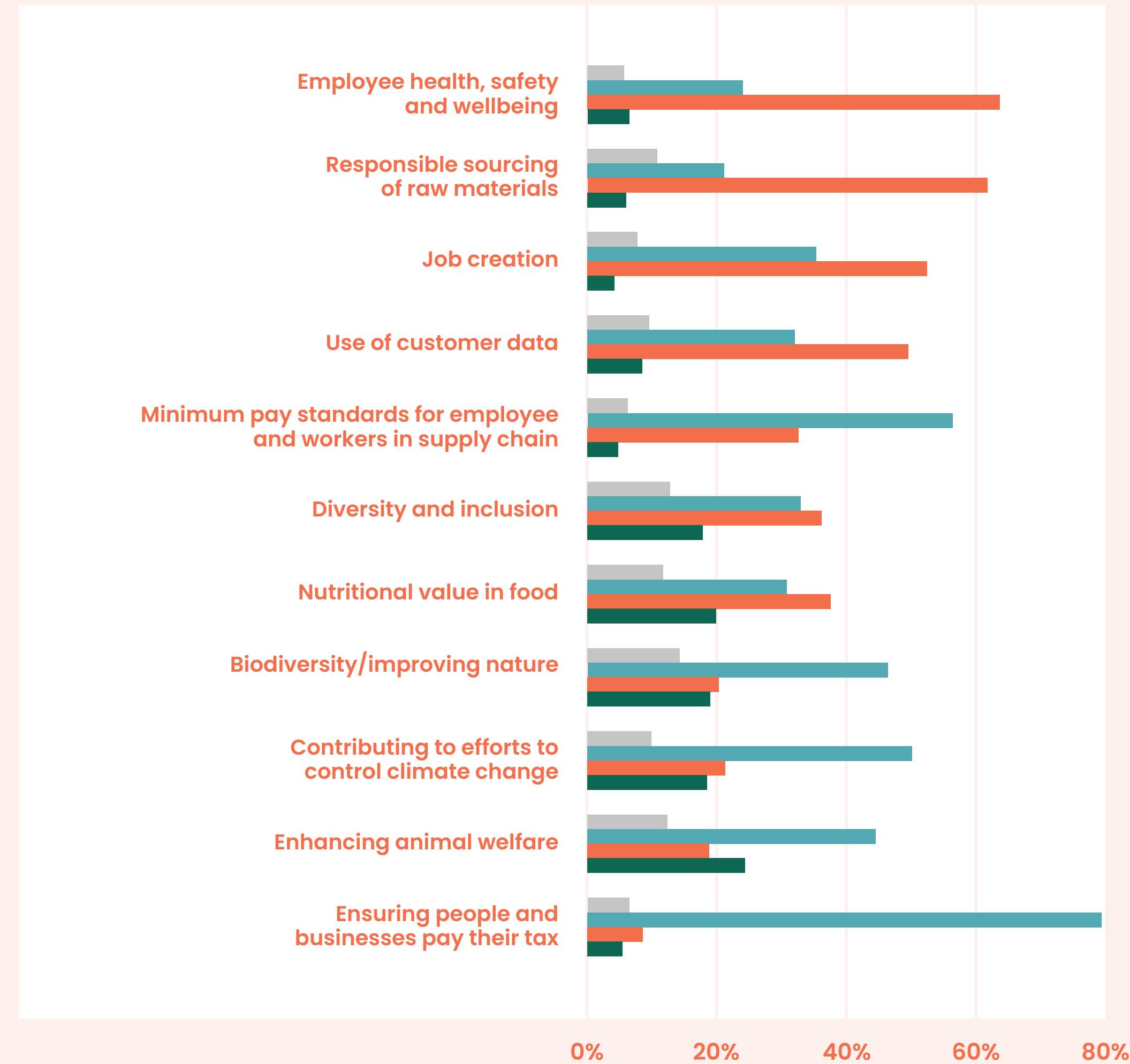
**FOR EACH OF THE FOLLOWING ISSUES, WHO DO YOU THINK SHOULD BE MOST RESPONSIBLE FOR ADDRESSING IT?**

- DON'T KNOW
- GOVERNMENT
- BUSINESSES
- INDIVIDUALS

**US**



**UK**



# 7. Are consumers willing to pay more for more sustainable products?

We posed a series of questions to our participants to gain an understanding of whether, and to what extent, people are willing to pay more for a T-shirt, phone or soft drink. The uplift in price was based on a company doing more, compared to another company, to address one of the following:

- Ensure its workers are paid a fair wage
- Produce half the carbon emissions
- Pay more tax (in the UK or US based on where the poll was being conducted)




The results showed that many consumers would, in theory, be prepared to spend more if any one of those issues was being addressed. Participants were most commonly prepared to pay the most for a product that ensures its workers are paid a fair wage. The only exception to this were US consumers when offered a phone with half the carbon emissions – they would be willing to pay on average 3.67% more for a phone with half the carbon emissions, and 2.84% more for a phone made by a company that ensures its workers are paid a fair wage.

Within our groups, the biggest variability in willingness to pay was linked to age groups. The youngest group of consumers was prepared to increase their spending the most across all issues, while people aged over 55 were prepared to increase their spending the least. For example, consumers in the US aged over 55 would be willing to spend 22% more, on average, on a T-shirt made by workers who are fairly paid, while someone aged 18-24 would be willing to spend 67% more for the same item.

Among the participants, those with a degree were overall willing to spend more than those without. This difference was more pronounced among consumers in the UK, compared to those in the US. For example, someone with a degree in the UK was prepared to spend 58% (36% US) more on a soft drink with half the carbon emissions, compared to someone without a degree, who would be prepared to spend 33% (29% US) more.




**US**

**WOULD BE WILLING TO PAY \$X MORE FOR A...**

				
<b>WHICH...</b>	<b>ENSURES ITS WORKERS ARE PAID A FAIR WAGE</b>	24%	3%	38%
	<b>HAS HALF THE CARBON EMISSIONS</b>	16%	4%	31%
	<b>PAYS MORE TAX IN THE US</b>	12%	2%	20%

**UK**

**WOULD BE WILLING TO PAY £X MORE FOR A...**

				
<b>WHICH...</b>	<b>ENSURES ITS WORKERS ARE PAID A FAIR WAGE</b>	28%	6%	48%
	<b>HAS HALF THE CARBON EMISSIONS</b>	23%	5%	40%
	<b>PAYS MORE TAX IN THE UK</b>	18%	4%	34%



*I'd pay five or ten cents more for a recyclable coffee cup without giving it a second thought*



Male, 62, US



*It depends what the price differential is ... we've been paying too little for an awful lot of stuff*



Female, 48, UK



*I always look at the packaging, one and two dollars [extra cost] is fine if there is less packaging*



Female, 40, US

### **Consumers are prepared to spend more on products that address social and environmental issues**

This area of research is the subject of large behavioural economic studies, and we are aware of the many factors that influence purchasing decisions. Our research highlighted that:

- Willingness to pay does not scale up as goods become more expensive.
- Across all demographics, consumers felt that more sustainable choices increase the cost of living.
- Consumers will often use environmental products or company attributes as a signal of a responsible business that also spans social and governance issues.

### **Sustainability attributes alone will not drive high sales**

When asked which issues were most important (when making a purchasing choice), how much the product costs (34% UK, 26% US) and the quality (29% UK, 26% US) of the product were the highest-ranking issues. Whether the product had been made in an environmentally responsible way was the next most selected issue, and was ranked as the top issue by 10% of participants in the UK and 9% in the US. Even if the sustainability credentials of a product are flawless, consumers will still be sensitive to price and quality.



**SECTION 2.**

**SUSTAINABILITY  
SEGMENTATION**

# SUSTAINABILITY SEGMENTATION

To help companies and governments better understand the views of US and UK adults, we have identified six distinct groups. Each group is a collection of people that think similarly about what it means to be a responsible business, and the impact that sustainability has on their own decisions. We hope these will help you to more clearly understand the commercial landscapes in which we are all operating.

The six segments are each fairly demographically diverse (though you will see there are a few characteristics that are more common in each). However, what they share is a world view, an attitude towards business, and a broadly similar willingness to pay more for responsible business practices.

From these six segments, you can zoom out further and note that the population falls broadly into three categories: the first two segments (32% in the UK in total, and 29% in the US) are the most willing to pay for higher standards of sustainability. They are split between those who are pessimistic and have little faith in business or government to save the planet or its people, versus a more optimistic group who are worried but think we can turn things around.

The middle two segments (UK: 39%, US: 28%) are both relatively pessimistic. They are split between those who

- a) have seen companies that they know make positive steps, but don't trust the broader system to make sure this approach grows to scale, and
- b) a more economically-driven group who believe that businesses should be responsible, but also prioritise action to save jobs and shore up the economy post-Covid.

Finally, we have our bottom third (UK: 25%, US: 43%). This is split between an overly-optimistic 12/13%, and individuals who feel excluded from the conversation about business responsibility and sustainability - either because they lack physical access to facilities, such as recycling and public transport, or because they find the language and debate about sustainability disconnected from the context of their own lives.

Each of these groups offers prospects for both businesses and legislators. We hope that by understanding them better, you will be more able to effectively realise those opportunities.

## UNDERSTANDING WHERE CONSUMERS FIT INTO THE SIX SEGMENTS ACROSS THE US AND UK

	US	UK
ANGRY ACTIVISTS	9%	14%
CORPORATE OPTIMISTS	20%	18%
PESSIMISTIC FREE-MARKETEERS	17%	17%
COMMERCIAL REALISTS	11%	21%
ETHICALLY DISENFRANCHISED	30%	18%
SUPERFICIAL ENTHUSIASTS	13%	12%

# Angry Activists

The most committed to taking action, Angry Activists actively seek products and brands that align with their values and try to encourage others to follow suit. This group is prepared to make significant changes to live sustainably. Angry Activists also believe that their own action will impact business decision making, and will attend protests as well as boycott businesses, countries of origin and sectors that are causing environmental damage or have human rights issues.



*“I do homework in terms of where I buy from, where clothing is made etc, it’s difficult, its time consuming, but I’ve got grandchildren on the way [and] the planet is a mess*



Female, 58, UK

Despite all having some sort of purchasing rules, which they try to keep to, Angry Activists in the UK were less confident that consumer action really caused businesses to change their behaviour – they were more likely to take action to soothe their own consciences. In contrast, their US colleagues firmly believed that together people can change the actions of businesses. As one US participant said, “You have to take individual action because it gives you hope”.



*The best way to effect change is to do in on mass. I view corporations and big interest as huge tanker ships filled with their load and nothing will move them unless it effects their profits*



Female, 77, US

## WILLINGNESS TO PAY

		ANGRY ACTIVISTS (\$)
	ENSURES ITS WORKERS ARE PAID A FAIR WAGE	59%
	HAS HALF THE EMISSIONS	43%
	PAYS MORE TAX IN THE UK	35%
	ENSURES ITS WORKERS ARE PAID A FAIR WAGE	12%
	HAS HALF THE EMISSIONS	12%
	PAYS MORE TAX IN THE UK	7%
	ENSURES ITS WORKERS ARE PAID A FAIR WAGE	170%
	HAS HALF THE EMISSIONS	111%
	PAYS MORE TAX IN THE UK	98%

# Corporate Optimists

Corporate Optimists place a high level of importance on using their purchasing power to drive positive changes towards businesses behaving more responsibly. They are the second most optimistic about the future overall, but believe climate change will get worse over the next decade, and this causes them a lot of concern. These consumers want their products to be sustainable and functional, and would try to avoid certain companies, particularly those making very cheap products that they therefore felt could not be sustainable. However, other personal factors, such as financial constraints and product availability, mean they are not always able to live as sustainably as they feel they should.



*There's a whole list of companies that we buy from that really we shouldn't, but we do*



Female, 52, UK



*Why should I be forced to buy a lesser product just because it comes in less packaging?*



Female, 52, US

Amongst the UK participants, belief in their own consumer power can tip over into guilt about making purchasing decisions that they know do not have the optimal sustainability credentials. They were sad that they don't always live up to their own ideals, and very concerned about the impact of that, and of the actions of their fellow citizens. US participants were less guilt-ridden, but remained frustrated by the need for trade-offs between performance and ethics.



*If businesses and consumers aren't going to do it by themselves perhaps legislation should be used*



Female, 48, UK

## WILLINGNESS TO PAY

		CORPORATE OPTIMISTS (\$)
	ENSURES ITS WORKERS ARE PAID A FAIR WAGE	42%
	HAS HALF THE EMISSIONS	38%
	PAYS MORE TAX IN THE UK	27%
	ENSURES ITS WORKERS ARE PAID A FAIR WAGE	10%
	HAS HALF THE EMISSIONS	10%
	PAYS MORE TAX IN THE UK	7%
	ENSURES ITS WORKERS ARE PAID A FAIR WAGE	122%
	HAS HALF THE EMISSIONS	81%
	PAYS MORE TAX IN THE UK	76%

# Pessimistic Free-Marketeers

Pessimistic Free-Marketeers tend to trust businesses more than they trust government. This usually stems from their own observations of companies adapting to meet consumer demand. Nonetheless, this segment believes that business behaviour is likely to deteriorate over the next 10 years because they see business behaviour as highly rational, and easily shaped by both customer demand and government intervention, such as tax incentives. This segment placed high importance on local and domestically sourced or produced products. UK participants expressed concern about the lack of ethics displayed by ‘superpower’ businesses from America and China, whilst US participants described a sense of pride in supporting local food and products made in America.



*There’s no standard so it’s hard to judge if a company is doing better or worse than others because, first of all, you don’t even know what things mean*



Male, 42, US

UK participants from this segment believed that market structure significantly impacts the speed of uptake of new, improved technology. Meanwhile, our US group were not so keen on government action, and prefer an independent, external source to verify everything.



*I don’t want to live in a country where the government is picking and choosing the winners and losers*



Male, 64, US



*Unless you implement these things the companies aren’t going to change. From the company’s point of view, it’s pure greed*



Male, 42, UK

## WILLINGNESS TO PAY

		PESSIMISTICS FREE-MARKEETEERS (\$)
	ENSURES ITS WORKERS ARE PAID A FAIR WAGE	32%
	HAS HALF THE EMISSIONS	25%
	PAYS MORE TAX IN THE UK	20%
	ENSURES ITS WORKERS ARE PAID A FAIR WAGE	6%
	HAS HALF THE EMISSIONS	6%
	PAYS MORE TAX IN THE UK	5%
	ENSURES ITS WORKERS ARE PAID A FAIR WAGE	99%
	HAS HALF THE EMISSIONS	73%
	PAYS MORE TAX IN THE UK	54%

# Commercial Realists

Commercial Realists believe that we should take action to address environmental and social issues, but that the impact of the pandemic on our economy means we will have to put jobs and livelihoods first. They appeared well-informed about the bold measures that are likely to be required, for example, to curb global warming. However, this came with a concern that green policies could be damaging to the economy. Their understanding of the scale of the climate emergency means that they feel individual actions to help address climate change are futile. Overall, they lack confidence in our collective ability to reverse current trends, and are therefore less willing to take action.



*If they are genuinely trying [on environmental issues] I believe it should be admired, but jobs definitely first*



Male, 53, UK

US Commercial Realists displayed significant wariness over additional government regulation. In contrast, UK participants from this segment saw government intervention as the only way to enact change.



*Companies succeed by pleasing their consumers. [If] they don't please their consumers, unlike the government, they can't force you to buy their product*



Male, 71, US



*The government need to deliver a rigorous agenda if they are going to deliver a sustainable project*



Male, 50, UK

## WILLINGNESS TO PAY

		COMMERCIAL REALISTS (\$)
	ENSURES ITS WORKERS ARE PAID A FAIR WAGE	6%
	HAS HALF THE EMISSIONS	5%
	PAYS MORE TAX IN THE UK	4%
	ENSURES ITS WORKERS ARE PAID A FAIR WAGE	1%
	HAS HALF THE EMISSIONS	0%
	PAYS MORE TAX IN THE UK	1%
	ENSURES ITS WORKERS ARE PAID A FAIR WAGE	21%
	HAS HALF THE EMISSIONS	15%
	PAYS MORE TAX IN THE UK	12%

# Ethically Disenfranchised

The Ethically Disenfranchised lack confidence – they struggle to define sustainability terms and consequently find it difficult to know how to make better, more sustainable choices. They expressed concern about environmental and social issues, but are hesitant to adopt more sustainable behaviours or change their purchasing habits. They are wary of making the ‘wrong’ choice. They are also less likely than other segments to trust what they hear about sustainability and business behaviour from nearly all sources – though they were slightly more likely than average to trust politicians and social media. As well as feeling excluded by the language of sustainability, many feel that even the simpler asks made of them to reduce their negative impact on the world are not possible within their lives.



*We know Boohoo is bad and Bodyshop is good, but what about what’s in between?*



Male, 52, UK

For UK participants, taking action to reduce their negative impact on the world was not seen as possible within their lives. They were overwhelmed by the number of asks, and confused by the sustainability jargon. As one participant put it, avoiding purchasing Chinese products is just not feasible. For US participants, access was a key issue, with local recycling facilities not guaranteed.



*Blacklisting an entire company seems kind of extreme*



Female, 24, US



*Saying you’re going to avoid [purchasing products from] China is not feasible*



Male, 64, UK

## WILLINGNESS TO PAY

		ETHICALLY DISENFRANCHISED (\$)
	ENSURES ITS WORKERS ARE PAID A FAIR WAGE	8%
	HAS HALF THE EMISSIONS	5%
	PAYS MORE TAX IN THE UK	3%
	ENSURES ITS WORKERS ARE PAID A FAIR WAGE	1%
	HAS HALF THE EMISSIONS	1%
	PAYS MORE TAX IN THE UK	1%
	ENSURES ITS WORKERS ARE PAID A FAIR WAGE	22%
	HAS HALF THE EMISSIONS	18%
	PAYS MORE TAX IN THE UK	19%

# Superficial Enthusiasts

Superficial Enthusiasts are a highly optimistic segment who like agreeing with everything. They have a general knowledge of responsible business issues. They like the idea of taking action. However, in practice, when it comes for example to purchasing, they are not swayed by sustainability attributes. Their optimism means that they do not feel any urgency to take action, and many argue that the information they need is not available, making it impossible to know which decision is best. Their lower level of understanding of jargon means that when asked about business responsibility, they tend either to link quality of product with sustainability, or to focus on very specific areas, such as health - usually where it impacts them personally.



*"I decide based on the quality of the products they are producing. Because when the quality is good they must have followed all the rules"*



Female, 40, US

Superficial Enthusiasts of both nations tended to relate sustainable product choices back to the impact on them, personally. Whilst for the UK, this meant choosing ethical products (such as organic food) and getting a better-quality product, Americans agreed but also hoped to gain better treatment by their employers and improved customer service.



*You shouldn't have to pay extra for stuff that's environmentally friendly, why should you have to pay extra?*



Male, 53, UK



*You can always vote with your feet and not buy the products, but that's cutting your nose off to spite your face*



Female, 66, UK

## WILLINGNESS TO PAY

### SUPERFICIAL ENTHUSIASTS (\$)

Superficial Enthusiasts say that they will spend more money for ethical products. However, their answers indicated that they were not factoring in the costs to their decision-making as one might expect. For instance, in the UK a third (29%) said they would spend £250 more for a phone, which is made by a company that pays its workers a fair wage - just over half the proportion who said they would pay £5 more. This compares to 73% of Angry Activists who

would pay £5 more, and 10% who would pay £250 more. Our analysis of this response pattern is that it does not indicate a reduced-price sensitivity, or willingness to generally spend more (particularly as this group is very young and often has a lower income), but instead that the question is being interpreted too hypothetically. As such, we avoid reporting the willingness to pay estimates here, as they are likely not to be indicative of actual behaviour.

**SECTION 3.**

**FIVE RECOMMENDATIONS  
FOR BUSINESS**

Our research has identified key findings, such as the most important sustainability issues to consumers, their perceptions of the sustainability leaders, their views on – and understanding of – sustainability, as well as their willingness to take action.

These consumer insights have enabled us to identify six different types of consumer when it comes to sustainability – Angry Activists, Corporate Optimists, Pessimistic Free-Marketeers, Commercial Realists, Ethically Disenfranchised and Superficial Enthusiasts.

In this section, we use our consumer insights to make five key recommendations for business sustainability leaders.



# 1. Don't assume you know what your customer thinks about sustainability

Too often, sustainability leaders downgrade consumers to being just one more stakeholder group or, even worse, don't consider them at all. Consumers should be included as a distinct stakeholder group, and their views carefully considered and balanced, alongside other stakeholder views. It is also important to gain a deep understanding of consumers...

**i. Understand the sustainability segmentation** of your consumers, and consider using our proposed segmentation or create a bespoke framework. Ikea, for example, has identified four broad groups of consumers with different attitudes and beliefs on climate change. The company tailors its engagement and communications, depending on which groups they are seeking to influence.

**ii. Consider the demographics of your customer base:**

- **Age:** Young people express higher levels of concern about climate change. They are more likely to notice social action and positive governance, and will protest against business behaviour. Therefore, including good information about a brand or product's sustainability credentials is particularly important when marketing to younger age groups.

- **Education Level/Wealth:** Consumers with high levels of education are more confident in their understanding of sustainability issues. People in the US with higher incomes, and people in higher social grades in the UK, are more willing to pay more for products, for example, which are locally sourced.
- **Geography:** Whilst we have found significant overlaps between UK and US consumers, there are differences that warrant consideration when planning consumer messaging in each market. Within the US and UK, there were also consumers - often living in more remote areas - who noted that they didn't have access to the same levels of sustainability infrastructure e.g. public transport or domestic recycling facilities.

# 2. Whilst tackling the climate crisis, don't forget about social issues

In the rush to tackle climate change, don't forget that social issues also resonate highly with consumers. This means that a broader sustainability plan and messaging to consumers are important...

**i.** Consumers think about responsible business practices as an integrated picture, covering both environmental and social issues. If you're only ever talking to consumers about environmental issues, you're missing out on a bigger engagement opportunity.

**ii.** Consumers told us that they were willing to pay the largest additional premium for items where workers in the supply chain are paid a fair wage. Delivering great results on carbon, but failing your workers, is a significant risk.

**iii.** Consumers move on. Seasoned sustainability professionals know that consumers tire of hearing the same single message, and so an approach that is exclusively focussed on carbon will seem outdated in the future. This is a challenge because carbon management is a task for the coming decades, not just the coming years. To manage this tension between consumer attention spans and long-term roadmaps, companies need a palette of activities from which to draw their customer messaging.

### 3. Use bold, clear and direct communications

The use of direct, bold and clear communications around a small number of issues helps consumers to recognise, and more confidently and quickly assess a company or product based on its environmental or ethical credentials. Our research shows that many sustainability terms – even the term ‘sustainability’ itself – are often not understood or are misunderstood. ‘Sustainability’ is heavily associated with environmental topics, which lacks the breadth often implied by corporate sustainability teams.

Three simple rules will help to ensure your sustainability communications are effective:

- i.**  
**Simplify** – avoid jargon and simplify, without bring misleading.
- ii.**  
**Apply a clear hierarchy** – if you’re a mass market brand, create layers of communication, simple at the top, clear but more fulsome in the mid-layer, and then rich and complex in the last for investors, NGOs and the seriously keen consumers (Angry Activists).
- iii.**  
**Exemplify** – provide context and examples of what you’re saying.

### 4. Use the segmentation inside your business to engage colleagues and influence decision making

Consumer insights are powerful because they help companies make better decisions about action and communication. Likewise, for business sustainability leaders, colleagues can provide useful consumer insights.

Those with a sustainability role would benefit greatly from better understanding the organisation’s senior team through the lens of sustainability segmentation. Doing so would allow you to deploy the right tactics to maximise engagement and influence decision making. For example:

- i.**  
**Increase knowledge** – address knowledge gaps by taking individuals or small teams on a learning journey.
- ii.**  
**Manage risk** – engage colleagues in scenario planning, such as the Taskforce for Climate-Related Financial Disclosures (TCFD).
- iii.**  
**Understand consumer interest and perceptions** – work with customer insights and marketing teams to conduct relevant research.

#### **Applying sustainability segmentation to all employees**

Using sustainability segmentation can also be used to effectively engage all colleagues, and embed a culture of sustainability within an organisation. Innocent Drinks, for example, has identified four types of sustainability roles, and employees must select one to include in their job description.

# 5. Keep looking for leading signals in your data

In our research, for example, we noticed that while consumers do talk and have concerns about worker rights and supply chains, many of them use country of origin as a proxy for how employees are treated when they are making purchasing decisions. This trend is strongest among older consumers but also observable in younger generations. This shows the importance of brands not only staying alert to their actual supply chain risks – but also the generalised rules that the public uses to choose their products.

Alongside current geo-political issues such as human rights and increased tariffs, this trend has led to a generalised hardening of views against China – in both markets, but especially in the US. This could be an area of commercial and reputation risk for companies that are reliant on Chinese components, even where sustainability teams are working hard to ensure fairness throughout their supply chains.

By looking for trends in your consumer research, you will be able to spot important signals – threats as well as opportunities – for your business strategy.



//  
*I won't buy from China*

//  
Male, 67, UK

//  
*I actively try not to buy things from China. I do not use Amazon, I don't really shop online, I try and go as locally sourced as I possibly can*

//  
Female, 58, UK

## TO SUM UP...

**1.**

Don't assume you know what your customer thinks about sustainability

**2.**

Don't forget the social issues whilst tackling the climate crisis

**3.**

Use bold, clear and direct communications

**4.**

Use the segmentation inside your business to engage colleagues and influence decision making

**5.**

Keep looking for leading signals in your data

**This report includes just a snapshot of our findings...**

If you would like to learn more, we would love to hear from you.

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