

SUSTAINABILITY SENTIMENT TRACKER 2023

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INTRODUCTION

About the BRODIE Public First Sustainability Sentiment Tracker

Welcome to the third annual BRODIE Public First Sustainability Sentiment Tracker.

This report offers key insights into **what consumers in the UK and the US think when it comes to sustainability and business.**

We ask the same key questions each year:

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. Who is responsible for progress on key topics: business, government, or the consumer?
6. Are consumers willing to pay more for more sustainable products?
7. What are the key differences between consumers in the US and UK when it comes to sustainability?

We analysed the answers to these questions, and more – this year with a focus on nature and the cost of living – and came up with some key **recommendations for businesses.**

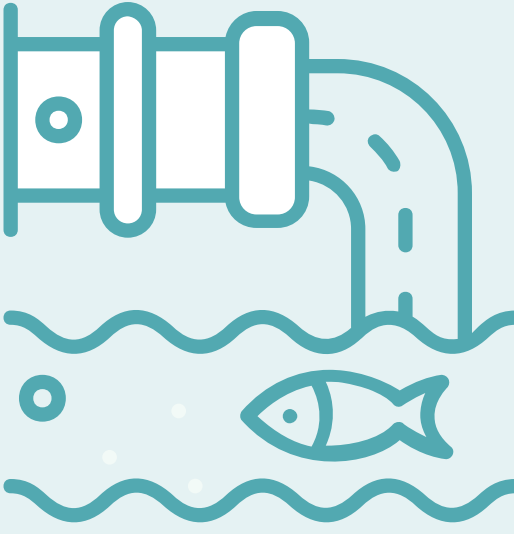
The Sustainability Sentiment Tracker also establishes a market segmentation. This **categorises consumers in the UK and US into six groups** defined by their beliefs and actions regarding sustainability, providing a framework to consider how best to engage them. It is **intended to support better decision-making in companies** with operations in the UK and/or US.

Through its objectivity and breadth, this Tracker differs from other research currently available to corporate leaders making sustainability decisions on behalf of brands or businesses. We explain about this on [page 26](#) in the Appendix.

SECTION 1.

**— AT A GLANCE: HIGHLIGHTS
AND KEY TAKEAWAYS**

HIGHLIGHTS AT A GLANCE

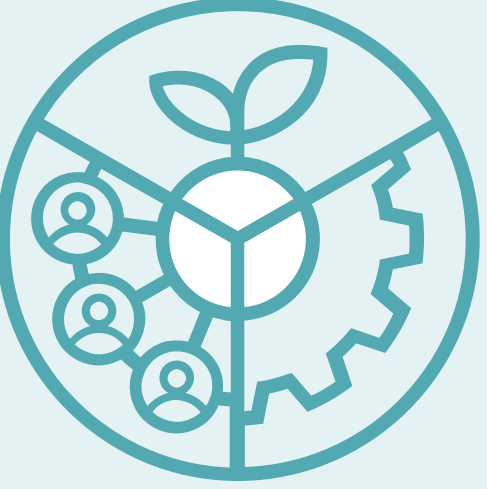


Clean water and seas is the number one aspect of nature people want to protect



In the US in 2021 people said businesses were solving rather than causing the biggest challenges facing us. In 2023, it's now the opposite.
8% → -14% NET

Cynicism about business' sustainability claims **is on the rise**



No change in concerns about ESG despite economic downturn



People would **pay 21% more** for a soft drink which produced half the carbon emissions, but quality and safety are the main drivers of premium prices



69% of Brits say they visit green space at least once a week



In the UK **52% say they feel worse off** than they did in 2022



Around **75% feel the rich are getting richer** at the expense of everyone else



Most people expect climate change to get **worse rather than better** over the next 10 years (UK, 62%; USA, 52%)



Low level of awareness of most businesses' impact on nature



Majority agree that sustainability-wise, it's more trustworthy for a company to talk about what **it has already done**, rather than what it's pledging to do in future

TAKEAWAYS FOR BUSINESS AT A GLANCE

1.

Talk to your consumers

Keep up the pace of communications on sustainability to consumers through this cost-of-living squeeze – they're still keen to hear what actions you've taken.

2.

Local nature

Consumers are especially open to hearing how businesses are working to protect nature on their doorsteps – they appreciate the benefits in terms of wellbeing and place-making.

3.

Nature for people & planet

There's an opportunity to bring nature into the brand conversation with consumers to help educate and raise awareness of the benefits of responsible, nature-sensitive production for people and planet.

4.

Clean water, please

Pollution of water is especially salient for consumers – meaning reputational risks or rewards depending on your business' impact.

5.

Honesty is best

Honesty, humility, clarity and transparency are key to credible sustainability communications, as scepticism about claims is widespread.

6.

Local impact

It's not all about big numbers when it comes to communicating about sustainability impacts: local relevance can move consumers even more.

SECTION 2.

— **KEY FINDINGS**

— **KEY TAKEAWAYS FOR BUSINESS**

1. Which sustainability issues are most important to consumers?

Each year we ask respondents to rank societal and sustainability issues in order of perceived importance.

The **state of the economy is top of mind** for all consumers again as the number one societal challenge, while in each country there's no change in the top three sustainability issues, but the issue of **human rights** has grown most in the US. **Worry over the state of the economy is felt more in the UK** (65%) than the US (53%), and concerns over Covid have all but disappeared in both countries. The top three societal issues in the US include **levels of crime and the quality and cost of healthcare**. In the UK, **immigration** has pushed climate change out of the top three (since 2022), and there's been a sharp increase in concern over **quality of healthcare**; unsurprising given hospital waiting lists and the series of health professional strikes in 2023.

This year we introduced some new questions to gauge levels of concern for the **natural world**. Over 80% said they enjoyed being in nature and appreciated the impact it had on their wellbeing. **Consumers felt it was most important to protect clean water and seas** (UK 50%; US 60%), followed in the UK by rainforests (38%), and trees & woodlands (35%); and in the US by clean air (46%) and trees & woodlands (32%).

TOP SUSTAINABILITY CONCERNS IN THE UK

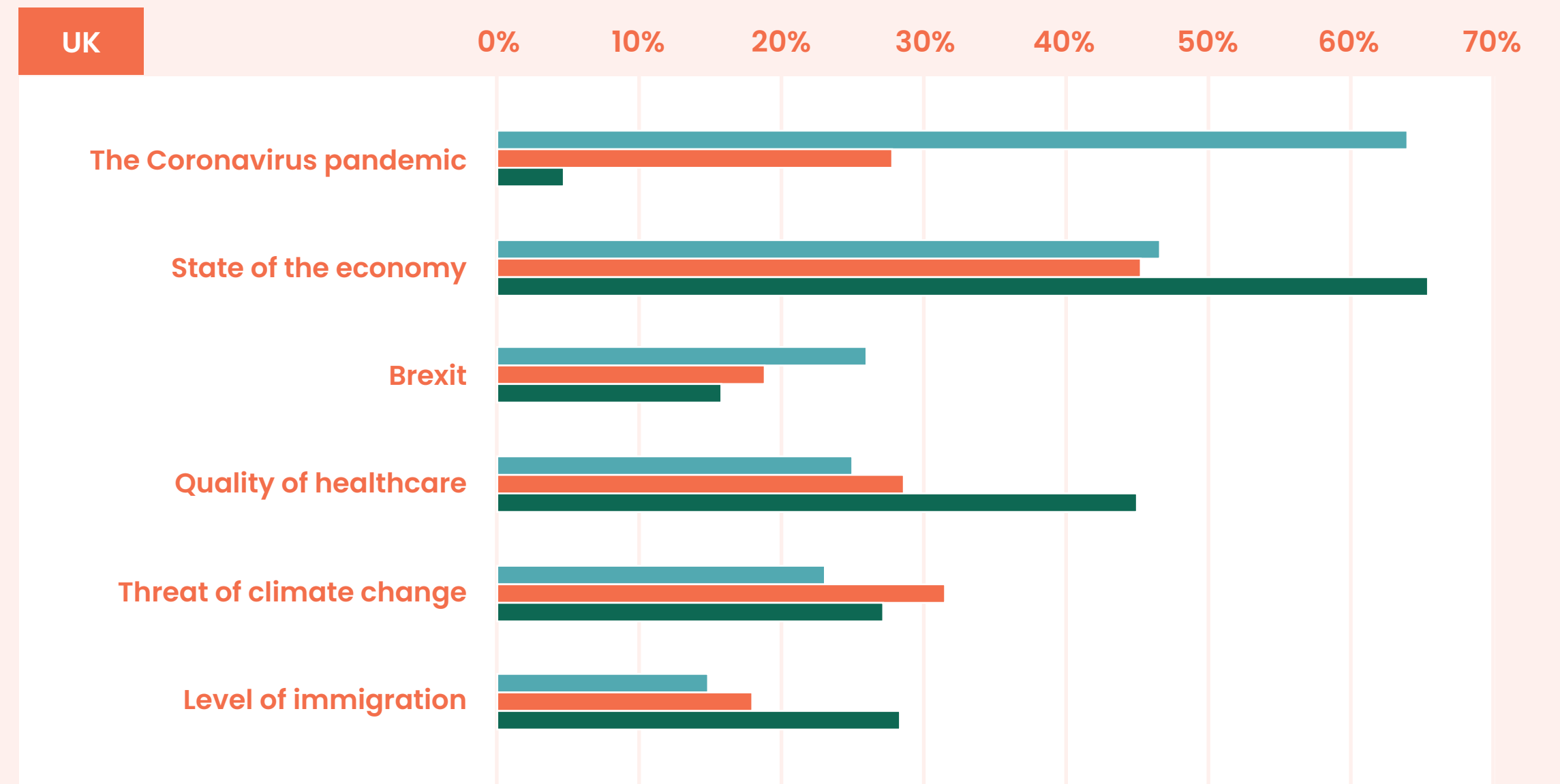
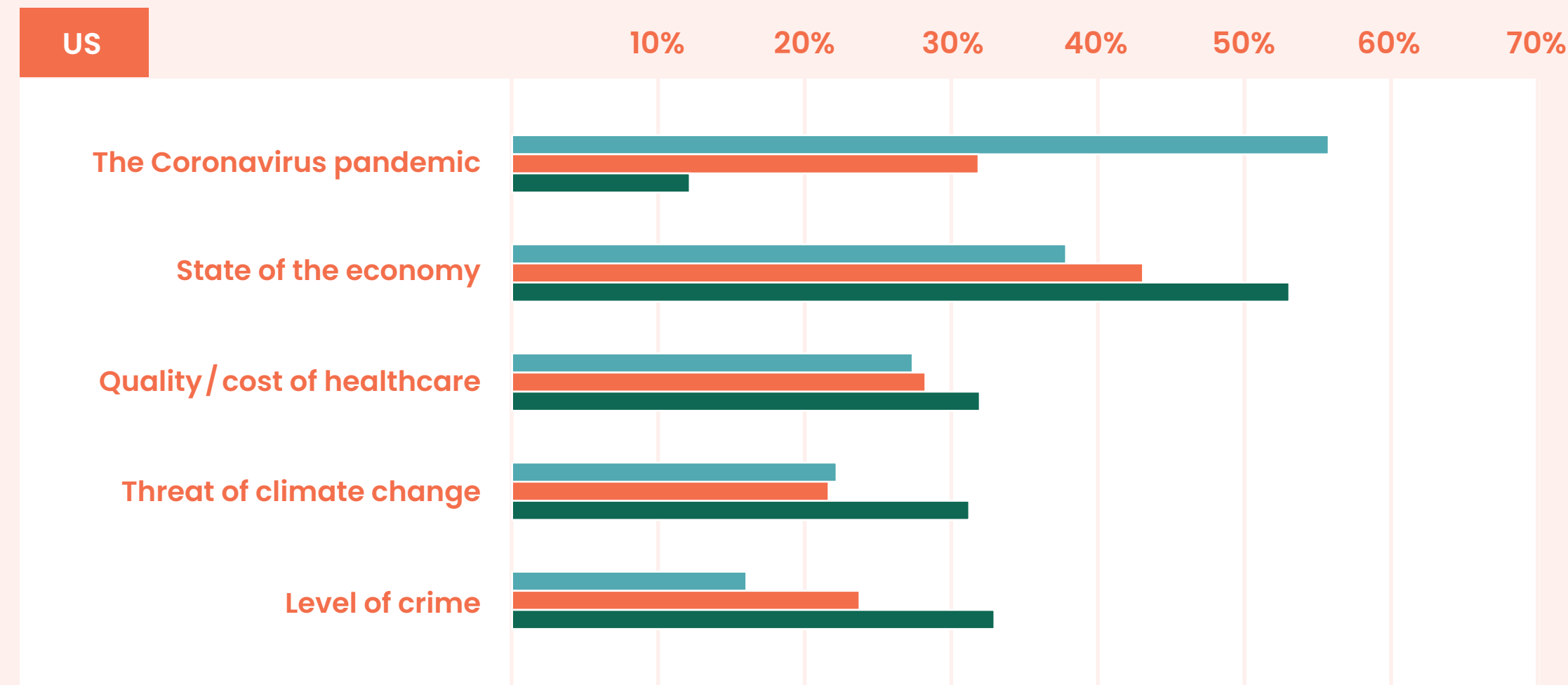
	2021	2022	2023	CHANGE IN % SINCE 2022
UK TOP 1	Employee health, safety, and wellbeing	Employee health, safety, and wellbeing	Employee health, safety, and wellbeing	+4%
UK TOP 2	Minimum pay standards for employees and workers in supply chain	Minimum pay standards for employees and workers in supply chain	Minimum pay standards for employees and workers in supply chain	+2%
UK TOP 3	Job creation	Contributing to efforts to address climate change	Contributing to efforts to address climate change	0%

TOP SUSTAINABILITY CONCERNS IN THE US

US TOP 1	Employee health, safety, and wellbeing	Employee health, safety, and wellbeing	Employee health, safety, and wellbeing	+2%
US TOP 2	Job creation	Human rights	Human rights	+9%
US TOP 3	Human rights	Job creation	Job creation	+3%

% OF RESPONDENTS RANKING CONCERN IN TOP SOCIETAL ISSUES FACING THE US & UK

Worries over Covid have all but disappeared, to be replaced by the state of the economy. Other top societal issues have remained static in the US, but in the UK, immigration has pushed climate change out of the top three, and there's been a noticeable increase in concern over quality of healthcare.



2. Which companies are perceived as sustainability leaders?

Unprompted awareness is low overall, with **Amazon, Apple** and **M&S** (UK) and **Walmart** (US) picked as the most consistent leaders on sustainability.

In our focus groups, participants could name very few brands which they felt acted responsibly. In the UK, Bodyshop and McDonald's were deemed ethical, while M&S and Starbucks were also referenced for their use of recyclable coffee cups and uniforms. In the US, ALDI was spontaneously suggested due to positive perceptions of its efforts to move to more sustainable packaging.

There's a continued trend of cynicism around business sustainability claims. Fewer people believe that businesses try to do the right thing: since 2021 agreement with this has fallen by 5% (from 37% to 32%), and disagreement has risen by 6% from 20% to 26%.

// I placed an order with Walmart... and they gave me the option to ship all the items separately from the same location. Or wait three days and get it all at once. Amazon gives you that option now too. //

Female, aged 62, Chaplain, Cleveland

Especially in the US, consumers viewed **ESG commitments as profit-making exercises lacking integrity**, and there's some evidence of a growth in support for regulation, something which divided respondents in previous years. When asked what it would take to trust a brand, personal experience, hearing from employees and celebrity endorsements were most convincing. **A trusted third-party was felt to help legitimacy**, eg. WWF.

In focus groups, we presented two sets of ESG ambitions from two companies to see how people received them without knowing their origin. **Overall, respondents were more impressed by commitments that were locally relevant**, preferring policies, for example supporting nurses, helping children with cancer, and doing things for the community. Global policies were 'impressive in a different way' which was "less appealing" – the targets were bigger but less relatable.

Everyone agreed it was more trustworthy for a company to **talk about what it had already achieved**, rather than future commitments.

WHICH ONE COMPANY/BRAND DO YOU THINK IS LEADING THE WAY ON SUSTAINABILITY AND BEING A RESPONSIBLE BUSINESS? (unprompted answers)

	UK		US
AMAZON	7%	AMAZON	12%
APPLE	4%	APPLE	6%
M&S	3%	WALMART	3%
TESCO	2%	TESLA	3%
JOHN LEWIS	2%	NIKE	3%
LUSH	2%	COCA-COLA	2%
NIKE	2%	PATAGONIA	2%
COCA-COLA	2%	MICROSOFT	2%
THE BODY SHOP	2%	PEPSI	1%
TESLA	1%	GOOGLE	1%
DON'T KNOW	25%	DON'T KNOW	21%
NONE	13%	NONE	10%

Please note: above is based on unweighted data

3. How optimistic are consumers about the future?

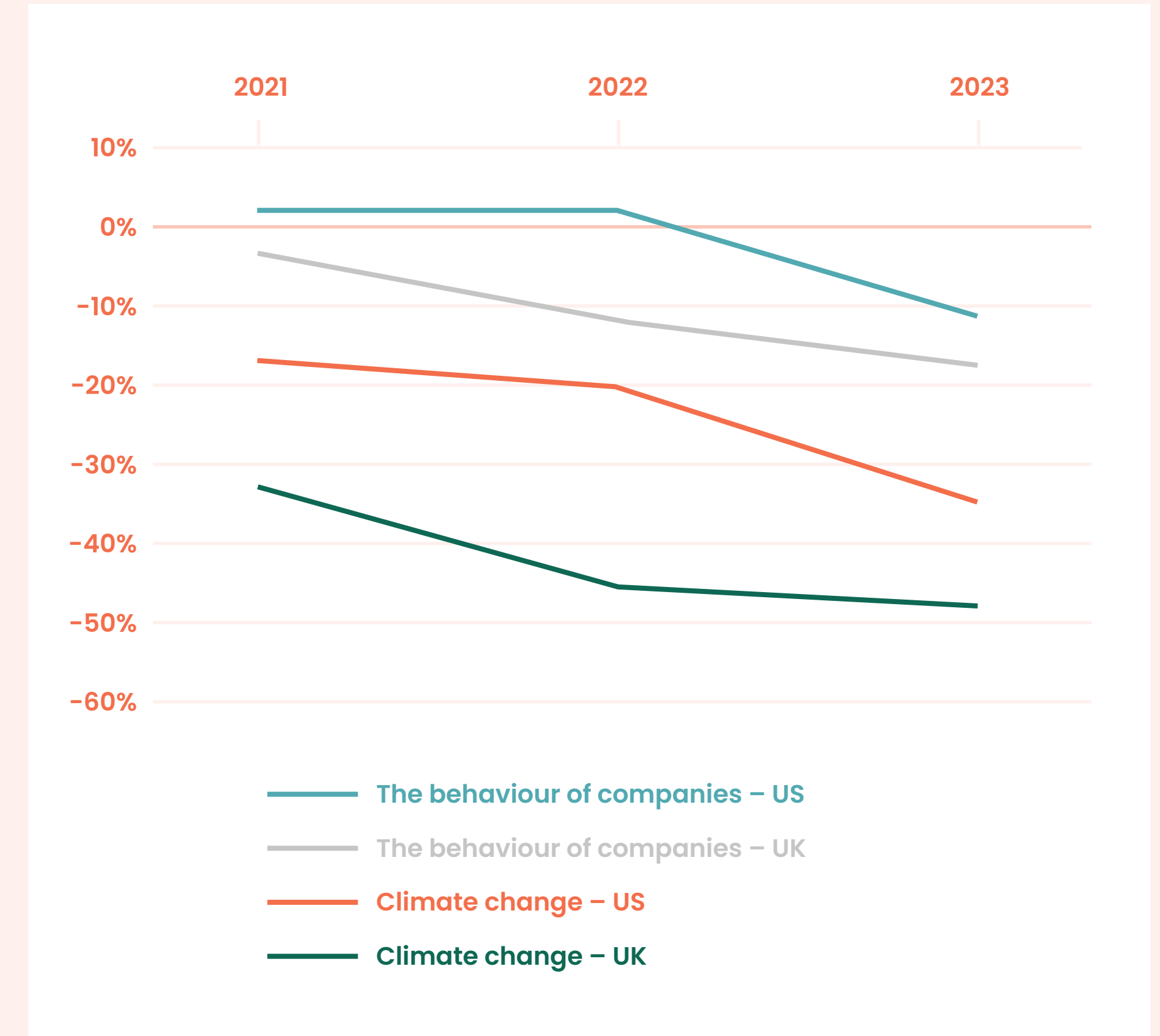
It's not a great picture. There's growing pessimism in both countries, with a majority expecting both climate change and the behaviour of companies to get worse.

62% of Brits expect climate change to get worse over the next 10 years. In the US, this time there's a significantly sharper rise in reported pessimism around climate change: the proportion saying it will get worse rises from 39% (2022) to 52% (2023).

In both the UK and the US, there's a continued trend towards the belief that **businesses are causing rather than solving the biggest issues facing us** and tend to hide what they do from the public.

In the UK, 76% believe that the rich are getting richer at the expense of everyone else, and now 72% of Americans agree with that, up from 65% in 2022.

NET WILL GET BETTER OVER THE NEXT 10 YEARS



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

We can see some of the most common sustainability terms are creeping into more widespread consumer understanding and awareness. Among US respondents, since 2022, we find sizable increases in confidence explaining the following terms:



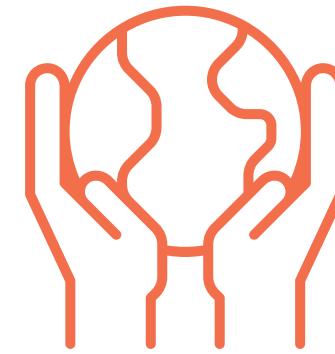
+8%
Climate change
 (61% → 69%)



+7%
Plant-based
 (61% → 68%)



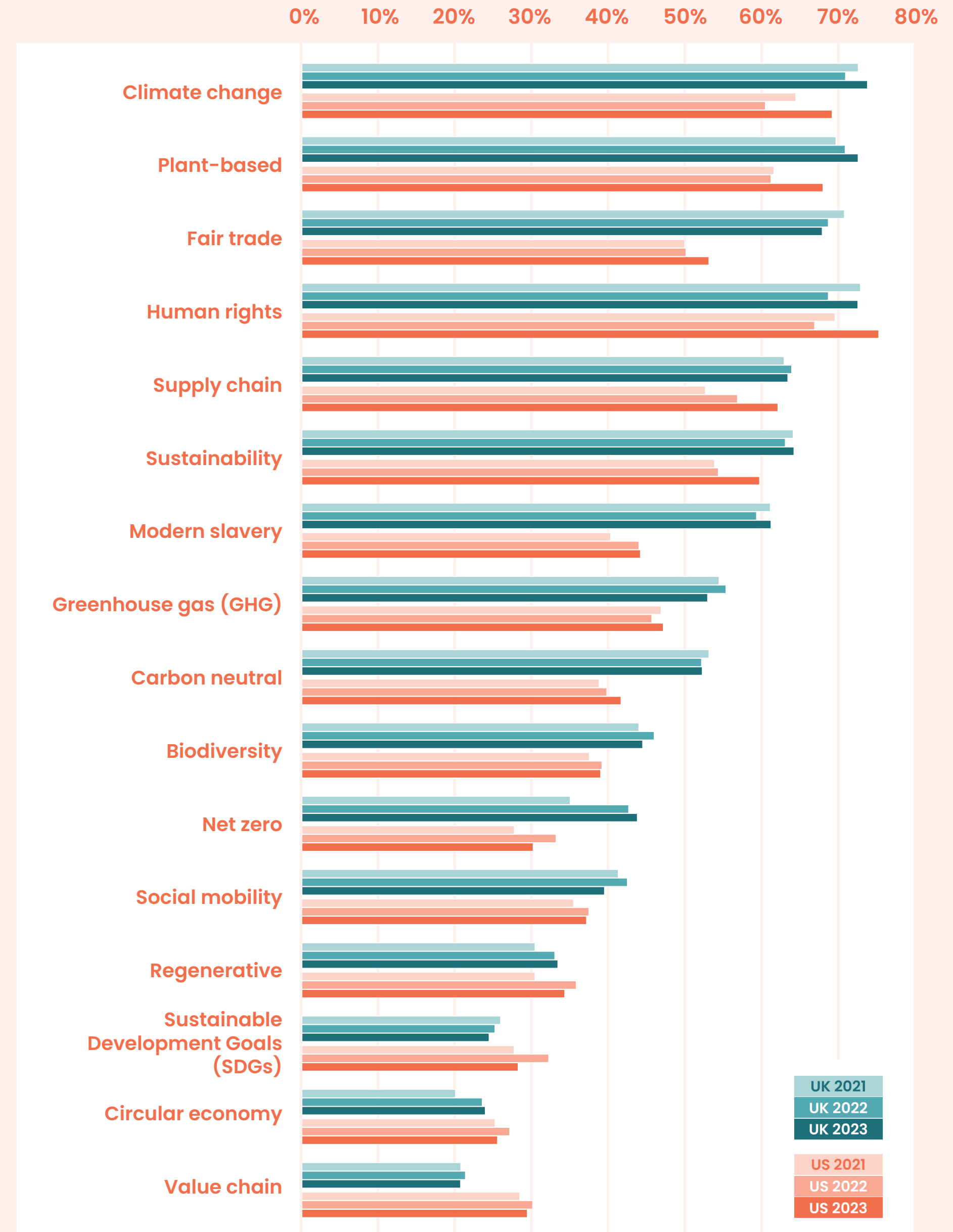
+8%
Human rights
 (67% → 75%)



+6%
Sustainability
 (54% → 60%)

British respondents show no major changes in their levels of confidence explaining the phrases we test, with 10 out of 16 terms static since 2022.

CONFIDENCE IN EXPLAINING TERMS BY COUNTRY AND YEAR



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

Attitudes on this have remained static over the last three years.

In the UK, most respondents expect sustainable businesses to have a **responsibility to environmental sustainability, adhere to strong values and treat staff well**. Environmental action was judged a key part of corporate responsibility. This included recycling, cutting down on waste, energy and fossil fuel use and trying to use alternatives to plastic or harmful materials.

In the US, commentary around corporate responsibility focused on **treating staff well and having a neutral impact**.

When presented with facts about falling biodiversity, focus groups were concerned for future generations and felt that this was ‘everyone’s fault’. Although some participants felt the onus should be on big corporations to act, most did not think anyone had a clear responsibility. No one mentioned the responsibility of government.

In the UK, when asked which businesses are **harmful to nature**, groups agreed that **manufacturing, construction and heavy industrial processes** had harmful effects. They referred to waste being discharged into seas and rivers. Only one participant had a vague understanding of the term ‘biodiversity’. Some believed that, while it was widely important to protect nature, priority should be given to **nature at home** versus in other parts of the world, suggesting we could have more impact at home than abroad.

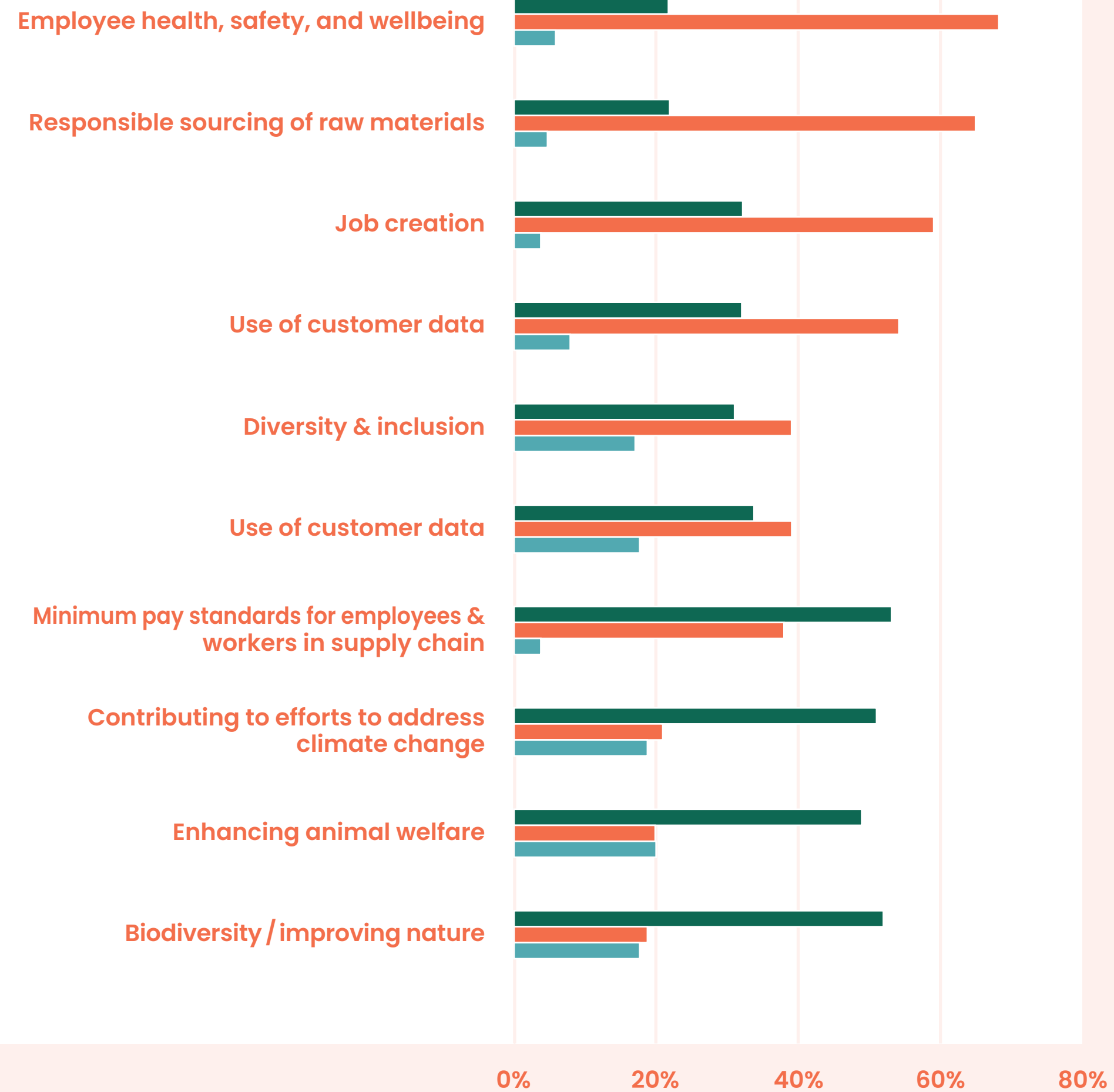
// We’re just counting on the next generation to do it. We don’t know what the hell we’re doing. We’re just doing whatever, putting it wherever we want to and letting someone else deal with it down the line... Anyone who can has the responsibility. //

Male, aged 37, Waiter, Cleveland

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

- GOVERNMENT
- BUSINESSES
- INDIVIDUALS

UK



US



6. Are consumers willing to pay more for more sustainable products?

As in previous years, we asked a series of questions to see whether, and to what extent, people were willing to pay more for a sustainably produced T-shirt, phone, or soft drink. The price uplift was based on a company doing more than a competitor around one of the following:

- Ensuring its workers are paid a fair wage
- Producing half the carbon emissions
- Paying more local tax

We find that people say they are willing to increase the amount they would pay for these products by the percentages shown in the chart opposite.

“If it’s a few extra bucks to feel like everyone’s getting their fair share then sure I am definitely willing to spend that... But if you’re like okay everything is doubled now and also our CEO is making millions of dollars then and it’s smaller than no.”




Female, aged 55, Medical Secretary, Cleveland

Even so, this year, **the most important factors affecting buying decisions for consumers remain price followed by quality** – and the gap between these has remained the same.

In questions about spending, we find no real shifts in Brits’ self-described behaviour. For example, the proportion who say they spend more to buy from companies that protect the environment has remained relatively steady, 37% in 2022, 34% now. Even though in 2022, 40% **disagreed** that ‘businesses should make their goods more expensive so they can pay their staff more’, and this has risen now to 48%.

“To be honest with you, for me, all of the things that we’re talking about right now [environment and sustainability] aren’t high on my priority list. I’m just being honest. You know, I’m a mother of six.”

Female, aged 40, Driver, Cleveland

ITEM	ESG Commitment	UK	US
	WAGES	29%	36%
	EMISSIONS	21%	21%
	TAX	20%	14%
	WAGES	15%	18%
	EMISSIONS	12%	11%
	TAX	9%	9%
	WAGES	3%	3%
	EMISSIONS	2%	2%
	TAX	1%	2%

6. Are consumers willing to pay more for more sustainable products?

The well-documented **say-do gap**, between claimed values and personal actions, was seen in younger respondents who admitted they were more likely to buy cheap items (e.g. low-quality clothing) rather than invest in longer-lasting items. The opposite was true for older respondents.

Stated spending on brands with ESG actions has not changed in the US, with around the same number of respondents saying they spend more on businesses who protect the environment. As seen in the UK, there is an increase in the proportion who would not want to see prices increase for social or environmental reasons.

// I'm living paycheck to paycheck right now... I'm probably guilty of not thinking about where it comes from or what has been sacrificed in the process. But we all have to eat and get by where we can and if that means sacrificing those views slightly then I think that's what we've got to do. //

Female, aged 27, Account Manager, Coventry

Most participants in our US focus groups did not feel guilty about selecting cost over sustainability and all stated that they had switched brands this past year to a cheaper option. An exception was that people said they were **willing to pay more for a sustainable product when associated with higher quality and safety**, such as organic baby food and skincare.

// All of those little, tiny boxes with symbols on the bottom, I think make people feel safer about buying things. And I'm not even sure we understand why anymore, it's just part of marketing... but it does make me feel like it's safer for my body. //

Male, aged 37, Waiter, Cleveland

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

More unites the UK and US than divides us, and we saw many similarities in our research. We did pull out the following points of difference:

- In the US there's stark **politicisation of environmental issues**: for example, when we ask people to rate the popularity of various business commitments to the natural world, a commitment to carbon neutrality by 2030 is least popular for 2020 Trump voters, but highly popular for Biden supporters.
- Certain **animal welfare values seem more mainstreamed in the UK** versus the US – for example, products not tested on animals were prioritised by UK consumers even though they were sometimes more costly, but not in the US. However, product safety and quality is non-negotiable for both audiences even though cost is the main purchase driver.

- UK participants admitted **some guilt about their behaviour around sustainability** but only when confronted with related media coverage. Most US participants did not feel guilty about selecting cost over sustainability.

// I think about it [sustainability] more when I see it on the news or on social media. But then if I'm going to buy something for myself, if it's cheap, I'm buying it and quite selfishly. But then if I'm seeing if it's been brought up on the news or social media then I think I feel guilty about it. //

Female, aged 25, Sales Manager, Coventry

- There seems to be **more pessimism generally in the UK** vs US on climate change and the future behaviour of businesses, with more scepticism towards business actions in the UK.
- Nearly **70% of Brits visit some form of green space** at least once a week. In the US, only 55% do.

- In the UK, generally **businesses are felt to be having a more negative impact on the natural world**. Americans tend to see businesses having a positive impact. For example, on clean water, 45% believe businesses are having a positive impact, compared to 31% saying negative. In the UK this is 33% to 37%.
- When asked directly, **the impact of the cost-of-living crisis is less noticeable in the US**: 33% say they feel worse off than they did last year, whereas in the UK, it's 52%.

SECTION 2.

— **KEY FINDINGS**

— **KEY TAKEAWAYS FOR BUSINESS**

KEY TAKEAWAYS FOR BUSINESS

1.

Talk to your consumers

Despite the economic squeeze, we've seen no marked reduction in concern about ESG over the last three years of our tracker. It seems that consumers will continue to pay for certain aspects of product quality, even though cost is now a key consideration. In the UK we heard consumers refer to some attributes linked to sustainable, ethical production where they wouldn't compromise – for example, free range versus caged eggs.

Businesses should keep up the pace of communications on sustainability because there are consumers who are genuinely interested – it's not the case that they don't care anymore because of the cost-of-living crisis. Linking sustainable choices to saving money can still resonate: people told us they are more **mindful of waste** – especially food and energy – as a key response to this.

// There's certain things I wouldn't buy. You know, products that use animal testing, eggs that are not free range. I do have some ethics that I will stick to. But when it comes to clothes and it's far away... //

Female, aged 43, Teaching Assistant, Coventry

// I've found we've not really downgraded what we've had, but we tend to be more careful in terms of not wasting. I will usually cook for four and then freeze... my food recycling bin is far less used than it was two years ago. //

Female, aged 56, Teacher, Coventry

// What's acceptable in my head is like meat and eggs, free range eggs I would pay more for them. Because I feel like A it's better quality and B the animal is having a better life. //

Female, aged 27, HR Consultant, Coventry

2.

Local nature

Consumers care about nature and talk about appreciating its benefits from a recreational and mental health point of view. Conserving nature is vital for the planet and to address the climate crisis, but it's just as vital for people and communities in terms of social cohesion, place-making and wellbeing. We heard people would be receptive to hearing about corporate sustainability actions to protect nature both at home and further afield – but it is **especially relevant when it's local nature**. And as noticed before, sustainability claims about **tangible actions** which have been carried out (rather than future ambitions) are more relatable and credible.

// Whenever you see them messing up, you want to see them cleaning up. If they're cutting down trees they need to be planting new ones. //

Female, aged 55, Medical Secretary, Cleveland

// Arriva the transport company. They use planes a lot because their employees are based across Europe. For every so many miles they plant a tree. That was quite nice and stuck in my head. //

Female, aged 31, Events Management, Coventry

// Every corner you turn, I feel like they're making a new Amazon warehouse... they're tearing down trees. I feel like they should at least be a bit more conscious of what they're doing to the environment. //

Female, aged 38, Property Manager, Coventry

KEY TAKEAWAYS FOR BUSINESS

3.

Nature for people & planet

There's a low level of awareness around most business operations and impact on nature. For example, most consumers have no clear understanding about the role of mass food production as a leading cause of habitat loss, deforestation, water quality issues and poor soil health. Some animal welfare ethics cut through in the UK, but it has taken decades of campaigning to get this across.

Responsible businesses have an opportunity to **help improve consumer education and understanding of more sustainable production** – including regenerative agriculture practices, pollinator protection, water stewardship, and ethical supply chain partnerships – bringing alive the benefits for both nature and people.

Starting to bring nature into the brand conversation with consumers is a chance to raise awareness and accelerate demand for action. Check out these [resources for business](#) from the *Save Our Wild Isles* campaign team.

// I'd just like to be educated on it... You can't even pronounce some of the things they're telling you. You've got to be really educated and know these terms. And you don't know what you're getting half the time and who is the right person. //

Male, aged 38, Driver, Cleveland

4.

Clean water, please

Protecting clean water and seas came up as most important to consumers in both the US & UK. Years of campaigning about water quality by environmental NGOs and, more recently, mainstream media seem to be cutting through and landing with the public. While there are obvious **risks for businesses who contaminate** water through their operations, there's an **opportunity for businesses to dial up communications about responsible water stewardship.**

// Where they're pumping their waste into the water, that's probably what comes to mind most [as an example of businesses having a negative impact on nature]. //

Female, aged 43, Teaching Assistant, Coventry

// Pollution and how they're disposing of certain things... I've seen a lot of pollution. They've just cleaned up our river and you don't want to see it all being dumped back in there. //

Male, aged 60, Machinist, Cleveland

KEY TAKEAWAYS FOR BUSINESS

5. Honesty is best

We're seeing **continued growing scepticism about businesses' sustainability claims** in both the US and UK. Businesses might heed the **transparency and clarity of their communications**: focusing on tangible actions, including familiar third-party accreditation, and being honest about progress tackling challenges. Using relatable language and picking the right channels to communicate sounds obvious, but consumers told us that they have a relatively high degree of trust in social media as a source of content – especially young people – so could this be used to more positive advantage?

// Responsible? I don't know... It's like they're looking out for their company rather than the responsibility of it. //

Male, aged 38, Driver, Cleveland

// Industry is not going to do a damn thing unless it makes them money. And if it provides any type of goodwill, that's just gravy on top of it, but what's driving them is their profits. //

Male, aged 64, Engineer, Cleveland

6. Local impact

The language of sustainability seems to be becoming more mainstream, with a widening understanding of key terms in both the UK and US. However, overall, people were more drawn to companies that were having a positive impact on people and local communities, finding this more relatable than a net zero goal, for example. As **businesses look to communicate their sustainability actions to consumers**, it's worth remembering that **while big numbers seem compelling** (and may help address stakeholder concerns), **they often leave consumers cold**, unless linked to a more accessible aspect of the business.

// I'm a bit indifferent [of Company B's pledges]. I like to think of what goes on at home. And that might be really, really selfish but, thinking of the state of our economy, I would like to know what's going on here first... what about our communities here? //

Female, aged 44, Nursery Manager, Coventry

// I personally prefer the more local the better. In Ohio, that's a great thing. If it happens to be in the United States that's okay. But I'm not all that excited by overseas. //

Male, aged 64, Engineer, Cleveland

APPENDIX.

- SUSTAINABILITY SEGMENTATION
- METHODOLOGY
- ABOUT BRODIE & PUBLIC FIRST

Sustainability segmentation

To help businesses and governments better understand the views on sustainability of US and UK adults, we have identified six distinct consumer groups:



Angry Activists



Commercial Realists



Corporate Optimists



Ethically Disenfranchised



Pessimistic Free Marketeers



Superficial Enthusiasts

Each group represents people who think similarly about what it means to be a responsible business, and for whom sustainability has a similar influence on their decision-making. Each of these groups offers opportunities for both businesses and policy makers.

The six segments are each demographically diverse (although there are 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** for responsible business practices.

Together **Angry Activists and Corporate Optimists** (totalling 27% in the UK, and 30% in the US) **are most willing to pay for higher standards of sustainability**. They represent those who are pessimistic and have little faith in business or government to save the planet or people, versus a more optimistic group who are worried but think we can turn things around.

Our **Pessimistic Free Marketeers and Commercial Realists** (totalling UK: 43%, US: 30%) **are both relatively pessimistic**. They are split between those who

- a) Acknowledge some companies make positive steps, but don't trust the broader system to make sure these scale, and
- b) A more economically-driven group who believe that businesses should be responsible, but also prioritise action to back jobs and boost the economy

Finally, we have the **Ethically Disenfranchised and Superficial Enthusiasts** (UK: 30%, US: 40%), which combine to make those least engaged with sustainability. They are split between a smaller **overly optimistic** group (Superficial Enthusiasts), and the remaining larger proportion of **people who feel excluded from the conversation about sustainability** (Ethically Disenfranchised) – either because they lack physical access to facilities, such as recycling and public transport, or because they find the language and debate is disconnected from their lives.

Sustainability segmentation



Angry Activists

The most committed to acting, **Angry Activists seek out 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 are the **most sceptical of businesses** and believe that their own actions will impact business decision making, so will attend protests as well as boycott businesses, countries of origin and sectors that are causing environmental damage or have human rights issues.

New for 2023

Angry Activists in the UK are most likely to say they feel worse off than they did in 2022, although their commitment to environmental issues means it has not made much difference to their sustainable behaviour. In the US, they have a much higher preference than others for packaging and carbon neutrality commitments, and lean towards a belief that businesses negatively impact the number of animal species in the world.



Corporate Optimists

Corporate Optimists value being able to use their purchasing power to drive positive change. 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 anxiety. These consumers want the products they buy to be sustainable and functional, and **try to avoid certain companies**, particularly those making very cheap products that they perceive as unsustainable. However, other personal factors, such as financial constraints, mean they are **not always able to live as sustainably as they feel they should.**

New for 2023

Corporate Optimists are the only segment to disagree with the statement that 'buying environmentally friendly products is something only the rich can afford to do' (46% disagree).

// I don't know how much of an impact I'm making, but if I feel like something's not right, I definitely won't give the company my money... //

Female, aged 55, Medical Secretary, Cleveland

Sustainability segmentation



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, they believe that **business behaviour is likely to deteriorate over the next 10 years** because they see it as highly rational, easily shaped by both customer demand and government intervention, such as tax incentives. Our previous work with this segment revealed that they **place importance on locally sourced or produced products.**

// It's all about money isn't it? They don't care about anything over money... They'll say things like 'oh we're helping the environment' but they don't really care. //

Male, aged 30, Butcher, Coventry

New for 2023

Pessimistic Free Marketeers are generally more positive on questions around the impact which businesses have on the natural world. In the UK, for example, although they are somewhat divided on it, they lean slightly towards saying businesses have a positive impact on the cleanliness of water, and the amount of green space in their local area.



Commercial Realists

Commercial Realists believe that we should take action to address environmental and social issues, but **that the importance of the economy means jobs and livelihoods must be put first.** They appear well-informed about the bold measures that are likely to be required, for example, to curb global warming. However, this comes 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.**

// I will do my bit, you know, I will recycle and try to do things to save the planet. But then you see big companies who produce so much plastic year on year... and it's a bit like, well is what I am doing actually that relevant? //

Female, aged 27, Account Manager, Coventry

New for 2023

Commercial Realists are the only group to disagree that environmentally friendly products tend to be higher quality. They are also the only group to lean towards a belief that a business would be more successful if it sold products more cheaply, even if it meant they were worse for the environment.

// Investing in ESG... It's going to drive up the cost down the line for the consumer. //

Male, aged 64, Engineer, Cleveland

Sustainability segmentation



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 express concern about environmental and social issues but are hesitant to adopt more sustainable behaviours or change their purchasing habits – 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 are 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 footprint on the planet are not possible within their lives**.

// I pretty much just shop wherever the sales are, and the price is really the only thing that would make me switch brands. //

Female, aged 40, Driver, Cleveland

New for 2023

The Ethically Disenfranchised are more likely to prefer corporate commitments to local litter abatement and produce growing. In the UK they have a greater tendency to agree that the demand for businesses to be environmentally friendly is damaging the economy. We find some evidence that segments think differently about the implications of low prices: for Angry Activists, these imply that businesses are paying low wages and doing more environmental damage, whereas for the Ethically Disenfranchised they do not.



Superficial Enthusiasts

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

// Recently I started buying from Shein. And I know it's probably not being made in the best circumstances... I just had a conversation recently where I was saying I felt guilty. But at the moment, I can just get what I want for a good price. So, I'm doing it and I'm just turning a blind eye to it. //

Female, aged 43, Teaching Assistant, Coventry

New for 2023

Further evidencing this group's high levels of optimism, we find they're the most likely to say they feel better off this year compared to last year. Despite this, a majority also say that 'with the cost of living as high as it is currently, I have been less concerned about how good for the environment the things I buy are'.

// I'm still annoyed about plastic bags. I kinda wish they would come back... I kinda miss the old way – it was handy and convenient. //

Male, aged 37, Waiter, Cleveland

Methodology

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 (eg. 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 through its **objectivity and breadth**. We start from a position of professional curiosity. It is our belief that companies are best served by knowing what consumers really think about sustainability. Poor quality consumer insights could lessen the impact of corporate investment in social or environmental sustainability programmes.

Summary of methodology

Public First is a member of the British Polling Council and abides by its rules.

We polled just over **2,000 consumers** in both the UK and the US, asking more than **150 questions** to each person. Polling was carried out online. Results were weighted to be **representative of national proportions on demographics**: in the UK by interlocked age and gender, region and NRS social grade; in the US by interlocked age and gender, state, education, and ethnicity.

We also conducted face to face qualitative interviews in Coventry, UK and Cleveland, Ohio. Primary research was carried out between March 24-31, 2023.

APPENDIX

About Brodie & Public First

BRODIE

BRODIE is an international responsible business and sustainability advisory firm, working with some of the world's most forward-thinking companies, across many sectors. The team 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 skill, unified through a passion to help businesses thrive.

www.brodiepartners.com



Duncan Gray

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Public First

Public First is a research and policy agency specialising in energy, climate change and sustainability. As well as policy recommendations packaged as compelling content, we offer the economic modelling and opinion research to 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 can 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.

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If you'd like to hear more about our work, please get in touch!

This report includes just a snapshot of our findings. If you would like to learn more, we would love to hear from you: please get in touch!

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