

A photograph of a wooden boardwalk or path winding through a dense forest. The path is made of wooden planks and is surrounded by lush green foliage and trees. The lighting is soft, suggesting a shaded forest environment.

Savanta:

ECO SEGMENTATION

Insight to power a greener economy

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Foreword

We live in deeply turbulent times. In the wake of a pandemic, a cost-of-living crisis has emerged, made worse by war, political chaos and geopolitical instability. However, amid such challenges it's essential the journey towards net zero, or net-negative carbon emissions, remains a critical focus for both public and commercial organisations - because ultimately the world's many problems pale in comparison to the existential threat of unchecked climate change. It's just hard to prioritise when other "once in a lifetime" crises emerge in such quick succession.

Against such unique societal conditions, this study provides clarity about the diverse public responses to climate change and does so by being grounded in behavioural science and a direct understanding of the values and contextual factors which influence our actions. Crucially, the work also provides a unique insight into the 'say/do' or 'intention/behaviour' gap: the troublesome cognitive dissonance that seems to scupper so many well-meaning green intentions.

It is easy to take the view, especially during a cost-of-living crisis, that a desire to be more sustainable, will be more expensive, lower priority or—for some—completely out of reach. Yet this isn't necessarily true. Against the odds there remains a broad public desire to meet sustainable goals, signifying there are opportunities even during a deep and global economic crisis.

This study demonstrates how society is changing and embracing (or resisting) those changes, and how the social contract between citizens, the state and commercial organisations is evolving across different generational groups. Yet more than anything, it offers businesses a new beginning by leveraging unique and powerful insights that can enable further transition towards more sustainable lifestyles. And by utilising the audience segmentation at the study's core, can also help organisations develop green plans around individual areas of interest.

Through our segmentation—which puts decision-makers on the front foot—the study offers a key to opening the door to many of the challenges around sustainability so many of us are already engaged with.

**Dr. Nick Baker**

Chief Research Officer | Savanta

Methodology

This report is based on the findings of a survey of 12,016 adults aged 18+ in the United Kingdom (5,005), United States (5,006) and Canada (2,005).

Data are weighted to be representative of age, gender, region and social grade (UK) or income/education (US and Canada).

Survey questions mainly used 10 point scales, or binary statements on which a scoring system was used, where 'points' were attributed to answers depending on how positive or negative an impact they have on sustainability (defined as the responsible and ethical treatment of both people and planet).

Factor analysis and cluster analysis was then applied to group attitudinal and behavioural dimensions. Answers to the OCEAN personality model and socio-political values were then overlayed to further define the segments.

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An overview of our results across the UK, US and Canada

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Market context

There is no greater crisis than that posed by climate change, yet more immediate challenges are limiting our ability to act. From the pandemic to war, or rampant inflation to divisive politics, the sustainability agenda is being usurped at every possible turn.

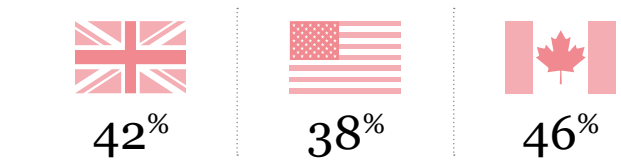
And it is not just leaders and institutions being side-tracked. Asked to rank the most important issues facing their country, most ordinary people also say they are struggling through the here and now, limiting their ability to adopt more sustainable behaviours or think long-term, even as increasingly extreme weather takes its toll.

However, dealing with the so-called ‘perma-crisis’ does not mean people are unconcerned. The UK, US and Canadian public are certainly beginning to ask more existential questions about the societies in which they live, and when asked outright, on average two in five (41%) are concerned about the potential negative impact of climate change on their country.

The responsible and ethical treatment of people, as well as planet, is also receiving more attention. Both economic growth and economic inequality and poverty are ranked equally highly as points of concern (18% ranking them in the top 3), and almost half (46%) are concerned about the welfare and rights of workers in their country.

The consensus? ‘Society is going in the wrong direction’. Nearly half (46%) in the US agree, along with two in five in the UK (37%) and Canada (39%). Worse still, on average only one in five consumers (22%) have confidence in our ability to find solutions to the biggest problems currently facing the world.

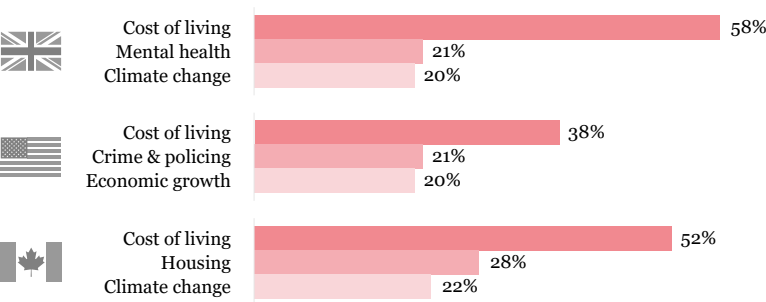
Q: To what extent are you concerned about climate change?



Potential responses here on a 1-10 scale, where 1 is ‘Not at all concerned’ and 10 is ‘Extremely concerned’. This visual shows those who rated 8-10.

Chart 1: Top 3 most important issues by country

Q: Which of the following do you think are the most important issues facing [country] at this time?



% ranking as the top 3 issues

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Game-changing, sustainable solutions may not come quickly while other priorities also sit high up the agenda, but by revealing this desire for change our research poses **three clear calls to action** for organisations to carve a path through the sustainability-jungle.

01 Consumers feel priced-out of sustainable choices

Producing products with a lower environmental impact tends to cost more as materials and processes are much bigger considerations. Consequently, green products have become synonymous with premium prices.

When matched against the cost-of-living crisis, this is having a detrimental impact on purchasing decisions across the board. Indeed, three in ten (29%) say they could not afford to buy more sustainable products and services, remaining as high as a quarter of those from the highest income brackets. With few households likely to escape from the cost-of-living crisis unscathed, almost everyone will be 'discounting' immediate behaviour change to shore up their finances. The 'premium' positioning may find it difficult to weather the storm of the coming months, as even affluent consumers decide more sustainable, more expensive, choices can wait.

Market dynamics currently dictate the cost for most sustainable products, so it's not just a case of maturing beyond the orthodoxy - they tend to cost more because that's the reality of placing environmental and ethical considerations first. It is therefore the role of the market (and marketers) to also approach consumers with a different message to justify the higher price, perhaps lifetime value, longevity and quality.

02 Sustainable products & services need to be clear on where they sit in the 'big picture'

Even with the advent of a mass market for sustainable goods and services, consumers will still want to prioritise - at least initially - based on their lifestyle and tastes. However, even if their intentions are good, our data suggests many lack the knowledge to weigh up exactly where they should be changing their behaviour.

When asked what actions they think have the greatest positive impact on reducing carbon footprints, the top three are recycling correctly (30%), using less energy at home (28%) and reducing food waste (25%). Meanwhile, several more significant lifestyle changes are being overlooked. These include using public transport regularly (only 12%), reducing meat eating or international flights (both 11%), decreasing dairy consumption (7%) and banking or investing pensions ethically (both 6%).

Evidently, encouraging many to make much bigger changes - going beyond a more straightforward reduce, reuse, recycle mindset - will require support. To fight climate change in time, not only will access to a more sustainable lifestyle need to improve, but education on the required scale of action must be stronger too. Consensus on how to make the most difference needs to be clearer.

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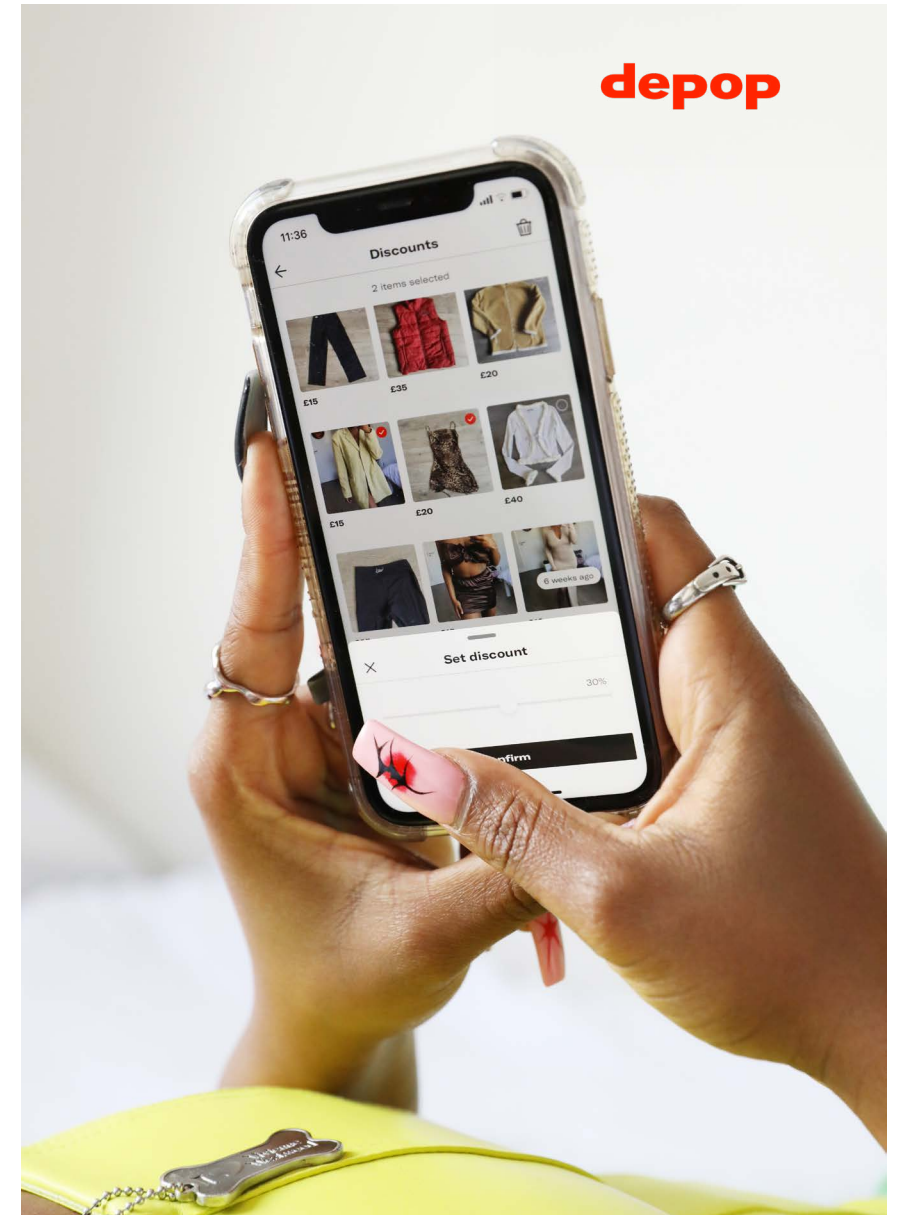
Change has already begun, so don't run the risk of being behind the curve

Despite barriers around cost and knowledge, a buzz around sustainability is growing. Close to two thirds having taken action to better inform themselves about or contribute to sustainable causes, be that signing a petition, sharing information on social media or donating to a relevant charity. Most notably, one in five (19%) have already boycotted a brand or product.

These have yet to filter through to decision-making more widely, but should brands be gambling on that state of play remaining? Our data and client case studies show there is much to be gained by seeing sustainable business models and products as an opportunity rather than a cost.

For example, the circular economy is being incorporated into 'traditional' business models with IKEA establishing Circular Hubs to repair, buy-back or sell on used furniture, and could amount to \$700bn a year in material savings in the FMCG sector.¹ Moreover, the boom of stand-alone clothing resale and second-hand platforms such as Vinted and Depop is one of the most visible shifts in behaviour in recent years, and is an instructive example of where breaking the tension between consumers' wallets and their good intentions can yield big returns.

However, 15% of respondents in our research don't want brands to offer them sustainable products and services, emblematic of the cognitive dissonance induced by government and business tinkering around the edges in the midst of perpetual crisis. Whilst it is tempting to 'tread carefully', fortune favours the brave: those who are most ambitious in aligning their core purposes and vision with delivering sustainable outcomes are best placed to turn it into competitive advantage.



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Intentions and actions of our seven segments

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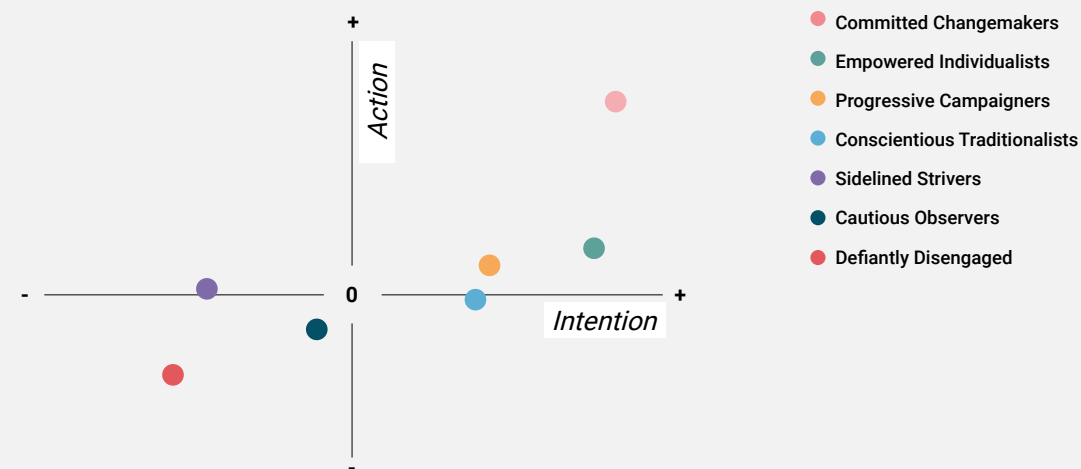
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Introducing our segmentation

Our segmentation shows that in their intentions and actions towards sustainability, the public falls into seven segments overall. Yet while four are well-intentioned, in reality, only one is following through with their practices so far.

The backbone of our segmentation is the well-publicised 'say-do' gap, plotting consumers' 'intention' to behave more sustainably against the real-world steps they have taken to date. Overlaying this analysis with socio-political values and personality traits creates a holistic view of the various capabilities, motivations and opportunities of different consumers.

Chart 2: The say-do gap



Committed Changemakers and **Empowered Individualists** have the highest intentions to live sustainably across all 'sectors' - in our research, that means in terms of lifestyle (food and non-food purchases), energy usage, transport, money and work,* as well as their 'general' concern for sustainability as an issue.

Progressive Campaigners and **Conscientious Traditionalists** also have good intentions overall, but these are not as strong. Compared to others, **Cautious Observers** - and in particular, **Defiantly Disengaged** and **Sideline Strivers** - see living sustainably as relatively low priority.

Committed Changemakers follow through on intentions to live sustainably on the whole, while only the **Defiantly Disengaged** act in a completely disengaged manner towards sustainable living.

The picture is much more mixed for the rest of the segments, who are taking at least some tentative steps, but remain fairly passive overall.

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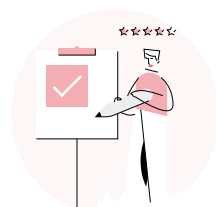
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Meet our audience



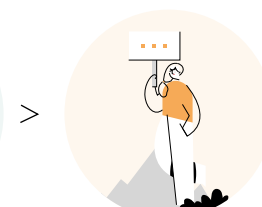
Committed Changemakers

... have a positive, internationalist world view and hold left-leaning values. They're concerned about sustainability and trust experts' views, but are relatively optimistic about society's ability to solve problems.



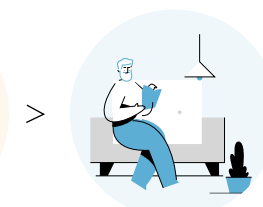
Empowered Individualists

... are relatively pessimistic, have right-leaning values and mostly focus their immediate 'world' rather than systemic social change. They tend to be very affluent, so could afford to do more on sustainability if convinced it would benefit them or enhance their lifestyle.



Progressive Campaigners

...tend to be relatively younger, middle to upper class with strong egalitarian values, but are distrustful of those with authority. They are outspoken and put their weight behind driving social change but are not (yet) taking significant action in their own lives.



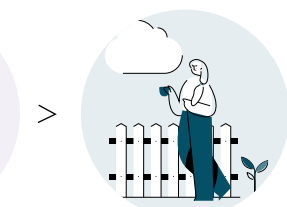
Conscientious Traditionalists

... tend to belong to the Baby Boomer and Gen X generations, live on middling incomes and have graduate-level education. Characterised by a strong sense of respect and personal responsibility, they show specific concern about climate change and live sustainably.



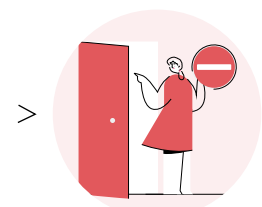
Sidelined Strivers

... are disproportionately young, low-income, and from ethnic minority backgrounds. They are 'just about managing' and feel extremely pessimistic about their prospects. The cost-of-living crisis looms large for this group who therefore have limited opportunities to engage with sustainable behaviours.



Cautious Observers

... are relatively less affluent, hold left-leaning values, and feel very disgruntled about the direction of society. However, they are sceptical about collective action and expect authority figures to take the lead and offer a helping hand or guidance that will make the world a better place.



Defiantly Disengaged

... hold strong right-leaning values, are pessimistic and individualistic, and prefer to 'go it alone' than trust experts or established institutions. They're active rejectors of sustainability, particularly aspects around the responsible and ethical treatment of workers and promoting values of equality.

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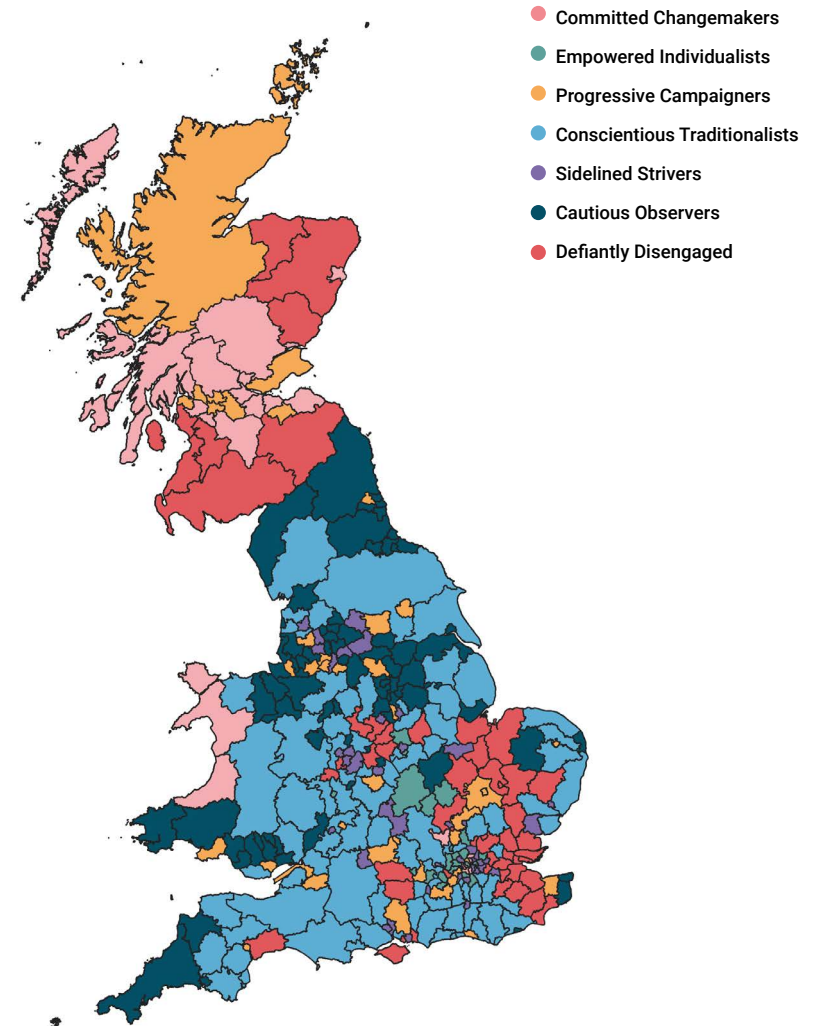
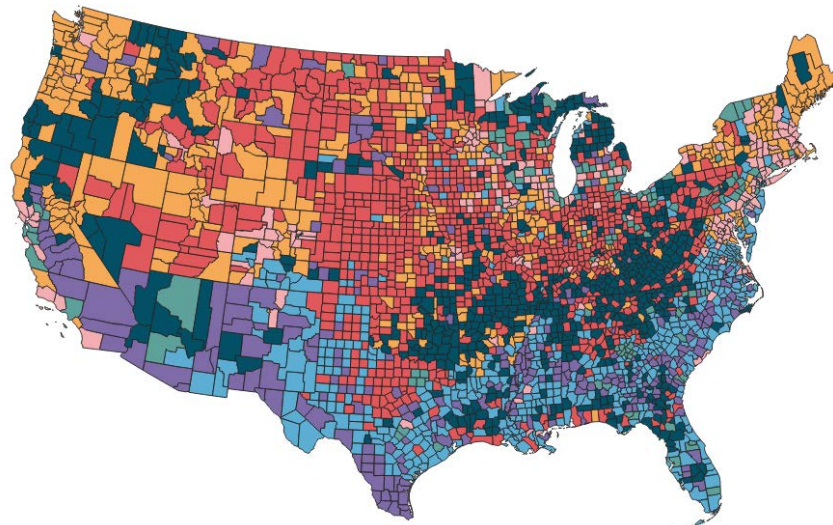
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The distribution of our segments across the UK and US to some extent reflect our politics since 2016.

The more 'progressive' segments on sustainability are found in historically left-leaning, urban areas, while segments who are more hesitant about the agenda live in more rural areas which tend to have been right-leaning in recent years. There are particularly close parallels in the US with the results of the 2020 Presidential Election.

That said, there are some trends that run against the grain. The first is that **Sidelined Strivers** tend to live in left-leaning areas, despite being relatively disengaged with sustainability. Secondly, **Empowered Individualists** are overrepresented in the UK Conservative heartlands. Wealthy and established, this segment are the right's traditional base, with the key difference being they are more engaged in sustainability.



- Committed Changers
- Empowered Individualists
- Progressive Campaigners
- Conscientious Traditionalists
- Sidelined Strivers
- Cautious Observers
- Defiantly Disengaged

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Sustainability by sector

What do different segments think about sustainability? What steps are they taking to live more sustainably? Let's look at their grocery shopping and food consumption, lifestyle, energy usage at home, travel habits and attitudes towards money.

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Sector spotlight

Before exploring how the segments' intentions and actions towards sustainability differ, first let's review the overall research results...

Grocery & Food

For grocery shopping, consumers' **top three criteria** are:

1. Value for money - 62%
2. Quality - 55%
3. Low prices - 52%

Despite the rise of plant-based alternatives, **73%** overall describe themselves as **meat eaters**.

Many aim to **'buy local'** - **67%** choose this option where possible over food grown abroad.



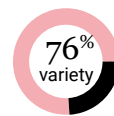
Almost
3 in 4
eat meat

Lifestyle

Most (71%) pay more attention to **price and quality** than where an item is made, or what it is made of.

76% buy from a variety of retailers to meet their needs, with only **24% solely** going to **brands they see as ethical** or committed to having a positive impact.

However, **nearly half (43%) buy second-hand** where possible and **75% pass on unwanted items** to others.



24%
solely buy from
ethical brands

Home & Energy

In 2022, with energy prices at risk of spiralling out of control, it's unsurprising that **cost (66%) is the key concern** - twice as important as green energy (32%).

67% either don't have a green energy tariff, or don't even know if they have one.

Longer-term many would consider, or have already, improved their home's energy efficiency e.g. **by installing solar panels (45%)** - **but few actually have (9%), likely due to cost**.



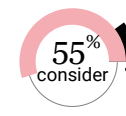
2 in 3
don't have a green
energy tariff

Travel & Transport

Safety (58%) is a hygiene factor, followed by cost and convenience concerns, but carbon emissions generated is the least important factor overall (24%).

Petrol and diesel cars are the most common way to travel daily - 30% use them every day, ahead of walking/ wheeling (25%) and all public transport.

55% would consider buying an electric vehicle - only 10% have so far, again due to price, with only the most affluent owning them.



Only **10%**
have purchased an
electric vehicle

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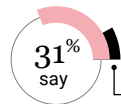


Money

Customer service (59%) is top of mind when choosing to save or invest, while investing money ethically or sustainably (38%) is the least important criteria.

48% find it difficult to save consistently, if at all, rising to 51% in the UK - indicating why higher returns (46%) are a bigger priority than sustainability.

31% say their pension is only invested in ethical or sustainable industries, but more education is needed - the true figure is estimated to be between 1-8%.²



In reality only 1-8% have pensions invested in ethical or sustainable industries



Work

After a competitive salary and flexible working hours, employees' next priority is to find a **company with a reputation for treating their staff well (51%)**.

67% say it's their employer's role to lead sustainable practices and initiatives at work, while 32% say it is employees' responsibility.

Staff believe the **top employer benefits** from leading these initiatives will be strategic - **improved customer perceptions (33%) and future growth (32%)**.



2 in 3 say employers should lead sustainable practices at work

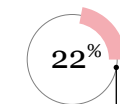


Youth

Climate change (19%) is among the top three concerns for 18-24s, with the cost-of-living crisis leading the way (32%) followed by mental health (22%).

Gen Z are the most likely to have boycotted a brand or product (22%) in relation to sustainability issues.

24% of 18-24s say they have few friends or family members who talk about sustainability.



Gen Z are most likely to have boycotted a brand or product

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Grocery & food

As the cost-of-living crisis escalates, many consumers face extreme trade-offs. Some are skipping meals to keep the lights on³ - while others face a choice between food, fuel, rent, medical care and more.⁴

Even for those with less extreme choices to make, there's still a greater risk they'll de-prioritise efforts to live more sustainably right now.

Therefore, it's unsurprising that for food shopping, value for money (62%) is the top consideration. Also key are ingredient quality (55%)—showing there are still some things consumers refuse to compromise on—and low prices (52%).

In terms of diet, meat isn't leaving the menu anytime soon; 73% overall are meat eaters, and only one in ten (11%) rank reducing meat consumption as one of the top three actions for reducing an individual's carbon footprint. Yet Western countries need to cut meat consumption by three quarters to meet climate change goals.⁵

Flexitarians account for 17% overall, followed by vegetarians (5%) and vegans (3%).

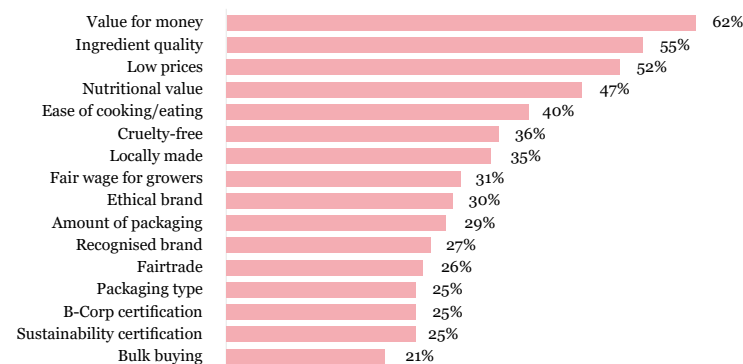
Committed Changemakers lead the way: 33% are flexitarians, 13% are vegetarian and 12% are vegan. Only 40% are meat eaters. **Empowered Individualists** are also much more likely to have moved away from meat—only 52% eat it and 27% are flexitarians.

But the Western Pattern Diet (WPD) is popular for a reason. For many, pre-packaged meat is cheap, filling, quick to cook and tasty, perhaps why 70% of the eco-conscious **Progressive Campaigners** remain meat eaters. As do the relatively older **Conscientious Traditionalists** (79%) and **Cautious Observers** (81%) who grew up on traditional diets.

Chart 3: Important considerations when buying food



Q: How important, if at all, are each of the following considerations when deciding which types of foods to buy and eat?

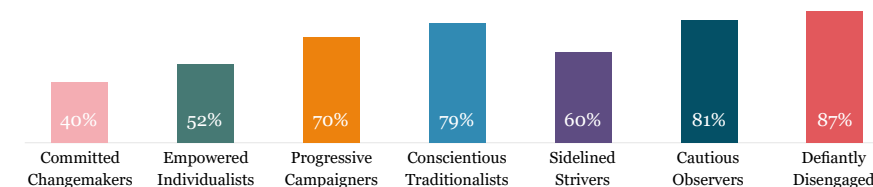


% Ranking 8-10 on a 10 point scale, where 1 is not at all important and 10 is extremely important

Chart 4: Predominantly a meat-eating society



Q: How would you describe your current diet? **Meat-eater**



% describing their diet as 'meat-eater'

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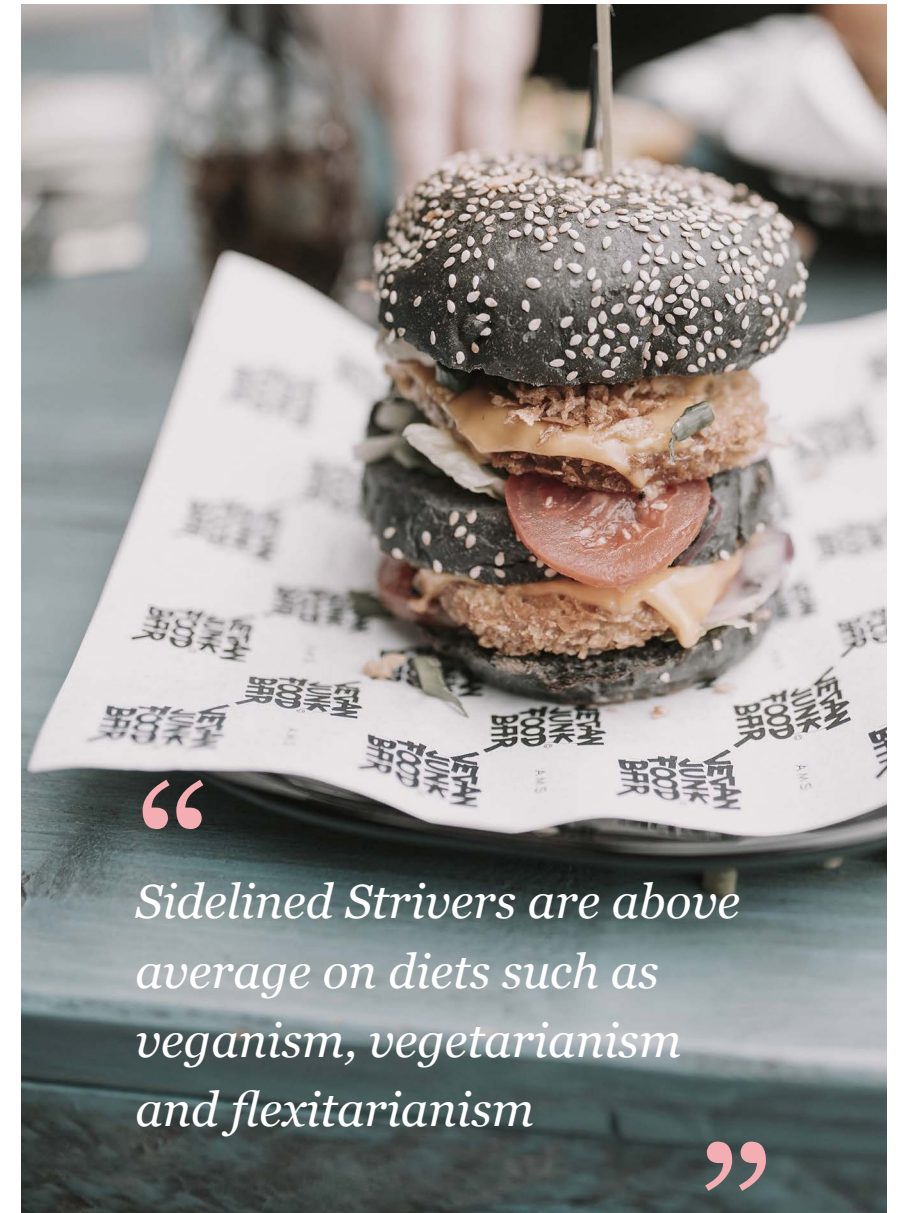
However, there's an interesting difference among lower-income segments. While 87% of the **Defiantly Disengaged** eat meat, **Sidelined Strivers** (60%) are well below average. **Sidelined Strivers** are above average on other diets, such as veganism, vegetarianism and flexitarianism—proven by research to be the most affordable.⁶ Their primary intention may have been to just keep food costs down—but in doing so, they are also eating more sustainably.

Apart from value, quality and price, what else is important to consumers overall when buying food? After nutritional value, as well as how easy it is to cook, comes cruelty-free certification. Cruelty-free certification matters most to the four most sustainably active segments—**Committed Changemakers** (54%), **Empowered Individualists** (52%), **Progressive Campaigners** (50%) and **Conscientious Traditionalists** (46%).

Among the least important criteria overall are Fairtrade, B-Corp and other general sustainability certifications - for example from organisations like the Rainforest Alliance. In other words, while anti-animal cruelty messaging cuts through to some extent, other sustainability marks struggle. This isn't a huge surprise; from our other studies, some of these marks are either not well-known or poorly understood. But a simpler 'buy local' narrative is landing, with 67% overall choosing this where possible over food grown abroad.

So what?

1. As the cost of living increases, awareness of cost-saving diet choices needs to grow too - flexitarian, vegetarian and vegan diets are cheaper than meat diets.
2. There's also potential to promote sustainability by foregrounding adjacent benefits around health, quality and cost—i.e. showing how these diets are better for your health, your wallet and your planet.
3. Sustainability certifications need stronger marketing efforts to cut through as successfully as cruelty-free and 'buy local' messages, to impact food choices.



“
Sidelined Strivers are above average on diets such as veganism, vegetarianism and flexitarianism
 ”

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However, there are some quick wins for consumers' food purchase habits. The majority (54%) feel that to buy their favourite food, they can't avoid buying it in plastic packaging. **Committed Changemakers** (61%), **Conscientious Traditionalists** (54%), **Empowered Individualists** (52%) and **Progressive Campaigners** (51%) try to look for food in minimal plastic packaging where possible. Many consumers appear to be trying their best, but even a good proportion of the most sustainability-motivated segments find it difficult to locate non-plastic packaged products. While some consumers will never be regulars at refill shops, there's an opportunity for brands to be competitive at adapting their packaging and be the 'easy swap' for those looking to ladder up their sustainable behaviours.

It's not just how food is packaged which is unsustainable, but the rate of food wastage.

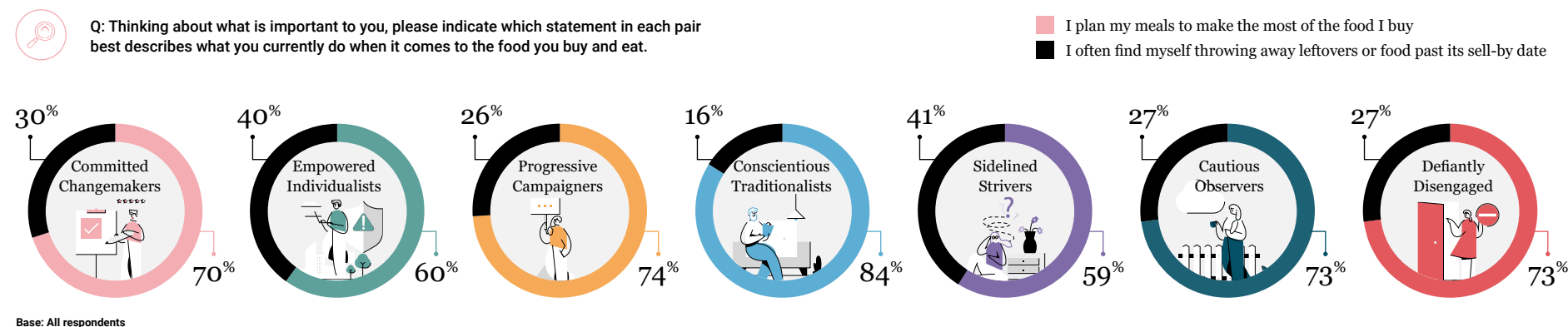
Encouragingly, 72% plan their meals in advance to make the most of the food they buy, with **Conscientious Traditionalists** (84%) leading for this behaviour. It is perhaps unsurprising that the affluent but time poor **Empowered Individualists** are among the worst for regularly throwing away leftovers or food past its sell-by date (40%), but the low-income **Sidelined Strivers** (41%) also struggle with this.

Nevertheless, unfortunately the average overall for wasting food, by failing to plan meals in advance, is over one in four (28%). That closely matches estimates from the Environmental Protection Agency (EPA) for global food waste - 25%. The EPA also claims that this causes up to 10% of global greenhouse gas emissions.⁷ No-one wins from waste - there's a major opportunity for brands to help here.

So what?

1. More sustainable food production will inevitably require a rethink of product design and lifecycle, for example scrapping best before dates or collaborating with and spreading awareness for apps like Too Good To Go or OLIQ, which connect brands with surplus food to consumers looking to save money.
2. Retailers could also do more to support meal planning – e.g. sharing recipe ideas for meat-free versions of popular, well-known dishes, providing tips on safe storage and fridge temperatures – to help reduce food waste.
3. Brands should continue to invest in diversifying away from plastic packaging to options such as bioplastics, glass or cardboard, along with information about how these small changes can make a difference. Refill stations integrated in traditional supermarkets, following the Waitrose Unpacked blueprint, will be needed to make going packaging-free a widely accessible behaviour.⁸

Chart 5: Food usage and wastage



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Lifestyle

Examining broader ‘lifestyle’ purchases—technology, furniture, clothing, personal care—it’s clear consumers’ prioritisation of convenience is a challenge.

Value for money (64%) and product quality (57%) are the top criteria for lifestyle purchases. Again, aside from cruelty-free, sustainability certifications are not high priority factors (and have previously been found to raise concerns about compromised product quality).⁹

Around one in five (18%) think it’s harder for them to change their lifestyle than for other people. That may not sound high, but regarding sustainable living, it’s the most well-intentioned segments who agree significantly more—**Empowered Individualists** (42%) and **Committed Changemakers** (29%). Only 11% and 25% respectively disagree.

The result? Most (76%) buy from a variety of retailers to meet their needs, with only 24% solely going to those they see as ethical or committed to having a positive impact. This is still a minority mindset even among **Empowered Individualists** (39%) and **Committed Changemakers** (40%), showing that efforts to market based on sustainability credentials alone is likely to fall flat.

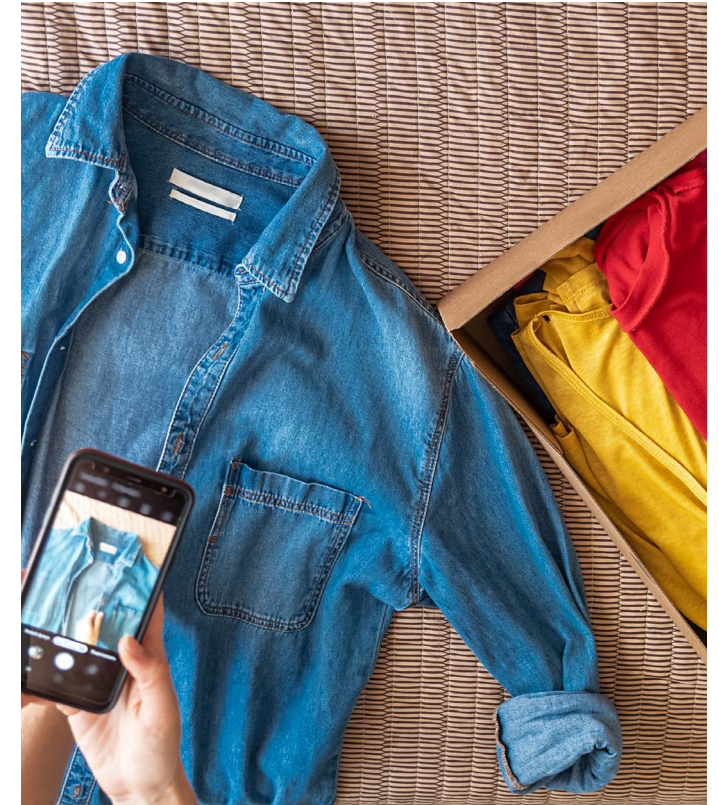
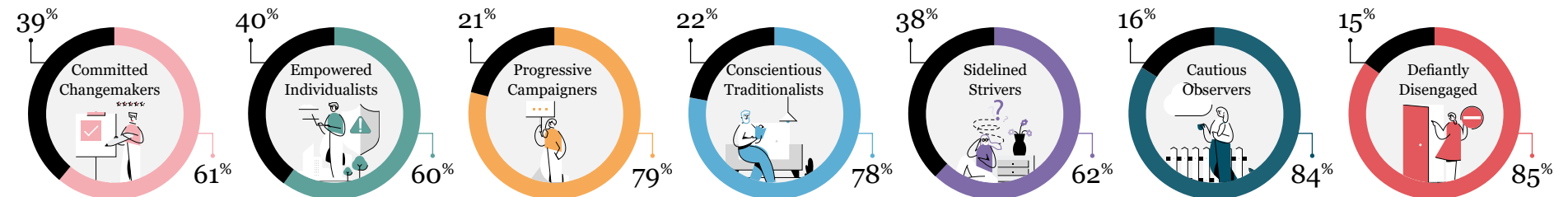


Chart 6: Positive impact of purchasing



Q: Thinking about what is important to you, please indicate which statement in each pair best describes what you currently do when it comes to your lifestyle and shopping for non-food products.

■ I buy from a variety of retailers to meet my needs
■ I only buy from brands which I know to be ethical/committed to having a positive impact



Base: All respondents

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However, there are signs of a sustainability-first mindset taking root. Whereas sustainably produced food is the 'premium' choice, consumers can actually save money by behaving sustainably when it comes to other goods. Nearly half (43%) buy second-hand where possible and 75% pass on unwanted items to others.

The drive towards second-hand and resale has been particularly noticeable in the fashion sector, with platforms such as Vinted and Depop allowing consumers to get their 'fast fashion' fix sustainably and—crucially—cheaply. Now our research reveals that the vast majority (77%) prefer to wear clothes for a long time and avoid buying new ones. It's estimated that high-volume, low-price clothing sales could decline 10-30% in as soon as five years.¹⁰

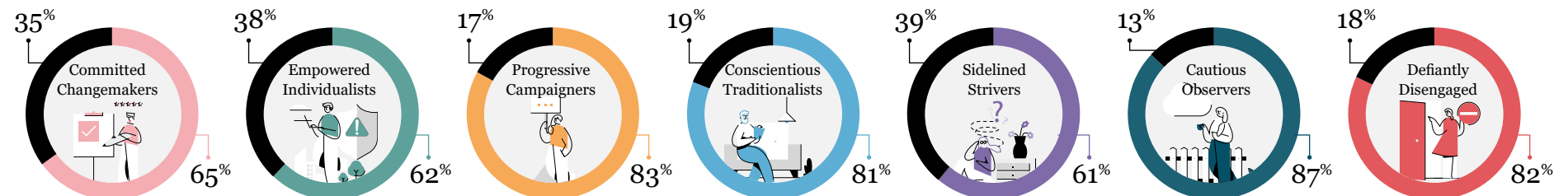
The re-use mentality for clothing is something several typically less sustainably active segments have embraced better than others. The less affluent **Cautious Observers** (87%), the **Defiantly Disengaged** (82%) and **Conscientious Traditionalists** (81%) are among those most likely to avoid buying new clothes. **Committed Changemakers** and **Empowered Individualists** tend to do this too, but are more likely to feel it's important to wear what's in fashion right now. It's significantly more important to 18-24s too.

Overall, the majority (57%) still prefer to buy things new, but with a recession looming large many will also seek to extract more value out of what they already own.

Chart 7: Buying habits: fashion or frugality?



Q: Thinking about what is important to you, please indicate which statement in each pair best describes what you currently do when it comes to your lifestyle and shopping for non-food products.



Base: All respondents

So what?

1. Cost is key, but so is convenience. Brands committed to having a positive impact via sustainability initiatives must still aim to meet customers' needs as broadly as possible - otherwise they will turn to other retailers.
2. Brands can benefit from the uptake in pre-loved trade across all consumer segments by establishing their own buy-back and resell platforms, following the example of Patagonia's Worn Wear and Lululemon's Like New schemes.
3. While resale is booming, behaviours around repair are more underdeveloped. Among more engaged segments there's an opportunity to build brand loyalty by establishing in-house repair services (e.g., Osprey's All Mighty Guarantee) or partnering with third parties (e.g., clothing brand Ganni's reject partnership with Sojo on-demand repairs) so consumers keep hold of products for longer.

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CASE STUDY

case study
Pandora

Pandora is the world's largest jewellery brand, designing, manufacturing and marketing hand-finished and contemporary jewellery made from high-quality materials at affordable prices. It recently identified a win-win opportunity to meet the needs of its customer base whilst making its business more sustainable: the Diamonds by Pandora lab-grown diamonds collection, launched in the United States in August 2022.

Internal insights had highlighted a trend toward more sustainable products among its growing base of younger, Gen Z and millennial customers, and the brand was also interested in showing its more established customers that there is a different way of doing things in the jewellery industry.

Pandora wanted to empower its customers looking for 'affordable luxury' to express sustainable values while maintaining its attractive pricing. Identical to a mined diamond, Pandora's lab-created diamonds are grown, cut and polished using 100% renewable energy.

As a result, the carbon footprint of a finished Pandora lab-created diamond is 95% lower than that of a mined diamond of the same size. Diamonds from this range are then set in recycled gold and silver, further reducing the carbon footprint to the equivalent of a pair of jeans for a 14k gold ring with a 1 carat lab diamond. This move is helping the brand expand its use of diamonds and make them more accessible to more people, benefiting both the business and crucially, the planet too.

www.pandoragroup.com

PANDORA



Home & Energy

The ongoing energy crisis has heavily restricted competition for home utilities.

Cost is top of mind for all segments, but the events of 2022 have for the first time made visible to consumers the link between renewables, energy security, and lower prices in the long-term.

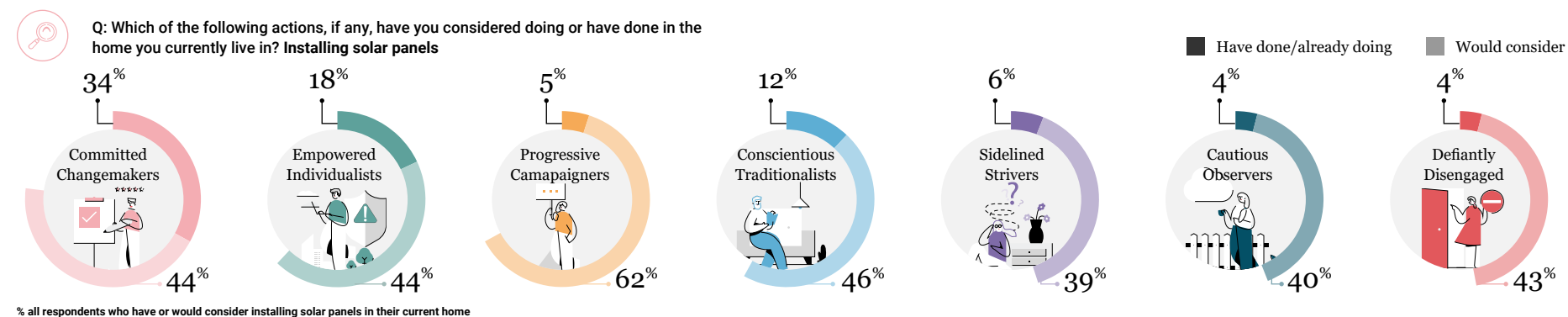
Currently, only the most affluent segments feel able to prioritise renewable energy. Over half (55%) of **Committed Changemakers** cite where a supplier offers renewable energy as important criteria and 61% have chosen a 'green' tariff. It's a similar story for **Empowered Individualists**—51% say it's important and 52% have selected one. In contrast, a similar proportion (46%) of the liberal but lower-income **Progressive Campaigners** say renewable energy is an important factor in their decisions, but only 22% have chosen such a tariff.

Only one in five (18%) of the **Defiantly Disengaged** say whether a supplier buys renewable energy is important, suggesting this segment will need to see renewables fall below fossil fuels before they consider making the switch. A similar proportion of **Sidelined Strivers** (15%) say the same, but this is more a reflection of their opportunities to engage rather than motivation since they are most likely to be confronted with the invidious 'heat or eat' dilemma through the cost-of-living crisis.

There are growing calls for the price of renewable energy to be decoupled from burnt gas, which industry body Energy UK claims can reduce household bills by up to £250 a year.¹¹ Alternatively, the US may have the answer - connecting community solar power projects and families, potentially saving households 50% per year.¹² Projects such as these also have the added benefit of providing greater long-term security and reliability, by not relying on energy imports from other countries—crucial in 2022.

It will likely take some radical, creative thinking like these ideas to rush through a major move to renewables. But without decisive action soon, many consumers will focus on whatever is cheapest in the short-term and de-prioritise green energy.

Chart 8: Interest in installing solar panels at home

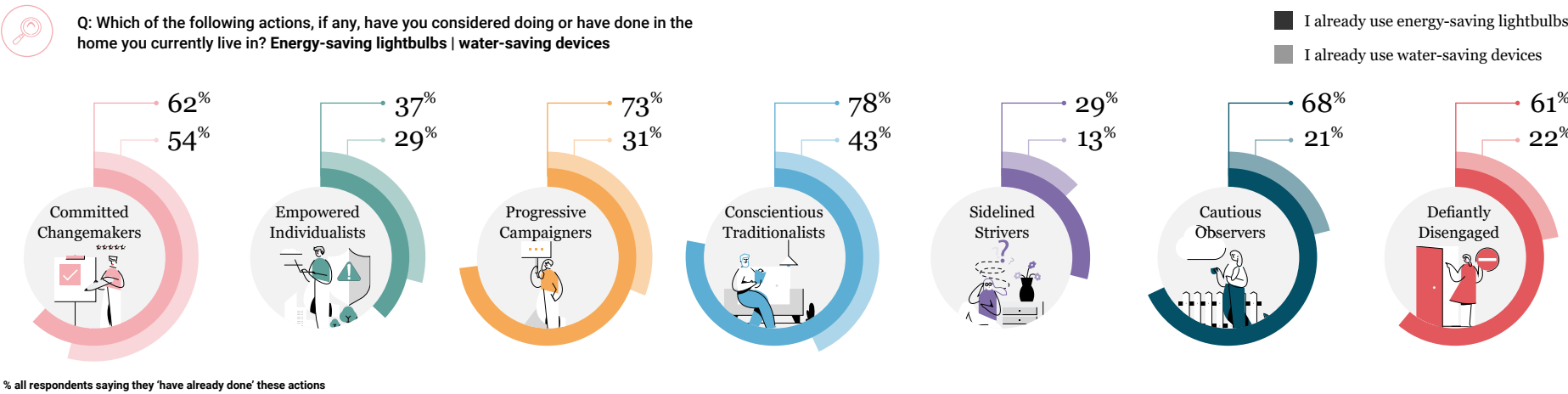


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There is more that consumers can do right now though, regardless of their energy tariff type or cost. Many are taking steps to reduce their energy usage. For example, 62% are trying to reduce how much water they use and 60% have already installed energy-efficient light bulbs in their homes. These energy-saving behaviours appear to be driven by frugality rather than sustainability, with **Conscientious Traditionalists** (78%) and **Cautious Observers** (68%) outperforming the more affluent **Committed Changemakers** (62%) and **Empowered Individualists** (37%) on using energy efficient lightbulbs. However, even here there are missed opportunities. Only 29% of **Sidelined Strivers** use these, and they are more likely than any other segment to have never heard of them (14%). These are quick ‘win-wins’ better for both planet and consumer wallets, and more should be done at a government and industry-level to spread awareness of these products.



Chart 9: Usage of energy-saving and water-saving devices



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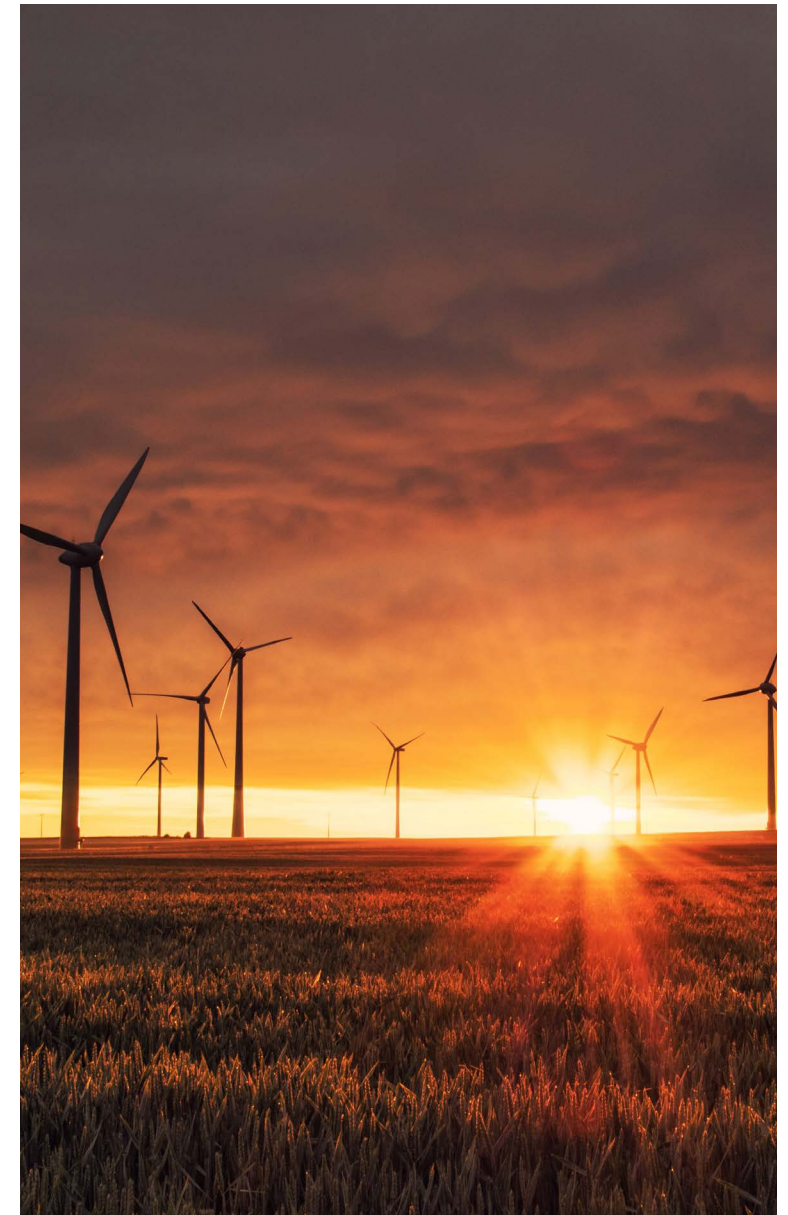
In the US and Canada, while the majority (58%) only use air conditioning when absolutely necessary, 42% have it on most days. The otherwise well-intentioned **Empowered Individualists** are the worst offenders here, with 53% using their air conditioning most days.

Yet as we cool our homes, we warm the planet. AC units' chlorofluorocarbons contribute to climate change and the demand for air conditioning is predicted to triple by 2050.¹³ There is hope though—growing adoption of low-carbon heat pumps, which can also provide AC, may improve the situation in the long-term.

Cooling or heating buildings is expensive—even more so when energy goes to waste. One UK charity has estimated that consumers can save up to £375 a year on bills through changing their behaviour around usage, and more must be done to promote similar messages.¹⁴

So what?

1. After cost, customer service is the clear second criteria that consumers look at when choosing an energy provider. Cost may be beyond suppliers' control but they can still differentiate by keeping customers informed promptly, and by explaining the implications behind any developments.
2. Going further, energy suppliers can compete for consumer loyalty in this tough market by educating customers on how to reduce energy waste more effectively, without making major lifestyle changes. Smart Meters also present an opportunity to re-engage consumers with energy and provide real-world 'feedback' on their behaviour.
3. There's also an opportunity for home product ranges to communicate their energy-saving credentials. For example, sales of items such as air fryers and electric blankets have picked up and are allowing households to use energy in more targeted ways.



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case study
Smart Energy GB

Smart Energy GB is the not-for-profit campaign helping everyone in Britain understand the importance of smart meters and their benefits to people and the environment. The rollout of smart meters is the key to achieving low-carbon, efficient and reliable energy but also brings a range of personal consumer benefits, which for some audiences feel more relevant and motivating.

In response to the cost-of-living crisis, we have focused our messaging on communicating how, by making energy usage more tangible and visible, people can use smart meters to save energy and budget more easily. With rising energy bills affecting everyone, this approach ensures our campaign is widely relevant, but is particularly targeted to customers in vulnerable circumstances, who we have a specific responsibility to reach.

We are also taking practical steps to reduce the barriers these customers could experience, such as partnering with national charities, including the Royal National Institute of Blind People, Carers UK and the Royal Voluntary Service, to reach people through a trusted messenger, ensuring our website and communications are accessible, and working with energy suppliers to optimise the installation experience for these audiences.

Through the efforts of our sector to broaden access to smart meters, at the end of June 2022 there were 29.5 million smart and advanced meters in homes and small businesses (Department for Business, Energy & Industrial Strategy), and the Data Communications Company (responsible for smart meter telecommunications infrastructure) estimates the roll-out leads to a reduction of 580,000 tonnes of carbon dioxide per year.

www.smartenergygb.org



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Longer-term, consumers are starting to 'think big' when it comes to energy efficiency and security. Nearly a quarter (23%) have already installed extra cavity wall or roof insulation, while a third (33%) would consider it, something which is true across all segments, so there's universal appetite.

The most popular long-term renewables idea is installing solar panels, with nearly half (45%) in our research considering it, even 43% of the **Defiantly Disengaged**. But overall only 9% have done it, likely due to the high upfront cost. **Committed Changemakers** (34%) have taken this step en masse, as well as 18% of **Empowered Individualists**. These segments are among the relatively wealthier, demonstrating that if consumers have the funds, they're prepared to invest wisely in the name of long-term savings and energy sustainability.

The right initiative is required though. Even where financial incentives are provided, consumers who do not fully buy into the push to 'green' our homes may be wary of the hassle. The fate of the now-scrapped UK's Green Homes Grant is instructive, which suffered from the complex and limited application criteria, and long delays in issuing vouchers.¹⁵ Initiatives in the US are predominantly at a state level, such as under the guise of 'weatherization' rebates in Wisconsin, but have received a boost from the Inflation Reduction Act which included significant investment in home retrofit.

The next test for government and industry collaboration in the UK is a boiler upgrade scheme offering households up to £6,000 to install low-carbon heat pumps.¹⁶ Similar to solar panels, 10% have installed one already. A third (34%) would consider it. However, the majority either say they would never consider it, have never heard of it, or think it's not applicable - suggesting more must be done to publicise the initiative.

Almost half
would consider installing
solar panels
in the name of long-term savings
and energy sustainability



So what?

1. Among the most affluent consumers, momentum is already building around installing solar panels and heat pumps at home, and could even become status symbols akin to the electric car.
2. At the same time, industry and government will need to work closely to grow a mass market through supporting skill development and offering incentives for home retrofit to make it viable for builders and suppliers, and make it consistently accessible for less affluent segments.
3. Home retrofitting and renewable energy programmes are not only a 'win-win' for the planet and for people's pockets, but for the public purse too. Investment in domestic energy generation will take pressure off upgrading the national energy infrastructure as the grid becomes less about transferring power from power stations to homes, and more about transferring it from home to home.

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CASE STUDY

The Federation of Master Builders

The Federation of Master Builders is the UK's largest trade association in the construction industry, representing the interests of small and medium-sized building companies.

In the context of rising energy prices, now more than ever, it is time to make the case that making our housing stock more energy-efficient is a win-win for both people and planet. However, with the best will in the world we recognise that most UK homeowners are unable to afford improvements such as upgrading their insulation, or installing a heat pump. This means there is only a very small, specialised market for UK builders to work with, and limited opportunity to build skills and best practice.

The FMB, backed by the Construction Leadership Council, are therefore leading the call for the government to implement a National Retrofit Strategy (NRS) to meet net zero targets, cut bills, and support energy security. Under this strategy, we want to see the Government introduce a comprehensive fabric first approach scheme, where the system of the entire house is considered, from insulation through to heating technology. The scheme would need 'seed' capital from the Government to kick-start the industry, then the market can take over as it develops. Ultimately, only the Government could create the central governance and confidence for such a comprehensive scheme.

In the medium and longer term, private finance would also have an important role to play by offering green mortgages or stamp duty discounts for those committed to upgrading homes. The NRS would bring multiple benefits to the UK, saving 84.9Mt carbon emissions by 2040, creating 500,000 new jobs particularly in historically deprived areas, and cutting fuel bills by £436 on average.

www.fmb.org.uk



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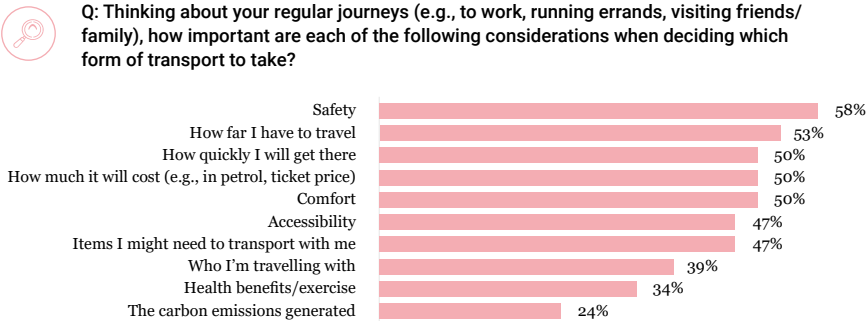
Travel & Transport

The car is perhaps the most distinctive symbol of personal freedom, the linchpin of social and economic life in western societies, and for some an extension of our own personalities.

A third (30%) use petrol/diesel cars every day, and particularly in the US and Canada, cars are near-irreplaceable for travelling long distances. Personal cars as the mode of choice reflects consumers’ key priorities when it comes to deciding how to travel—cost, speed and comfort. In other words, convenience is king, with safety and journey distance top hygiene factors when deciding how to get around.

It is no surprise, then, that the journey towards emission-free transportation is long and winding. On the face of it, carbon emissions are the least important consideration overall.

Chart 10: Important considerations when making journeys

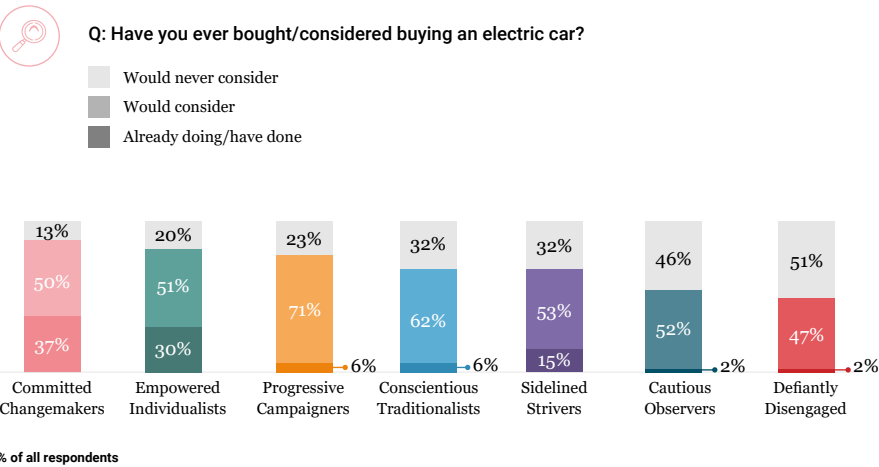


% Ranking 8-10 on a 10 point scale, where 1 is not at all important and 10 is extremely important

However, **Committed Changemakers** (45%) and **Empowered Individualists** (44%) are significantly more likely than all other segments to say it's important criteria. Reflecting this, three in ten (30%) **Empowered Individualists** own an electric vehicle, rising to more than a third (37%) of **Committed Changemakers**.

In each segment bar one, over half would consider buying an electric car, with the **Defiantly Disengaged** (47%) very close behind too. **Progressive Campaigners** (71%) and **Conscientious Traditionalists** (62%) are the most likely. Some **Sidelined Strivers** (15%), the lowest income segment, already own one despite being least likely to consider carbon emissions (11%). Appetite for electric vehicles (EV's) is transcending environmental values, and is perhaps one example in the realm of sustainability where it pays to be a status symbol.

Chart 11: Appetite for Electric Vehicles

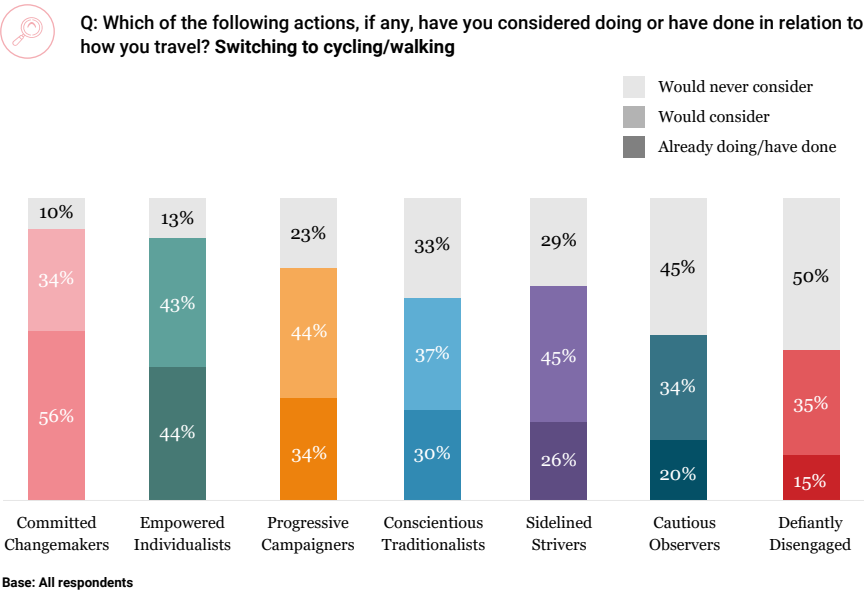


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More broadly, those living in urban areas are widely being encouraged to shift away from cars wholesale. Overall, at least a quarter have already taken certain steps to travel more sustainably—even if their main intention may be just to save money, or get in a bit of extra exercise. Steps include switching to cycling or walking when they would usually drive (27%)—rising considerably among **Committed Changemakers** (56%) and **Empowered Individualists** (44%)—and reducing the number of vehicles owned by their household (25%).

This may gain momentum with rising petrol prices. The low-income **Sidelined Strivers** are significantly less likely than all other segments to use cars daily (24%), and one in five (22%) have already reduced the number of vehicles they own, another example of how saving money and a more sustainable lifestyle are closely connected.

Chart 12: Adapting travel habits



So what?

1. In travel, the convenient and value-for-money options tend to triumph over the 'greenest' option. To succeed, sustainable travel solutions must factor in convenience and cost-efficiency too.
2. For more affluent segments, there's opportunity to continue to drive uptake of electric vehicles as ownership becomes a modern status-symbol. The sector must balance moves to drive down car usage with inclusion, and ensure older, disabled, and lower-income citizens have access to genuinely affordable, accessible, and convenient alternatives.
3. Investment in infrastructure and technologies which support cycling and walking will also be welcomed as the uptake in active travel since the pandemic persists.

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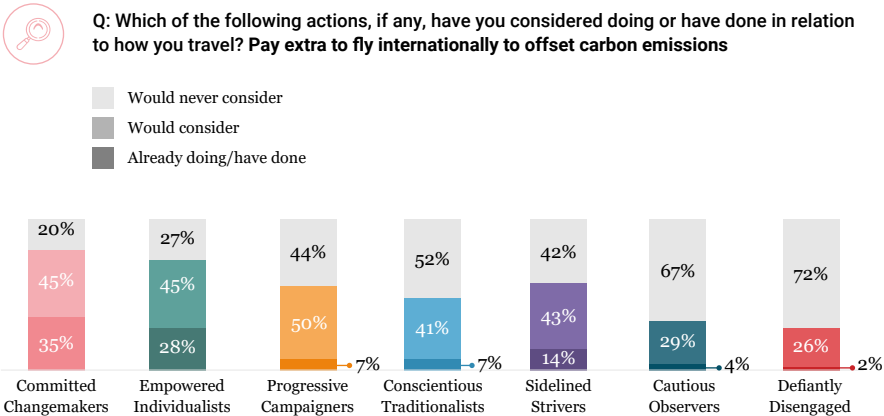
If the car is the symbol of personal freedom, affordable air travel has democratised an escapism consumers are not going to give up easily. In contrast to day-to-day travel, different segments are divided over whether they'll consider offsetting carbon emissions when flying abroad. Income isn't the key factor here. **Sidelined Strivers** (43%) are similarly likely to consider carbon offsetting as **Empowered Individualists** and **Committed Changemakers** (both 45%).

However, the majority (53%) say they'll never consider doing this - in particular the **Defiantly Disengaged** (72%), **Cautious Observers** (67%) and **Conscientious Traditionalists** (52%). It suggests that while the most pro-environment consumers may pay more, others need more reassurance about how the money is spent and whether it is an effective solution to the problem.

There's another factor here. Compared to 2019, flying is declining, down from 4.7bn passengers a year to 2.3bn in 2021. That's largely due to the impact of COVID-19, but the aviation industry may never reach pre-pandemic figures again. Over two thirds (69%) in our research have not taken a flight in the last 12 months, despite the lifting of lockdown restrictions, with the cost of living likely contributing to this.

If the future of road transport is electric, then the aviation equivalent is hydrogen, or other emission-free fuels.¹⁷ The latter is a better long-term solution than carbon offsetting, but will take much longer to come into effect. Whichever way sustainable travel evolves, our research suggests that cost and convenience will continue to be crucial.

Chart 13: Consideration for offsetting carbon emissions



Base: All respondents

So what?

1. Growing suspicion around carbon offsetting means there's an opportunity for airlines to differentiate by offering new, more authentic solutions that don't just come across as add-on costs.
2. The aviation sector can also soften concerns about carbon emissions by better communicating recent changes—such as making fleets lighter¹⁸ and removing single-use plastics¹⁹ on flights.
3. For the rail sector, there's an opportunity to attract those looking to go abroad without flying, or choosing to staycation instead, with targeted messaging.

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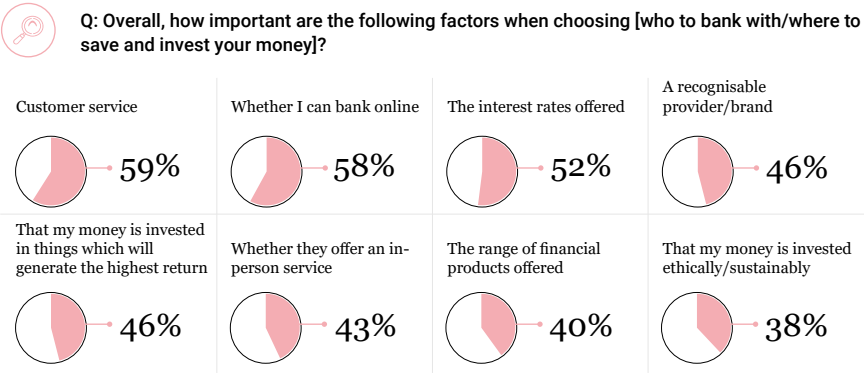
Money

It is clear throughout this report that money talks, but what about sustainable finance?

When choosing who to bank with, given that most mass-market options are either free or have small account fees, customer service (59%) and online banking (58%) emerge as the key differentiators, with interest rates (52%) next.

Most consumers already think their bank invests wherever they can get the best returns (63%), instead of only investing in sustainable or ethical industries (37%). In any case, it is perhaps unsurprising that in the current economic turmoil, getting the highest returns (46%) is much more likely to be important to consumers than investing money ethically or sustainably (38%). The vast majority (84%) are inclined to stick with a bank they trust rather than switching.

Chart 14: Banking and investment choices



% Ranking 8-10 on a 10 point scale, where 1 is not at all important and 10 is extremely important



Investing money
ethically
or sustainably is of
least importance
when choosing who to bank with

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While consumers are almost certainly looking for a steady hand than anything which is seen to 'rock the boat', there is demand from a large swathe of the public for banks to take tentative steps towards sustainable investments. Around half of **Committed Changemakers** (56%), **Empowered Individualists** (54%), and **Progressive Campaigners** (47%) rate sustainability as an important consideration for choosing a bank, and on par with getting the best returns.

The ever-pragmatic **Conscientious Traditionalists** are likely more honest about the state of play. Half (51%) rate sustainability as important, but the highest returns (60%) ultimately take precedence. Banks need to tell a convincing story that sustainable investments can balance risk and return, and that not investing in sustainable funds may be a risk in itself over the long-term as the regulatory landscape changes in response to the drive towards Net Zero.

Those who grasp this narrative stand to benefit. Collectively, these segments not only hold a large share of wealth, but they also have a greater propensity to switch: a third of **Empowered Individualists** (34%) and **Committed Changemakers** (30%) regularly change banks.

However, the results also suggest this sector is the least mature in terms of public awareness about where their money goes. Many are unsure which industries their bank, pension, or insurance products invest in, but around two thirds of **Progressive Campaigners** (64%), **Conscientious Traditionalists** and **Committed Changemakers** (both 62%) want to be involved with deciding how financial providers invest their money.

Before even the biggest supporters of sustainability are ready to put their money where their mouth is, education around sustainable finance will need to improve.

So what?

1. Financial brands seeking to support their customers on sustainability will likely need to educate them about how to do it, by actively promoting consumer-friendly informational content to improve awareness.
2. To encourage sustainability-conscious customers to switch, give them greater involvement in decisions around responsible, ethical-first investing. Make it as easy as possible too – e.g. via an app, rather than in-person only.
3. More broadly, digital platforms which aim to visualise all investments in one place – such as the long-awaited UK Pensions Dashboard – provide another opportunity to engage and educate consumers on how to invest in line with their values.

Chart 15: Importance of ethical investment



Q: Overall, how important is it that your money is invested ethically/sustainably when choosing who to bank with/where to save and invest your money?



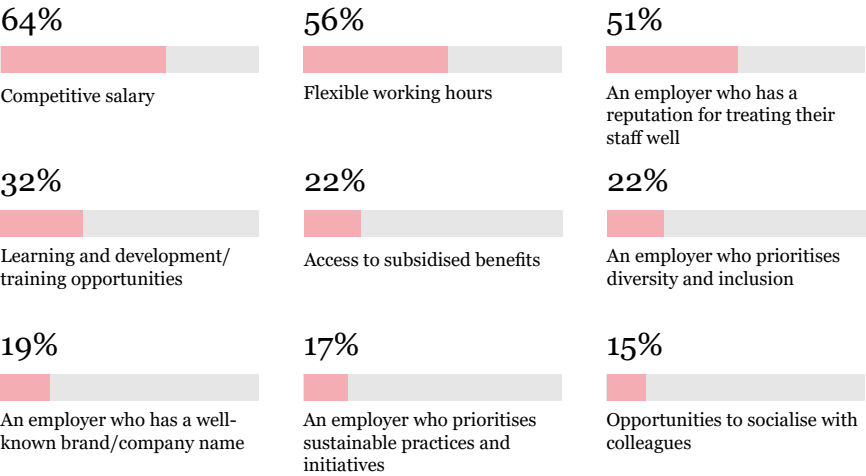
% Ranking 8-10 on a 10 point scale, where 1 is not at all important and 10 is extremely important

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Sustainability in the workplace

Do candidates consider employers’ sustainability credentials when applying? And do employees expect their employer to follow sustainable practices and initiatives?


Workers’ top two criteria for choosing an employer won’t shock you—a competitive salary (64%) and flexible working hours (56%). The third one though has ethical practices at heart—they want an employer with a reputation for treating their staff well (51%).



% selecting in top 3



Chart 16:
Top considerations
for job seekers

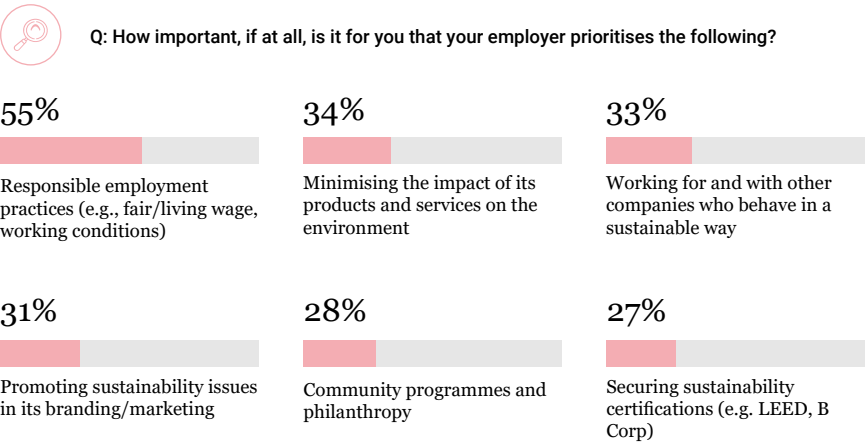
 Q: Which are most important to you when deciding whether to work for an employer? TOP 3

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Out of a range of ways employers can demonstrate their credentials, over half (55%) of staff want to see responsible employment practices. That means fair wages and fair working conditions, for example.

This stance unites workers, regardless of their broader views of the sustainability agenda. Amongst the strongest advocates are **Conscientious Traditionalists** (73%), the **Defiantly Disengaged** (72%) and **Cautious Observers** (63%), as well as **Committed Changemakers** (62%).

Chart 17: Sustainable priorities



% Ranking 8-10 on a 10 point scale, where 1 is not at all important and 10 is extremely important

More specific initiatives appeal to the majority of **Committed Changemakers** and **Empowered Individualists** - suggesting they have higher expectations for employers:



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Sustainability at work - who’s in charge?

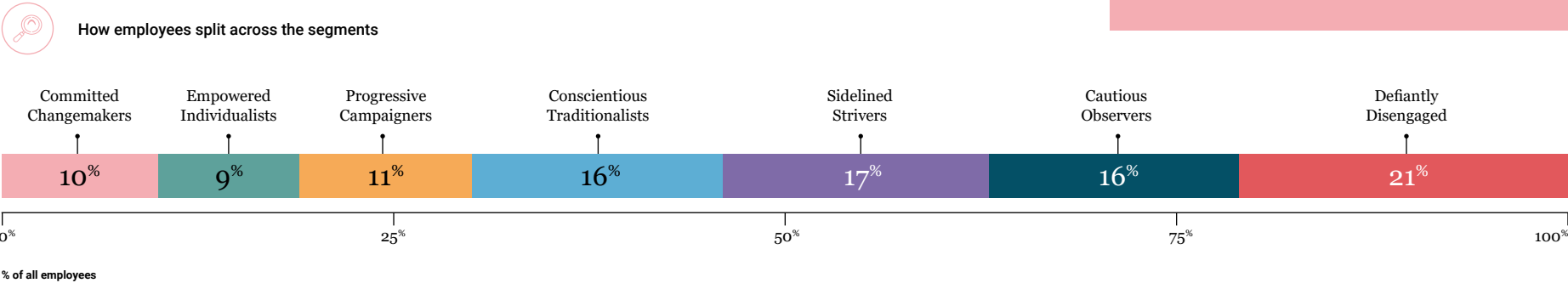
When it comes to leading sustainable practices and initiatives at work, 67% say it’s their employer’s role and 32% say it is employees’ responsibility.

It’s the very different **Cautious Observers** (79%) and **Progressive Campaigners** (73%) who are most in favour of employers leading the way. On the one hand, it implies this is another issue which everyone can agree on, although these segments do have in common a left-leaning and likely pro-interventionism stance.

On the other hand, other segments’ views suggest the issue is more nuanced. Only 54% of **Committed Changemakers** agree, plus 58% of **Empowered Individualists** - but also **Sidelined Strivers**, who overall have low intentions to live sustainably. So, at least four in ten out of these segments believe the onus is on employees instead.

All this suggests that while employers will have the final say on sustainable practices and initiatives, employees have a role to play too. Most expect their employer to set the agenda. For example, that can mean committing to sustainably-invested staff pensions as a company policy, without waiting for employees to demand it first. Yet in addition, companies can also work with the more sustainably-engaged segments in their workforce to collaborate on the way forward.

Chart 18: Employee share of segmentation



So what?

1. Employers can see greater strategic benefits from their sustainability initiatives by communicating specific examples and most importantly, their impact—both internally to employees, as well as externally to customers and stakeholders.
2. Leaders can ‘role model’ their company’s sustainability agenda, inspiring employees by demonstrating behaviours that drive the strategy forward.
3. Provide opportunities for employees to take part in the sustainability agenda, giving them a sense of pride when goals are achieved.

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Benefits for employers embracing sustainability

Will employers see a return on their investment though? Workers think so.

Rather than more ‘tactical’ positive impacts such as risk reduction (only 15%), staff believe the top two benefits will be strategic. These are improved customer perceptions (33%) and future growth (32%).

Nearly half (45%) of **Progressive Campaigners** believe a boost in customer perceptions will be the biggest benefit for employers embracing sustainability. **Cautious Observers** (37%) and the **Defiantly Disengaged** (35%) agree.

Conscientious Traditionalists (37%), followed by **Committed Changemakers** (31%) and **Sidelined Strivers** (27%) see future growth as the biggest positive impact. **Committed Changemakers** also see improved attraction and retention of employees (31%) as the top benefit. Meanwhile, **Empowered Individualists** think sustainable practices will most likely lead to improved brand value (29%).

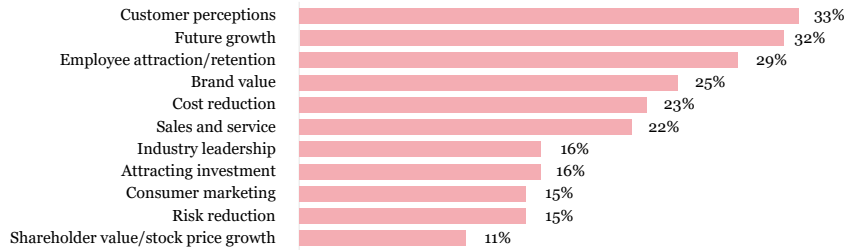
While **Committed Changemakers** believe there are a wider range of benefits for employers, even segments less engaged with sustainability can see the positives. They agree that leading on sustainability will improve company perceptions as well as staff attraction and retention.

These have the potential to be long-lasting advantages for employers. If initiatives are meaningful enough, they won’t be dismissed as short-term, tick-box exercises to comply with any regulations that may come and go. Sustainable practices can have the added benefit of helping future-proof companies, as both their employees and customers start to take sustainability more seriously.

Chart 19: Benefits for businesses



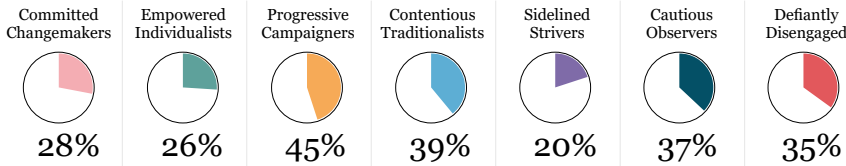
Q: Which of the following areas do you think are most positively impacted by businesses having sustainable practices and initiatives?



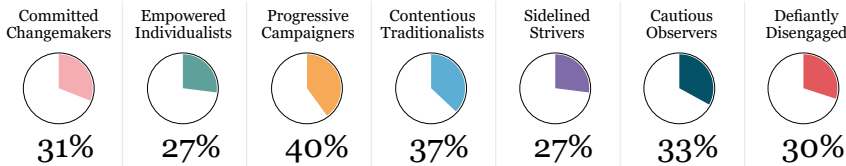
% selecting each option, multicode

Chart 20: Top benefits by segment

Customer perceptions



Future growth



% selecting each option, multicode

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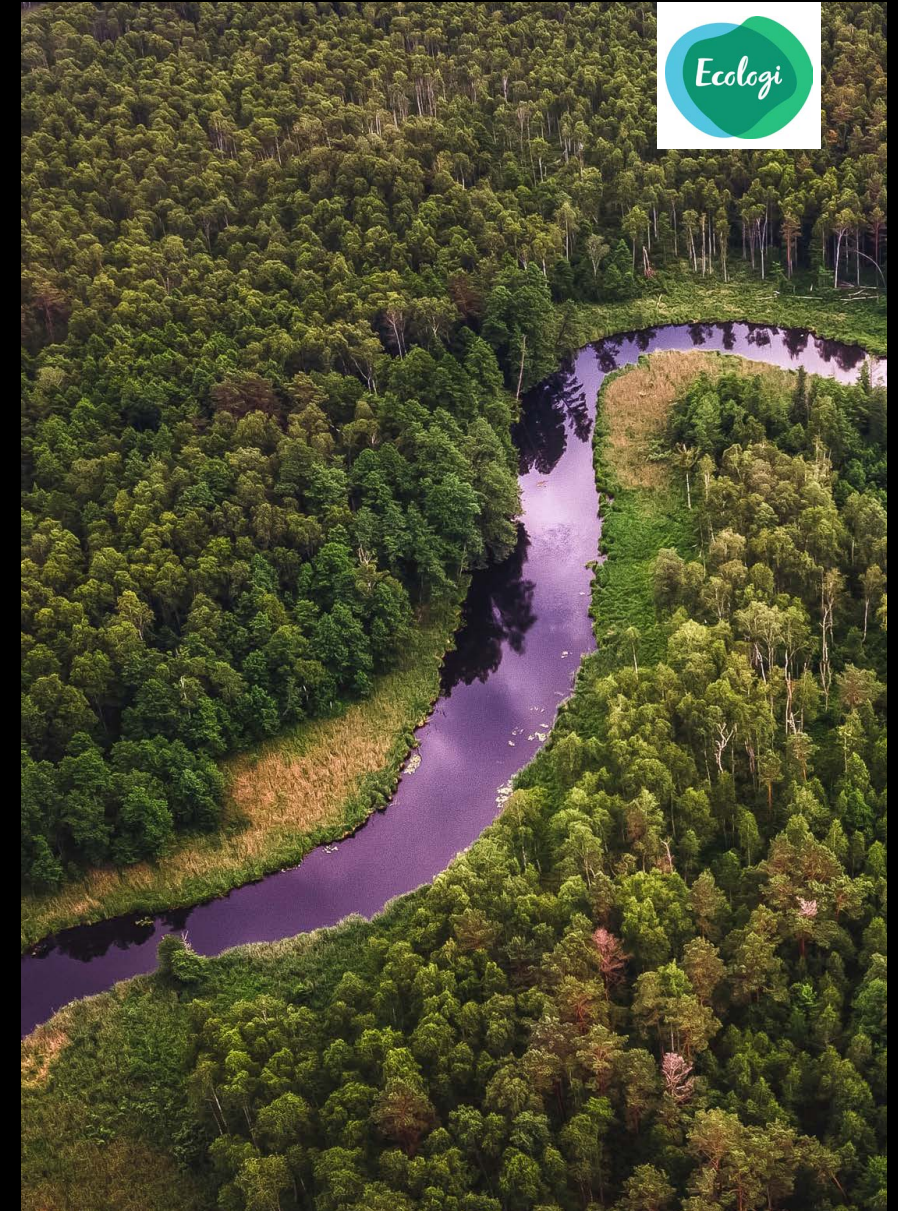
Ecologi

Ecologi is the market leader in collective climate action. Since launching in 2019, through its 37,000 members, including 15,000 businesses, Ecologi has funded the planting of over 51 million trees and avoided over two million tonnes of verified carbon dioxide equivalent from entering our atmosphere - equivalent to over 6% of London's annual emissions in 2021. In 2022, Ecologi was recognised in the top 5 percent of B Corporations globally, in the Environment and Governance categories.

Through its platform, the social enterprise helps businesses and individuals take climate action. This includes a Climate Positive Workforce® subscription where businesses can support responsible reforestation around the world and offset the footprint of their employees through funding verified carbon avoidance projects such as providing fuel-efficient cookstoves in Tanzania and protecting lowland peat forests in Indonesia. Businesses can easily utilise Ecologi's eCommerce API integration to fund climate action projects for every purchase made.

Their latest product, Ecologi Zero offers a free and simple way to calculate, visualise and gain insights into your business' greenhouse gas emissions in near real-time to initiate and equip you on your net-zero journey. Ecologi helps business owners and employees to know that they work for ethical and responsible organisations that share their values as well as attracting future talent to the organisation.

www.ecologi.com



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Youth and the future of sustainability

Where does Gen Z stand on sustainability and why should brands take note?

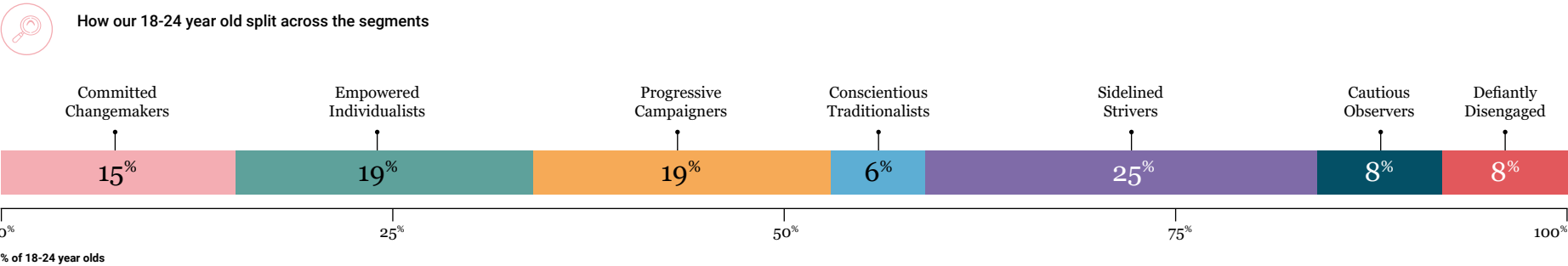
Growing up with the climate change challenge: Will Gen Z, the 18-24s in our research, be the vanguard of a sustainability revolution and help the world achieve Net Zero targets by 2050? Or, in these turbulent times, will an ever-increasing set of life challenges distract them from sustainability goals?

At first glance, the outlook is concerning. A quarter of 18-24 year olds are in the **Sidelined Strivers** segment - feeling excluded and disillusioned, 'just about managing' and taking little action on sustainability so far.

More encouragingly, just over half (53%) are **Committed Changemakers**, **Empowered Individualists** or **Progressive Campaigners**. These are the three segments most concerned about sustainability, but they're more likely to be the latter two, meaning that their intentions are strong but their actions aren't - yet. Already labelled the 'Instagram generation', Gen Z may need to convince others they're not merely virtue signalling when championing sustainable causes.



Chart 21: Strong intentions but limited actions... for now



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Like everyone else, 18-24s see the cost-of-living crisis as the biggest challenge today (32%). With the near future full of uncertainty - following on from an unprecedented pandemic - it's understandable that their next concern is mental health (22%). Climate change (19%) completes their top three.

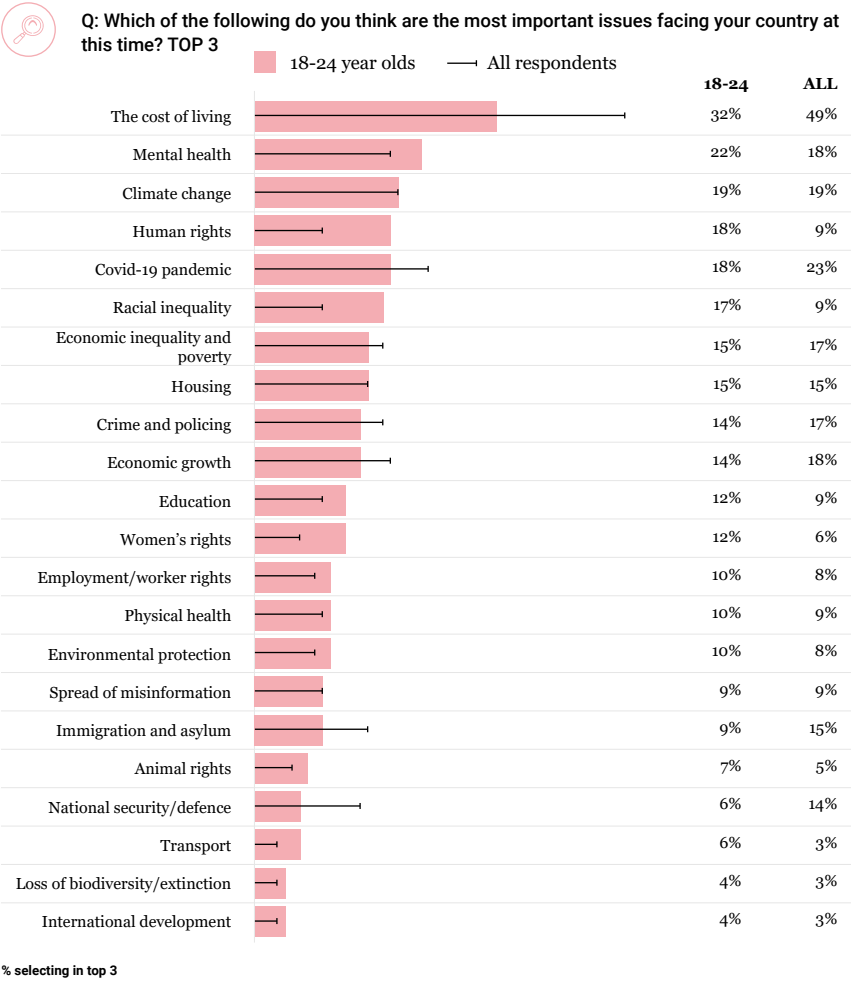
Then, after COVID-19 (18%), they are much more likely than other generations to see human rights - also 18% - and racial inequality (17%) as the biggest threats. Clearly, Gen Z supports the ethical treatment of both people and the planet.

Despite the challenges, overall 18-24s are the least likely to agree *"society is going in the wrong direction"* and significantly more likely to disagree than most other ages. They seem more optimistic than other generations.

Time is still on their side to make a difference and Gen Z should be prepared to call out those who stand in the way of their path to progress. They don't have time for pleasantries - they're the least likely generation to agree it's important to *"respect decisions made by the whole community"* if they dispute them.



Chart 22: Challenges faced by Gen Z



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Are Gen Z taking any action?

This generation is well informed about the scale of the challenge in front of them. They're the most likely age group to read books, watch documentaries or listen to podcasts about sustainability.

In some ways—for example, politically—Gen Z are the most active at promoting sustainability and pushing it up the agenda. The 18-24s are the most likely to have boycotted a brand or product (22%)—which serves as a stark warning for any companies with unsustainable practices.

When it comes to food, 18-24s are the most likely to be vegetarian and are most likely to buy organic, free-range or sustainably sourced products. When travelling, they're the most likely to take public transport.

Gen Z are also most likely to have:

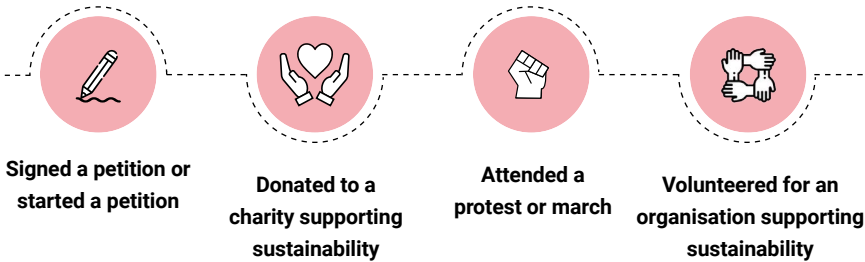
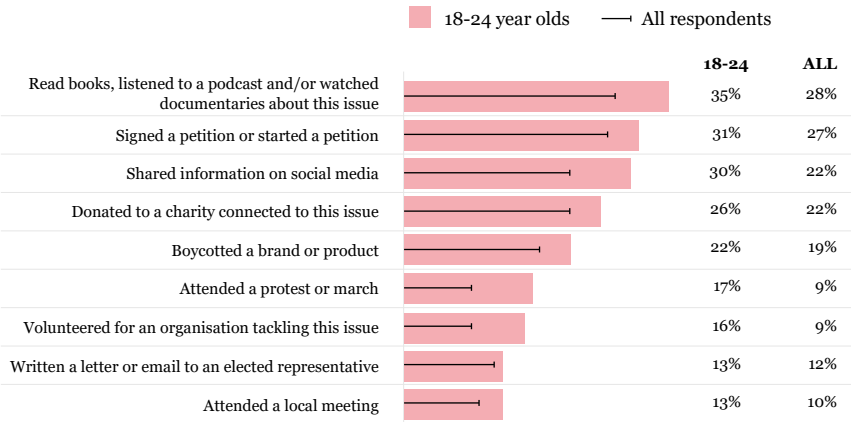


Chart 23: Gen Z actively promote sustainability

Q: Below are some things some people get a chance to do, and some don't. Have you ever done any of the following when it comes to promoting sustainability? (i.e., the responsible and ethical treatment of people and planet)?



% selecting each option, multicode

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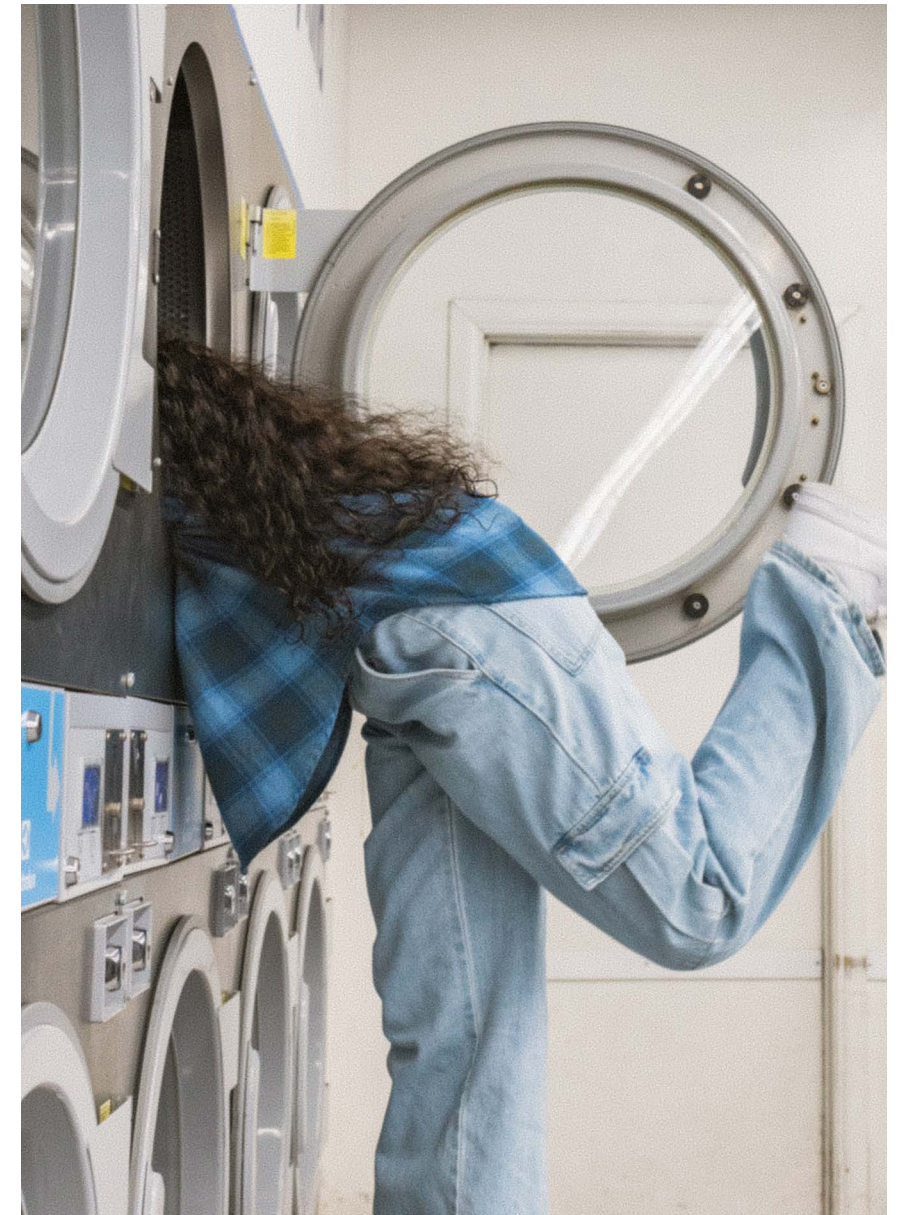
Yet in other ways, they still have much to learn. In 2022, as we try to navigate through an unprecedented energy crisis, Gen Z aren't using resources as sustainably as others.

They're the most likely generation to:

1. Wash laundry at a high temperature
2. Wash clothes whenever they need them, rather than waiting for a full load
3. Have the heating on most days
4. Leave electronic devices on standby (although 25-34s aren't any better at this)
5. Not think about how much water they're using
6. Feel confused about how to correctly recycle packaging

With time - and as they take on more household responsibility and decision-making power - some of these habits will surely improve. After all, over half (55%) aren't yet in charge of their home's energy and utilities.

As we've explored throughout the report, to help consumers make more sustainable choices, more education is needed. Not only that - Gen Z needs the right support and opportunities too. In particular, the one in four falling into the **Sidelined Strivers** segment must have awareness of and access to sustainability 'win-wins', the simple steps that also save them money. That's something the government may, or may not, deliver on. Therefore, there's an opportunity for brands to take the initiative.



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Gen Z and ethical brands

A quarter of Gen Z say they want to live in a more sustainable way but aren't sure how to. And of course, even those who think they're sure aren't necessarily doing all they can yet. Moreover, 24% say they have few friends or family members who talk about sustainability.

One way to bridge the knowledge gap is for companies to improve access to their sustainable products and services. Leading by example will set the standard and can lay out the blueprint to a sustainable way of life.

However, Gen Z won't tolerate tick-box practices, they'll dismiss these as cynical PR ploys. In **Savanta's youth report: Gen Z and Ethical Brands**, released earlier this year, we discovered that 85% of young people want to share ideas and experiences with brands to develop better ethical solutions. Giving them a chance for their voices to be heard will help bring authenticity to initiatives.

While it's widely reported Gen Z are willing to spend more on sustainable products, it's also true that, like other age groups, value for money remains their top criteria.



So what?

1. Brands' initiatives must be credible and genuinely well-intentioned, otherwise Gen Z will likely dismiss them as 'greenwashing' and the ideas will backfire.
2. While some may be willing to pay a premium, value matters most; long-term progress will only come through greater access to sustainable offerings.
3. Brands must collaborate with young people on sustainability - create change with them, don't dictate terms to them.

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CASE STUDY

University of Nottingham

Traditionally a flagship publication, the bulk of the information provided in a university prospectus has been increasingly moving online. Nonetheless, universities continue to print these chunky, colourful and costly publications to give away at open days and recruitment fairs.

Gen Z audiences are passionate about sustainability and the environment. They are also digital natives, accustomed to having the world at their fingertips. Informed by these insights and using lockdown as a lever, the University of Nottingham has created an innovative suite of micro materials including an alternative to the traditional prospectus with a significantly reduced environmental impact.

'The World's First Micro Prospectus' takes its inspiration from luxury clothing tags and coffee loyalty cards and is no bigger than a business card. It comes complete with a QR code linking to a fully digital prospectus with all the information students, parents and teachers need about studying at the University of Nottingham.

This tiny prospectus is already making a big difference - both to university operations and the environment. The QR code has driven over 5,000 visits to the university website and has delivered significant cost savings to production and print. For Gen Z however, the biggest benefit has to be the environmental impact with more than 72 tonnes of paper, 54,000 litres of water and over 18,240kg of CO2 saved.

www.nottingham.ac.uk



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1. **Niche offer** | Sustainable consumer offers remain niche, targeted at a narrow set of audiences
2. **Over reliance on eco-ethics** | Relying on eco-ethics alone limits the commercial opportunity within sustainability—and the potential impact on climate change
3. **Green priorities** | Green motivations may not be the *top* priority—but they are a priority
4. **Consider the whole audience** | By only targeting the most eco-engaged, needs and desires amongst the less engaged are going unmet
5. **It's critical** | As sustainability moves from a differentiator to a hygiene factor, it will become critical to future-proofing a business
6. **Sustainability strengthens teams** | Businesses with a sustainable strategy are able to attract and retain the best talent
7. **Accessible choices for all** | Sustainable consumer choices also require “levelling up”—making sustainable choices accessible and relevant to different groups and areas
8. **Maintain relevance** | As the sustainable market matures, it needs to be reframed to be relevant to a wider set of audiences:
 - **From premium to mass market** | As the market matures, we need to move beyond embedded associations of sustainability being premium.
 - **From sacrifice to shared benefit** | The implicit idea that sustainability has to mean a sacrifice to the consumer is counter-intuitive. Sustainability should mean more beneficial for both the individual and planet.
 - **From moral high-ground to broader motives** | Sustainable consumer choices must cover a *range* of incentives in order to convert a broader set of audiences to sustainable choices.

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Net Zero

Savanta, as part of the Next 15 Group plc, has accelerated its commitment to running a more sustainable, equitable and diverse organisation that displays leadership in governance and values. We are using the internationally recognised B Corp framework to focus our strategy on people, planet and profit.

It is also a signatory to the Market Research Society (MRS) Sustainability Pledge, committed to achieving a Net Zero business. This pledge is a central part of Savanta's commitment to being more sustainable, to operate in a carbon neutral manner and to do so in a way that doesn't acquiesce to inaction.

Nick Baker (CRO) is also a founder member of the Insight Climate Collective aiming to create an industry action plan to address climate issues.

Savanta believes sustainability is integral to all aspects of client work, as we collectively work towards the Paris Climate agreement 2050 Net Zero requirement.



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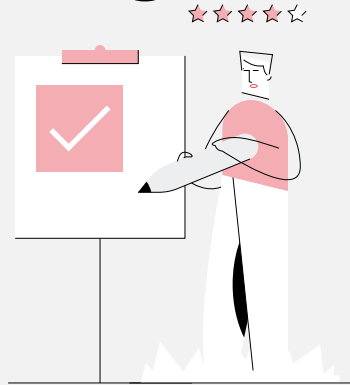
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Exploring the demographics and key traits of our 7 segments in more detail

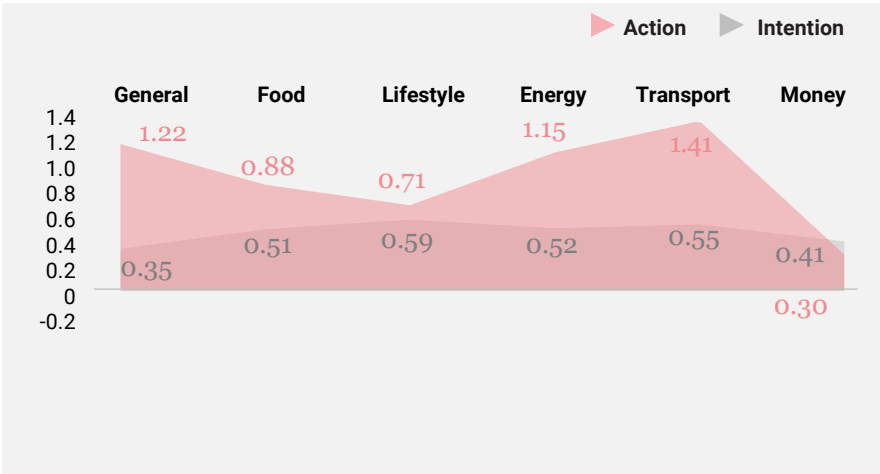
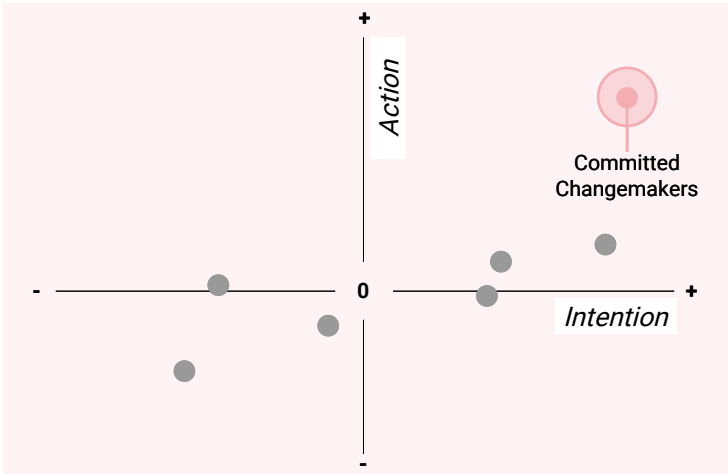
Committed Changemakers



... have a positive, internationalist world view and hold left-leaning values. They're concerned about sustainability and trust experts' views, but are relatively optimistic about society's ability to solve problems.

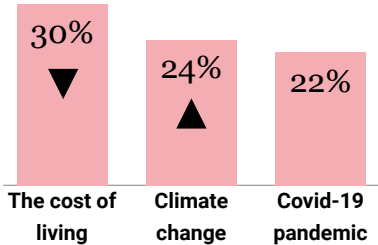
Members of this segment tend to be young but well-established in their lives and careers, meaning they also can afford to make sustainable choices—such as eating a meat-free diet and driving an electric vehicle.

The sustainability say-do gap



Care about...

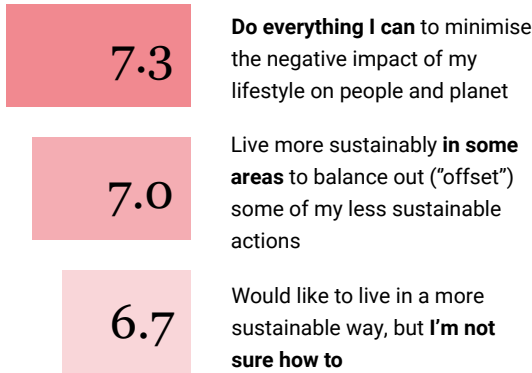
Top 3



▲▼ Significant difference from general population

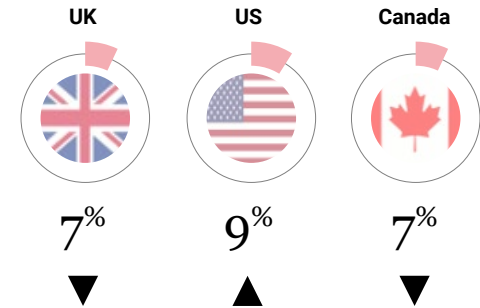
Motivated by...

Mean score

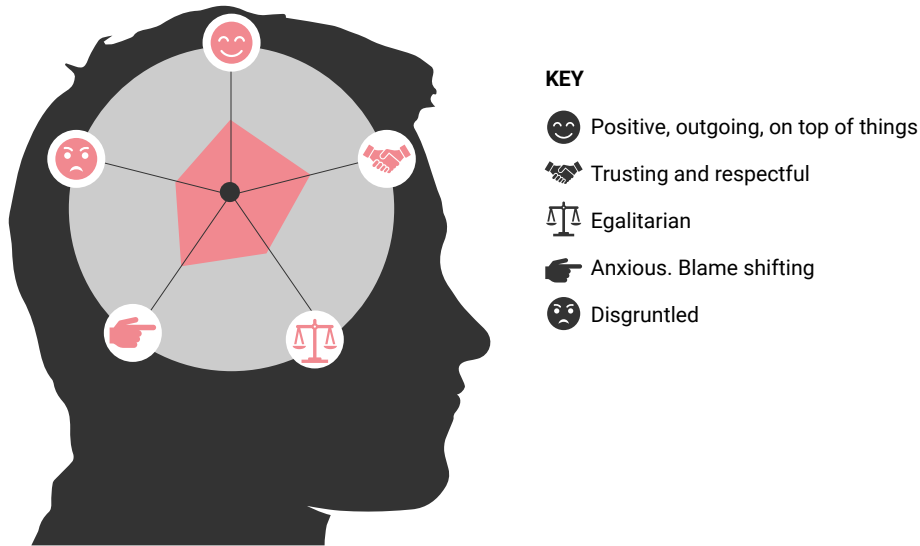


Market share...

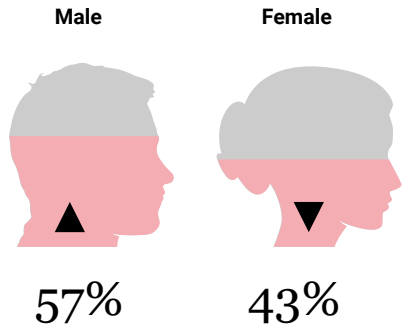
Mean score



Personality traits exhibited



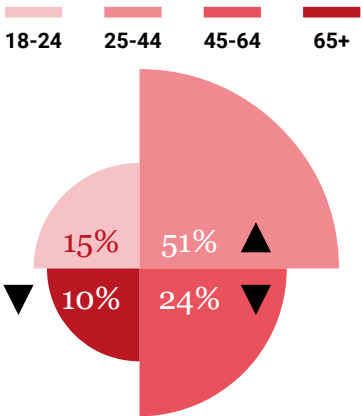
Gender



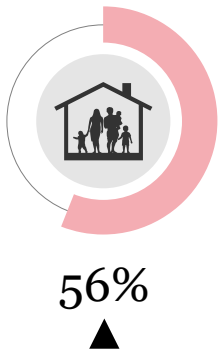
Tertiary education



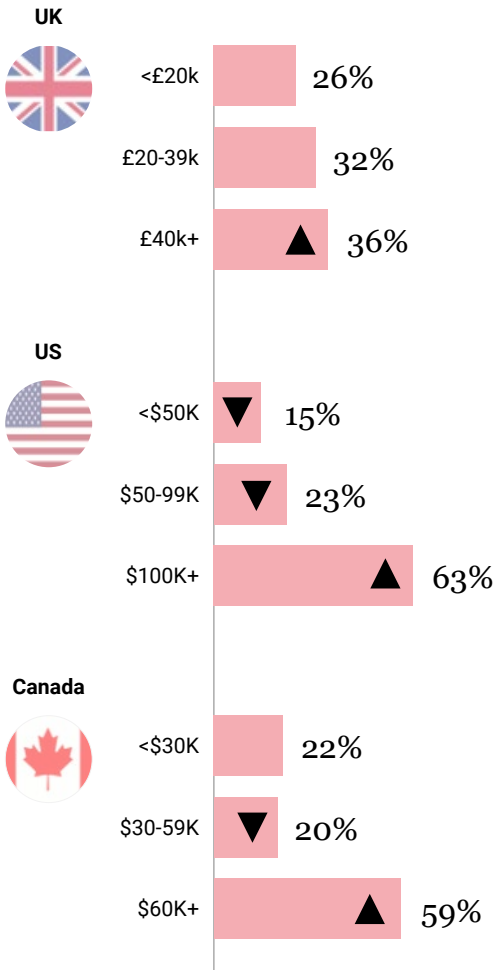
Age



Kids in household



Income



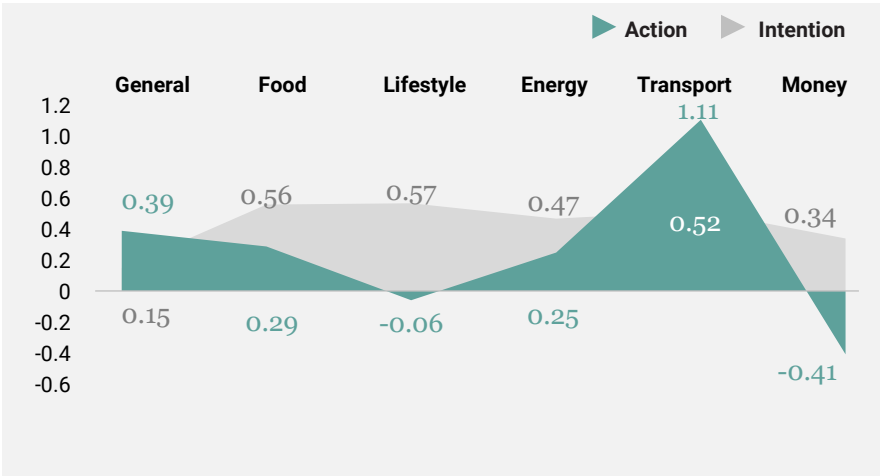
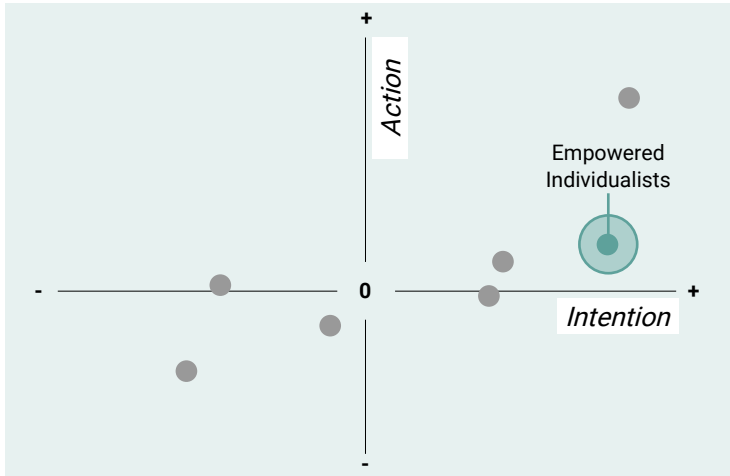
Empowered Individualists



... are relatively pessimistic, have right-leaning values and mostly focus on their immediate 'world' rather than systemic social change.

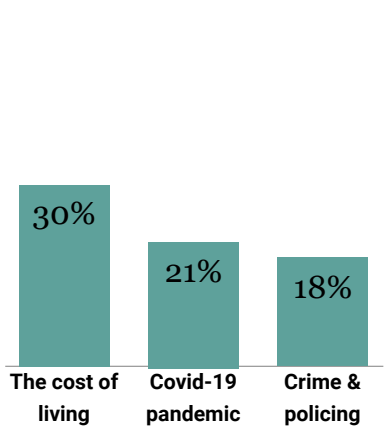
They tend to be very affluent, so could afford to do more on sustainability if convinced it would benefit them or enhance their lifestyle. However, they are more likely than any other segment to say it would be more difficult for them to change their lifestyle than other people, and on balance they are less likely to have friends or family members who talk about sustainability.

The sustainability say-do gap



Care about...

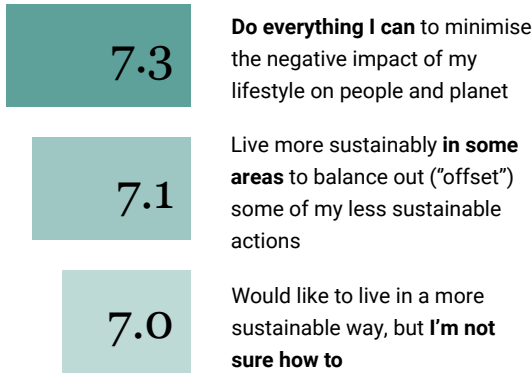
Top 3



▲ ▼ Significant difference from general population

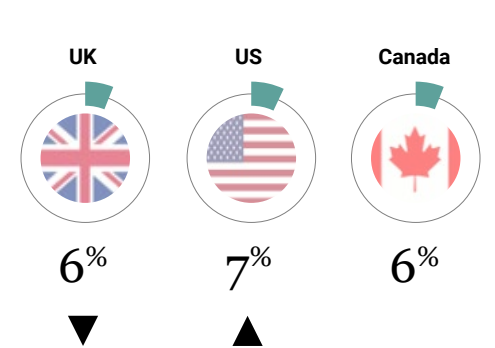
Motivated by...

Mean score



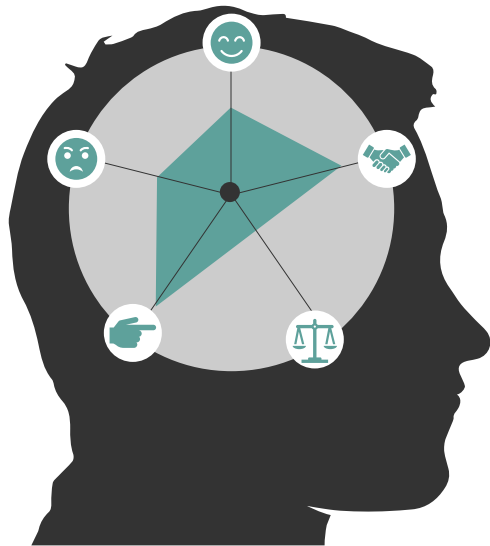
Market share...

Mean score



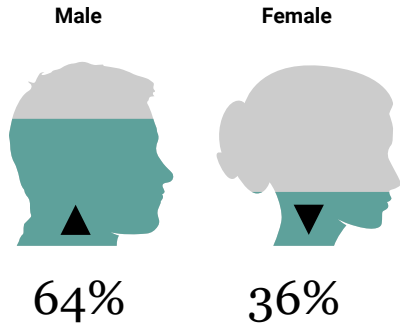


Personality traits exhibited



- KEY**
- 😊 Positive, outgoing, on top of things
 - 🤝 Trusting and respectful
 - ⚖️ Egalitarian
 - 👉 Anxious. Blame shifting
 - 😞 Disgruntled

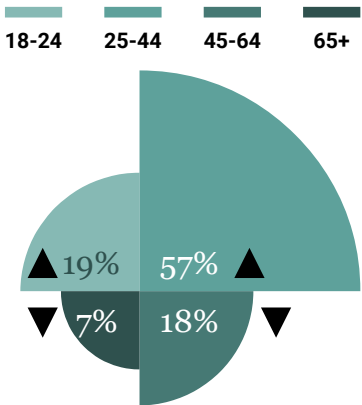
Gender



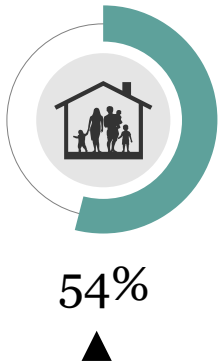
Tertiary education



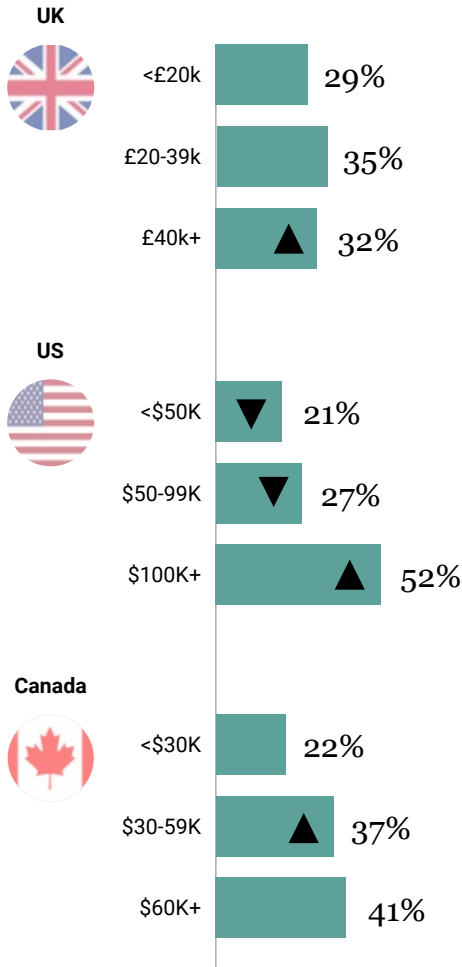
Age



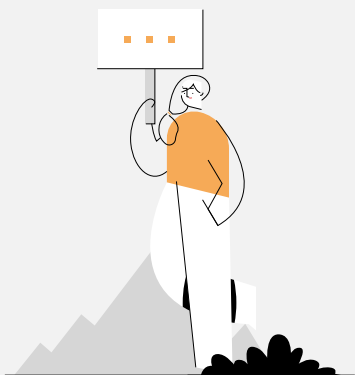
Kids in household



Income



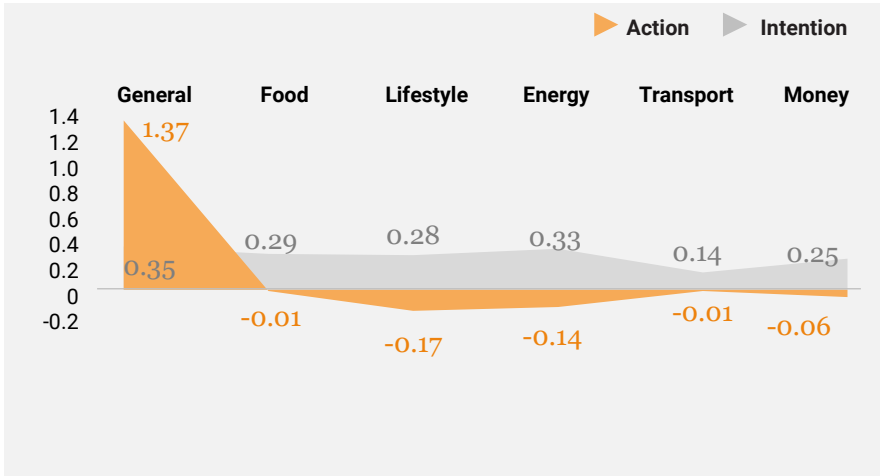
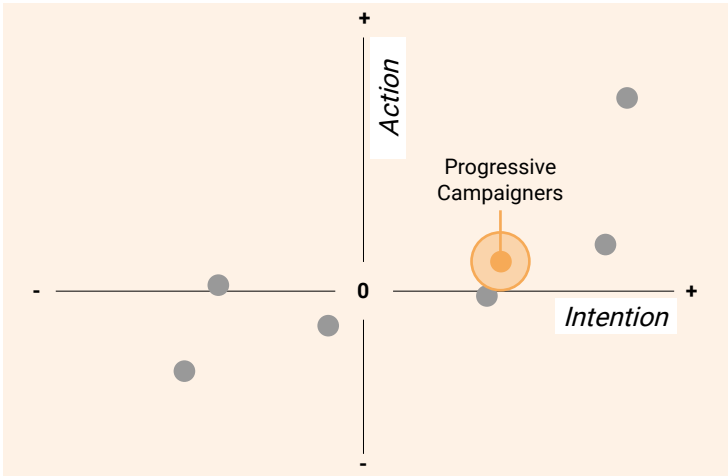
Progressive Campaigners



...tend to be relatively younger, middle to upper class with strong egalitarian values, but are distrustful of those with authority.

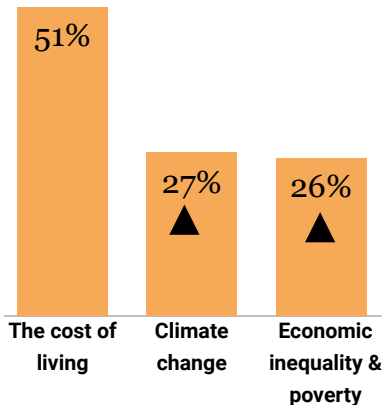
They are outspoken and put their weight behind driving social change—signing petitions, boycotting brands, and promoting causes on social media—but are not (yet) taking significant action in their own lives. Barriers include cost of living pressures, as well as a lack of clarity on how to live in a more sustainable way in practice.

The sustainability say-do gap



Care about...

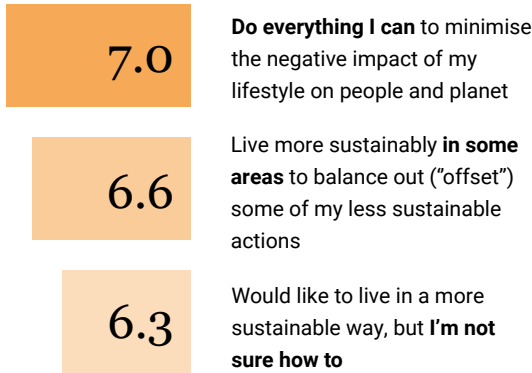
Top 3



▲▼ Significant difference from general population

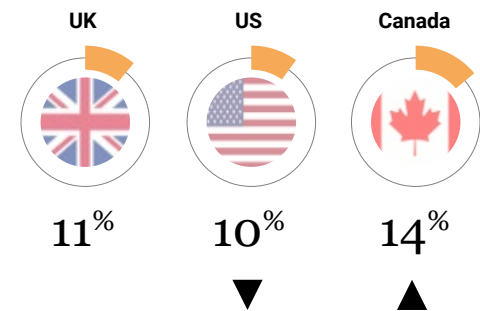
Motivated by...

Mean score



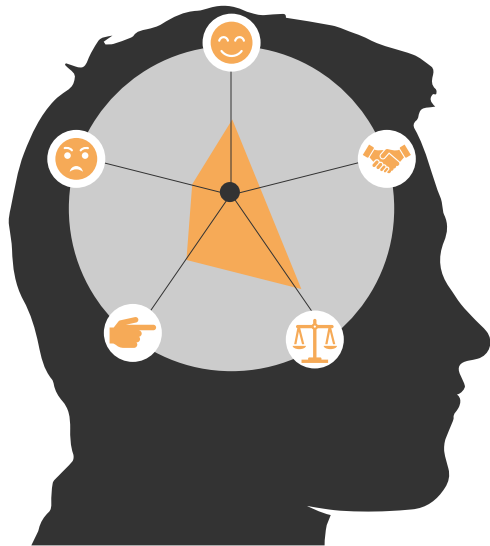
Market share...

Mean score



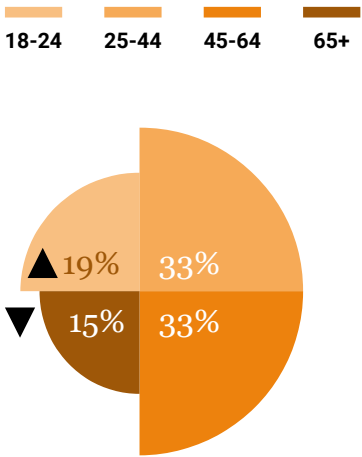


Personality traits exhibited

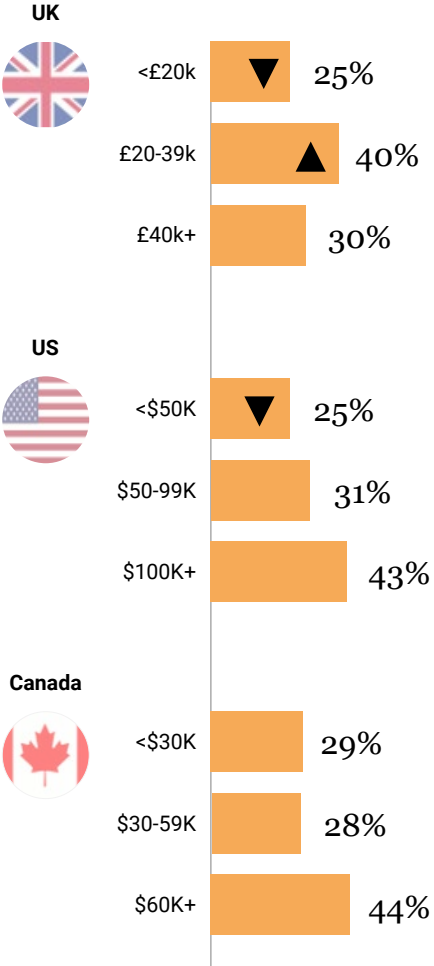


- KEY**
- 😊 Positive, outgoing, on top of things
 - 🤝 Trusting and respectful
 - ⚖️ Egalitarian
 - 👉 Anxious. Blame shifting
 - 😞 Disgruntled

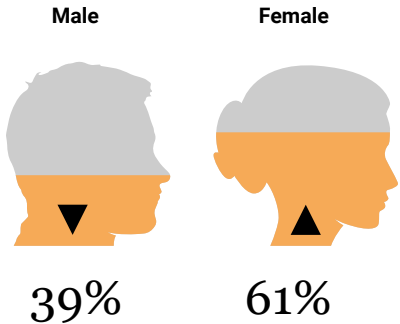
Age



Income



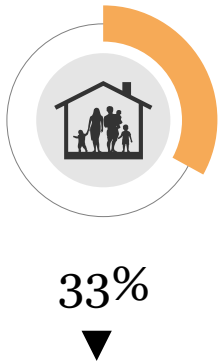
Gender



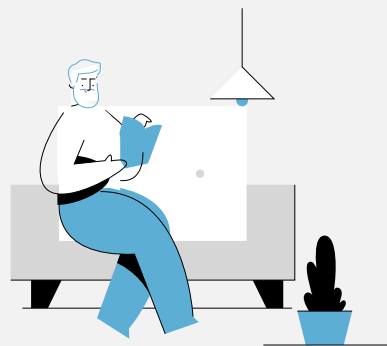
Tertiary education



Kids in household



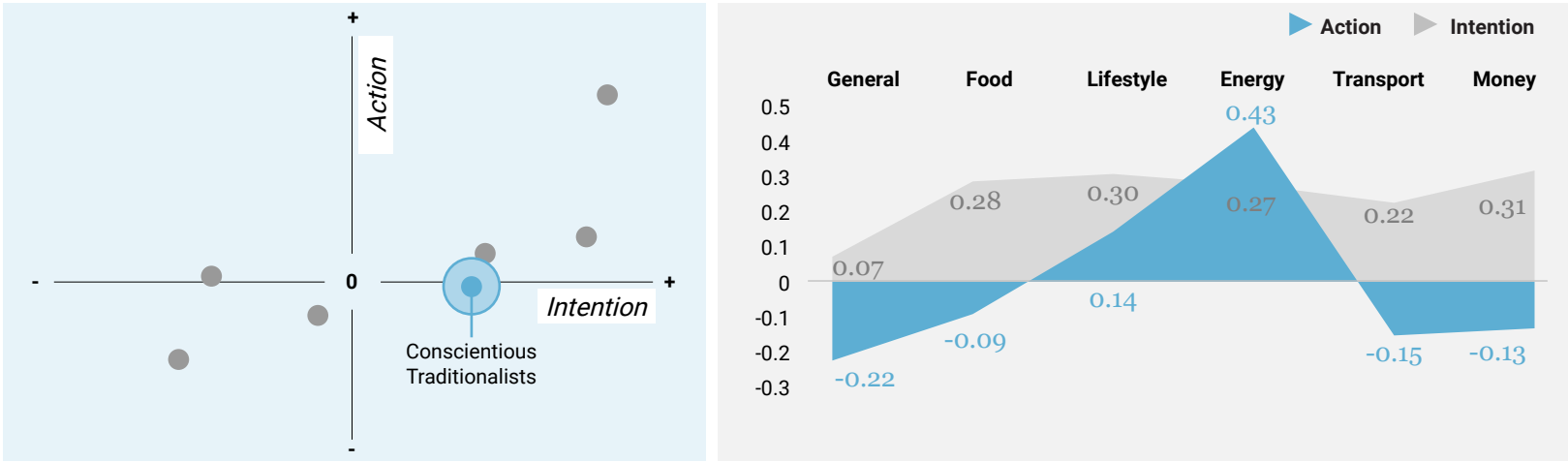
Conscientious Traditionalists



... tend to belong to the Baby Boomer and Gen X generations, live on middling incomes and have graduate-level education.

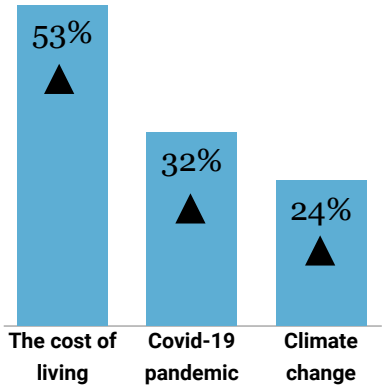
Characterised by a strong sense of respect and personal responsibility, they show specific concern about climate change and live sustainably more out of a sense of duty than proactive engagement with the issues, and only where it is 'practical' and frugal.

The sustainability say-do gap



Care about...

Top 3



▲▼ Significant difference from general population

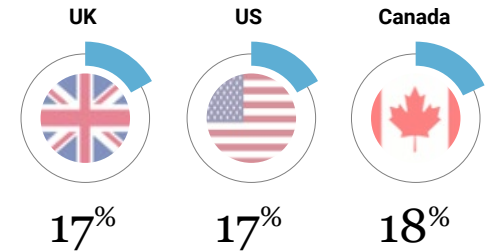
Motivated by...

Mean score



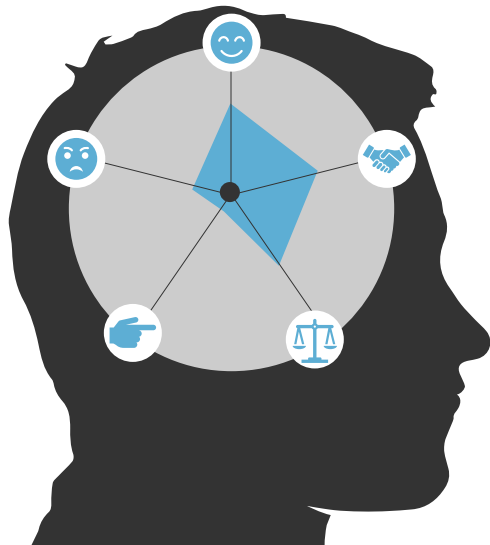
Market share...

Mean score



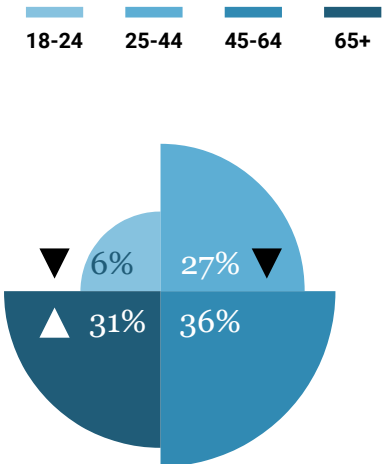


Personality traits exhibited

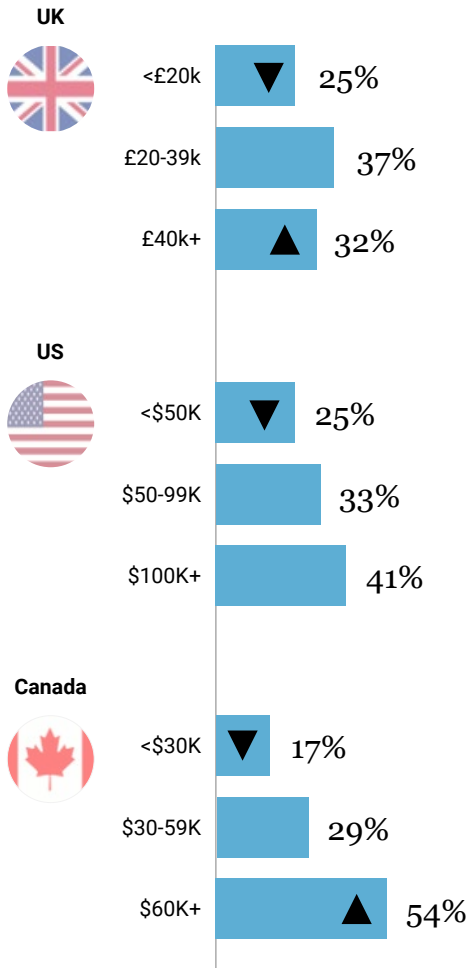


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 - 😞 Disgruntled

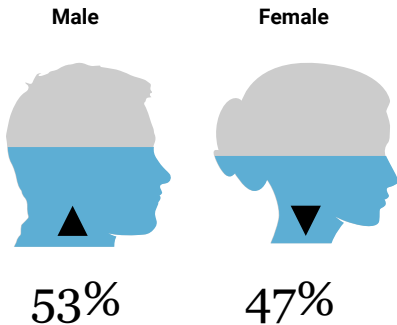
Age



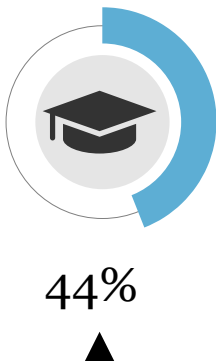
Income



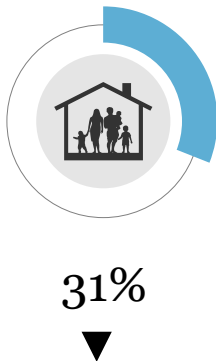
Gender



Tertiary education



Kids in household



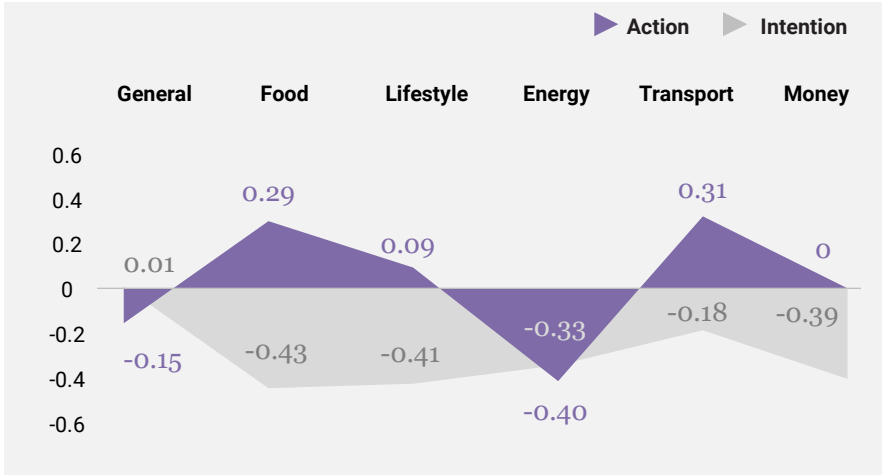
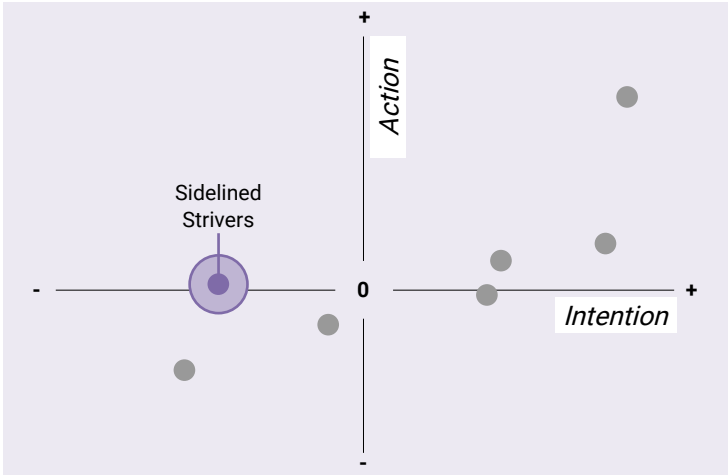
Sidelined Strivers



... are disproportionately young, low-income, and from ethnic minority backgrounds. They are 'just about managing' and feel extremely pessimistic about their prospects.

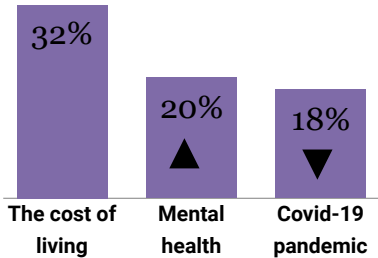
The cost-of-living crisis looms large for this group who therefore have limited opportunities to engage with sustainable behaviours, although they are prepared to attend local events, volunteer and protest suggesting that they're ready to engage within the community when they can.

The sustainability say-do gap



Care about...

Top 3



▲▼ Significant difference from general population

Motivated by...

Mean score



Do everything I can to minimise the negative impact of my lifestyle on people and planet

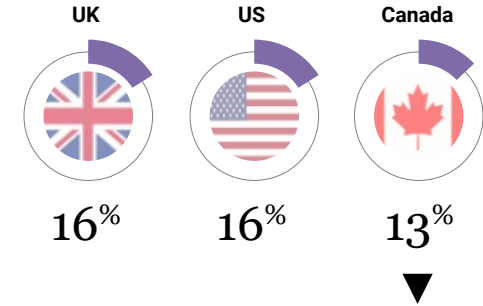
Have **few** friends or family who **talk about sustainability**

Could not afford more sustainable products and services

Live more sustainably in some areas to balance out ("offset") some of my less sustainable actions

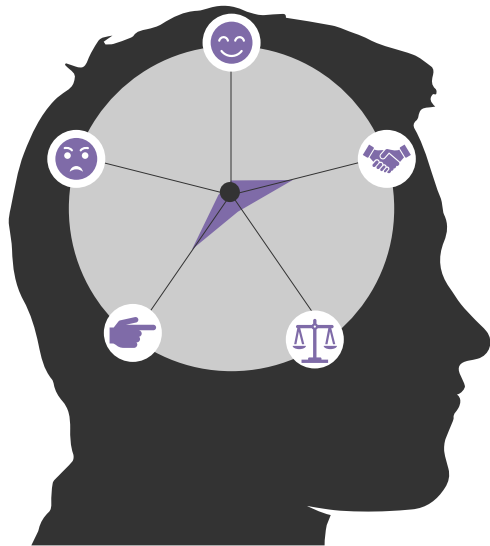
Market share...

Mean score



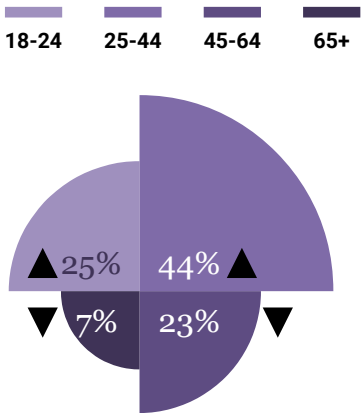


Personality traits exhibited

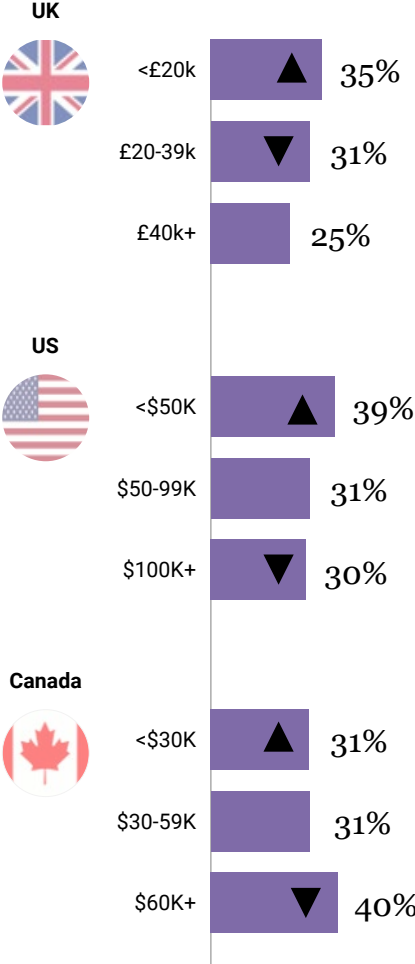


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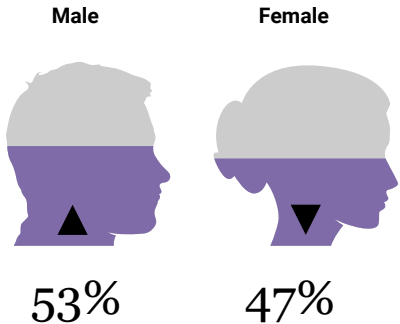
Age



Income



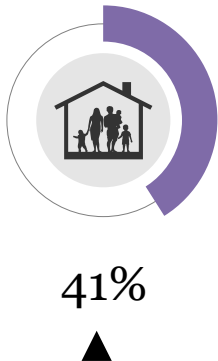
Gender



Tertiary education



Kids in household



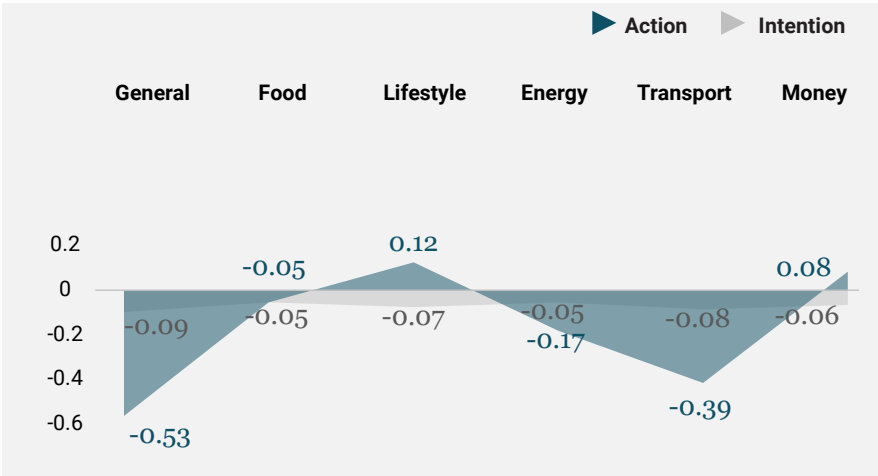
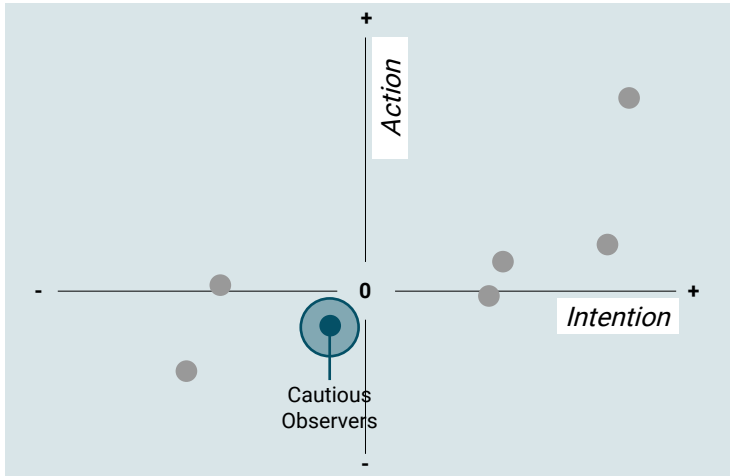
Cautious Observers



... are relatively less affluent, hold left-leaning values, and feel very disgruntled about the direction of society. However, they are sceptical about collective action and expect authority figures to take the lead and offer a helping hand or guidance that will make the world a better place.

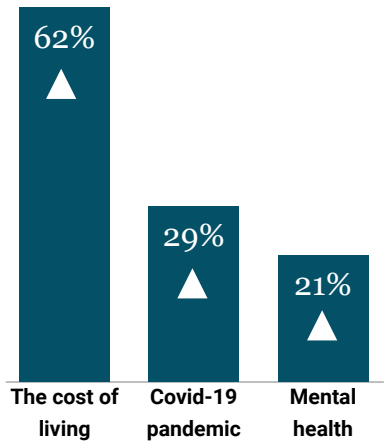
On sustainability, they are still wary about its importance compared to personal concerns, but show some promise around lifestyle and money.

The sustainability say-do gap



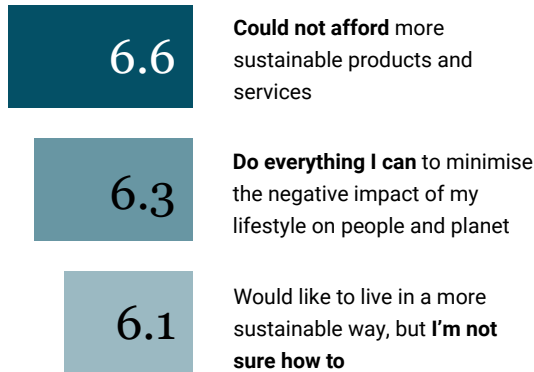
Care about...

Top 3



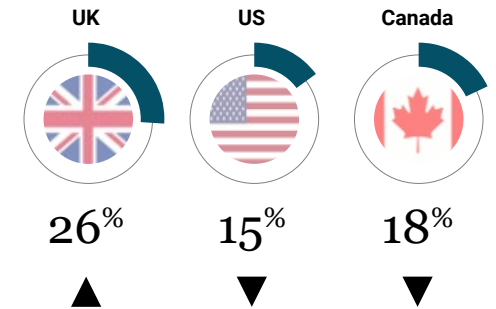
Motivated by...

Mean score



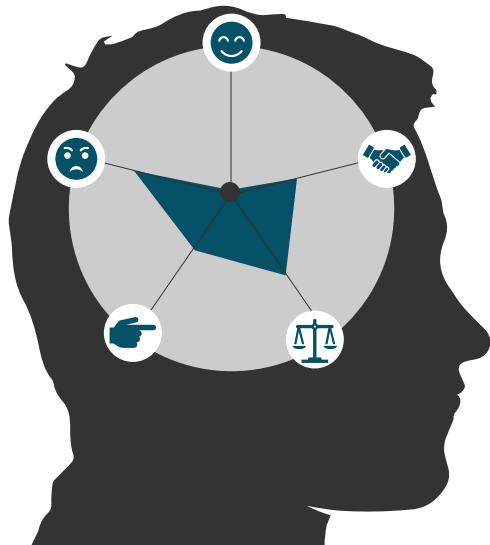
Market share...

Mean score



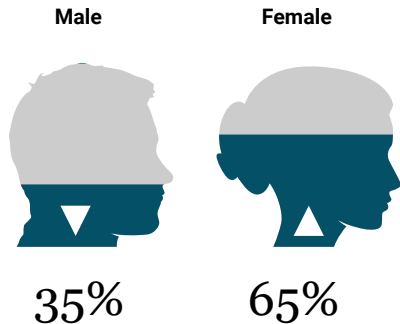


Personality traits exhibited



- KEY**
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 - 👉 Anxious. Blame shifting
 - 😞 Disgruntled

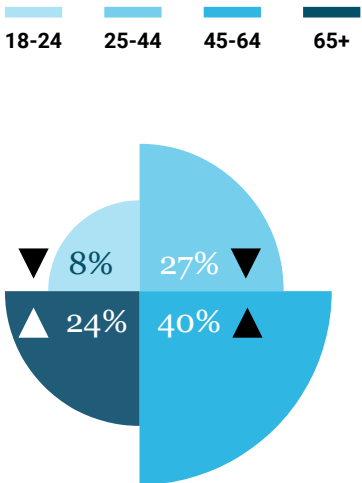
Gender



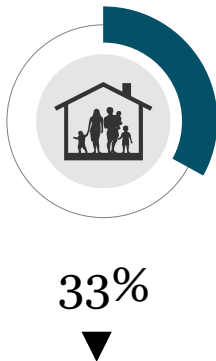
Tertiary education



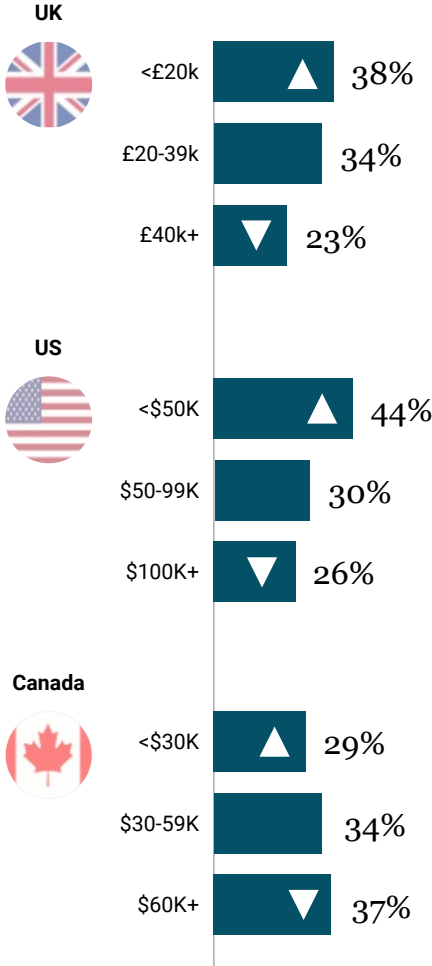
Age



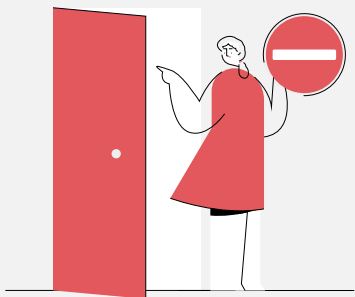
Kids in household



Income



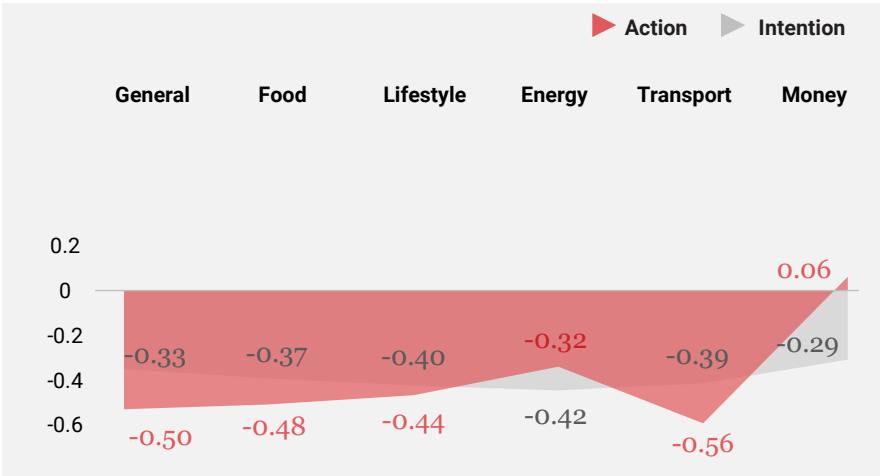
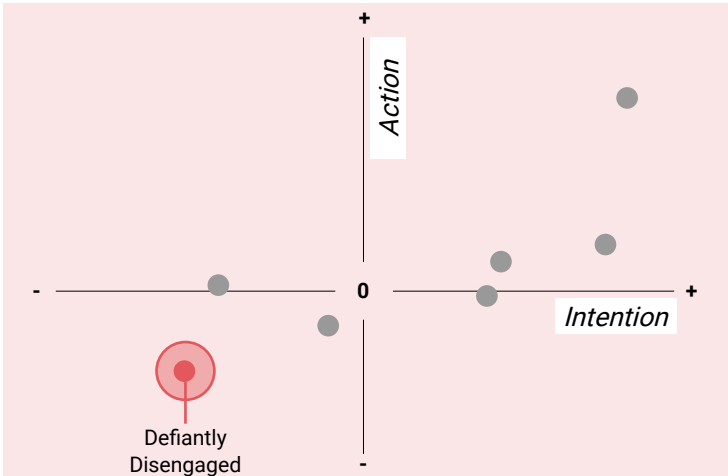
Defiantly Disengaged



... hold strong right-leaning values, are pessimistic and individualistic, and prefer to 'go it alone' than trust experts or established institutions.

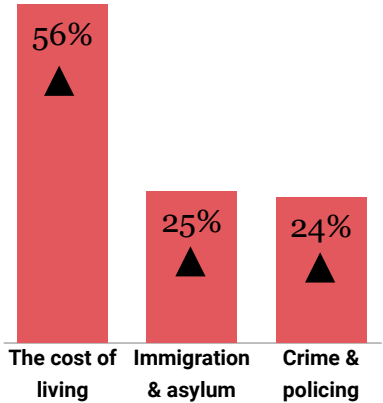
They're active rejectors of sustainability, particularly aspects around the responsible and ethical treatment of workers and promoting values of equality. Sustainable consumer choices would likely need to be the easiest and cheapest options to engage this segment.

The sustainability say-do gap



Care about...

Top 3



▲▼ Significant difference from general population

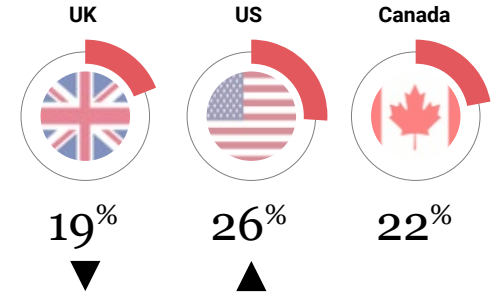
Motivated by...

Mean score



Market share...

Mean score



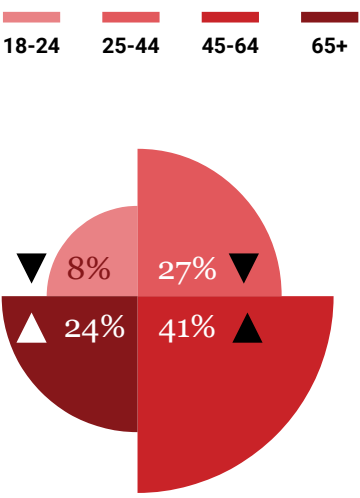


Personality traits exhibited

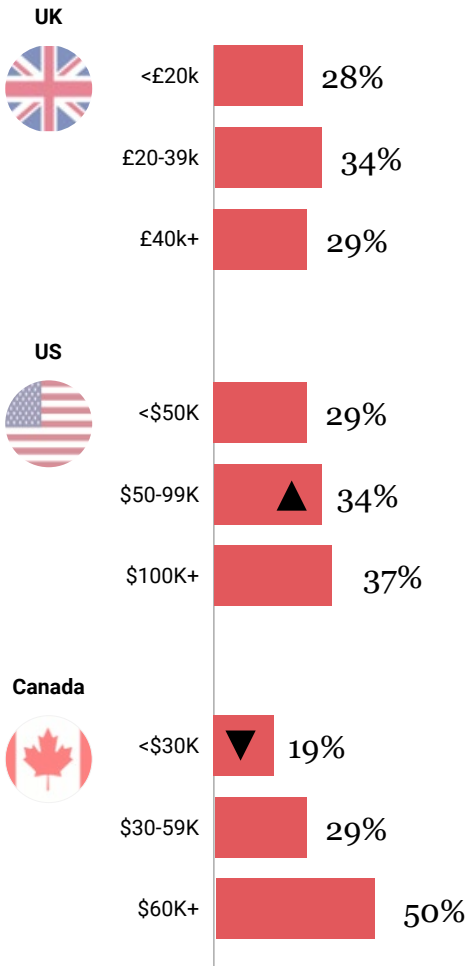


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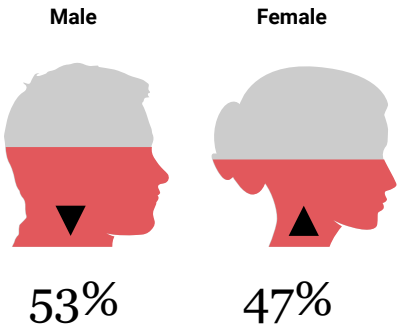
Age



Income



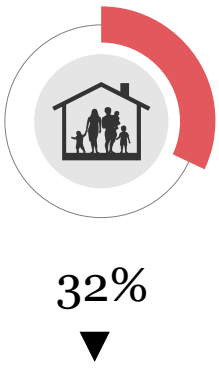
Gender



Tertiary education



Kids in household



Foreword

Market context

Introducing our segmentation

Sustainability by sector

Sector spotlight

Grocery & food

Lifestyle

Home & energy

Travel & transport

Money

Workplace

Youth

Conclusions

Contact

Appendix

Sources

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