SUSTAINABILITY SENTIMENT TRACKER 2022

BRODIE | PUBLIC FIRST

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

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

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

But first, let us introduce ourselves to you...

BRODIE

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

www.brodiepartners.com

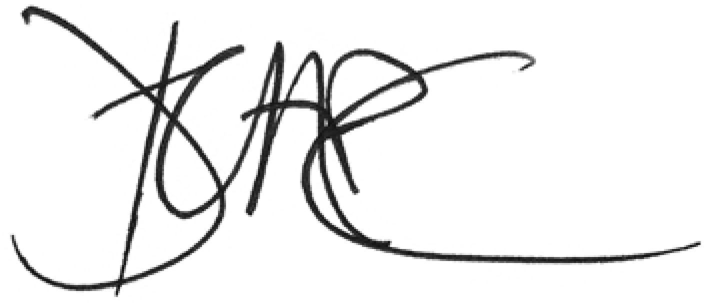
Public First

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

www.publicfirst.co.uk

This summary includes just a snapshot of our findings, so please do get in touch if you would like to hear more.

With best wishes,



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INTRODUCTION

The BRODIE Public First Sustainability Sentiment Tracker

The BRODIE Public First Sustainability Sentiment Tracker provides answers to a series of key questions about **what consumers in the UK and the US think when it comes to sustainability and business**. These include:

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

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

Primary research was carried out between March 4-12, 2022. During the fieldwork period, the cost of living crisis was taking hold in the UK, with indications that energy bills were set to increase heavily. Conflict in Ukraine had just started, while the concern around the Coronavirus pandemic was fading Since the completion of fieldwork, these trends have continued.

Our extensive opinion research (and that of others) suggests that despite this chaotic backdrop, attitudes to sustainability issues have not changed fundamentally. This might seem surprising, but we believe reflects how these issues have become almost existentially important in the minds of the public.

SECTION 1.

KEY FINDINGS

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

KEY FINDINGS

ENVIRONMENT

41%

US consumers who say they spend more buying from companies protecting the environment this year

3 out of 5

Top sustainability concerns which are environmental in UK

CO_2

Understanding of net zero has increased by

7% ↑

in the UK since 2021

15% ↑

UK over 65's who put climate change among their top 3 issues in 2022 v 2021

BUSINESSES

48%

UK 18-24s who think businesses are lying about their sustainability credentials to sell more products

48%

US consumers unable to name any company leading on sustainability

PERCEPTION

≠

REALITY

when it comes to cost of living sustainably

Specific actions such as buying second-hand clothes are overwhelmingly recognised to save money or break even in the long run, but sustainable lifestyles in general are perceived to cost more.

PEOPLE

73%

UK consumers who feel the rich are getting richer at the expense of everyone else

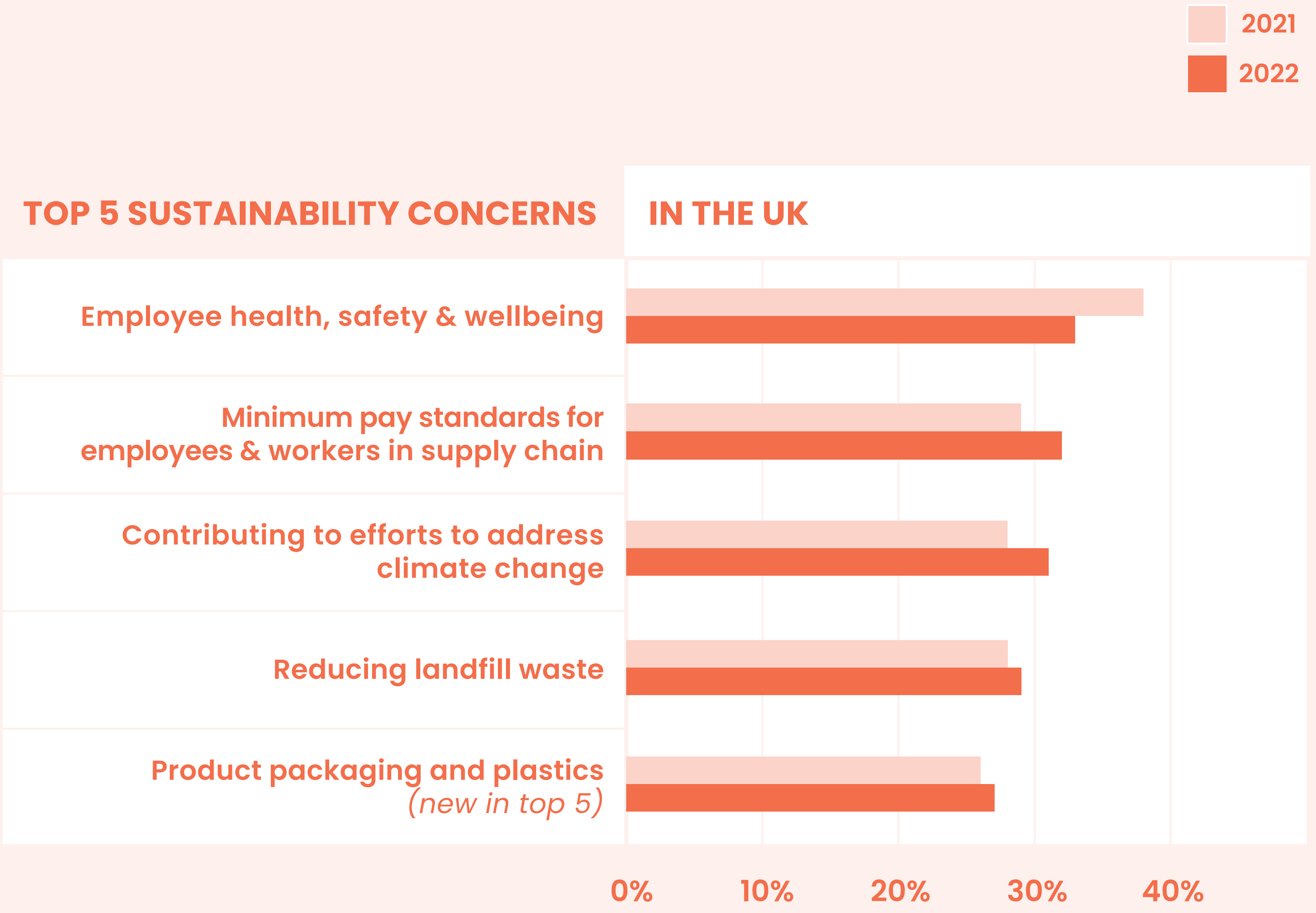
Businesses pay their junior staff too little according to

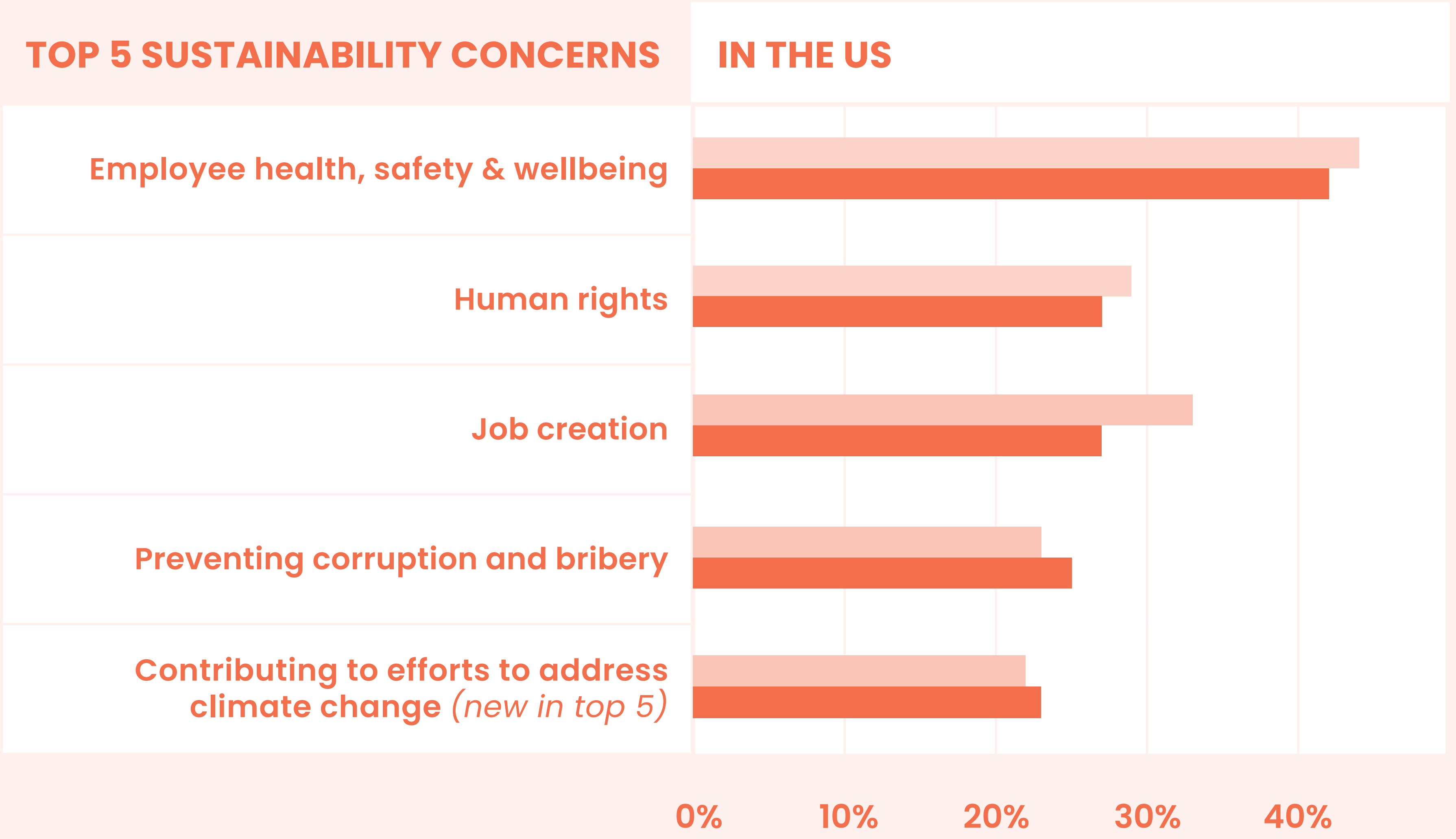
45% of UK consumers

27% of US consumers

1. Which sustainability issues are most important to consumers?

Unsurprisingly, given the rapid rise in inflation, taxation and cost of living in both countries, respondents in the UK and US rate **the state of the economy as the number one issue facing their country**. When it comes to sustainability concerns, people in both countries still feel **employee health, safety and wellbeing** is the top priority but overall it has reduced in importance from last year along with job creation: a signal of the pandemic receding. **In the UK, climate change has become more of an issue for all consumers** – especially for older respondents over 65 (up 15% since last year). Social issues dominate less than they did last year, with climate change now the number two concern in the UK and entering the top five for the first time in the US, knocking job creation out of fifth place. **Plastics and packaging is now a top 5 concern** in the UK meaning that environmental issues are now the leading areas of concern.





2. Which companies are perceived as sustainability leaders?

41% of UK consumers were unable to name a sustainability leader – or said there were none – around the same level as last year; **44% could not in the US – up from 35% last year**. Household name brands clearly cut through in terms of unprompted consumer perceptions of sustainability. This may in part be due to the frequency with which consumers typically encounter them, and hence the greater potential for influence. It's notable that there have been few changes in the top ten brands since last year.

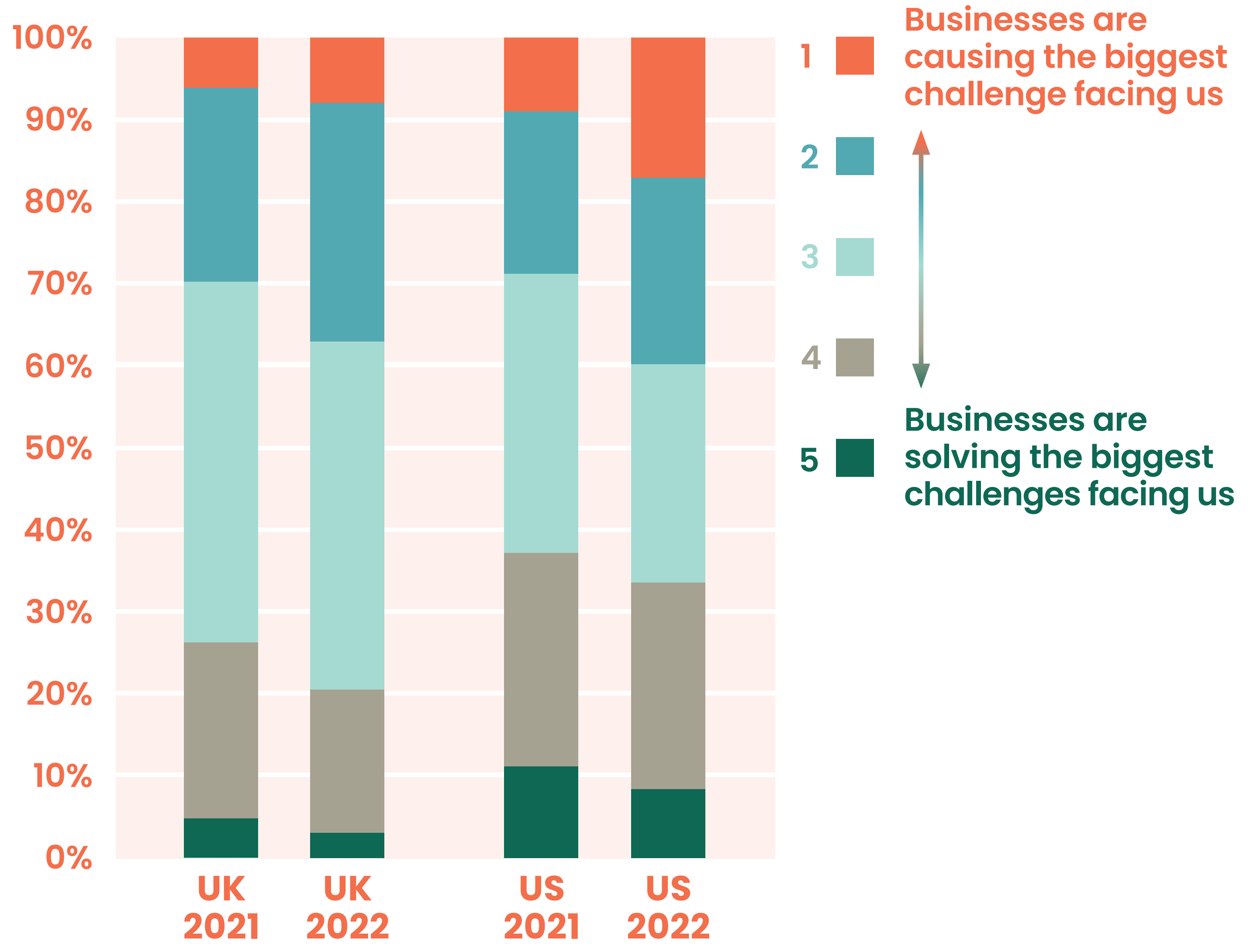
Noticeably new in this year's poll is a **growing cynicism around business sustainability claims**. Many respondents agree that they would feel more comfortable buying products that have an independent environmental certification (UK: 56%, US: 46%) or come from businesses which have made commitments to reduce their environmental impact (UK: 61%, US: 53%).

Nevertheless, about **a third of people in both countries now agree that businesses claiming to reduce their impact on the environment are just lying** to sell more products, and only a small proportion outright disagree with this view. Notably, it's **young people** who are saying this in both the UK (48% of 18-24s) and US (44% of 18-24s).

Additionally, 41% of UK and 45% of US respondents – a relatively consistent proportion across demographic groups – feel that **businesses are "just saying" they are taking ethics more seriously**, rather than genuinely doing so.

Finally, consumers in both countries are now more likely to think that **businesses are causing the biggest sustainability challenges** facing us rather than solving them. Young people again, especially in the UK, voice this opinion (51% agreeing with this compared to 40% in 2021).

WHICH OF THE FOLLOWING IS CLOSER TO YOUR VIEW?



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

	UK		US
AMAZON	7%	AMAZON	9%
TESCO	4%	APPLE	5%
APPLE	3%	COCA-COLA	3%
COCA-COLA	3%	NIKE	3%
M&S	3%	TESLA	3%
CO-OP	2%	GOOGLE	2%
JOHN LEWIS	2%	MICROSOFT	2%
MCDONALD'S	2%	PEPSI	2%
SAINSBURY'S	2%	WALMART	2%
THE BODY SHOP	2%	STARBUCKS	1%
DON'T KNOW	27%	DON'T KNOW	33%
NONE	14%	NONE	11%

Please note: above is based on unweighted data

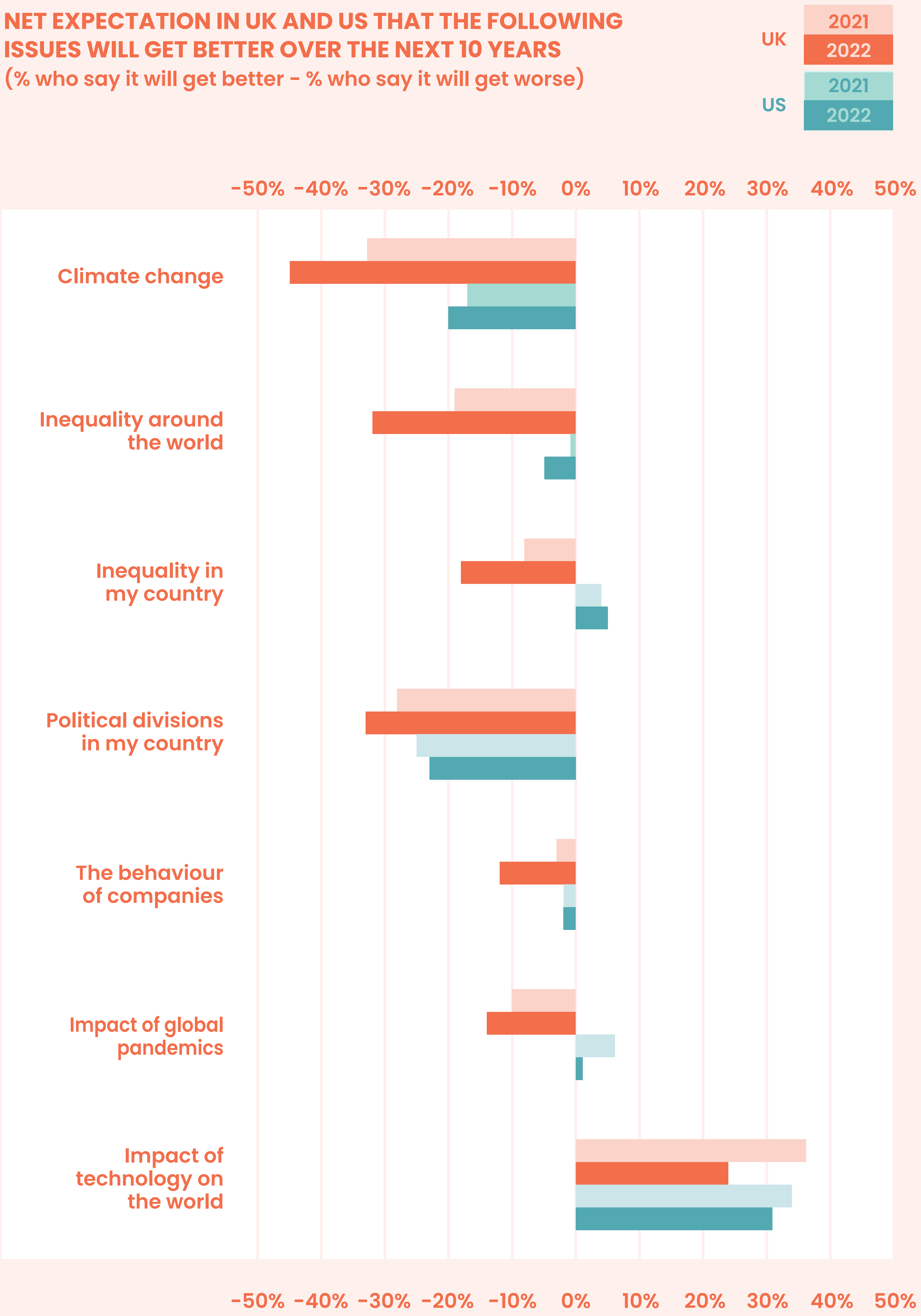
3. How optimistic are consumers about the future?

The last 12 months have been a rollercoaster for many – return to jobs and reopening businesses for some but also closures and losses for others; the return of socialising but also different working patterns. Underpinning this is the reality of the increasing cost of living and widening inequalities. **UK consumers have become more pessimistic** about the next 10 years on every aspect but **most notably on climate change, inequalities, and the behaviour of companies**.

Significantly, in response to a new question this year, we found that **in the UK almost three quarters of people believe that the rich are getting richer at the expense of everyone else** (73%), with just 5% who disagree.

No significant difference was found between social grades, education level, or Leave vs Remain voters. 65% of Americans think that the rich are getting richer at the expense of everyone else, but there's almost double the number of people who disagree with this than in the UK (9%).

NET EXPECTATION IN UK AND US THAT THE FOLLOWING ISSUES WILL GET BETTER OVER THE NEXT 10 YEARS
(% who say it will get better - % who say it will get worse)



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

Many common sustainability terms remain mysterious to consumers. Overall, respondents in the UK claimed they were more familiar with (and confident to explain) terms to a stranger, than those in the US. Compared to 2021, the only phrase which seems to have **significantly improved in awareness and understanding is 'net zero'**, rising from 35% to 42% of consumers confident to explain. As last year, this comes with a correlation with social grade: AB consumers rose from 47% confident in 2021 to 58% in 2022, while DE consumers only from 25% to 29%. The good news is that the rate of DE who have never heard of the phrase 'net zero' has dropped from 21% to 12% - possibly because COP26, held in Glasgow, had a high mass media profile in the UK in November 2021.

Similarly **in the US, confidence has risen in the term 'net zero'**, from 27% to 33%. Confidence in this term is lowest among older respondents at 22%, and peaks at 40% among those aged 45-54. There are also **significant regional differences** on this, with West Coast states 49% confident compared to 30% in both East Coast and Non-Coastal states. **Confidence has also risen in the term 'regenerative'** from 30% to 36%.

TOTAL % WHO ARE SOMEWHAT OR VERY CONFIDENT IN EXPLAINING THE MEANING OF THE FOLLOWING TERMS TO A STRANGER

	UK		US	
NET CONFIDENCE	2021	2022	2021	2022
HUMAN RIGHTS	73%	69%	69%	67%
CLIMATE CHANGE	73%	71%	64%	61%
FAIR TRADE	71%	69%	50%	50%
PLANT-BASED	70%	71%	61%	61%
SUSTAINABILITY	64%	63%	54%	54%
SUPPLY CHAIN	63%	64%	53%	57%
MODERN SLAVERY	61%	59%	40%	44%
GREENHOUSE GAS (GHG)	54%	55%	47%	45%
CARBON NEUTRAL	53%	52%	39%	40%
BIODIVERSITY	44%	46%	37%	39%
SOCIAL MOBILITY	41%	42%	35%	37%
NET ZERO	35%	42%	27%	33%
REGENERATIVE	30%	33%	30%	36%
SUSTAINABLE DEVELOPMENT GOALS (SDGs)	26%	25%	27%	32%
VALUE CHAIN	20%	21%	28%	30%
CIRCULAR ECONOMY	20%	23%	25%	27%

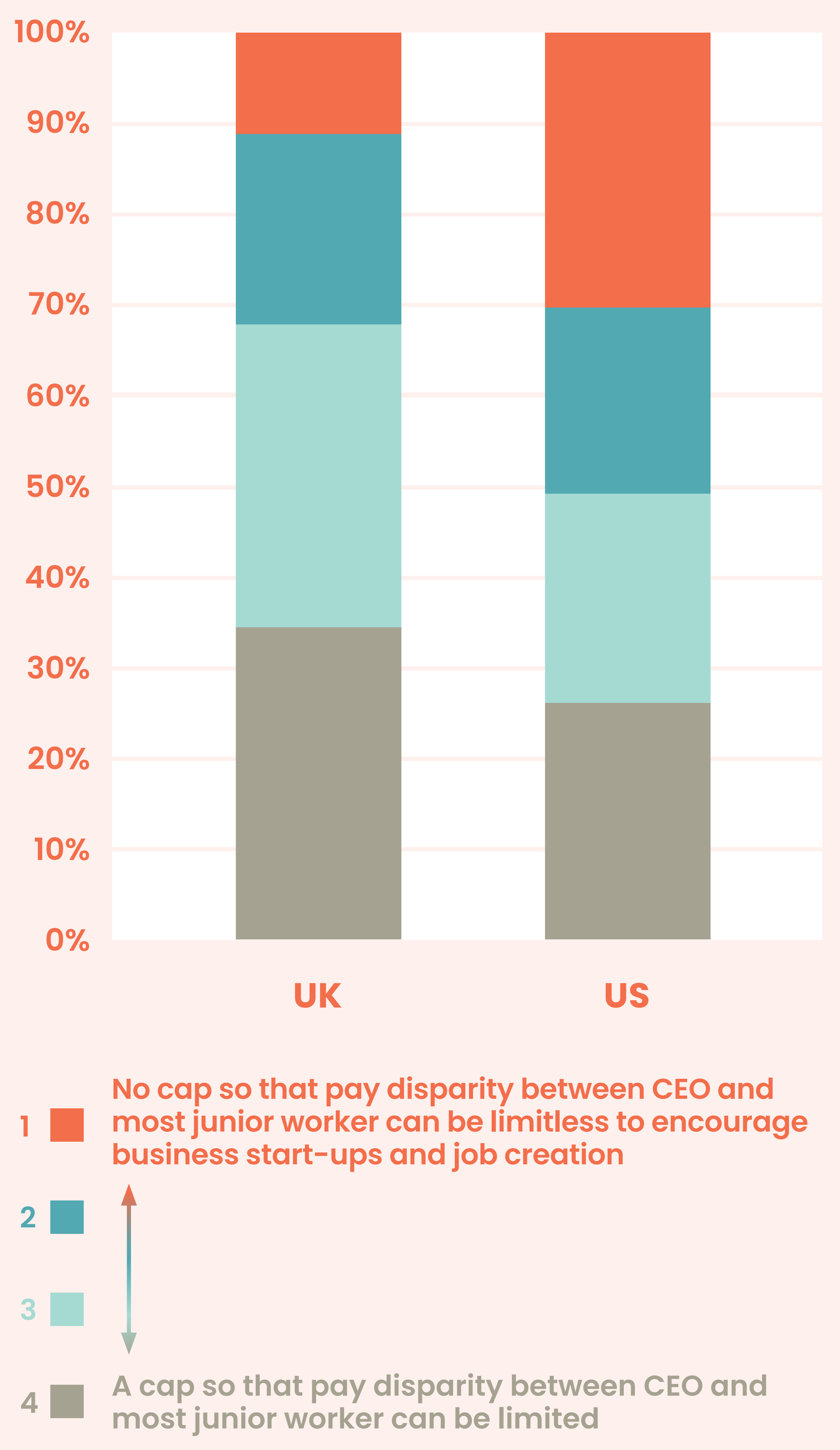
5. Who is responsible for progress on key topics – business, government or the consumer?

Consumers still have a nuanced view of responsibility aligning with who they perceive can drive change. In the UK, opinion about who is responsible for progressing sustainability issues (individuals, businesses, or government) shows little change from last year. There's a small movement towards people believing that **businesses have responsibility for progressing diversity & inclusion**, rather than government (36% business in 2021, now 40%). Likewise, **responsibility around minimum pay standards shifts towards business** (56% government in 2021, now 51%).

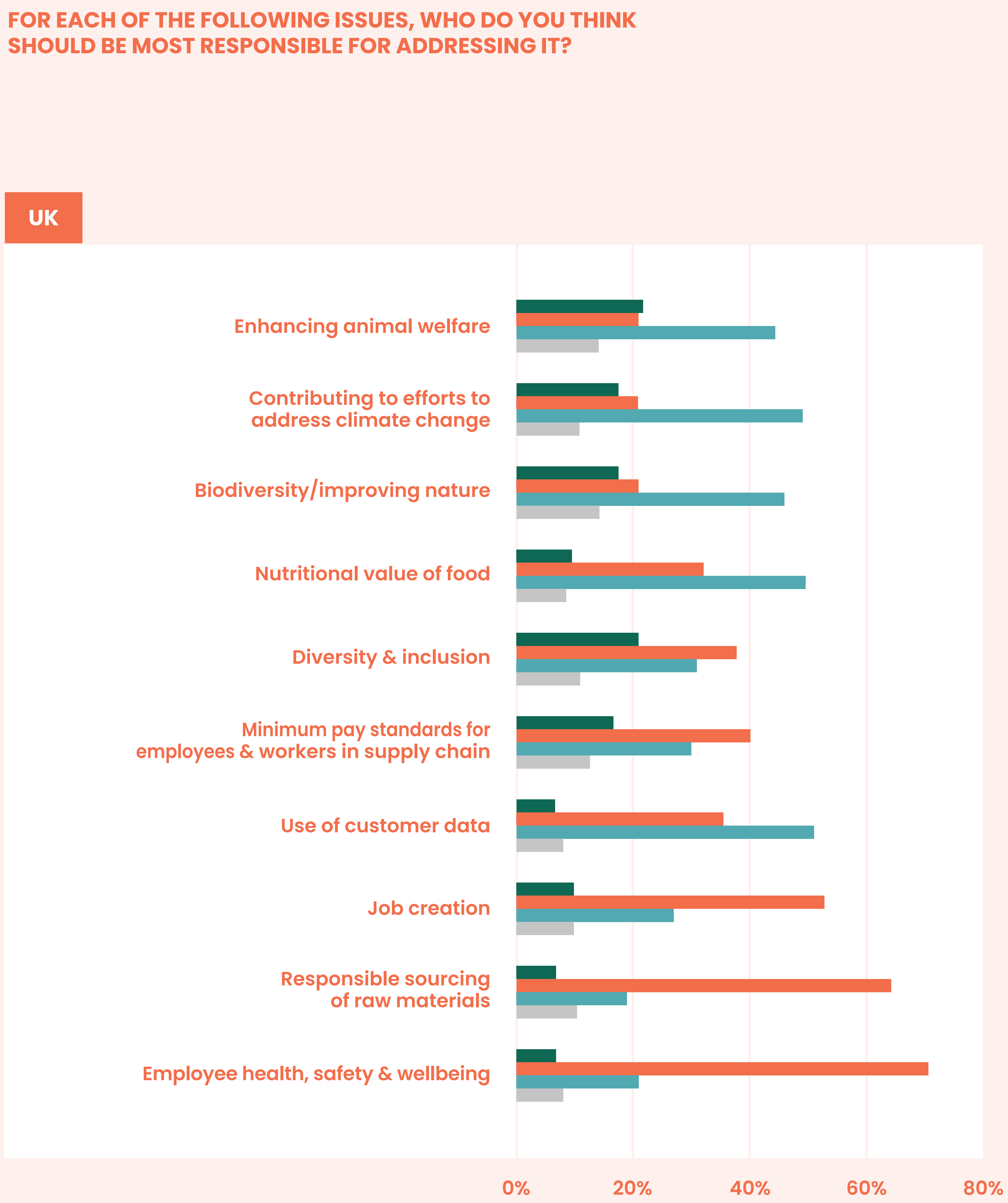
In the US, there are also few changes, other than a drop in the number of people who hold government responsible for ensuring minimum pay standards (38% to 32%), and more confusion with people saying they don't know who's responsible.

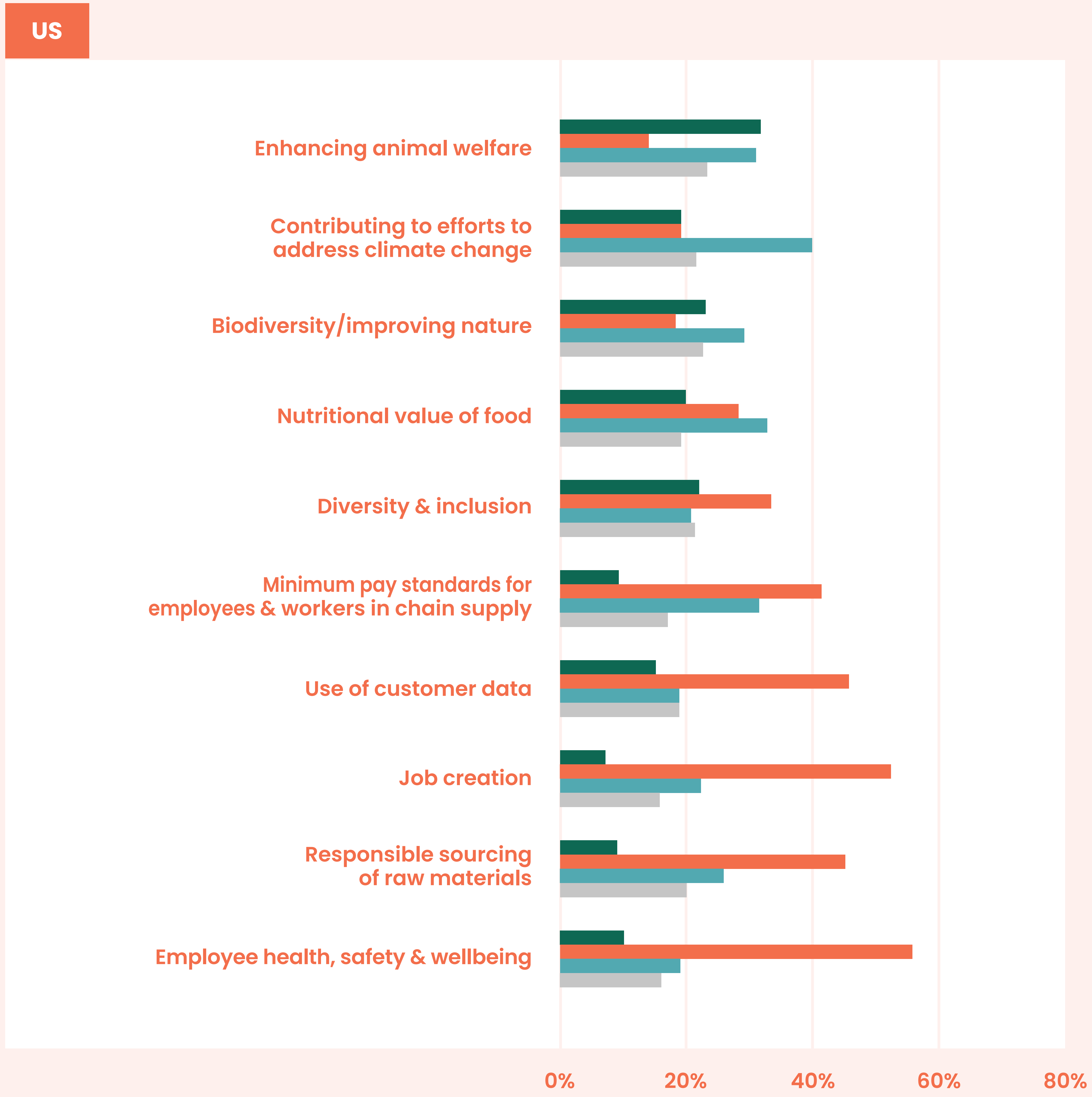
To probe further, we asked a new question about perceptions of pay disparity. In both countries, **people tend to agree that businesses pay their frontline and junior staff too little**, although this trend was much starker in the UK than in the US. By more than 4-to-1, respondents in the UK thought that businesses pay their junior staff too little rather than too much. **Respondents in the US are far less likely to agree that businesses are paying their junior staff too little**, in fact 22% said that junior staff are paid too much. When asked where businesses should find the money to increase junior staff pay, most people opted to give senior executives a pay cut (67% in UK, 53% in US).

IF YOU HAD TO CHOOSE, WOULD YOU PREFER…?



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





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

As in last year's poll, we asked a series of questions to see whether, and to what extent, people were willing to pay more for a sustainably produced T-shirt, phone, or soft drink. The price uplift was based on a company doing more than a competitor around one of the following:

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

This year, the **most important factor affecting buying decisions for UK consumers remains price followed by quality – and the gap between these has widened**, with price being significantly more important than quality in 2022. Price became the **top consideration even for the highest socio-economic group** (AB): everyone is looking for a bargain.

And yet, **perhaps counter-intuitively, willingness to pay more for sustainable products has increased**, in some instances substantially. People are more tolerant of small increases in the cost of small products, even with the current cost of living squeeze. It's most true for soft drinks (in the UK, respondents are on average willing to pay nearly double for a soft drink which pays its employees fairly). However, the top limit on willingness to pay has not increased.

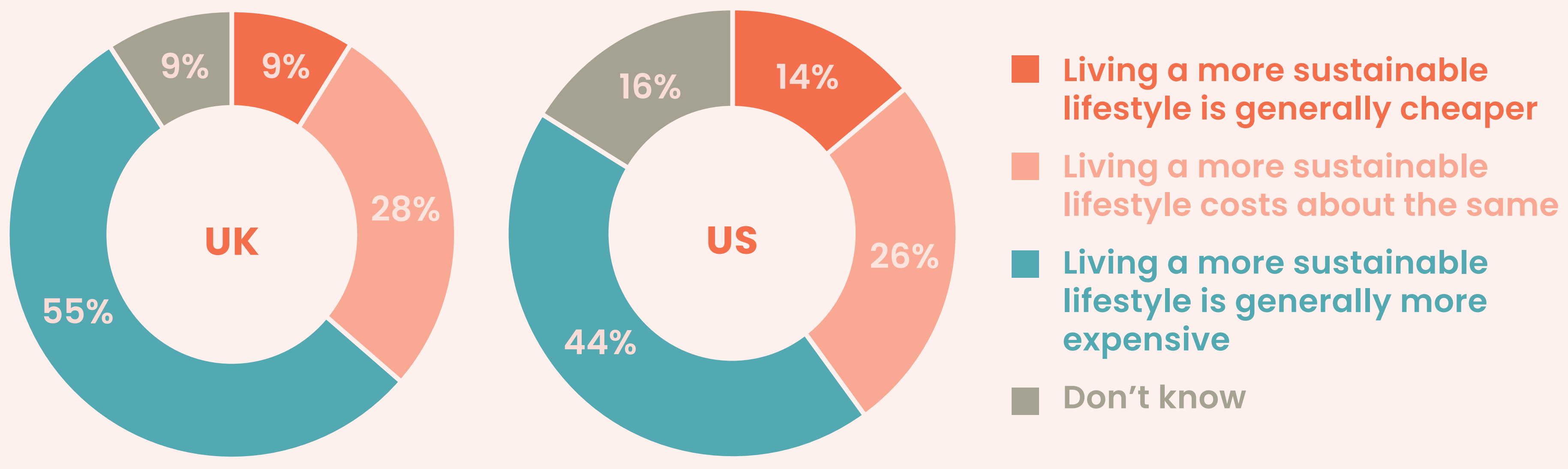
In the US, the greatest change is in the number of people who agree that they spend more buying products from companies that protect the environment (37% agreement in 2021 to 41% agreement in 2022).

In a new question this year, when asked, 55% of people in the UK think that, in the abstract, sustainable lifestyles are more expensive. In the US, that same proportion is 44%. Only 9% (UK) and 14% (US) said that, in the abstract, living a sustainable lifestyle is cheaper.

However, it appears there's **a disconnect between the perception of the cost of a sustainable lifestyle versus the real-life experience of making sustainable choices**. When presented with a range of **sustainable purchases** – such as buying second-hand clothes or a reusable coffee cup, in both the US and UK these **are overwhelmingly recognised to save money or break even in the long run**. The exception was electric vehicles, for which people (especially older people) think that they would cost more overall.

UK	WOULD BE WILLING TO PAY X MORE FOR A...		
ENSURES ITS WORKERS ARE PAID A FAIR WAGE	48%	5%	92%
HAS HALF THE CARBON EMISSIONS	36%	6%	66%
PAYS MORE TAX IN THE UK	27%	6%	49%

US	WOULD BE WILLING TO PAY X MORE FOR A...		
ENSURES ITS WORKERS ARE PAID A FAIR WAGE	39%	5%	57%
HAS HALF THE CARBON EMISSIONS	27%	7%	39%
PAYS MORE TAX IN THE US	3%	1%	12%



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

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

1. Environmental sustainability issues are more salient in the UK. Climate change, reducing waste to landfill and packaging and plastics were all in Brits' top five sustainability concerns. In the US equivalent list only climate change made it this year.

NB. Climate change is more **partisan** in the US: only 10% of those who voted for Donald Trump in 2020 selected climate change as a concern (31% who voted Biden); in the UK, climate change is still selected by around a quarter of those who voted Conservative in 2019 (25%) even if Labour supporters seem more concerned (38%).

2. Climate change anxiety has increased. We can see this across all UK age groups whereas it has only been seen to increase among older US respondents in our poll.

3. Brits are more confident to explain sustainability jargon. While consumers in both countries understand similar sustainability terms, 42% of UK consumers said they would be confident explaining net zero, compared to 33% of Americans.

4. UK consumers have become less optimistic about the future. Their pessimism has risen most sharply around the behaviour of companies, and growing inequalities, both home and abroad. Optimism remains stable in the US.

5. US consumers appear less engaged with sustainability than those in the UK. People in the US said they were less confident on all but 4 of the words and phrases which were tested. When we asked which of a series of 22 issues people in the UK and US tended to think of as "sustainability issues", people in the US selected around 4.4 of them, whereas the UK selected around 5.7. This may indicate people hold a broader definition of sustainability in the UK.

6. Brits are more willing to pay more for goods to ensure staff are paid fairly and the environment safeguarded. Given a scenario of sustainability trade-offs between environmental impact, staff pay and consumer prices, Brits prefer businesses to protect the environment (75%) and pay their staff fairly (68%) rather than keep prices low. Americans broadly agree, but at a far reduced rate. 35% choose lower prices at the cost of more environmental damage, and 37% at the cost of businesses paying their staff less.

7. Brits seem more sensitive to low pay. When asked about business rate of pay for junior staff, 45% of respondents in the UK agree that businesses are paying their staff too little, with just 27% of Americans sharing the same opinion. 10% of Brits think junior staff are paid too much, compared to 22% of Americans. A consistent trend in our polling, this may stem in part from a greater level of mistrust for businesses among Brits, as well as a political polarisation of this issue in the US.

8. UK consumers are more likely to have taken action to improve their environmental impact. This is through recycling (63%) than their US counterparts (42%). This reflects the lower availability of services such as recycling in the US and lower level of importance placed on environmental issues. The action most people in the US mentioned was turning lights off (46%) whereas in the UK it was taking own bags to the supermarket (68%, compared to 34% in the US).

SECTION 2.

SUSTAINABILITY SEGMENTATION

SUSTAINABILITY SEGMENTATION

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

Angry Activists

Commercial Realists

Corporate Optimists

Ethically Disenfranchised

Pessimistic Free Marketeers

Superficial Enthusiasts

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

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

	UK		US	
	2021	2022	2021	2022
ANGRY ACTIVISTS	14%	11%	9%	7%
CORPORATE OPTIMISTS	18%	15%	20%	17%
PESSIMISTIC FREE MARKETEERS	17%	16%	17%	12%
COMMERCIAL REALISTS	21%	22%	11%	13%
ETHICALLY DISENFRANCHISED	18%	27%	30%	35%
SUPERFICIAL ENTHUSIASTS	12%	10%	13%	16%

NB: The 2022 segment proportions have largely remained within margin of error of 2021, with the exception of the Ethically Disenfranchised group in the UK, which has grown from 18% to 27%. In part we expect this may be due to a question order effect: this year, we asked the key segment questions up front, and the proportions likely represent more accurate unprompted estimates of disenfranchisement in the UK and US.

SUSTAINABILITY SEGMENTATION

Together **Angry Activists and Corporate Optimists** (totalling 25% in the UK, and 24% in the US) **are most willing to pay for higher standards of sustainability.** Angry Activists are pessimistic and have little faith in business or government to save the planet or people, while **Corporate Optimists are worried but are still hopeful we can turn things around.**

Our **Pessimistic Free Marketeers and Commercial Realists** (UK: 37%, US: 25%) **are both relatively pessimistic.** They are split between those who

a) Acknowledge some companies make positive steps, but don't trust the broader system to make sure these approaches grow to scale, and

b) A more economically-driven group who believe that businesses should be responsible, but also prioritise action to back jobs and shore up the economy

Finally, we have the **Ethically Disenfranchised and Superficial Enthusiasts** (UK: 37%, US: 51%). They are split between a smaller overly optimistic group, and the remaining larger proportion of people who feel excluded from the conversation about sustainability – either because they lack physical access to facilities, such as recycling and public transport, or because they find the language and debate is disconnected from their own lives. The Ethically Disenfranchised come across as more disenfranchised in the US. For example, 32% in the US say they don't know whether climate change will get better or worse in the next 10 years, compared to 16% in the UK.

Angry Activists

The most committed to taking action, **Angry Activists seek out products and brands that align with their values** and try to encourage others to follow suit. This group is prepared to make significant changes to live sustainably. Angry Activists are the most sceptical of businesses and believe their own actions will impact business decision making, so will attend protests as well as boycott businesses, countries of origin and sectors that are causing environmental damage or have human rights issues. They are most likely to suggest a general reduction in profit to increase pay to frontline and junior staff.

New for 2022

For Angry Activists, the threat of climate change is their main issue of concern, overtaking both the economy and pandemic from last year. They place a high importance on brand reputation (increased from 49% to 59% in the UK, and from 50% to 58% in the US and whether those making a product have been paid well (from 36% to 43% in the UK, and 20% to 32% in the US).

Corporate Optimists

Corporate Optimists use their purchasing power to drive positive change. They are the second most optimistic about the future overall but believe climate change will get worse over the next decade, which causes anxiety. These consumers want products to be sustainable and functional, and try to avoid certain companies, particularly those making cheap products they perceive to be unsustainable. However, other personal factors, such as financial constraints and product availability, mean they are not always able to live as sustainably as they feel they should.

New for 2022

This group remains the least cynical on business motives: Corporate Optimists in both UK and US are the only segment who are more likely to disagree that 'businesses that say they are better for the environment are lying'. They remain the biggest believers in the power of business with 60% in the UK and 52% in the US saying businesses can persuade people to behave more ethically.

Pessimistic Free Marketeers

Pessimistic Free Marketeers tend to trust businesses more than they trust government. This usually stems from observations of companies adapting to meet consumer demand. Nonetheless, they believe that business behaviour is likely to deteriorate over the next 10 years because they see it as highly rational, easily shaped by both customer demand and government intervention, such as tax incentives. Our previous qualitative work with this segment revealed that they place importance on locally sourced or produced products. UK participants express concern about the lack of ethics displayed by 'superpower' businesses from America and China, while US participants have pride in supporting local goods made in America.

New for 2022

The proportion of this segment placing the level of taxation among their top three issues has increased from 6% to 15% in the UK, along with increasing pessimism about inequality in the UK with 88% thinking it will get worse, up from 79% in 2021. Along with the Angry Activists we find this group to be highly concerned by wealth inequality: 80% in the US and 87% in the UK agreed that 'at the moment the rich are getting rich at the expense of everyone else'.

Commercial Realists

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

New for 2022

The state of the economy remains paramount for this group in both the US and UK, with increasing concern around the threat of terrorism and the state of the armed forces. This group is least interested in hearing about the ethical values of companies and is the segment most likely to want businesses to pay their staff less and make their products cheaper: with 42% agreeing with this approach in the UK, and 53% in the US (the only segment with a majority leaning this way).

Ethically Disenfranchised

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

New for 2022

This group continues to demonstrate high levels of disengagement. For example the majority either don't know or are ambivalent to the question 'most businesses which say they're driven by ethics do so to sell more stuff'. However, there have been some positive changes, for example 30% of this group now say they are confident in explaining the meaning of 'net zero' to a stranger in the UK, which while still the lowest of any segment is up considerably from 21% in 2021.

Superficial Enthusiasts

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

New for 2022

44% of respondents in this group in the UK leaned towards saying that living a more sustainable life is generally more expensive, and thought that the various sustainable choices we offered (eg: takeaway coffee cups and second-hand clothing) would typically cost more money. As in 2021, it is difficult to know whether this is genuine opinion or if they are showing their uncertainty by guessing at an answer. Either way, this indicates that the group needs clearer messaging on the cost effectiveness of sustainable decision making.

SECTION 3.

SIX KEY TAKEAWAYS FOR BUSINESSES

1.
SHOW YOUR VALUE

Be clear about your sustainable value. Demonstrate how your brand or business purpose shows up in your commitments to the environment and society. Although price is still the main deciding factor for consumers (almost all look at price before quality) and there are implementation challenges for business on sustainability – such as driving product circularity or human rights issues in supply chains - brands shouldn't deprioritise sustainability because consumers, especially young people, are still willing to pay more for sustainable products. We found that people will spend more if they are convinced by the ethics of a business and if they can better judge the value of making a more sustainable choice and decide that it's worth it.

2.
SPELL IT OUT

Show consumers clearly how sustainable living can be easier and cheaper. Our research indicates a rise in the proportion of consumers who are becoming disenfranchised from sustainability. Businesses have an opportunity to help bring them into the conversation through daily brand interactions, using simple, clear, language. Brands can play a role in helping to make sustainable choices the norm and more relevant to people's lives by focusing more on personal benefits such as cost savings and health benefits. Spelling out specific 'stealth sustainability' life-hacks such as washing at 30 degrees; buying second hand; eating less meat; using leftovers or choosing repair options, could lead most people to realise they can save money – and act.

3.
ACTIONS OVER AMBITIONS

Tell consumers what you've done, rather than what you're going to do. Concern about climate change is rising, especially in the UK, and more consumers understand what net zero means. But we're seeing more pessimism and scepticism about businesses' role in causing the climate, nature, and inequality crises. This presents a chance to communicate not just your sustainability commitments but, most importantly, the tangible actions your business has taken – and is taking - towards realising them.

4.
TRUST IN PARTNERSHIPS

Explore how third-party accreditations and partnerships can help build trust. With more consumers expressing cynicism about businesses' sustainability commitments and motives, it's clear that trust is an issue. Trusted third-party endorsements - including sustainable procurement accreditations or non-profit partnerships – could help to deliver robust proof points and drive credibility and advocacy for your brand. Cross-sector collaboration and partnership working will be key to addressing some of the complex, systemic challenges we're facing. With more actors working together, providing visible and tangible proof of action will be one of the ways to counter cynicism and start to engage your audience.

5.
START ON THE INSIDE

Look after your team. There's increased scrutiny and expectation from consumers in both the US and the UK that businesses rather than governments take responsibility for a range of standards for their employees, from diversity, equity and inclusion, working conditions, fair rates of pay, to health, safety, and wellbeing. For example, the impact of P&O Ferries' poor treatment and communication with their workforce continues to be felt, with their reputation (and government contract) taking a hit. Not only is it the right thing to do, it makes good business sense as part of a holistic strategy to attract and retain employees.

6.
YOUNG HEARTS AND MINDS

Connect and build trust with young people. As we've seen, young people particularly express cynicism about businesses and their sustainability ambitions. 54% of 18-24s in the UK trust social media for this sort of information which is much higher than older groups. Word of mouth recommendation is also a proven way to do this with a more naturally cynical audience – where people learn about something from a reliable source, for example friends, family, neighbours or even colleagues and employers. How can you support and empower your employees - for example through your culture and policies, training, or volunteering opportunities - to be ambassadors for your business and brands? It's a way to bring your sustainability commitments to life through personal conversations, actions, and organic social media.

SUMMARY OF KEY TAKEAWAYS FOR BUSINESSES

1.

Be clear about your sustainable value. Demonstrate how your brand or business purpose shows up in your commitments to the environment and society.

2.

Show consumers clearly how your brand can make sustainable living cheaper and easier. Be specific and suggest relevant actions they can take.

3.

Tell consumers about what you've done, rather than what you're going to do. The proof is in the pudding...

4.

Explore how third-party accreditations and partnerships could help build trust and add credibility to your actions.

5.

Look after your team. They're critical to your long-term success – and the outside world will judge poor behaviour.

6.

Connect and build trust with young people. Word of mouth and social media could be ways to do this, such as building an ambassador culture with your employees.

APPENDIX

The need for the BRODIE Public First Sustainability Sentiment Tracker

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

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

The BRODIE Public First Sustainability Sentiment Tracker overcomes these challenges through its **objectivity and breadth**. We start from a position of professional curiosity. It is our belief that companies are best served by knowing what consumers really think about sustainability. Poor quality consumer insights could lessen the impact of corporate investment in social or environmental sustainability programmes.

Summary of methodology

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

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

This report includes just a snapshot of our findings…

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

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