# SB Socio-Cultural Trends Research™ 2024 Highlights

Analysis & Insights on Consumer Sustainability Intentions & Actions

# Executive Summary

- Gen Z and Millennial consumers signal a growing sustainability market
  - Approximately 40% say they have switched brands in the past six months because their usual brand was not as environmentally or socially responsible.
  - These generations also lead the way in terms of acting on the overall lesser-adopted of the SB Nine Sustainable Behaviors™, namely Eat More Plants, Choose Nature-Friendly, Support Women & Girls, Expand Equity & Opportunity, and Show Up.
  - These generations also feel more emotionally affected by their personal impact – just less than half feel pressure to behave in sustainable/ethical ways and more than half feel guilty about their impact on the environment.
- New ESG Segmentation shows that the people who find ESG issues to be the most urgent are not the only ones taking action, nor are they always the ones leading the way through their sustainable behaviors
  - Those in the "Discerning" segment (which is comprised of more Gen Z and Millennials) are far more likely to engage by Eating More Plants and taking societally-focused actions. 60% say they have switched brands in the last six months for a version that is more environmentally responsible.
  - The "Complying" segment (which is comprised of more Gen X and Boomers) performs relatively highly in terms of taking action on the more mainstreamed of the SB Nine Sustainable Behaviors™, namely Be Energy Smart, Think Durable, Reduce Water & Food Waste, and Go Circular.
- The Intention-Action gap
  - The intention-action gap continues to be less than 10% when asking about specific Sustainable Behaviors (ie. Be Energy Smart), suggesting that people have a firmer grasp on their personal capabilities and aspirations at the micro-level, even while they express willingness to switch brands and make lifestyle compromises. This suggests an opportunity for brands to provide more options and avenues for people to live more sustainably as part of their everyday routines.

## About SB Socio-Cultural Trends Research™

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

SB Socio-Cultural Trends Research™ is designed to assess consumer values around sustainability, their supporting behaviors, and understand the gap between intentions and actions through the lens of the SB Nine Sustainable Behaviors™.

Ipsos is the research partner for SB Socio-Cultural Trends Research™.
This research was conducted as part of Ipsos Essentials, a global behavioral tracking study.

As part of this partnership, this report includes Ipsos' newly updated ESG Segmentation to better understand nuances in consumer behavior.

**Methodology**

Survey of the U.S. general public (n=2,006), fielded February 5th-9th, 2024.

Where global insights are referenced, the markets tested include: Italy, China, Spain, Germany, South Korea, Brazil, Mexico, South Africa, France, United Kingdom, Japan, India, Australia, and Canada.

Significant increases and decreases from previous waves indicated with ▲ and ▼ markers on charts.

*Note: the last wave was fielded in March 2023.*

# US respondents continue to recognize the interconnectedness of social and environmental challenges; many struggle to know what to focus on.

## WHICH IS MORE IMPORTANT TO ADDRESS:

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

**19%**
Environmental

**52%**
Both Equally

**29%**
Social

**67%**

agree that there are so many critical problems in the world, they struggle to decide what to focus on.

Similarly to the US, globally, there is a skew toward social issues

*(15% Environmental, 32% Social)*

**Q:** Some people say that environmental challenges, such as climate change and pollution are the most important for society to address. Other people say that social challenges like racial or gender inequality are the most important for society to address. Which of the following is closest to your point of view?
**Base:** 2006

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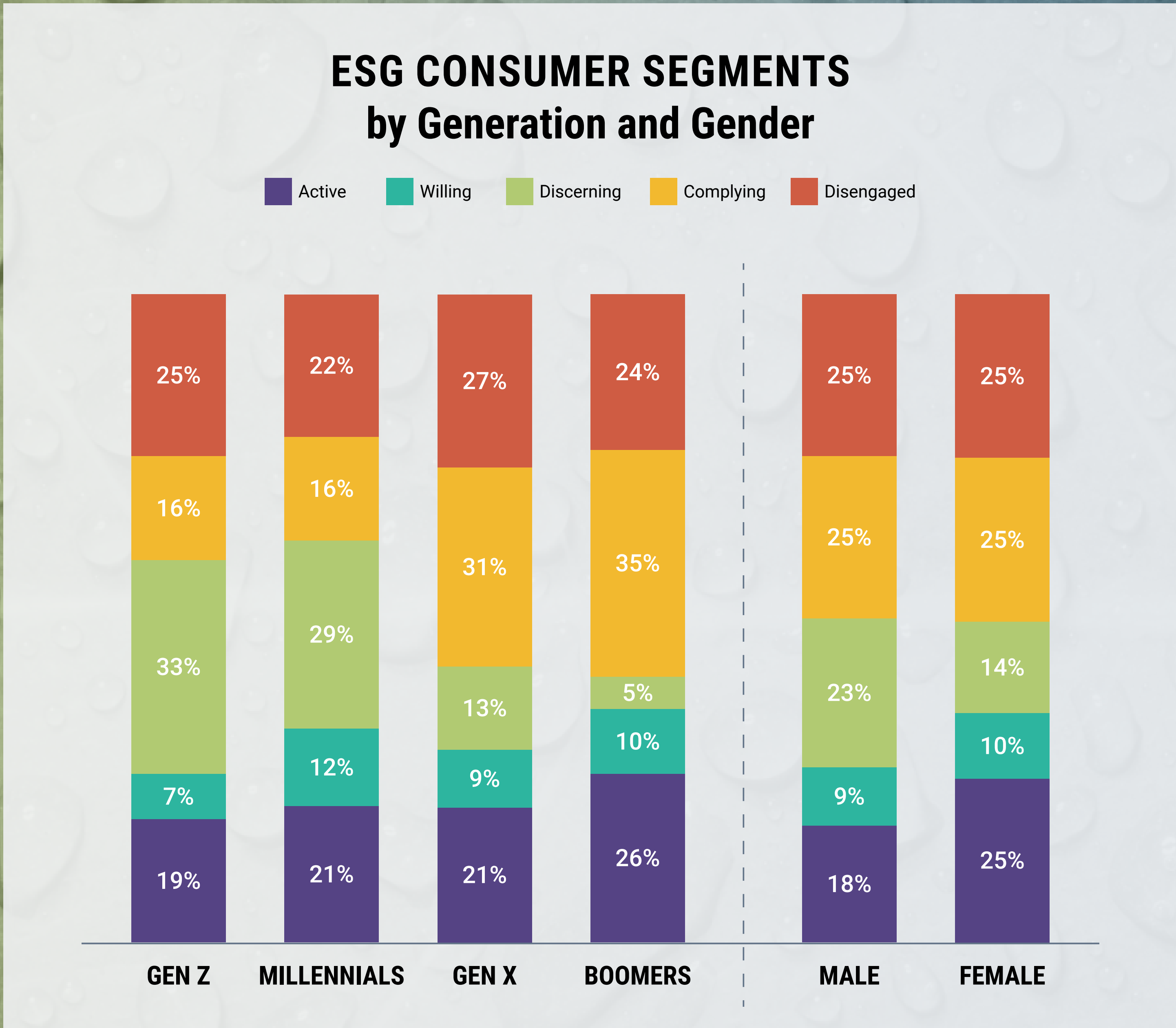
# New segmentation conducted across 15 Global markets looks at two main dimensions across Environmental, Social Justice, and Corporate Governance Issues: Level of Concern and Level of Action/Intended Action.

| | | | VS. GLOBAL |
|---|---|---|---|
|  | "It is upon me to accelerate change and wake up the world" | 22% ACTIVE | -1% |
|  | "I'm pragmatic about the contributions I'm willing to make" | 10% WILLING | -6% |
|  | "I'm focused on proven solutions that fit into my busy lifestyle" | 19% DISCERNING | +5% |
|  | "I will do enough to not be called out" | 25% COMPLYING | +4% |
|  | "I am not the one to save the world" | 25% DISENGAGED | -1% |

MORE ACTIVE ↕ LESS ACTIVE

*Segmentation conducted as part of Ipsos Essentials*

**Gen Z** and **Millennials** are more likely to be **Discerning** – looking to focus action where it has most impact – while **Gen X** and **Boomers** are more likely to be **Complying.**




**Base:** Gen Z: 264, Millennials: 644, Gen X: 566, Boomers: 532, Male: 967, Female: 1039

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# SB 2024 SAN DIEGO

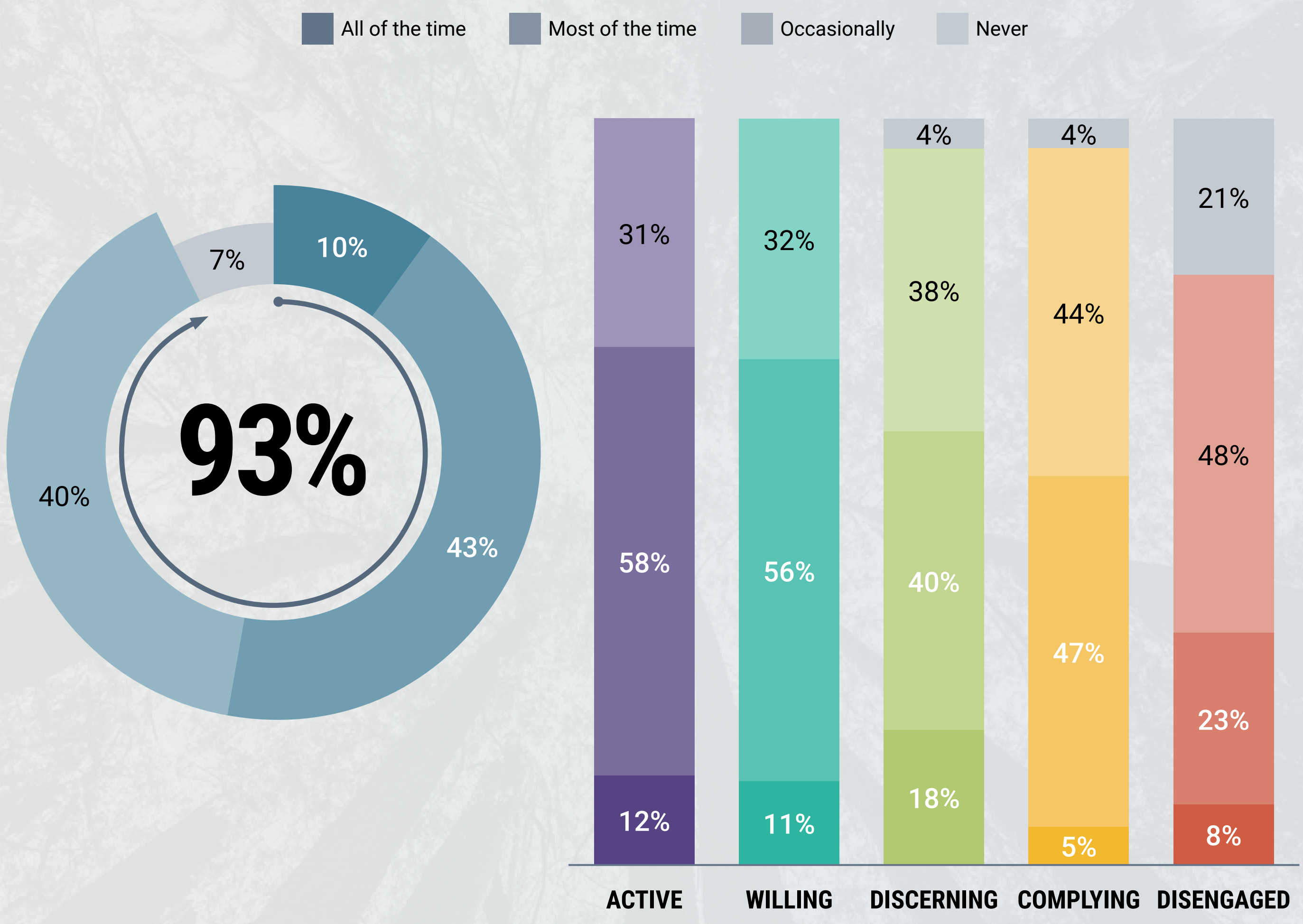
## OCTOBER 14–17 | TOWN & COUNTRY RESORT


## The Global Event for Regenerative Brands & Leaders

**REGISTER TO HEAR MORE CONSUMER INSIGHTS**

# 93% of people in the US say they behave in ways that protect the planet, its people, and its resources at least occasionally; the **Discerning** group is most likely to say they behave in these ways all of the time.

## BEHAVING IN WAYS THAT PROTECT THE PLANET, ITS PEOPLE AND ITS RESOURCES




**Q:** How often do you behave in ways that protect the planet, its people and its resources?
**Base:** Total: 2006, Gen Z: 264, Millennials: 644, Gen X: 566, Boomers: 532

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

## SB NINE SUSTAINABLE BEHAVIORS™

### ADDRESS CLIMATE CRISIS

**EAT MORE PLANTS**
Moderate meat consumption and eat mostly plant-based foods.

**BE ENERGY SMART**
Conserve energy and use renewable energy sources where possible.

**THINK DURABLE**
Purchase durable, reusable products and use fewer disposable ones.

### PRESERVE RESOURCES FOR LIFE

**REDUCE FOOD + WATER WASTE**
Use only what you need and find ways to reduce water and food waste.

**GO CIRCULAR**
Choose products made with recycled content and recycle, rent, share, and buy used over new products.

**CHOOSE NATURE-FRIENDLY**
Buy products with clean ingredients and products that protect habitats and biodiversity.

### FOSTER RESILIENT SOCIETIES

**SUPPORT WOMEN & GIRLS**
Support causes and products that support women and girls, that includes purchasing from women-owned businesses.

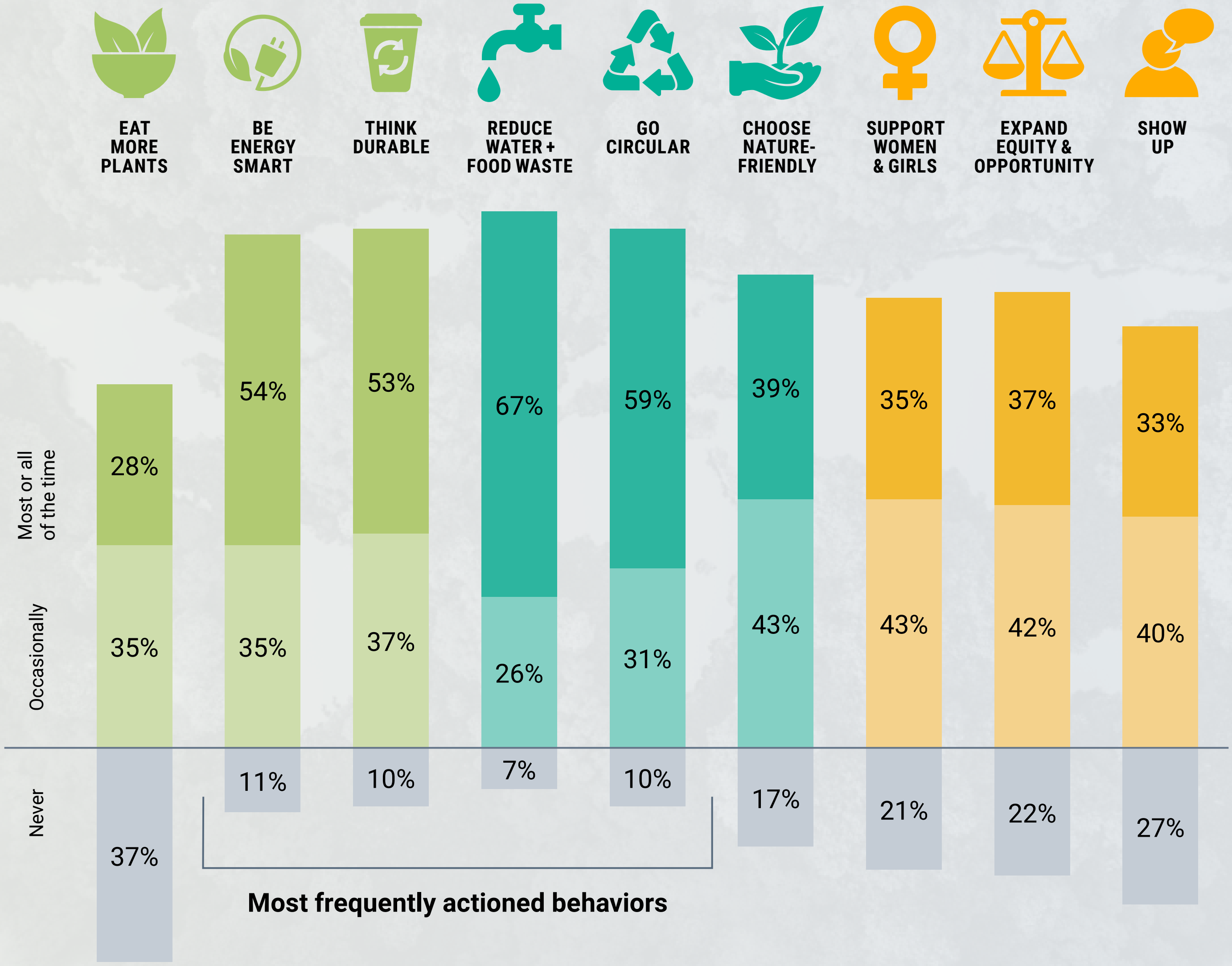
**EXPAND EQUITY & OPPORTUNITY**
Support brands offering inclusive and equitable products, policies and practices.

**SHOW UP**
Actively participate in organizations, buy from companies that support sustainable living, and vote.

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

# Americans continue to take the most action around more mainstream behaviors, and struggle more with Eat More Plants and the societally-focused behaviors.

## SUSTAINABLE ACTIONS IN THE PAST 12 MONTHS




**Q:** When given the opportunity, how often (if at all) did you personally do each of the following in the past 12 months?
**Base:** (n=2006)

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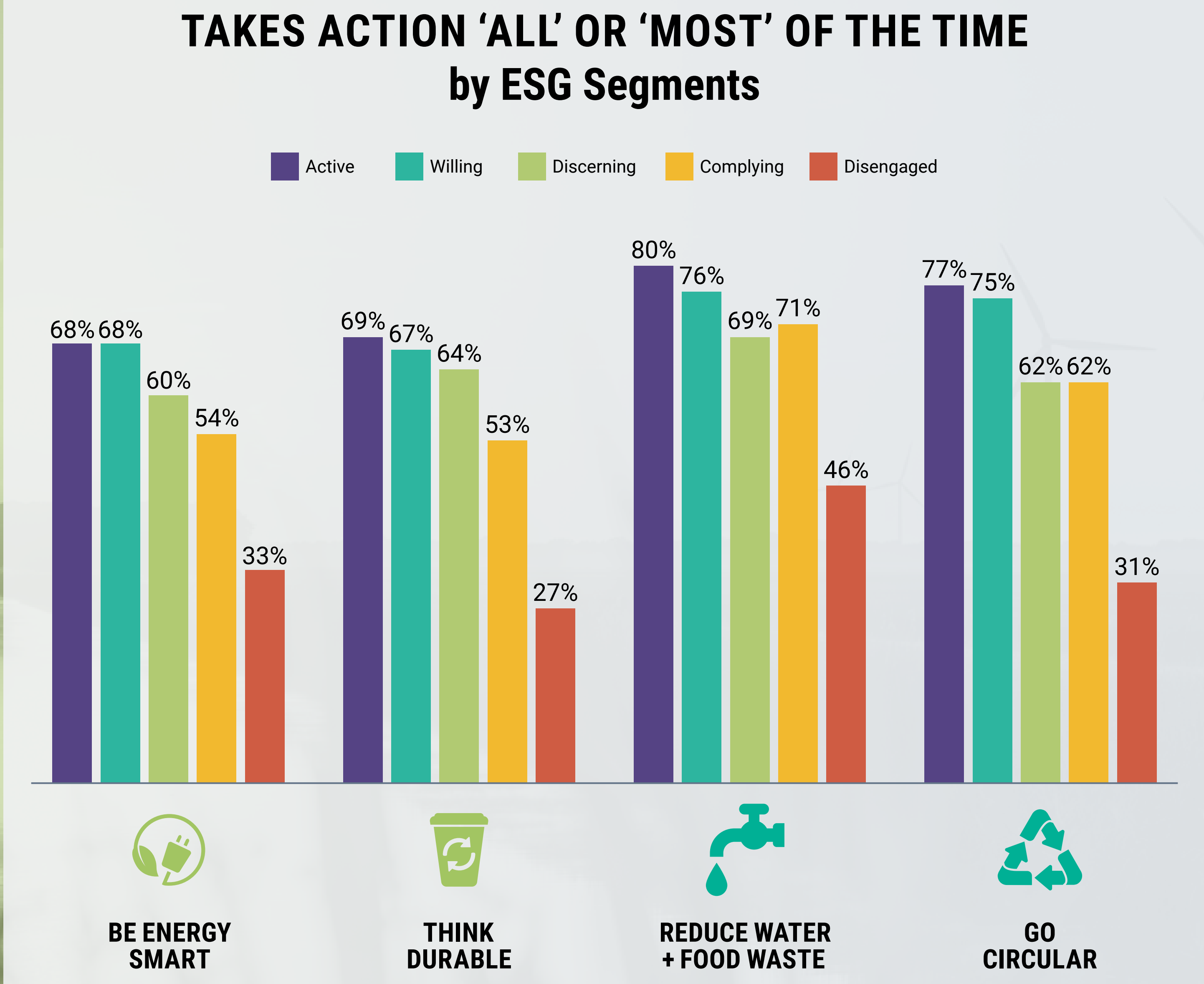
# The more mainstream behaviors in US culture follow a predictable distribution among the segments, with a sizable drop-off for **Disengaged.**




**Q:** When given the opportunity, how often (if at all) did you personally do each of the following in the past 12 months?
**Base:** Active: 440; Willing: 194; Discerning: 370; Complying: 506; Disengaged: 496

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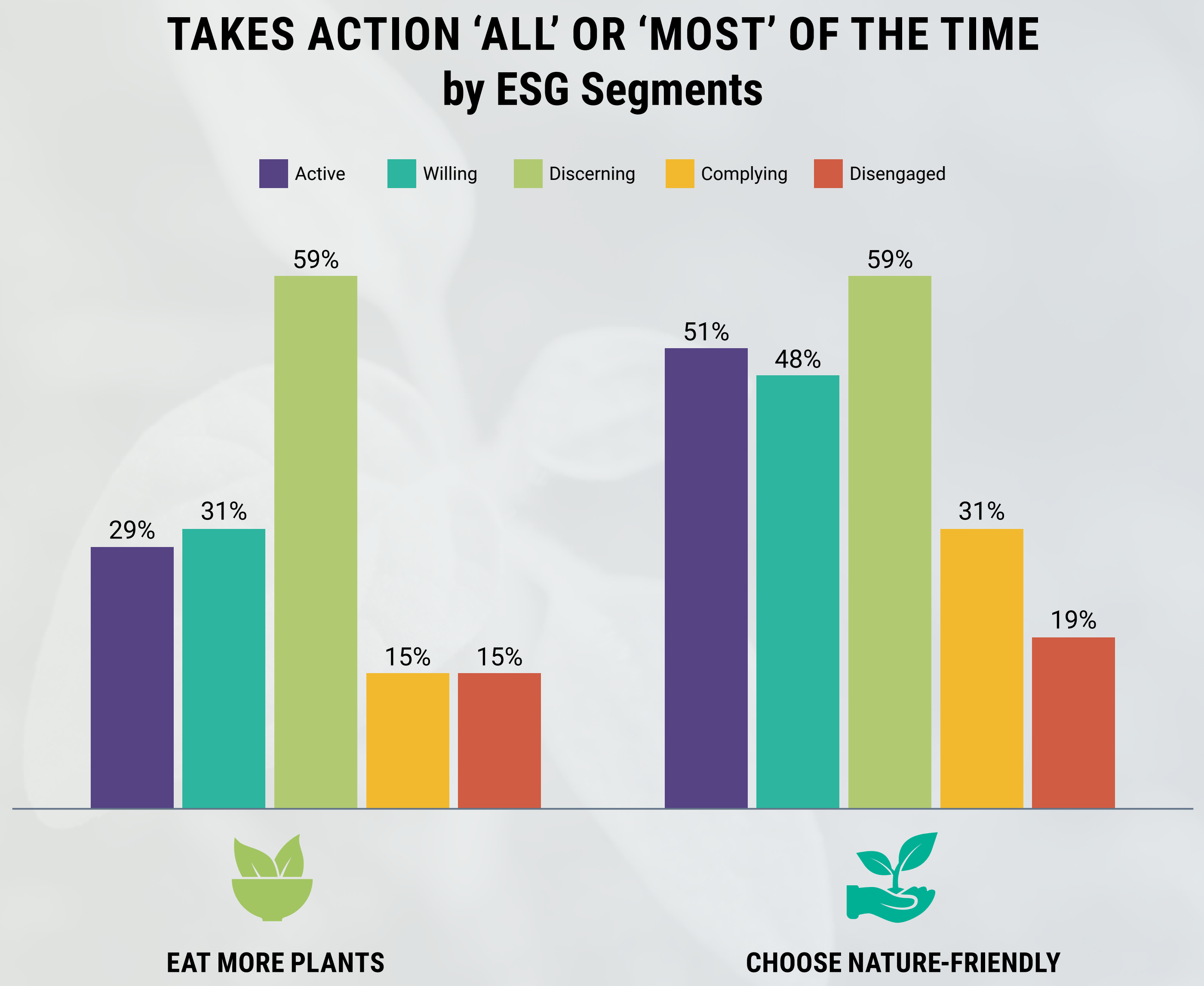
# The **Discerning** group outperforms other segments for the lesser-adopted environmental behaviors, namely Eat More Plants and Choose Nature-Friendly, possibly due to their higher-income lifestyles.




**Q:** When given the opportunity, how often (if at all) did you personally do each of the following in the past 12 months?
**Base:** Active: 440; Willing: 194; Discerning: 370; Complying: 506; Disengaged: 496

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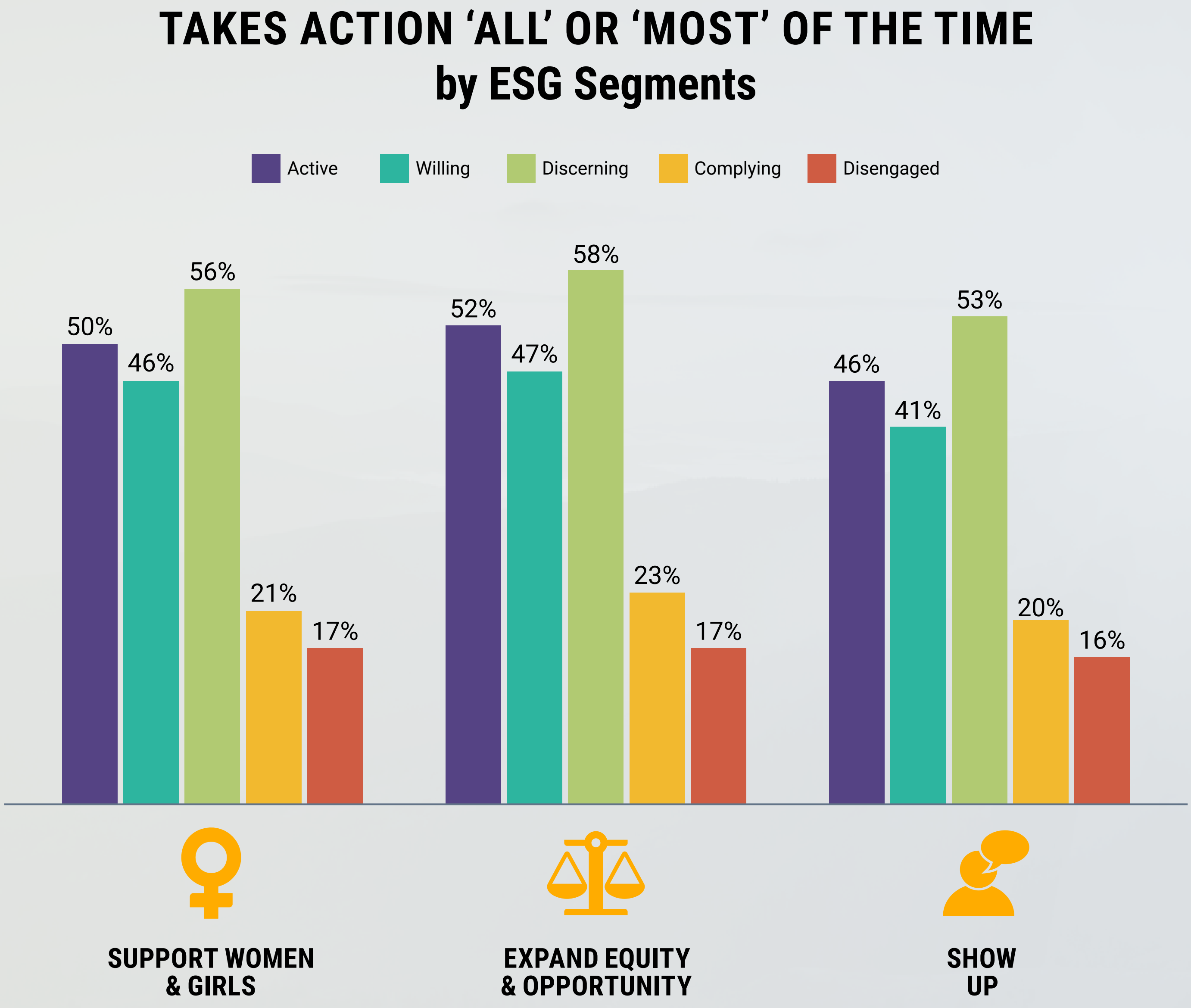
# The **Discerning** segment outperforms others on the societally-focused behaviors – a significant drop-off occurs for both **Complying** and **Disengaged** segments.

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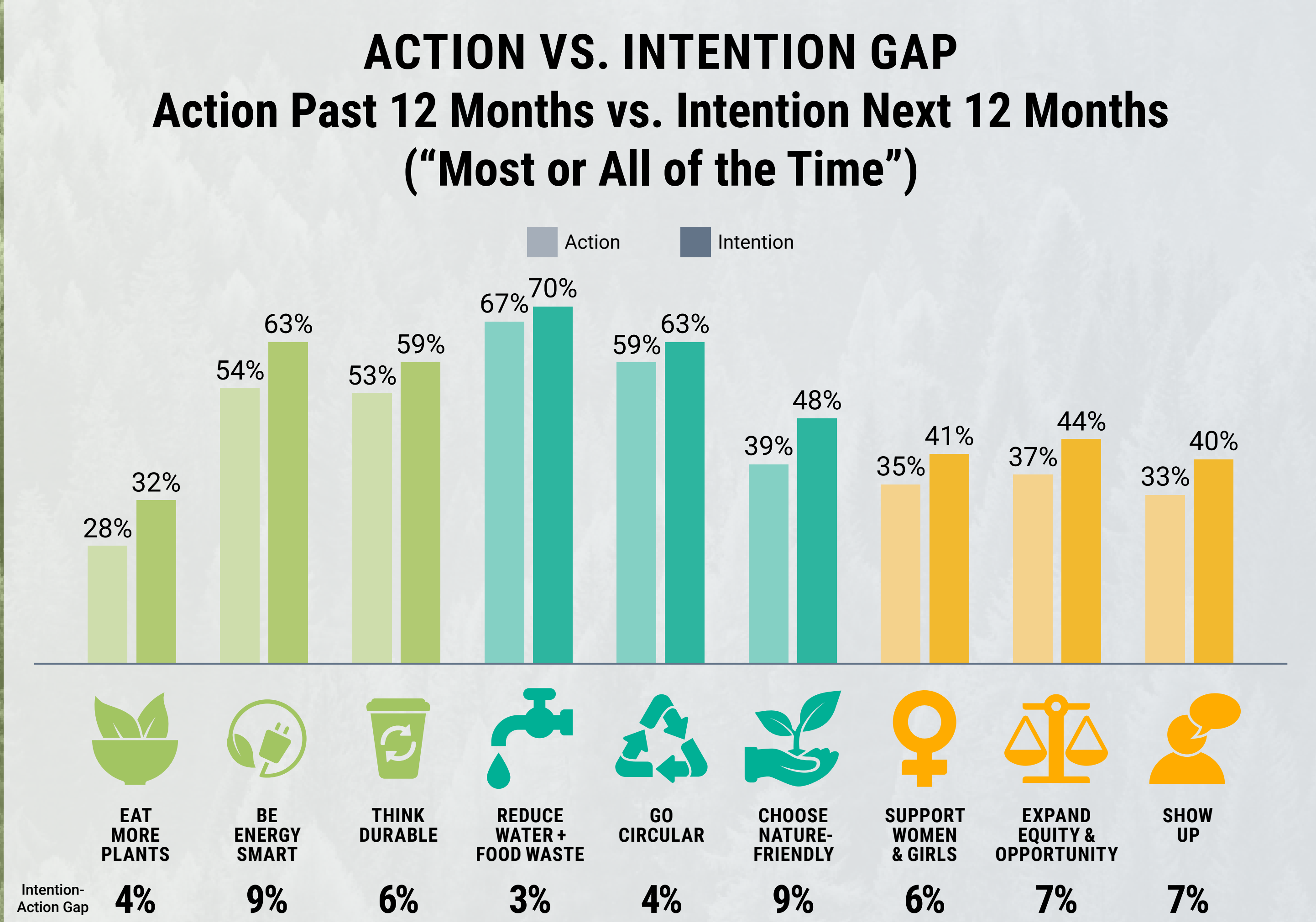
# The Intention-Action gap continues to be less than 10% when asking about specific Sustainable Behaviors (ie. Be Energy Smart), suggesting that people have a firmer grasp on their personal capabilities and aspirations at the micro-level. Brands have an opportunity to create more opportunities for action.




**Q:** Over the next 12 months, how often do you intend to do each of the following?
**Q:** When given the opportunity, how often (if at all) did you personally do each of the following in the past 12 months?
**Base:** : (n=2006)

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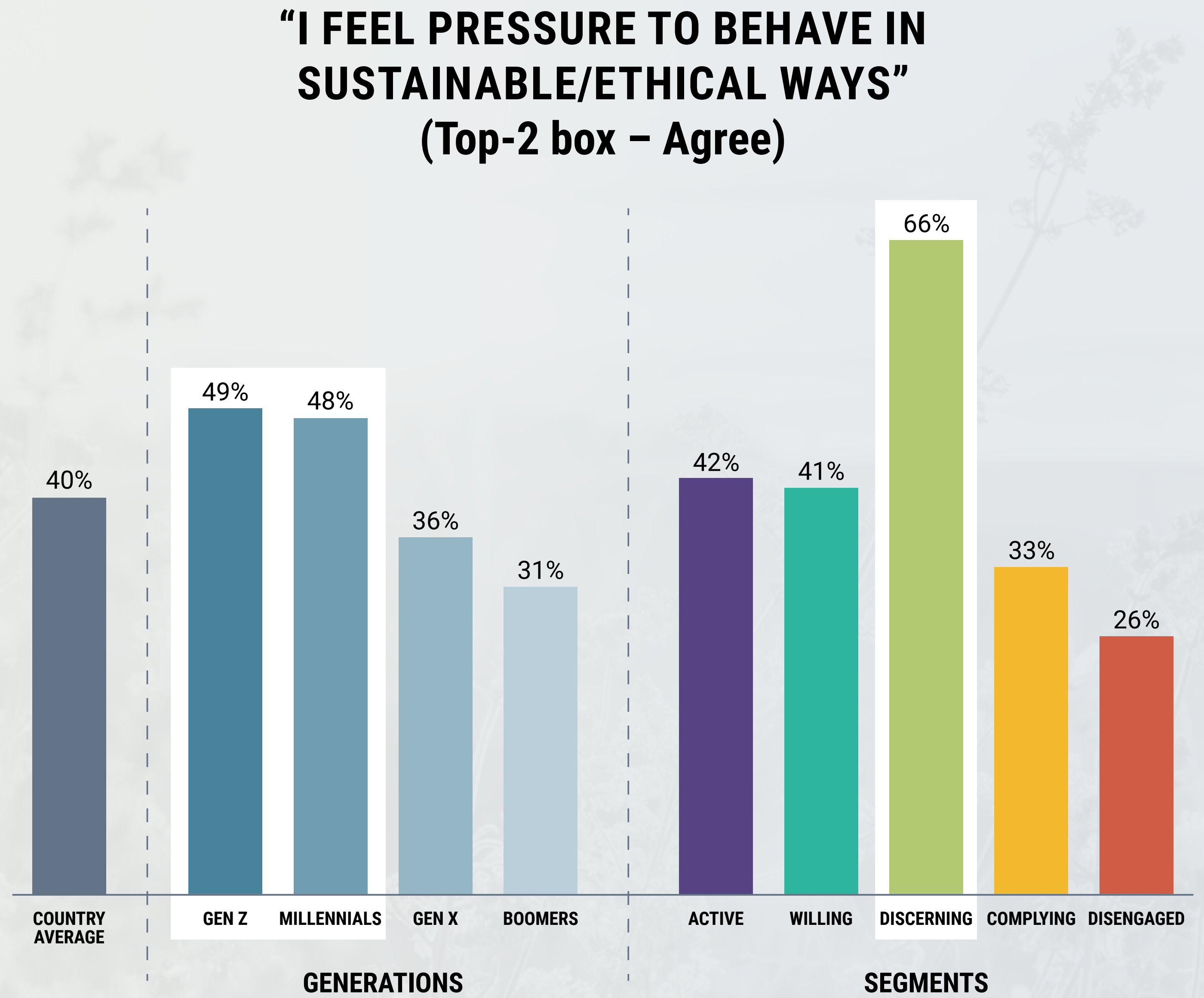
# The **Discerning** Segment feels the most pressure to behave sustainably; this correlates with **Gen Z** and **Millennials** being more represented within this group.




**Q:** How much do you agree or disagree with each of the following statements?
**Base:** 2006; Gen Z: 264; Millennials: 644; Gen X: 566; Boomers: 532;
Democrat: 830; Republican: 580; Independent: 427;
Active: 440; Willing: 194; Discerning: 370; Complying: 506; Disengaged: 496

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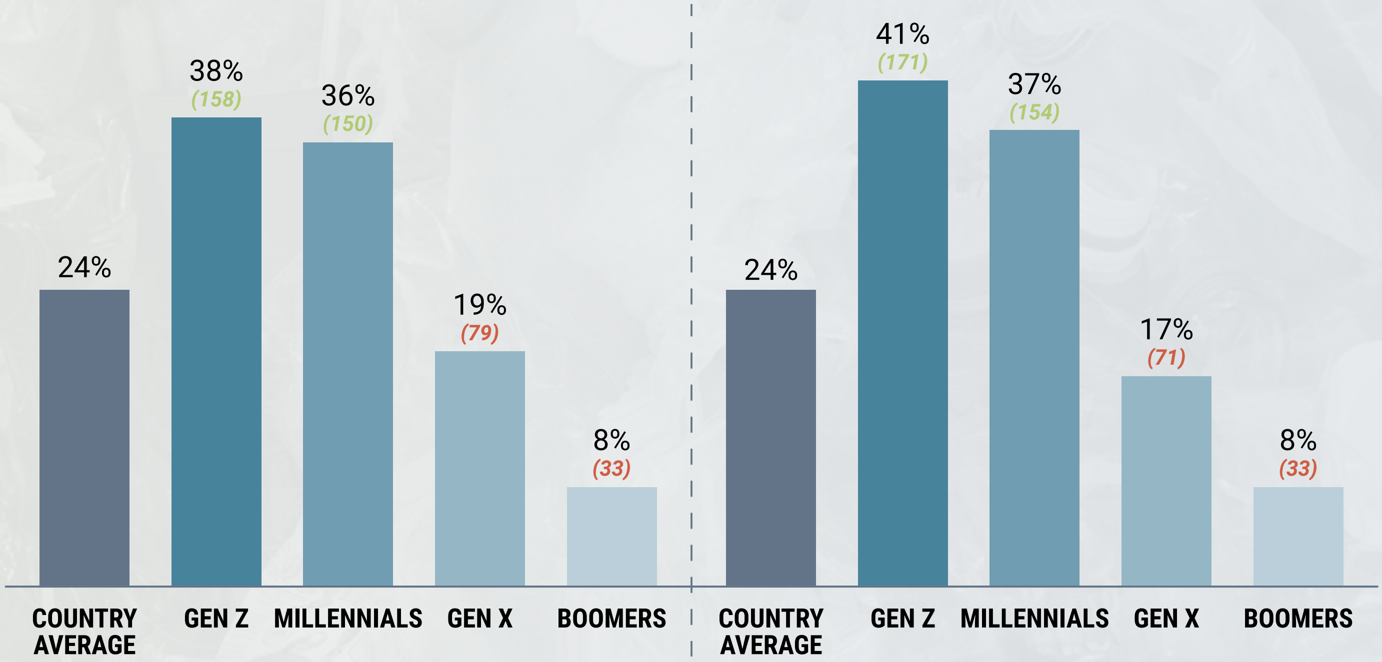
# Consumers are taking action at shelf: Close to 40% of Gen Z and Millennial consumers have already switched brands for ones that are more environmentally and socially responsible.

## "IN THE PAST 6 MONTHS, I HAVE SWITCHED A BRAND I USUALLY BUY FROM BECAUSE IT'S NOT…"

**Environmentally Responsible (Top-2 box – Agree)** | **Socially Responsible (Top-2 box – Agree)**




**Note: An index of 120 or more is significantly higher than total, and 80 or below is significantly lower**

**Q:** How much do you agree or disagree with each of the following statements?
**Base:** 2006; Gen Z: 264; Millennials: 644; Gen X: 566; Boomers: 532

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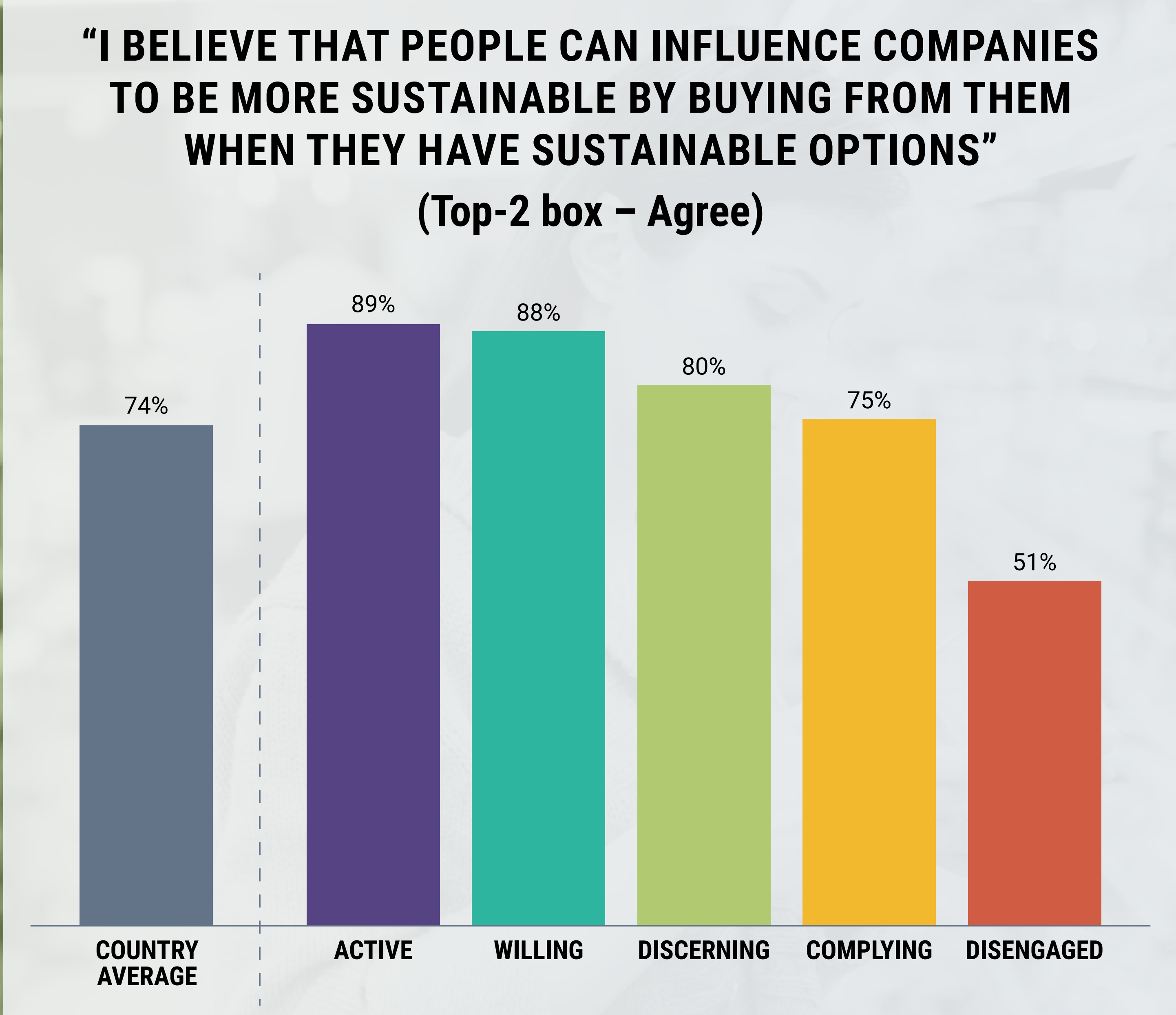
# There's a general consensus that individuals can influence company action through their purchasing choices.

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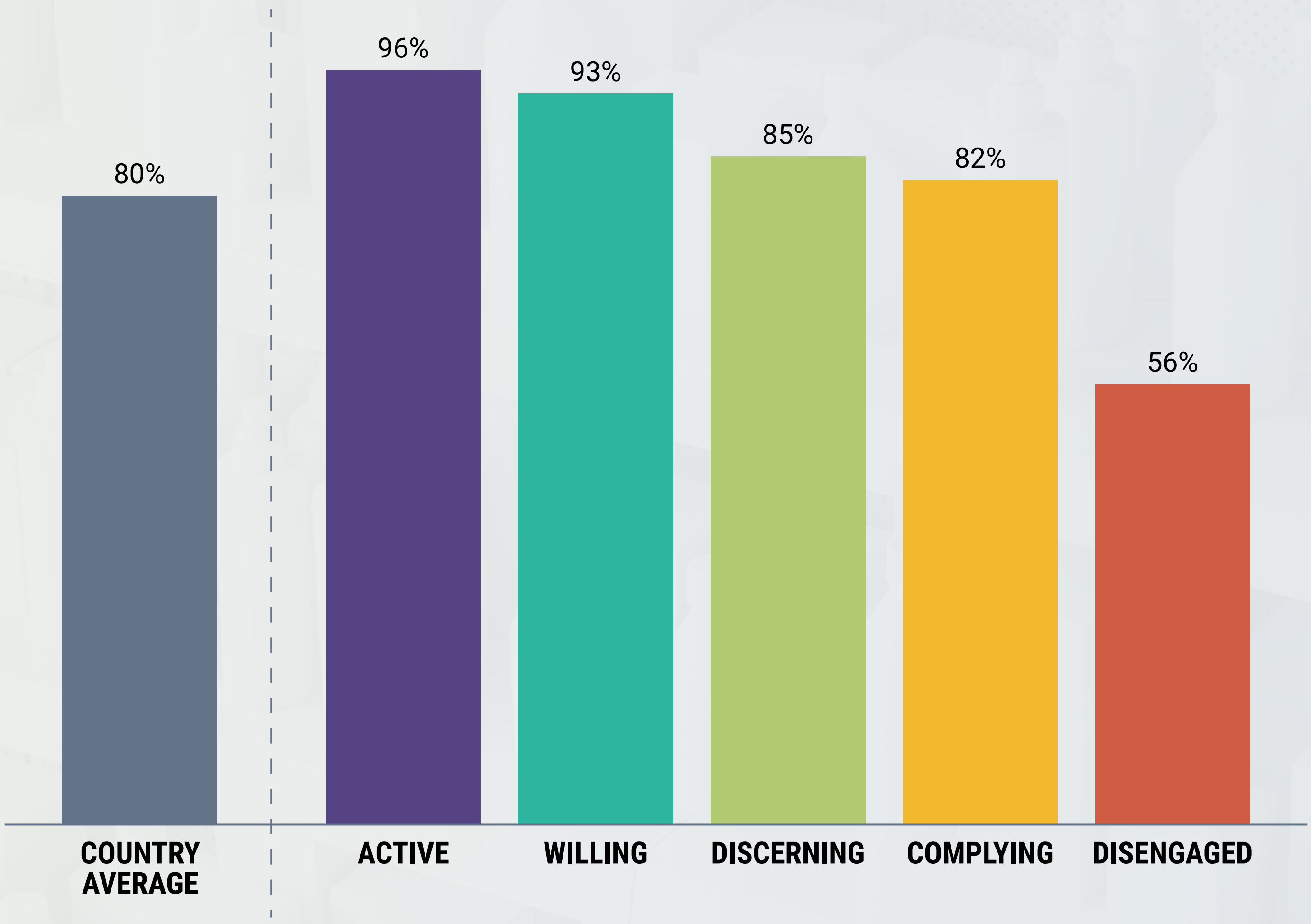
# Consumers across all segments want to know what companies are doing around sustainability.

## "IT'S IMPORTANT FOR COMPANIES TO SHARE THEIR SUSTAINABILITY EFFORTS WITH THEIR CUSTOMERS"

**(Top-2 box – Agree)**




**Q:** How important is it for companies to share their sustainability efforts with their customers?
**Base:** 2006; Gen Z: 264; Millennials: 644; Gen X: 566; Boomers: 532;
Democrat: 830; Republican: 580; Independent: 427;
Active: 440; Willing: 194; Discerning: 370; Complying: 506; Disengaged: 496

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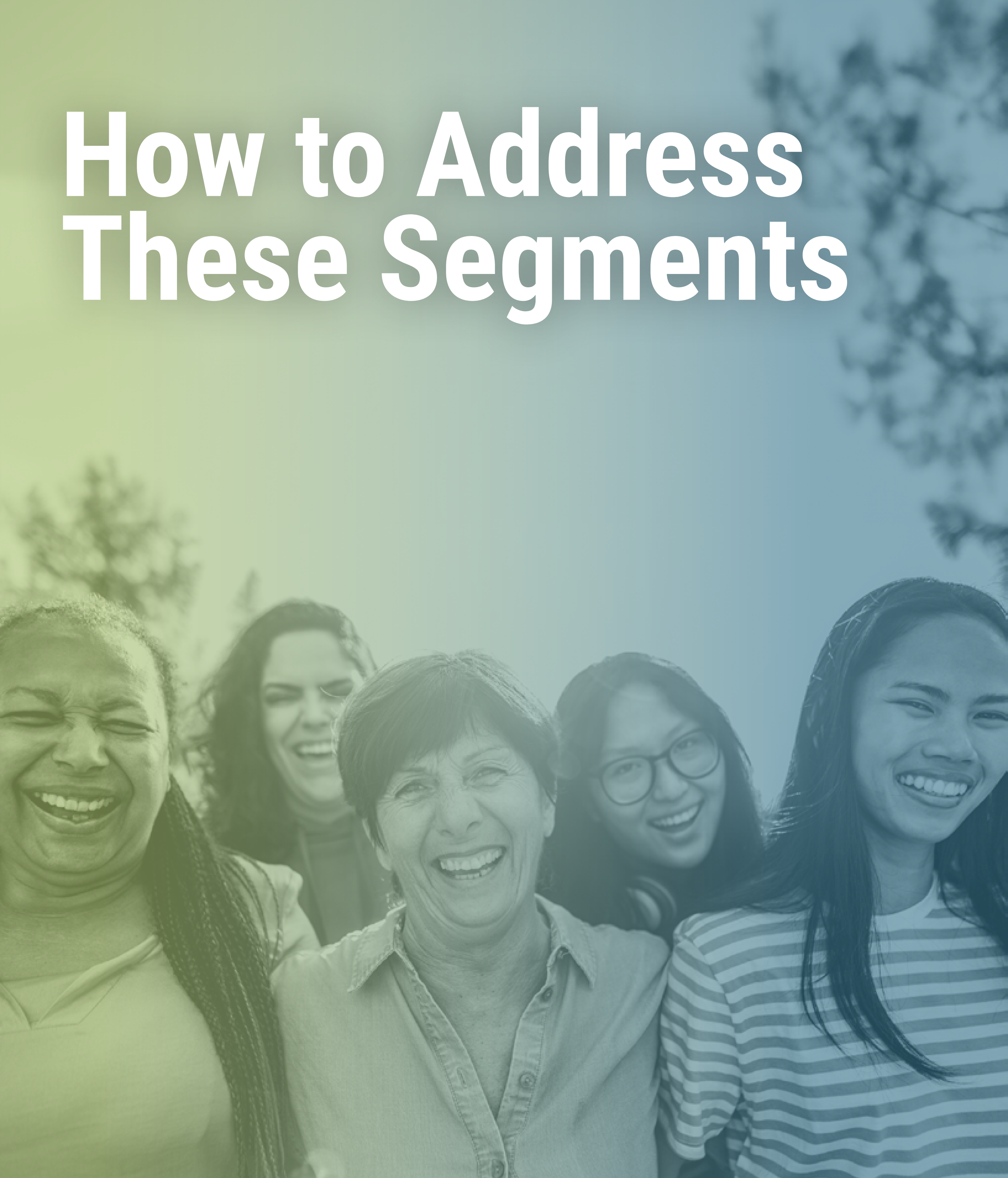
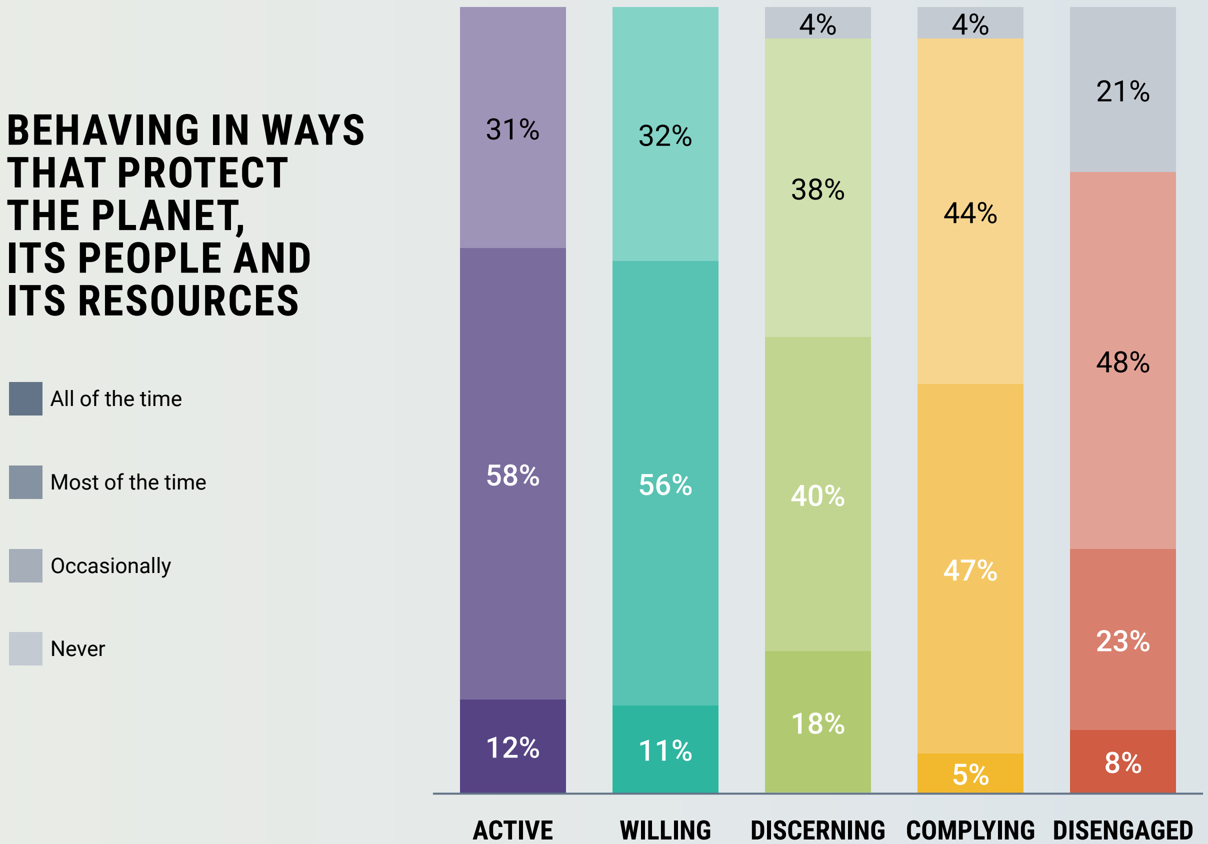
# How to Address These Segments



# 1 DON'T IGNORE THE COMPLYING SEGMENT

Though it's comparatively less, this segment has strong potential. Over half of the Complying segment say they're willing to switch brands explicitly for a more sustainable version of that product, and 96% see themselves as people who behave in ways that protect the planet, its people, and its resources at least occasionally.

This segment mostly engages in sustainable behaviors that are more mainstream; brands have the capability to increase the mainstream appeal and adoption of sustainable behaviors so that those table stakes for "not getting called out" will be higher.

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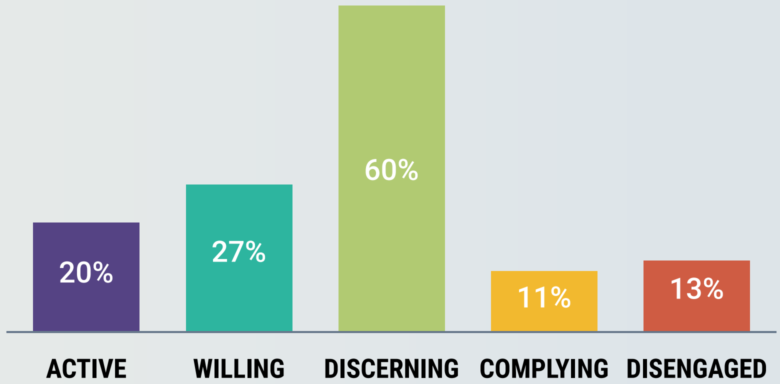
# 2 CONNECT WITH DISCERNING CONSUMERS BY SHOWING THEM MEASURABLE IMPACT

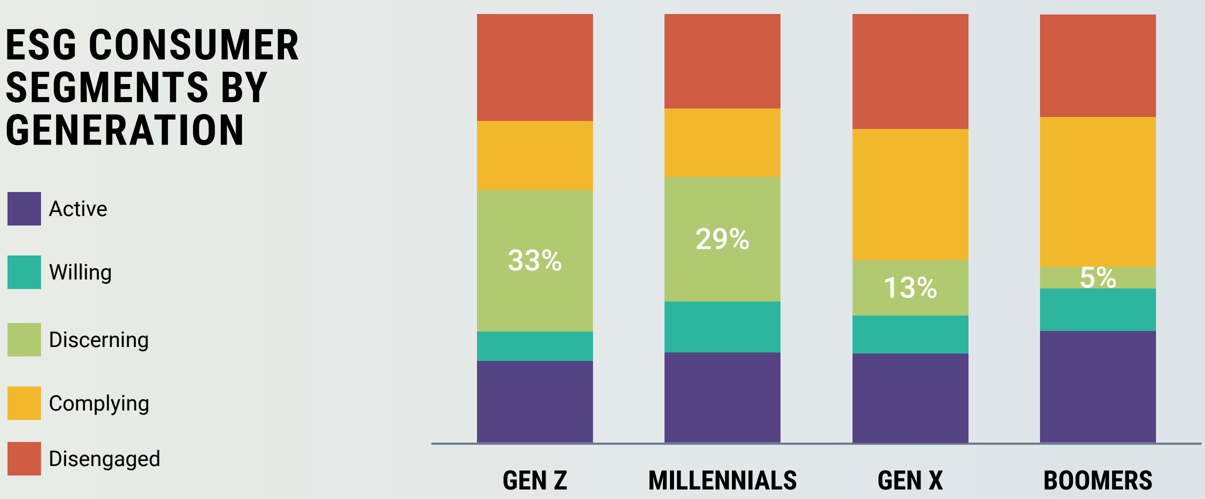
They feel a great deal of guilt and pressure around their personal impact, and are willing to spend money to help assuage their guilt.

This is a powerful group as they are younger, have more discretionary income, and are willing and able to move beyond what's currently the norm as far as individual sustainable behavior goes and with regards to switching brands. They are most likely to be the ones driving culture change and acting as early adopters for new sustainable options. Use them as trendsetters, but first show them that your solutions are meaningful and impactful.

**"IN THE PAST 6 MONTHS, I HAVE SWITCHED A BRAND I USUALLY BUY FROM BECAUSE IT'S NOT ENVIRONMENTALLY RESPONSIBLE"**




**ESG CONSUMER SEGMENTS BY GENERATION**

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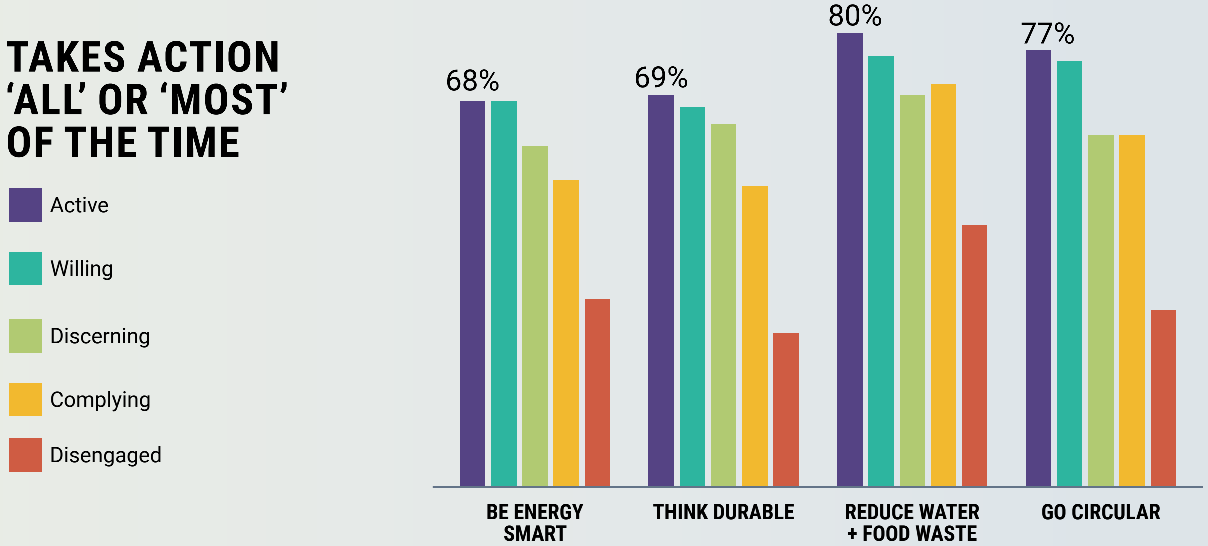
# 3 ACTIVES AND WILLINGS ARE READY TO PARTICIPATE AND ADVOCATE – AS LONG AS IT'S WITHIN REACH

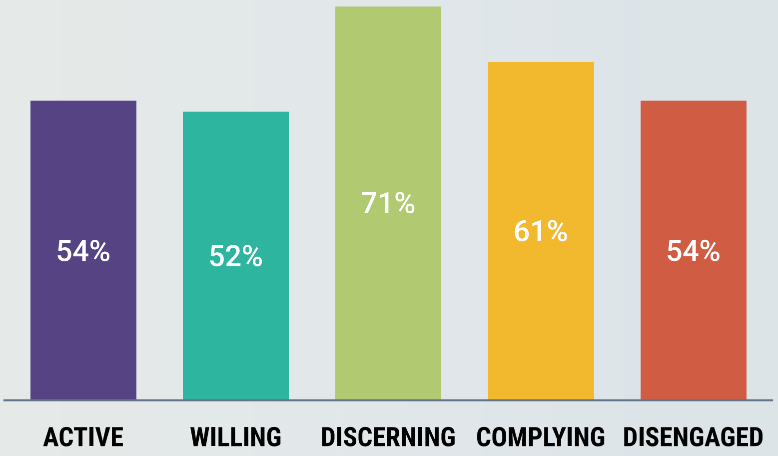
They are looking for accessible options from brands that match their values and are eager and ready to act.

They are some of the *least* suspicious of companies using environmental and social messages to get them to buy; however, they will protest organizations that they see as practicing unethical behaviors, so it's important to show them brand efforts with honesty and transparency.

## TAKES ACTION 'ALL' OR 'MOST' OF THE TIME




## "I AM SUSPICIOUS OF COMPANIES USING ENVIRONMENTAL AND SOCIAL MESSAGES TO GET ME TO BUY"

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