GLOBAL CONSUMER ARCHETYPES TO FOSTER SUSTAINABLE LIVING

December 2023

CONSUMERS INTERNATIONAL
COMING TOGETHER FOR CHANGE

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CONTENTS

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Saroja Sundaram, Citizen Consumer and Civic Action Group, India:

"I congratulate Consumers International for coming out with this comprehensive, timely, study report. Global consumers' sentiments about sustainability have been captured very well in the report. As the study mentions, support from the governments and businesses on the key elements of availability, affordability and accessibility are a prerequisite to enable sustainable living for consumers."

Patrick Elf, Middlesex University London:

"This comprehensive new report by Consumers International and GlobeScan provides important consumer insights that will provide important direction for policy makers and the business community alike. With its mixed-methods approach bringing together survey and interview approaches, and its aim to enable more sustainable consumption by supporting consumers around the world to make more sustainable choices, it offers a both welcome and urgently needed step into the right direction."

ABOUT CONSUMERS INTERNATIONAL

Consumers International is the membership organisation for consumer groups around the world. We believe in a world where everyone has access to safe and sustainable goods and services. We bring together over 200 member organisations in more than 100 countries to empower and champion the rights of consumers everywhere. We are their voice in international policy-making forums and the global marketplace to ensure they are treated safely, fairly, and honestly. We are resolutely independent, unconstrained by businesses or political parties. We work in partnership and exercise our influence with integrity, tenacity, and passion to deliver tangible results.

ABOUT GLOBESCAN

GlobeScan is a global insights and advisory consultancy working at the intersection of sustainability, behaviour change, and trust. We partner with leading companies, NGOs, and governmental organisations to deliver insights that guide decision-making and build strategies that contribute to a sustainable and equitable future. Established in 1987, we have offices in Cape Town, Hong Kong, Hyderabad, London, Paris, San Francisco, São Paulo, Singapore, and Toronto. GlobeScan is a participant of the UN Global Compact and a Certified B Corporation.

FOREWORD FROM CONSUMERS INTERNATIONAL

Up to 70 percent of greenhouse gas emissions can be reduced through interventions focused on consumption (IPCC). As advocates for consumers, we want a fast, fair and accountable transition to happen. Change happens faster when it is with and for people. Far greater public insight and understanding is needed about consumer interests, needs and rights, to build real pathways for everyone.

This new study shows the vast global demand for change: a green transition is desired by the majority of consumers and there is significant support for making the green choice the default choice. The study also explores what pathways people want and value, and the trade-offs, triggers and barriers they manage.

Finally, it suggests how businesses and governments can actively help people, with respect for their rights. People expect that governments and businesses take the lead to build a sustainable marketplace that meets consumers' legitimate needs for affordability, accessibility, and safety.

The study is explorative with the goal of generating robust discussion, analysis and action on sustainable living, consumer rights, and the nature of consumption during a time of crisis and transition. Exploring crucial questions together can set us all on the pathway toward sustainable living.

KEY FINDINGS AND RECOMMENDATIONS

KEY FINDINGS

We conducted a bespoke segmentation from data collected on almost 30,000 consumers from 31 markets and ran deep-dive interviews across 31 households in five countries — Brazil, China, India, Kenya, and Spain – on questions surrounding the aspiration-action gap for sustainable living. The findings from this study high-light:

94%

Ninety-four percent of consumers support the shift to a green economy. This needs to be a systemic change led by governments and businesses. Over 80 percent of consumers hold governments, businesses, and international institutions responsible for implementing the changes needed. This view is shared across all countries and consumer segments. Consumers also expect these stakeholders to hold each other accountable, to collaborate, and ensure support for sustainable living. A reliance on individual behaviour changes alone to enable a green transition will likely lead to incremental change due to a lack of capacity to act individually, not only for economic reasons but also for social, political, and practical reasons.

87%

Eighty-seven percent of consumers say they are feeling the impacts of the rising cost of living, and therefore the high upfront costs of products and services have an even greater influence over other purchase decisions, and this is especially true for the identified Savers segment in this study. **Consumers need support from businesses and governments to make large investments in sustainable living.** Examples of this support include grants, subsidies, low-interest loans for solar panels, retrofitting homes, purchasing electric vehicles and building the associated charging infrastructure, etc. While consumers want more sustainable options, the cost-of-living impacts mean they are less able to express this in the marketplace. Without greater support, consumers will not be able to drive the uptake of certain greener choices. This further underscores that the responsibility for transitioning to a greener economy cannot be left solely to consumer purchase decisions.

Consumers we interviewed are supportive of the default choice being green. Offering a default choice that is green removes the need for consumers to search for and compare different items for just one purchase parameter. However, the incorporation of sustainable defaults will also need to **meet the wider legitimate needs of consumers**, enshrined in the UN Guidelines for Consumer Protection. Even consumers who identify themselves as environmentally conscious will not sacrifice certain priorities and lifestyles to lower their impact, for example, taking public transport where it is perceived as inadequate or unsafe. Addressing these legitimate needs within default sustainable products and services will further increase trust and uptake.

KEY FINDINGS

There are ways to appeal to consumers by highlighting other benefits of sustainable products and services like style, performance, and technology – this is particularly important for consumers who are less engaged in or motivated by sustainability. In particular, consumers who were identified as part of the Seekers and Savers segments are more enthusiastic about technology and could drive more adoption of low-carbon technologies where it appeals to their aspirational or legitimate needs. Electric vehicles already appear to be identified as "desirable," "stylish," and "fashionable" by a growing number of consumers, especially the Seekers segment.

Consumers need to feel a sense of empowerment to adopt sustainable behaviours; feeling that their actions do not matter is a barrier to doing more. **Greater awareness of sustainable lifestyles and their positive impacts encourages consumers to do more** – this is particularly true for those who feel they are already doing a lot but may not be engaging in the most impactful actions (i.e., Conscious Consumers segment) and consumers who are reluctant to make big changes without an obvious need. Consumers will also feel more empowered if they have greater access to and awareness of the sustainable options available to them. Infrastructure that makes action easy, convenient, reliable, and safe will help turn sustainable behaviours into a societal norm that even those less engaged in sustainability will find feasible and appealing.

Tailoring interventions to meet the needs and attitudes of different consumer segments is likely to result in greater uptake of sustainable living. This study identified that consumers can be segmented along the lines of what they need most, i.e., greater empowerment (Conscious Consumers), increased desirability (Seekers), normalising the opportunity (Supporters), and making it affordable and accessible (Savers).

This report sets out segment-specific recommendations for governments and businesses to support consumers.

RECOMMENDATIONS TO HELP GOVERNMENT AND BUSINESS UNLOCK SUSTAINABLE BEHAVIOURS AMONG CONSUMERS

Now is the time for governments and businesses to double down on actions that help enable a green transition and sustainable lifestyles through systemic change. The climate is at a tipping point and consumers are reaching the limit of what they feel able to do, so there is no time to wait or rely on consumers (who are often reacting to market conditions).

To enable widespread uptake of sustainable behaviours, businesses and governments should focus on the creation and implementation of sustainable defaults – solutions that are sustainable by design and often the prominent (or only) choice, e.g., shifting to renewable sources of power only, eliminating petrol/diesel cars, etc. This will enable all consumers, whether interested in sustainability or not, to make a difference and enable action among those who have little ability to change their lives.

However, it is imperative to ensure these defaults also meet other consumer needs, e.g., performance, cost, style, etc., and that the consumer does not face any negative repercussions. Consumers are currently very sensitive to costs and therefore new policies and business offerings that increase costs, whilst having good intentions, may result in significant backlash. Consider where the costs of new measures could fall and where savings could be made to counteract this.

OVERARCHING RECOMMENDATIONS FOR GOVERNMENTS

- **Make sustainability options the default options** with consideration for the legitimate needs of consumers, including but not limited to accessibility, safety, and affordability.
- **Investment in infrastructure** is crucial for all segments across countries, e.g., improving cycling routes, safer public transport, community installation of solar panels, energy-positive homes, and recycling of consumer goods.
- **Adapt interventions to local and regional contexts and demands**, such as where national goals may not be working practically locally for consumers. Local consumer research can help build bottom-up solutions to challenges on circularity, green mobility, and home energy usage, and communication campaigns can be personalised for local needs and values.
- Provide **education on which sustainability behaviours are the most impactful and information on how individuals can get involved**, as there is a disparity between action and impact.
- **Support and invest in innovation in consumer technology for sustainable and future-oriented solutions**. For segments like Seekers, innovative solutions are highly appealing and could help them adopt more sustainable practices.

OVERARCHING RECOMMENDATIONS FOR BUSINESSES

- **Offer sustainable products and services as the default**. It should increase uptake and help reduce a business' scope of environmental impacts. This will require adaptations throughout the product lifecycle, especially at the design stage and may involve new/alternative business models to incorporate sustainable services.

- **Promote re-commerce practices in your businesses**. Circular behaviours are being practiced but uptake is slow overall across all segments. Look at enabling these behaviours with circularity principles embedded in products and services.

- **Ensure there are affordable and accessible options for more sustainable products and services**. Other financial support can include offering incentives to switch to more sustainable products or disincentivising unsustainable products. However, it will be key to ensure consumers' needs are still met.

- **Raise consumer awareness of sustainable living opportunities.** Utilise advertising, influencers, social media, and product labelling to communicate **new aspirations for living sustainably, supported by information** on impacts of purchasing sustainable products and services. Make communications easy to navigate and understand.

- **Promote other benefits** linked to sustainable consumption such as health, style, technology, and performance. For example, to help reduce the amount of consumption, highlight durability attributes of products, but for those who are more materialistic, signpost them to better options.

INTRODUCTION AND OBJECTIVES

CONSUMER RIGHTS AND SUSTAINABLE LIFESTYLES

Consumers are the largest group of actors in the global economy and are therefore essential to ensuring global action is successful in safeguarding our natural environment. For the world to reach net zero, consumers everywhere will have to make fundamental changes in the **food they eat, how they travel, heat, cool, and power their homes, and the products they buy.** It is not a fair responsibility to place on consumers where the current structure of the marketplace favours unsustainable options.

Consumers can play a greater role only when they are given more rights – for example, when the sustainable choice is made to be the easy choice. A rights-based view of the marketplace is therefore crucial to understanding and unlocking consumers' ability to drive faster and more meaningful system change. Internationally agreed principles on consumer rights aim to ensure people's needs are met effectively. Adopted by the UN General Assembly, the Guidelines for Consumer Protection cover a range of issues including the promotion of sustainable consumption patterns.

WHAT DO CONSUMERS NEED?

The guidelines are centred around meeting 11 'legitimate needs' of consumers.

For more information please see:
https://unctad.org/topic/competition-and-consumer-protection/un-guidelines-for-consumer-protection

CONSUMER INSIGHTS SERIES

Consumers International is investing in consumer insight generation to support our mission and global networks in 2023. The Consumers International Consumer Insights Series will bring together a multi-stakeholder group of experts to advance understanding of consumer behaviours, values and needs.

UNIQUE

1. **Provides a consumer rights lens:** Adopting a consumer principles-based approach to gain insights offers a unique understanding of consumers' needs, values, and experiences in the marketplace. This approach aims to focus on deep-rooted societal issues such as fairness, while avoiding commercial bias. Ultimately, these insights can benefit businesses and policymakers by identifying barriers to greater consumer trust.

2. **Builds on extensive data collected by our Members on the ground in over 100 countries:** on a range of issues from consumer complaints, real prices in the marketplace, experiences in online/offline environments, values and views on new products and services. Also helps to uncover ‘edge cases’ where interventions may not be working as effectively as elsewhere.

GOALS

- Highlight new and relevant research on consumer trends
- Share consumer insights from our Member and expert network – edge cases and perspectives from network of NGOs, government and others looking at the marketplace
- Provide a safe platform to share and hear feedback on new ideas
- Identify new trends and issues for consumers
- Potential for dialogue and exchange
- Build research projects which focus on consumer insight for public good.

INTRODUCTION TO THE RESEARCH

People around the world are increasingly affected by a host of environmental and societal challenges. The rising cost of living, escalating impacts from climate change, the growth of digitisation, and advanced technologies are all impacting consumer lifestyles now and in the future. Addressing these issues requires collective, transformational action – from governments, businesses and industries, and consumers.

Citizen concern about sustainability has increased steadily over the last five years, despite recent events including COVID-19, the cost-of-living crisis, and conflicts (GlobeScan 2023). However, the ability and willingness of people to consume more sustainably remains unclear.

Across regions, we have observed consumers' intent to live sustainably, however their actions toward this have been limited. Affordability, awareness, and accessibility have been identified as key barriers to living sustainably, but what are the trade-offs consumers need to make and what needs to be done to enable more sustainable living?

In September 2023, Consumers International partnered with GlobeScan, an international insights and strategy consultancy, to address these questions surrounding the aspiration-action gap and bring the voice of consumers to policy-makers, business leaders, and civil society advocates.

FINDINGS FROM GLOBESCAN'S HEALTHY & SUSTAINABLE LIVING RESEARCH, %, AVERAGE OF CONSUMERS IN 31 MARKETS, 2023

Worries about war and conflict are at the forefront of global concerns, but apprehensions about climate change and water pollution follow closely behind.

76% feel affected by climate change.

87% feel affected by cost-of-living increases and the main barrier for not taking more action to protect the environment is cost.

68% believe they should consume less to protect future generations.

RESEARCH OBJECTIVES AND DESIGN

TOGETHER, GLOBESCAN AND CONSUMERS INTERNATIONAL DESIGNED A PROGRAMME TO MEET THE FOLLOWING OBJECTIVES:

Main objective: To deliver consumer insights that will inform and empower policy and business decision-making that will:

- enable more sustainable consumption;
- support consumers around the world to make sustainable choices;
- empower people to live more sustainable lifestyles.
- champion the globally recognised consumer protection need for sustainable consumption patterns.

To achieve this core objective, GlobeScan and Consumers International aimed to do the following:

- Identify the trade-offs consumers are making relating to sustainable lifestyles and what role the cost-of-living crises play.
- Examine the scenarios and triggers different consumer segments need to adopt more sustainable consumption, focusing on low-carbon technology adoption.
- Understand what role consumer rights play in building trust in the marketplace among consumers toward sustainable lifestyles.
- Explore how different marketplace actors can make sustainable lifestyles easy, affordable, and desirable for consumers.

To help bring the consumer voice to the policy conversation and to achieve these objectives, Consumers International and GlobeScan embarked on two key phases of research:

1. Utilising and repurposing pre-existing global research conducted by GlobeScan to create a **consumer segmentation** which can help explore the hypotheses
2. Conducting a small number of exploratory **in-depth interviews** with consumers in five key markets to add depth to the segmentation findings and explore more specific needs and support

The research focuses on the topic of sustainable living – throughout the research, we have considered UNEP's definition of Sustainable Living:

"Sustainable Lifestyles are considered as ways of living, social behaviours and choices, that minimise environmental degradation (use of natural resources, CO_2 emissions, waste, and pollution) while supporting equitable socio-economic development and better quality of life for all."

Sustainable living will require changes in all lifestyle domains: food, mobility, housing, leisure and consumer goods. This research focused on aspects within select domains: mobility, home energy consumption and consumer goods (mobile phones). Hence, study recommendations are limited to these aspects but highlight well the potential and need for further efforts.

Note: This research is exploratory by design. It intends to provide directional findings to guide policy and decision-makers. The foundational insights shared are designed to spark discussion and debate around what support businesses and governments can offer to progress developments and enable sustainable lifestyles. It can be used to identify further topics of exploration and research.

SEGMENTATION OVERVIEW AND CONTEXT SETTING

CONSUMER SEGMENTATION – OVERVIEW

Using GlobeScan's pre-existing 2023 *Healthy & Sustainable Living* research, we used advanced statistical analysis to develop a psychographic and behavioural segmentation to better understand how to enable sustainable consumption. Four distinct consumer segments were identified based on their attitudes toward sustainability, the sustainable actions they take, and their openness to technology as a solution.

The segmentation provides a global view of consumer attitudes toward sustainability and is intended to advance the discourse on personalised interventions to increase engagement toward sustainable living. It provides broad guidelines on what influences and motivates these four distinct consumer groups toward more sustainable consumption. We highlight key attitudes and behaviours that differentiate each segment, the different support and approaches that motivate these segments, and potential ways to engage these groups for more sustainable living.

BUILDING THE SEGMENTATION

- ATTITUDES TOWARD SUSTAINABILITY
- REPORTED SUSTAINABILITY RELATED BEHAVIOURS/ ACTIONS
- OPENNESS TO TECHNOLOGY

OUTCOME OF SEGMENTATION ANALYSIS

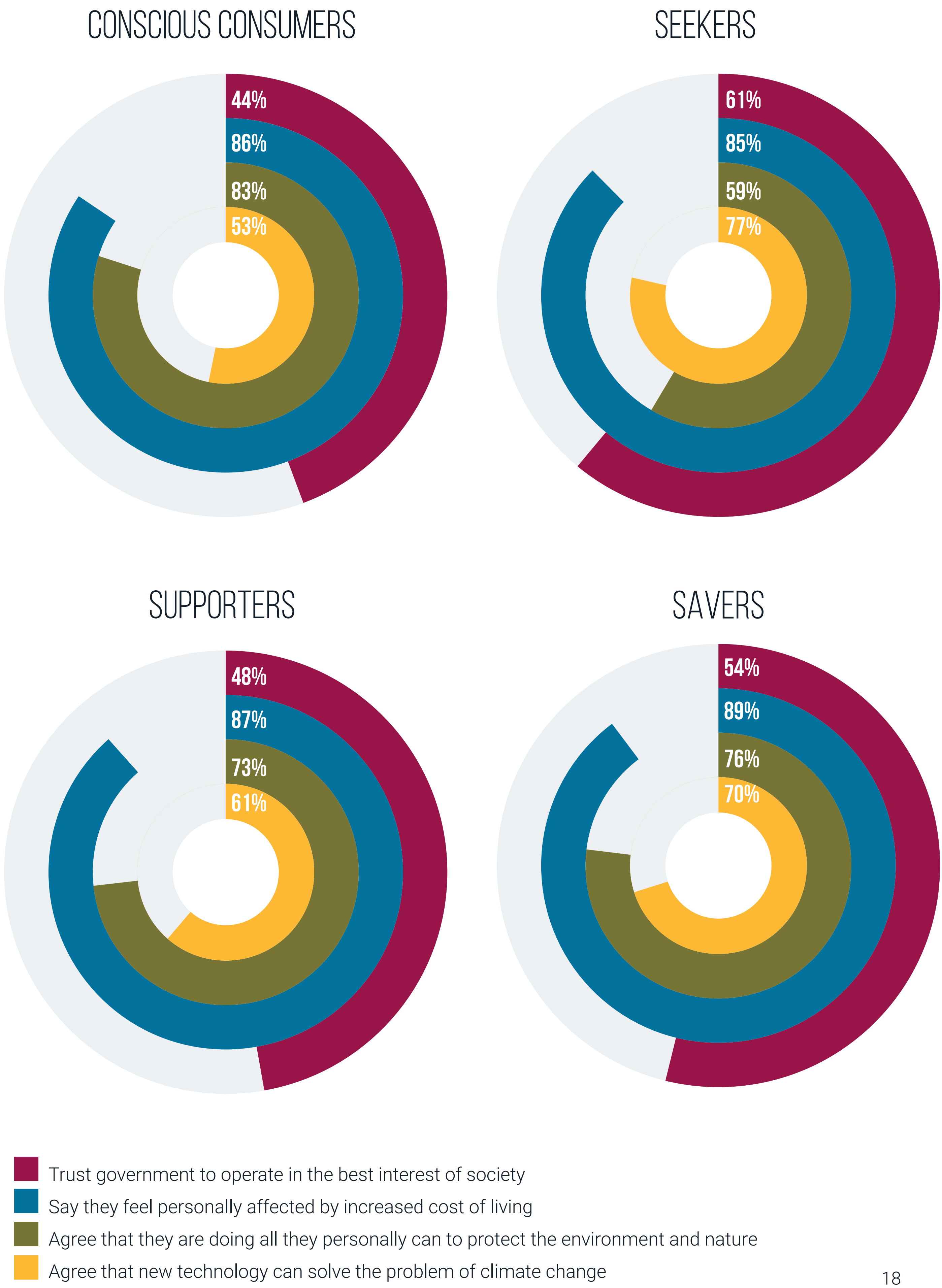
- **CONSCIOUS CONSUMERS** – **27%** of the respondents
- **SEEKERS** – **27%** of the respondents
- **SUPPORTERS** – **22%** of the respondents
- **SAVERS** – **24%** of the respondents

ATTITUDES EXPLORED

- TRUST IN INSTITUTIONS
- BARRIERS TO SUSTAINABLE LIFESTYLES
- PERCEPTION OF PERSONAL IMPACT OF ACTIONS
- EMPOWERMENT/ AGENCY AND ENGAGEMENT ON SUSTAINABILITY
- ROLE OF GOVERNMENT/ BUSINESS ON SUSTAINABILITY ISSUES
- SUPPORT/ OPPOSITION FOR CLIMATE SOLUTIONS

Approach: To minimise question response biases (e.g., straight lining), ratings were centred/standardised. The centred data was analysed using Principal component analysis to explore latent dimensionality/patterns. The four segments were produced using K-means cluster analysis. The segmentation quality/robustness was tested using Discriminant Function Analysis with 95% of cases correctly classified.

CONSUMER SEGMENTATION



CONSCIOUS CONSUMERS – OVERVIEW

CONSCIOUS CONSUMERS

MEET ADRIANA

A woman living in the suburbs of Brazil with her teenage children. With the hot summers, she worries about climate change and the future her children will have. She is strong-minded and strives to make a difference. She wants government and businesses to step in and do more to address climate change. She is considerate of what she buys, preferring things that are made sustainably, that are high quality, and reusable. She would love to install solar panels, but it is a challenge because she lives in a condo.

ACTIONS

Actively trying to be more sustainable at home and while they shop, but not always engaging in the most impactful actions, e.g., high levels of recycling but little use of public transport.

FEELINGS OF PERSONAL RESPONSIBILITY

High

TRUST IN GOVERNMENT AND BUSINESS

Low

BARRIERS AND MOTIVATORS

Have a strong sense of personal responsibility but already feel like they are doing all they can. Have limited awareness of what actions have most impact. Face social, political, and practical obstacles, e.g., lack of business and government support, lack of infrastructure (e.g., public transport), and costs. Interested in easy and affordable options that make a real difference.

DEMOGRAPHICS

More likely to be Gen X (1965 to 1980) / Boomer (born before 1965), female, own their home, slightly less urban.

SUPPORT NEEDED

Build on sense of personal responsibility by making them feel empowered to take the most impactful actions.

SEEKERS – OVERVIEW

SEEKERS

MEET VISHNU

A man in his early 30s living in urban India. He is interested in the latest products, styles, and technology, and loves spending his time searching online for trendy and innovative products. He is willing to spend on the latest new products, concepts, or service models. While he personally is not very interested in sustainability, he does think electric vehicles and other cutting-edge technology are the future. He thinks it would be great to use the latest technology and wants to find ways to subsidise these investments.

ACTIONS

Materialistic by nature and not proactively making sustainable choices. Seekers are engaging in certain sustainable practices, for example circular/recommerce behaviours such as renting and buying second-hand – though unlikely because of its environmental impact.

FEELINGS OF PERSONAL RESPONSIBILITY

Low

TRUST IN GOVERNMENT AND BUSINESS

High

BARRIERS AND MOTIVATORS

Low levels of personal empowerment on reducing environmental impact and reluctant to change their lifestyle. Enjoy trying new things, trends and technology and are often early adopters, though somewhat limited by cost. Can be influenced by governments, brands, and their communications due to high levels of trust and engagement.

DEMOGRAPHICS

More likely to be Gen Z (born 1997 to 2005) / Millennial (born 1981 to 1996), male, multigenerational households / children <18, renting, urban.

SUPPORT NEEDED

Appeal to their character by making sustainability stylish and desirable but also engage on concept of sufficiency and personal impact.

SUPPORTERS – OVERVIEW

SUPPORTERS

MEET ANTONIO

A middle aged man living in Spain with his partner. He goes to work every day on the train and lives a modest, routine-based lifestyle. He is frugal and always takes his grocery bags when shopping to avoid additional fees. He knows there are environmental problems in the world and tries to do his part – he separates waste and uses the fan instead of air conditioning whenever possible. While he sees some of his neighbours buying electric vehicles, he thinks they are too expensive and charging them would be inconvenient. He is waiting for the government to offer bigger incentives or for the price to come down.

ACTIONS

Engaged in sustainable actions that are often part of the social norm and infrastructure dependent (e.g., recycling, using public transport, saving energy at home), but have varying levels of impact. Less engaged in responsible purchasing behaviours.

FEELINGS OF PERSONAL RESPONSIBILITY

Medium

TRUST IN GOVERNMENT AND BUSINESS

Low

BARRIERS AND MOTIVATORS

Some desire to play their part but have low interest in sustainable behaviours that require more effort or altering purchase behaviours. Need more support from governments and businesses to help make actions convenient and part of the norm. Held back by cost but motivated by co-benefits such as saving money and improving health and lifestyle.

DEMOGRAPHICS

More likely to be Gen X (born 1965 to 1980) / Millennial (born 1981 to 1996), male, living alone / with friends / partner / shared accommodation.

SUPPORT NEEDED

Make sustainability the default so actions are easy to adopt. Consistently communicate and educate them on what is expected and what is both low effort and impactful. Use communications that play to a sense of social norm, e.g., how many neighbours are installing solar panels to help control energy bills.

SAVERS – OVERVIEW

SAVERS

MEET EMMANUEL

A young man who has just graduated from university in Kenya. He wants to move to the city for better work opportunities and provide for his young daughter. He is worried about the environment but also needs to provide for his family. Conserving water and energy is part of his day-to-day life due to local supply issues. He bought a new mobile phone after his last one broke but is sometimes unable to charge it due to power issues. He sees the world changing and wants to help. He wishes the government would build better infrastructure to modernise his community.

ACTIONS

Proactively taking sustainable actions focused on saving money and resources (e.g., saving water or energy), but likely driven more by the economic context they live in (often a larger segment in more emerging markets).

FEELINGS OF PERSONAL RESPONSIBILITY

High

TRUST IN GOVERNMENT AND BUSINESS

High

BARRIERS AND MOTIVATORS

Personally motivated to make a difference – especially as they feel more impacted by climate change – but are limited by micro and macro constraints (mostly cost and lack of access to infrastructure). Have competing priorities such as saving money, so need support from governments and businesses. Care about the environment but also interested in additional benefits action can bring, e.g., new jobs, saving money, etc.

DEMOGRAPHICS

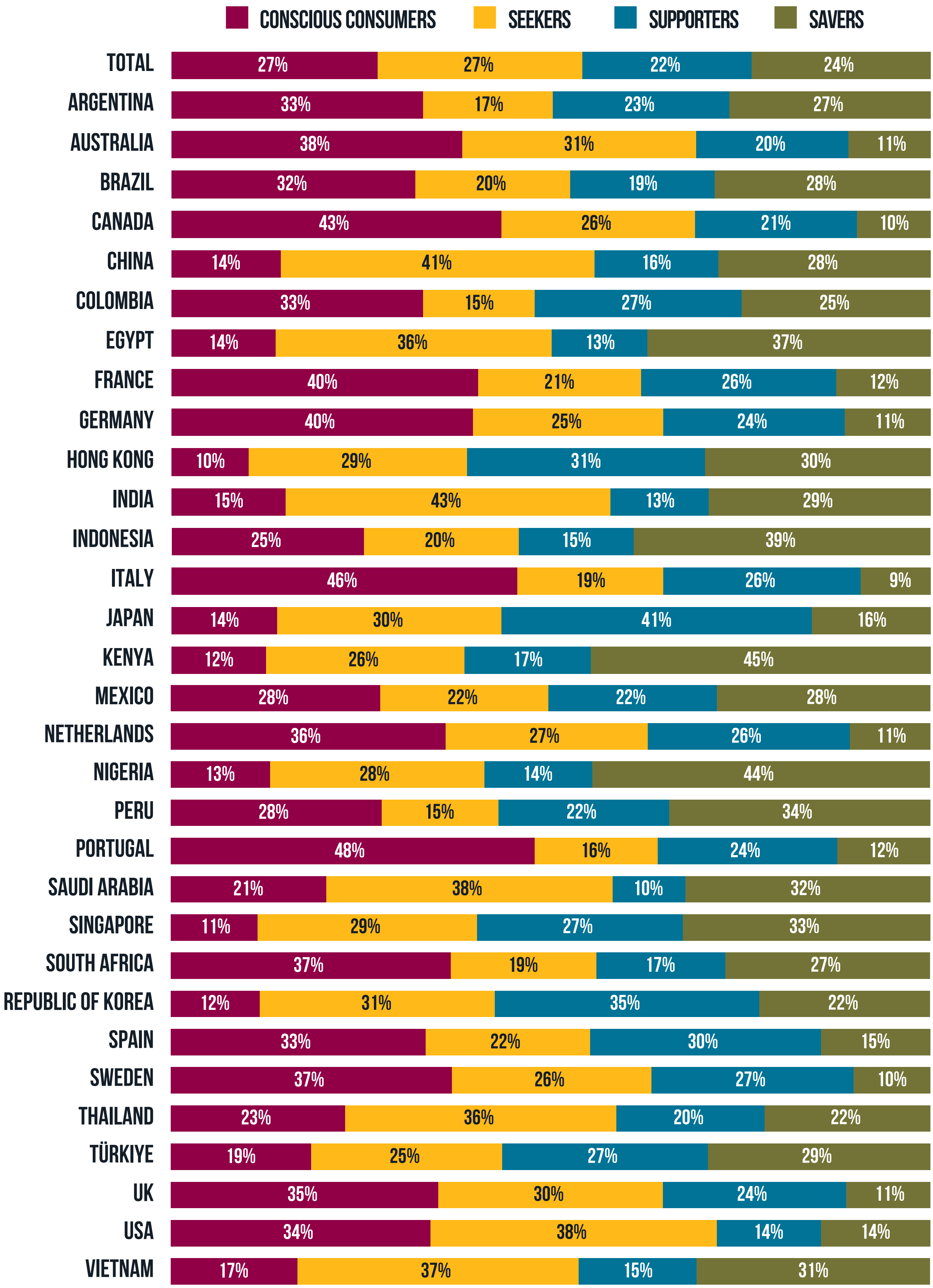
More likely to be Gen Z (born 1997 to 2005) / Millennial (born 1981 to 1996), households with children <18, urban

SUPPORT NEEDED

Creation and promotion of affordable and accessible solutions that are easy to adopt without negatively impacting other priorities and needs.

SEGMENT SIZE BY MARKET

This graph shows the proportion of each segment present in the countries surveyed in GlobeScan's 2023 *Healthy & Sustainable Living* research. All four segments are present in each market but with different proportions. Each market can use this information to better understand the make-up of their population and tailor their policies and solutions to meet the specific needs and preferences of different consumer segments.



COST-OF-LIVING IMPACTS

The increased cost of living has affected a large majority of people globally. All segments are affected by cost of living, though Savers, where a higher proportion are in the Global South, have more people saying they are “greatly affected” (62%) while Seekers have the smallest proportion saying the same (53%).

Emerging markets are particularly feeling more affected by cost of living. It has become financially *“difficult to survive”* (Saver, India) and *“almost unbearable for people”* (Seeker, Kenya). This also coincides with fears of increasing crime rates and risks of unemployment.

Consumers are taking measures to limit their weekly spending including reducing fuel consumption, batch cooking, and saving energy at home. With reduced purchasing power, consumers are eating out less, paying more attention to grocery prices, and looking for more durable and high-quality products that will last longer (without costing more).

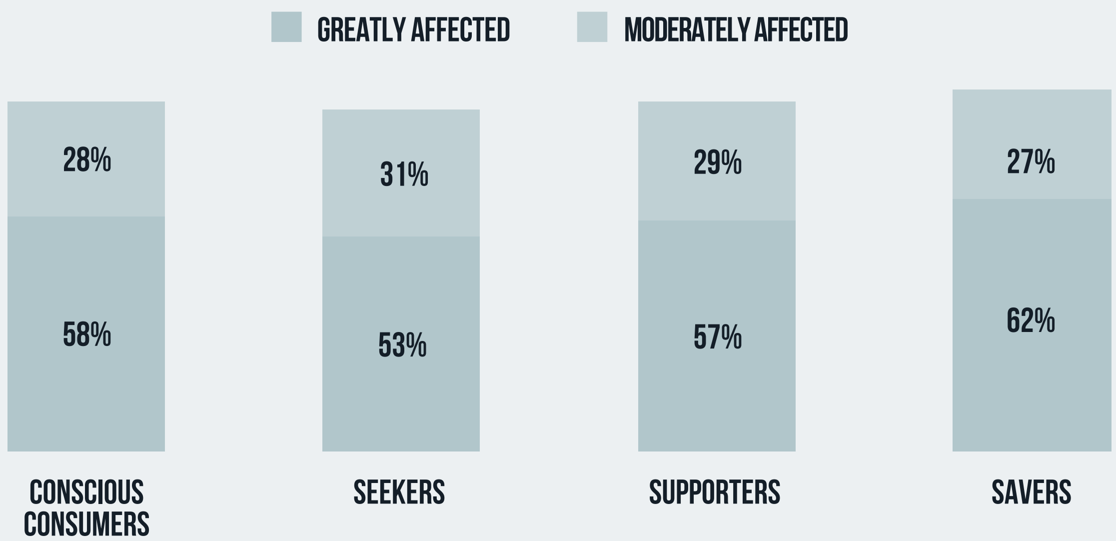
The cost-of-living crisis is an important context for the sustainability conversation. Many cost-saving behaviours have environmental benefits, e.g., using less power, reducing food waste, etc. However, we also found that an increased focus on saving money results in trade-offs and different priorities. In countries where cost-of-living impacts are more acute, consumers are hard-pressed to choose sustainable options if they are perceived to be more expensive. Similarly, any government or business initiatives or policies that may result in higher costs for consumers may face backlash and potentially derail progress on sustainability.

87%

of global consumers feel affected by the increased cost of living

“It's difficult, sometimes we need to stop buying one thing to buy another.” *(Saver, Brazil)*

THE EXTENT TO WHICH CONSUMERS FEEL AFFECTED BY THE INCREASED COST OF LIVING



SUPPORT NEEDED TO ENABLE SUSTAINABLE LIVING

When it comes to living sustainably, consumers generally want to play their part but are reaching the limit of their capabilities. They are now more reliant on governments and businesses to empower and enable them to lead more sustainable lifestyles. There is a strong demand across all segments and countries for governments and businesses to act responsibly and address climate change.

72%

of **consumers** feel they are doing all they can to protect the environment and nature.

83%

hold **governments** responsible for addressing climate change.

82%

hold **companies** responsible for addressing climate change.

80%

hold **international bodies** like the United Nations responsible for addressing climate change.

People also expect business and governments to hold each other accountable to make sure these key issues are addressed:

88% think **large companies have a responsibility to encourage governments** to do more to address climate change.

78% believe their **government should create laws that require large companies to go beyond their traditional economic role** and work to make a better society, even though this could lead to higher prices and fewer jobs.

SUPPORT NEEDED TO ENABLE SUSTAINABLE LIVING

CONSUMERS ACROSS ALL COUNTRIES AND SEGMENTS IDENTIFY THAT THEY NEED SUPPORT FROM GOVERNMENTS AND BUSINESSES IN THREE KEY AREAS:

AVAILABILITY	Consumers are limited in what they can do if the facilities and services are not available to them. Many sustainable behaviours are limited by a lack of **supporting infrastructure**, e.g., limited public transport, energy supplier options, recycling facilities, charging infrastructure for electric transport options. With government and business investment, the necessary facilities for sustainable options can be **scaled up and used by the masses**. Ensuring the infrastructure is **reliable, safe, and conveniently located** will be important.
AFFORDABILITY	Expense is an ongoing barrier to participating in sustainable behaviours, particularly with the current increases in cost of living. The provision of monetary support from governments and businesses can enable more people, regardless of their income, to take action. Suggested support takes a variety of formats including the provision of **subsidiaries and grants** (for individuals or businesses), **lower-priced products**, and **financial incentives** or **discounts** (e.g., to switch to more sustainable service providers).
ACCESSIBILITY	To live more sustainable lifestyles, consumers need more **education and access to an ecosystem that is easily navigable**. It will be important to raise awareness of the **severity of climate change**, its **impacts on society and the environment**, and the **steps to prevent or mitigate** these impacts. To ensure consumer participation in sustainable behaviours, it will be important for governments and businesses to **increase awareness of the sustainable products and services** available and the co-benefits they offer, e.g., saving people money. Communications will need to be easy to navigate and comprehend as more **understanding about the solutions** will enable people to make informed decisions and feel like they can have a positive impact.

CONSUMER SEGMENTATION – OVERVIEW OF ACTIONS

Each segment engages in different sustainable behaviours to varying extents. This chart shows how frequently each segment participates in important categories – food, energy/resource use, mobility, consumption, and circular/waste. The closer to the outside of the chart below, the more frequently the action is taken.

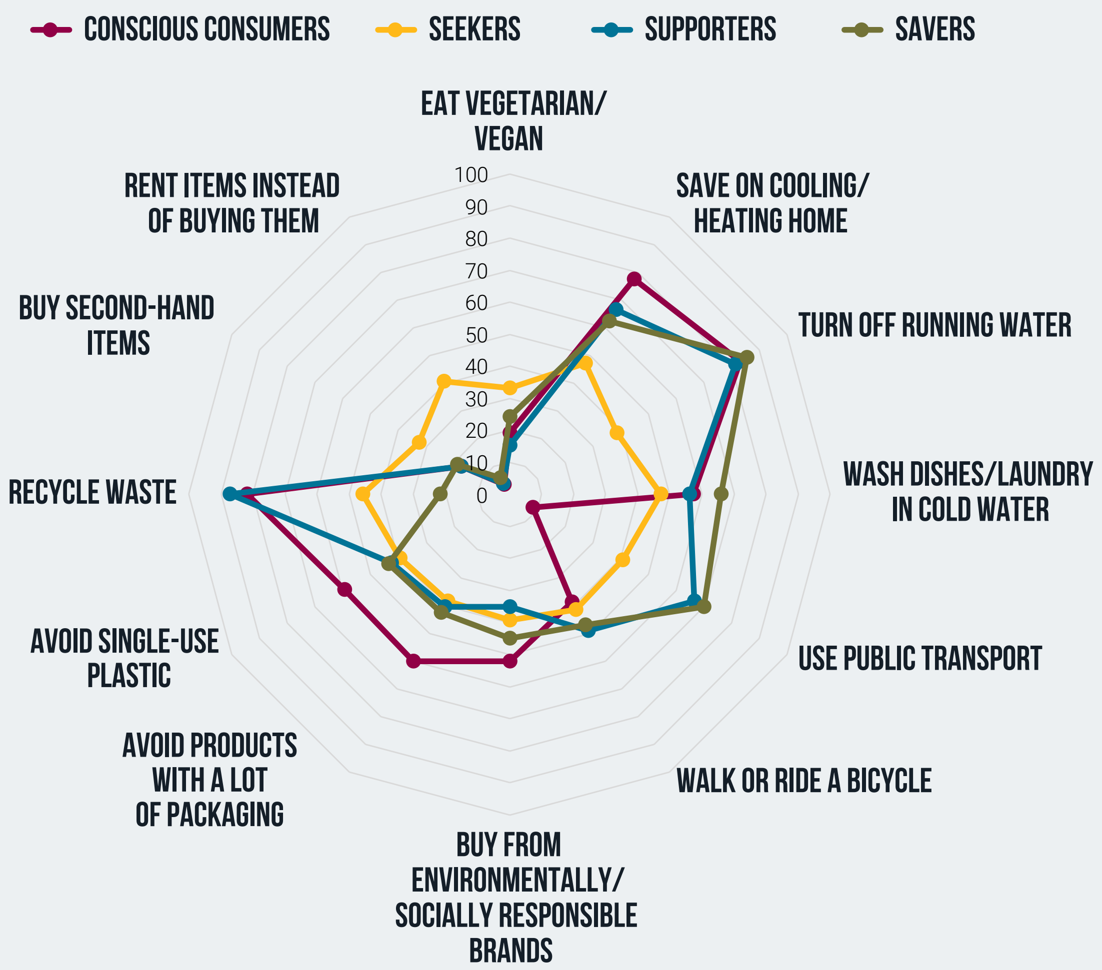
Compared to other segments, Conscious Consumers are more likely to participate in responsible shopping behaviours, e.g., avoiding products with lots of packaging or single-use plastic. They also take easy actions at home, like turning off running water and saving on heating/cooling. However, they rarely use more environmentally friendly modes of transport.

Seekers are doing less than others in general, except for when it comes to circular activities, where they have higher than average engagement in rental and buying second-hand. They are also more likely to eat plant-based diets.

Supporters are taking action in accessible daily activities that are likely part of their cultural norm, e.g., recycling, turning off running water, using public transport etc. They are less likely to buy responsible products.

Linked to their interest in cost-savings, Savers are focusing on resource use, saving water and energy where possible, as well as frequently using public transport. However, they are the least likely to recycle.

FREQUENCY OF ACTIONS TAKEN, % ALL/MOST OF THE TIME, 2023

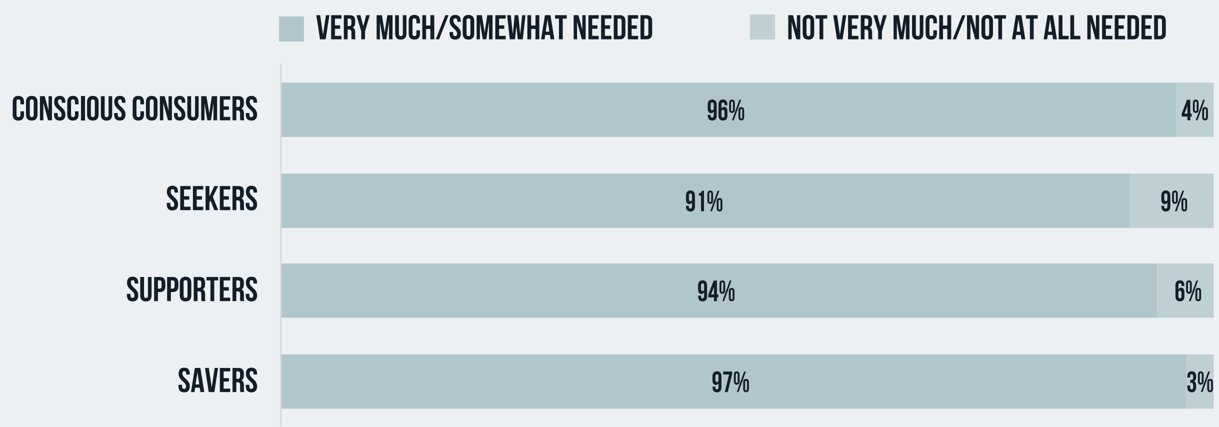


The figure represents the frequency of sustainable behaviours taken by each segment. Values closer to the centre indicates an action is taken less frequently, while values further from the centre are taken more frequently.

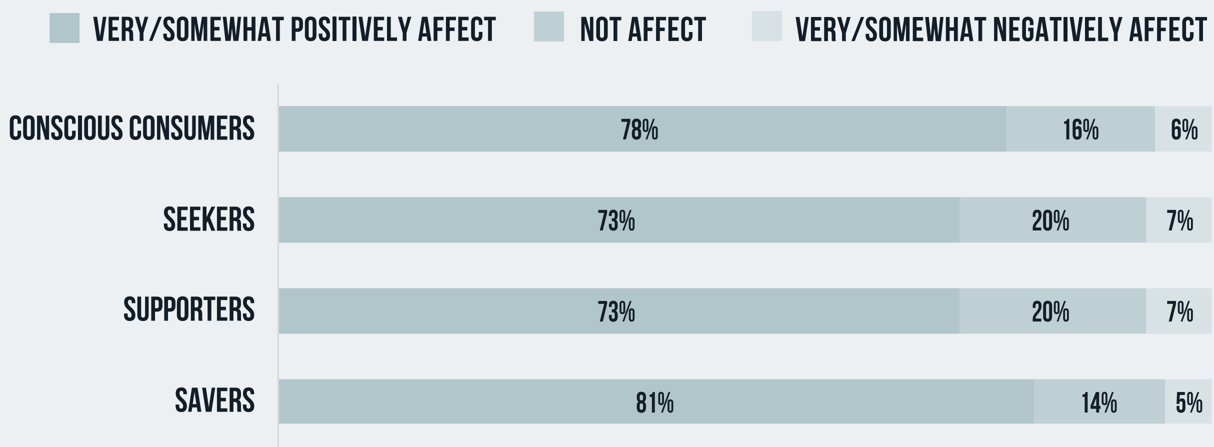
SUPPORT FOR A GREEN ECONOMY

As well as feeling the impacts of cost-of-living increases, consumers are also increasingly feeling affected by climate change. There is a clear belief among consumers that a shift to the green economy (moving away from fossil fuels and toward renewables) is needed to address climate change. The majority feel that it will impact their lives in a positive way, especially those who prioritise saving.

THE EXTENT TO WHICH A SHIFT TO THE GREEN ECONOMY IS NEEDED TO ADDRESS CLIMATE CHANGE



HOW A SHIFT TO THE GREEN ECONOMY WILL AFFECT MY LIFE AND THE LIFE OF MY FAMILY



The following description of a 'green economy' was shared with survey respondents: "In the past few years, some societies have begun shifting from fossil-based energy (e.g., oil, gas, coal) to renewable sources of energy (e.g., wind, water, solar) to address climate change. This is often called the transition to the green economy."

SEGMENTATION DEEP DIVE

CONSCIOUS CONSUMERS

PROFILE

Conscious Consumers are engaged on the topic of sustainability – they feel empowered and believe it is important to use their purchasing power responsibly and minimise their impact on the environment. They also feel that a sustainable lifestyle is connected to their well-being (physically and emotionally).

People in this segment are proactively taking action at home and while they shop. They are less materialistic, and where possible, prefer to buy brands/products that are more responsible for the planet. Despite believing they already take a lot of action, they are willing to further change their behaviour to live more sustainably.

They truly believe that actions they regularly take like recycling, reducing food waste, buying environmental products, and avoiding plastics have a large impact on protecting the environment. They also believe that taking public transport, walking, and cycling is good for the environment, but they are the least likely to engage in these behaviours – potentially due to living in less urban areas.

84% **think that living an environmentally friendly lifestyle is good for their mental health and wellbeing** (vs 76% globally)

83% **say they are doing all they can to protect the environment and nature** (vs 72% globally)

78% **want to reduce their impact on the environment** (vs 72% globally)

71% **believe that buying environmentally friendly products has a large impact on protecting the environment** (vs 58% globally)

59% **have changed their purchase choices to make a difference on issues they care about** (vs 50% globally)

56% **do not trust governments to act in the best interest of society** (lower levels of trust than the global average)

53% **think new technology will solve the problem of climate change** (lower than the global average of 65%)

"People do not use public transport. This is now in all major metropolises, big cities, etc. But people don't use it. Why? Because the service is deficient." *(Brazil)*

"If I think about my future, there are a lot of ways I envision living sustainably. I'm trying to make better choices, so I'm prepared and I'm motivated." *(Kenya)*

52% BUY FROM RESPONSIBLE BRANDS (vs 43% globally)

82% RECYCLE (vs 59% globally)

81% USER THEIR OWN SHOPPING BAG (vs 67% globally)

50% SET ASIDE FOOD WASTE FOR COMPOSTING (vs 39% globally)

59% AVOID SINGLE-USE PLASTIC (vs 47% globally)

8% USE PUBLIC TRANSPORT (vs 45% globally, despite 65% large impact on protecting the environment)

CONSCIOUS CONSUMERS

WHY THEY ARE IMPORTANT

Conscious Consumers pride themselves on being responsible and feel they are leading the way when it comes to taking sustainable actions – despite some actions having relatively low impact. This group is influential; they are more likely to inspire and encourage others to act sustainably and are more likely to vote for issues they care about.

Conscious Consumers have high expectations of government and businesses to act responsibly, particularly on climate change. They are the greatest supporters of a green transition. They are also generally supportive of more policies and investments to address climate change, particularly when it comes to educating people on ways to lower their climate and nature impacts. However, they have low trust in government and businesses and are sceptical about their ability to deliver.

BARRIERS TO TAKING MORE ACTION

- Already feel like they are doing all they can
- Limited awareness of the impact different actions have
- Cost
- Social, political, and practical obstacles, e.g., lack of business and government support, lack of good quality infrastructure (e.g., public transport)
- Low trust in government and businesses
- More sceptical of technology's ability to solve climate change than other segments

MOTIVATORS TO TAKING MORE ACTION

- Sense of personal responsibility to make a difference
- Feeling empowered
- Belief in the positive impact they are having
- Ease and affordability of action

OPPORTUNITIES AND SUPPORT NEEDED

Conscious Consumers are taking small measures to be more sustainable in their daily lives. They are willing to change their lifestyles, so it will be important to build on this sense of responsibility by making them feel more empowered to take the most impactful actions.

GOVERNMENT SUPPORT

- Education on which sustainability behaviours are the most impactful and information on how individuals can get involved
- Invest in infrastructure and local planning that can ensure these more impactful behaviours are available, e.g., public transport, and promote the benefits
- Reduce the cost burden on sustainable choices and low-carbon solutions through subsidies and rebates, and disincentivise unsustainable actions, e.g., through regulation

BUSINESS SUPPORT

- Offer broader ranges of sustainability products across different price points
- Provide information on which products and services can enable a positive environmental impact
- Work with third-party certifications and independent organisations to showcase clear and comparable sustainability information on products and enable easier choices

SEEKERS

PROFILE

Compared to other segments, the Seekers have relatively less interest in sustainability topics. They are more interested in having material possessions and seek the latest trends and styles. They are content with their lifestyle.

Seekers are more optimistic about the state of the world than others and feel technology has a large role in addressing global environmental problems. They think that environmental problems are exaggerated. However, they do feel guilty and ashamed about their impact and are more likely to be criticised by others. Seekers are torn between micro and macro priorities, believing that what is good for them is not always good for the environment.

Despite this, they are engaging in some responsible purchasing behaviours. This segment is more likely than others to engage in circularity and recommerce (e.g., renting items and buying second-hand). They are also willing to pay more for sustainable products – though these products will also need to meet other priorities such as style and desirability.

77% **think that new technology will solve the problem of climate change** (vs 65% globally)

53% **feel guilty about their impact on the environment** (vs 49% globally)

52% **believe that individuals cannot do much to save the environment** (vs 36% globally)

44% **agree that in order to be happy, they need a lot of possessions** (vs 26% globally)

44% **think that the seriousness of environmental problems is exaggerated** (vs 27% globally)

"My main barrier is personal contradiction. I see a dress that I know I don't need, but end up buying it. That's why I like second-hand; I have new things, but more sustainable." *(Spain)*

TOP THREE BARRIERS:

- Too expensive **(42%)**
- Not enough support from government **(34%)**
- I like the way I live now **(30%)**

"Spending money and shopping will bring you happiness." *(China)*

41% RENT ITEMS INSTEAD OF BUYING THEM (vs 14% globally)

35% RETURN ITEMS TO STORE WHERE THEY GOT THEM OR REUSE, REPAIR, OR RECYCLE (vs 28% globally)

33% BUY SECOND-HAND HOUSEHOLD ITEMS / CLOTHES (vs 22% globally)

SEEKERS

WHY THEY ARE IMPORTANT

Seekers are a large segment, particularly in Asian emerging markets and the USA. They are a younger segment that is style-driven and excited by shopping and new purchases. They look for and are invested in the latest trends. They can be easily reached by brands/companies as they are seeking content and paying more attention to retailers, advertising, and influencers on social media.

While they might feel less personal empowerment when it comes to sustainability, they are optimistic about technology's ability to solve climate change. This segment is likely to be more tech-savvy, embracing and becoming early adopters of technological advances and infrastructure.

Compared to other segments, Seekers believe they are quite informed and express greater levels of trust in government and in business. This highlights a willingness to follow the lead of these institutions.

BARRIERS TO TAKING MORE ACTION

- Low levels of personal empowerment
- Enjoy a materialistic lifestyle and reluctant to change
- Cost

MOTIVATORS TO TAKING MORE ACTION

- Actions linked to shopping, trying new things or trends
- Utilising technology as a solution
- Trust in businesses and government to lead the way
- Actions promoted by social media influencers and advertising campaigns
- Appealing to their optimism for the future

OPPORTUNITIES AND SUPPORT NEEDED

It is in the nature of Seekers to want more things. It is important to engage them on the concept of sufficiency without shaming or guilting them, instead focusing on their individual impacts. Appeal to their character by making sustainability stylish and desirable.

GOVERNMENT SUPPORT

- As a more trusting segment, government can help to raise awareness and encourage more sustainable actions
- Create enabling frameworks for the roll-out of sustainable and safe consumer technology, such as smart-home requirements
- Remove the most environmentally harmful options from the marketplace

BUSINESS SUPPORT

- Campaigns through social media, advertising, and influencers that demonstrate style/status associated with sustainability (e.g., for electric vehicles)
- While they might not seek to consume less on their own, embedding sustainability into new products and services could excite and encourage sustainable behaviours (e.g., with mobile phones)
- Strengthening the recommerce market is an area that could satisfy both their material desires and reduce impact at the same time

SUPPORTERS

PROFILE

Supporters are aware of and concerned about sustainability issues in the world, but their worldview is not dominated by these concerns. They feel they are doing their part for the environment and believe their actions have an impact. They are likely to follow the lead of others when it comes to taking sustainable actions.

They engage in mainstream actions that are part of a cultural norm, where there is infrastructure in place to support them, and/or save them money. Typical actions include recycling, trying to save water and energy at home, and using their own shopping bags. They are also one of the segments most likely get around via public transport, cycling, or walking. Supporters are less engaged in responsible purchasing – they are less likely to deliberately choose environmentally friendly products and are not willing to pay more for them.

Supporters are less self-motivated to seek out information about or discuss environmentally friendly lifestyles. They also tend to be less trusting of governments and companies and are sceptical that technology will solve climate change.

91% **think climate change is a serious problem** (vs 91% globally)

73% **say they are doing all they personally can to protect the environment and nature** (vs 72% globally)

61% **say new technology will solve the problem of climate change** (vs 65% globally)

52% **don't trust governments to act in the best interest of society** (vs 48% globally)

48% **don't trust companies to act in the best interest of society** (vs 43% globally)

47% **are willing to pay more for sustainable products** (vs 56% globally)

45% **feel guilty about their impact on the environment** (vs 49% globally)

31% **seek out information on environmentally friendly lifestyles** (vs 38% globally)

"When I go shopping or buy something at the supermarket, and they want to give me a plastic bag, I always say no I don't want it, it's plastic." *(China)*

"If I want to do something which is environmentally sustainable, I have to find extra money and make that extra effort." *(India)*

87% RECYCLE (vs 59% globally)

74% SAY RECYCLING HAS A LARGE IMPACT ON ENVIRONMENTAL PROTECTION (vs 68% globally)

81% TURNING OFF RUNNING TAPS WHEN WASHING (vs 71% globally)

76% USE THEIR OWN SHOPPING BAG (vs 67% globally)

67% USE PUBLIC TRANSPORT (vs 45% globally)

SUPPORTERS

WHY THEY ARE IMPORTANT

Supporters are not leading the pack when it comes to sustainability, however they are essential to engage as they are quick to pick up and join in with mainstream sustainable behaviours. They tend to be in more developed countries and where infrastructure is more readily available, so could act as a more relatable group for other countries to mimic.

Convincing this segment that sustainability is part of the social norm will ultimately help to drive further adoption and acceptance of sustainable actions, particularly if they lead to tangible cost savings and/or health benefits.

BARRIERS TO TAKING MORE ACTION

- Cost
- Low interest in sustainable behaviours that require more effort
- Lack of government and business support
- Low trust in government and business

MOTIVATORS TO TAKING MORE ACTION

- Saving money
- Improving health and lifestyle
- Easy and convenient actions that save them time and effort
- Following social norms
- Showing them the impact and benefit of their actions

OPPORTUNITIES AND SUPPORT NEEDED

Sustainability needs to be accessible and easy to adopt for Supporters to participate – making it the default will be key to engage them. It is also important to consistently communicate with and educate them on what is expected of them and the potential impacts. These communications should be easy to understand and the actions easy to adopt.

GOVERNMENT SUPPORT

- Make sustainability options the default options without putting costs on consumers
- Awareness campaigns that normalise sustainable actions and inform of their impacts
- Invest in infrastructure that makes sustainable behaviours the norm and easy to adopt
- Make adoption of sustainable choices more affordable, particularly ones requiring larger upfront investment

BUSINESS SUPPORT

- Choice edit options to make sustainable products the default without impacting cost or quality
- Provision of accessible, convenient, and easy-to-use services that support sustainable behaviours
- Highlight popular uptake of sustainable choices by other consumers

SAVERS

PROFILE

People in the Savers segment are trying their best to save money and resources for personal and environmental reasons. They are more likely to feel affected by increased cost of living, climate change, and pollution.

Savers are proactively taking sustainable actions when they can (e.g., saving water or energy), but some of these behaviours are likely done due to the economic context they live in (often in more emerging markets). Nevertheless, Savers do care about the planet – they seek out information on sustainable lifestyles and are open to changing their behaviour and purchase choices to help. However, they are limited by micro and macro constraints (mostly cost and lack of infrastructure) and will prioritise saving money.

Savers are community-oriented and feel that a sustainable lifestyle is connected to their wellbeing and brings their family closer together. They are more trusting of and look for support from government, business, and technology.

- **85%** **for mental/emotional wellbeing** (vs 76% globally) **and physical wellbeing** (vs 77% globally)
- **81%** **feel more personally affected by climate change** (vs 76% globally)**, 89% feel affected by cost of living** (vs 87% globally)
- **78%** **want to reduce the impact they have on the environment and nature by a large amount** (vs 72% globally)
- **70%** **think that new technology will solve the problem of climate change** (vs 65% globally)
- **68%** **agree living an environmentally friendly lifestyle brings their family closer together** (vs 60% globally)
- **62%** **trust companies to act in the best interest of society** (vs 57% globally)
- **54%** **trust governments to act in the best interest of society** (vs 52% globally)
- **50%** **seek out information on healthier lifestyles** (vs 44% globally)**, 41% seek out information on environmentally friendly lifestyles** (vs 38% globally)

> ***"Fuel has definitely gone up in my country. I have to be more careful with what I'm cooking. I cook, freeze, and take it out when I need it for the day or the week."*** *(Kenya)*

> ***"We have always been careful and seek to save energy, mainly because we are concerned about the planet."*** *(Spain)*

86% SAY THEY TURN RUNNING WATER OFF WHEN APPLYING SOAP/SHAMPOO/TOOTHPASTE (vs 71% globally)

70% SAY THEY USE PUBLIC TRANSPORTATION TO GET AROUND (vs 45% globally)

22% RECYCLE (vs 59% globally)

66% SAY THEY WASH DISHES AND/OR LAUNDRY IN COLD WATER TO SAVE ENERGY (vs 56% globally)

71% SAY RECYCLING HAS A LARGE IMPACT ON PROTECTING THE ENVIRONMENT (vs 68% globally)

SAVERS

WHY THEY ARE IMPORTANT

Savers are attuned to sustainability, ready to act, and want to make an impact. Once affordable solutions are in place or they know what to do, they are happy to participate, especially if there are co-benefits. There is a greater proportion of Savers in emerging markets, and so some are constrained by access to and affordability of sustainable options. Despite this, they are still optimistic about the impact of sustainable actions and want to do more, even if they might not be able to partake in everything themselves.

Savers are supportive of greater government intervention and policies when it comes to the green transition. They trust government and businesses to act responsibly and are optimistic about their ability to do so. Savers are also interested in and optimistic about technology as a solution for climate change and would likely embrace these solutions too.

BARRIERS TO TAKING MORE ACTION

- Cost
- Competing priorities and needs
- Access to sustainable products/services and supporting infrastructure
- Lack of government and business support

MOTIVATORS TO TAKING MORE ACTION

- Saving money
- Sense of personal responsibility to make a difference
- Community/social benefits, e.g., new jobs
- Utilisation of technology as a solution

OPPORTUNITIES AND SUPPORT NEEDED

Savers need affordable, accessible, and easy-to-adopt options to participate in sustainability. They are willing to change their behaviours for personal and sustainability reasons but need to be informed on how to achieve this. Communication is crucial if new opportunities arise.

GOVERNMENT SUPPORT

- Investments in affordable and accessible infrastructure across all regions, not just urban areas, e.g., reuse, repair, and recycling
- Education and awareness campaigns to highlight the co-benefits of action
- Grants/subsidies to enable participation in sustainability investments
- Create and support new green industries that create job opportunities and make a further tangible connection for consumers

BUSINESS SUPPORT

- Offer affordable product lines with sustainability incorporated at all stages of the product lifecycle, e.g., design, manufacture, shipping, and disposal
- Create and promote local services that enable circularity/recycling where infrastructure might be lacking
- Awareness campaigns to demonstrate the impact of products and actions

TECHNOLOGY AND TOPIC DEEP DIVES

CONSUMERS INTERNATIONAL

GlobeScan

To help get more comprehensive insights into the actions people are taking, what motivates them, and what restricts them from doing more, we explored three key topics in depth:

MOBILITY
With a focus on public transport, cars, and electric vehicles

ENERGY
Delving into types of energy used at home and appetite for solar power

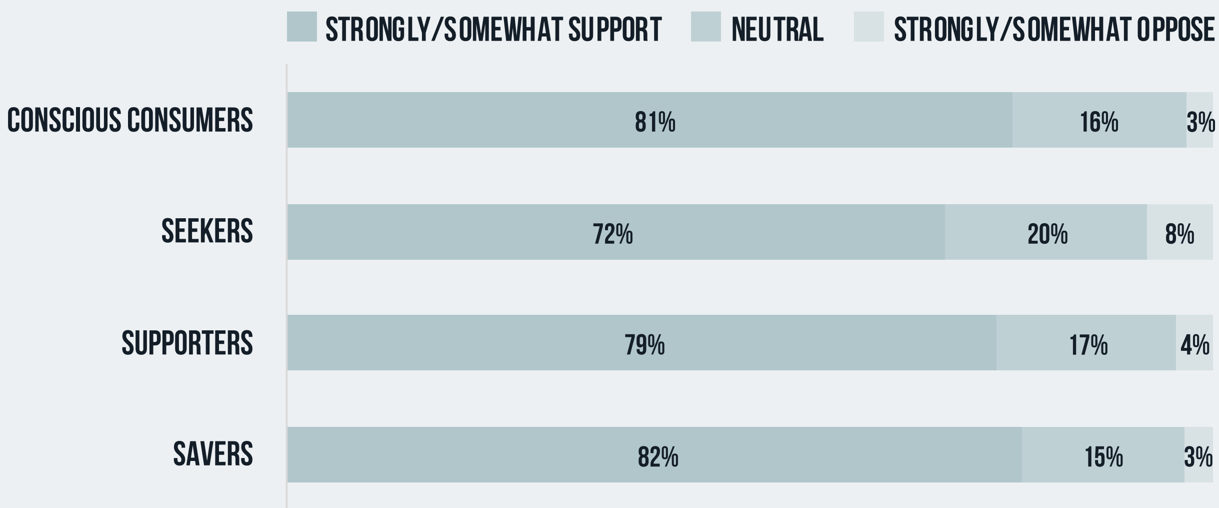
MOBILE PHONES
Looking at circular behaviours throughout a phone's lifespan

These topics were explored during the qualitative interviews in Brazil, China, India, Kenya, and Spain and insights can be found on the next few pages.

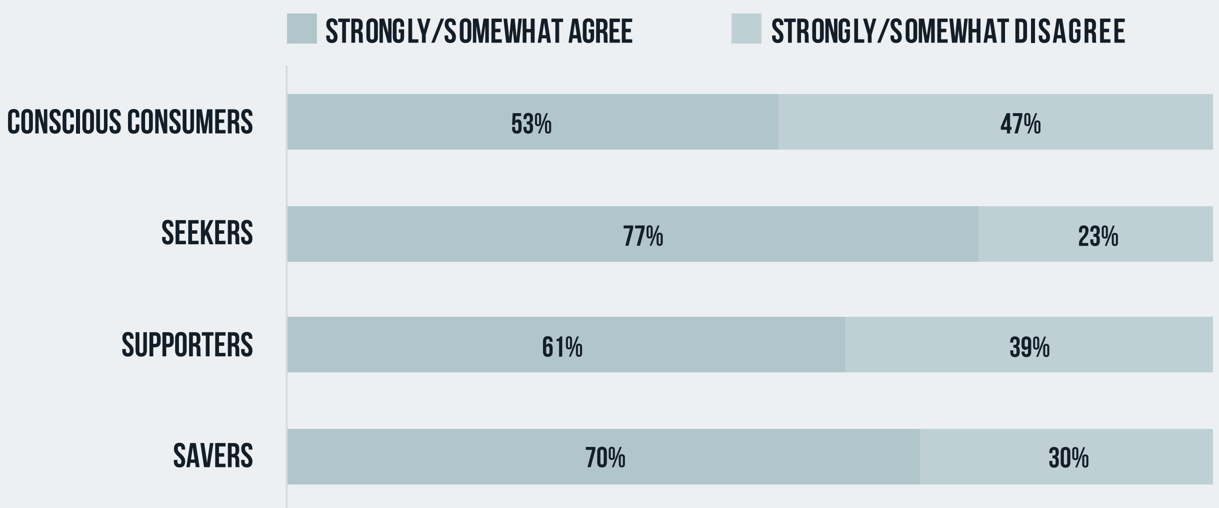
TECHNOLOGY AS A SOLUTION

The International Energy Agency estimate that around 55 percent of the emissions reductions needed for net zero are linked to low carbon technology adoption by consumers. There is general support for the use of technology to help solve society's problems, and a strong belief among all segments and in all countries that new technology can play a role in addressing climate change and supporting the green economy. Seekers and Savers are more likely to see technology as a silver bullet that means they will not have to alter their behaviours. However, Conscious Consumers and Supporters are slightly more aware that, though important, technology cannot be the only solution.

LEVEL OF SUPPORT FOR INVESTING IN NEW TECHNOLOGICAL SOLUTIONS LIKE CARBON CAPTURE AND STORAGE AS A POTENTIAL SOLUTION TO ADDRESSING CLIMATE CHANGE AND PROTECTING NATURE



NEW TECHNOLOGY WILL SOLVE THE PROBLEM OF CLIMATE CHANGE, REQUIRING ONLY MINOR CHANGES IN HUMAN THINKING AND INDIVIDUAL BEHAVIOUR



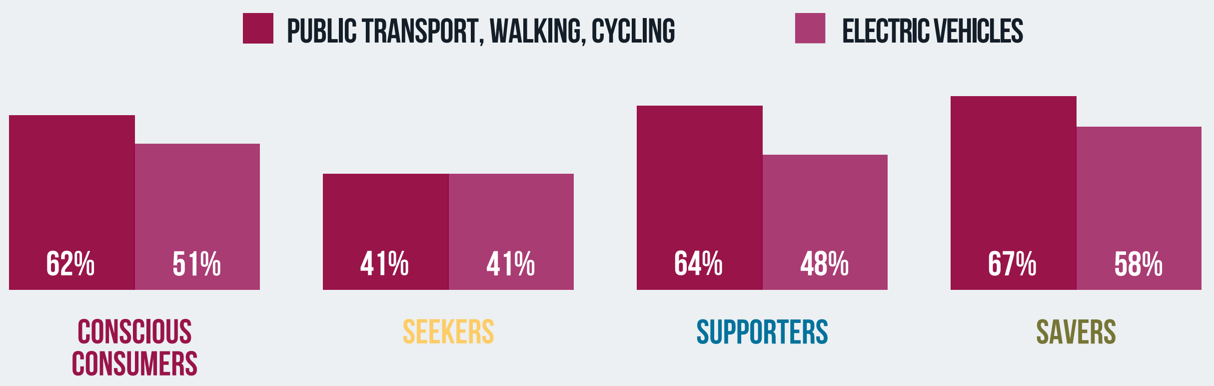
MOBILITY
ACTIONS, MOTIVATIONS, AND BARRIERS

Actions we know to be impactful (in priority order):

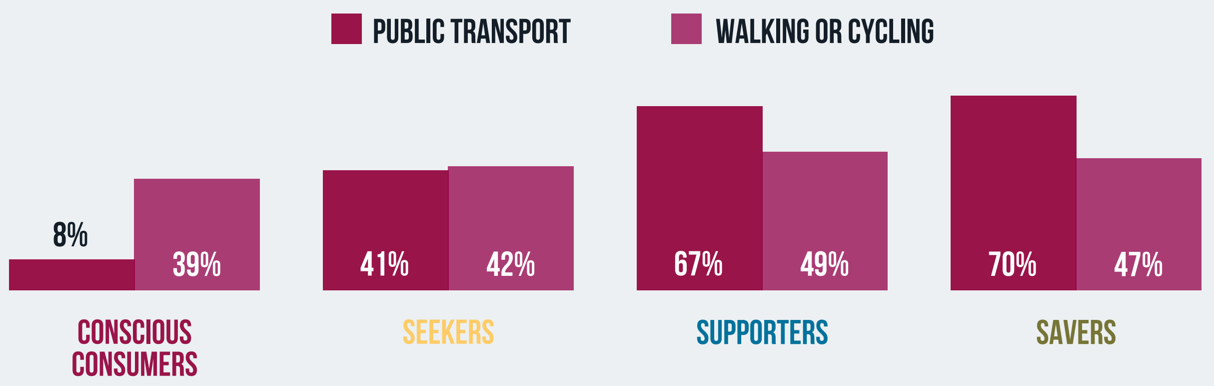
- Using people power, e.g., walking, cycling
- Utilising shared transport – public transport or rideshare options, e.g., bikes, scooters, cars
- Reducing the number of journeys taken, e.g., by exploring flexible working options
- Taking the shortest routes
- Choosing cleaner vehicles, e.g., electric vehicles, cars that use cleaner fuels

From our survey, we see that most consumers are aware that using people-powered or public transport is better for the environment, but not all are engaging in this behaviour. Supporters and Savers are the segments using more sustainable mobility methods.

% BELIEVE USING THESE MODES RATHER THAN CONVENTIONAL VEHICLES HAS A LARGE IMPACT ON PROTECTING THE ENVIRONMENT



% DO THIS ACTION MOST/ALL THE TIME



Source for impactful actions: Anatomy of Action

MOBILITY
ACTIONS, MOTIVATIONS, AND BARRIERS

PUBLIC TRANSPORT

- Most of our interviewees **frequently use public transport**, including those who own a car.
- Widely recognised **personal benefits** include lower costs, avoiding traffic, and quicker journeys. There is less, but still some, recognition of **environmental benefits**.
- However, levels of **satisfaction vary based on location. Many are frustrated** with unreliable services and inconvenient routes and schedules which prevent more uptake. Some modes are seen as more expensive and at times uncomfortable and unsafe for passengers.

"I'm bored of seeing oil petrol-run cars or diesel-run cars. I want something new that's environmentally friendly because we're all suffering from the pollution." *(India)*

CARS

- Our interviews revealed that while level of car ownership varies, **most have some form of access**, e.g., through family, friends, taxis, etc.
- They are seen as a **convenient and quick** mode of transport, and a necessity for some due to a **lack of or inconvenient public transport.**
- Key **downsides** are based on **experience and economics**, e.g., waiting in traffic, struggling to find parking spaces, and fuel costs.

"Electric cars are out of reach for many Brazilians." *(Brazil)*

ELECTRIC VEHICLES (EVS)

- There is a lot of **interest in EVs**, but ownership is not yet commonplace and is unlikely in the near future as **current barriers outweigh motivators**.
- Our interviews revealed the **main motivators** for considering EVs are:
  - **Sustainability:** Strong associations with environmental benefits, especially reducing air pollution
  - **Savings:** Some acknowledgement of long-term cost savings, e.g., cheaper fuel and maintenance costs
  - **Style and status:** The appearance and perceived prestige of owning an EV appeals to some
  - Additional motivator in Europe is an expectation that EVs will soon be the norm (due to EU zero-emission regulations).
- **Predominant barriers** to EV purchase centre around **expensive** upfront costs and a **lack of charging infrastructure**.
- Some are concerned about the technology (e.g., there is a slight preference for hybrids in Spain) and there are views that many driving downsides will remain, e.g., traffic, parking problems, etc.

MOBILITY
SUPPORT NEEDED AND TOPICS

SUPPORT NEEDED TO ENCOURAGE UPTAKE OF WALKING, CYCLING, OR PUBLIC/SHARED TRANSPORT

- Improved infrastructure (pavements, cycle paths, railways, etc.), not just in urban areas
  - Key for Conscious Consumers and Savers
- More accessible and convenient public transport networks and schedules, e.g., new routes, later running services, better connections
- Affordability schemes (e.g., discounts, subsidies) to reduce costs on the consumer
  - Key for all segments
- Invest in cleaner power/vehicles for a variety of transport methods, e.g., buses, rideshare
- Campaigns promoting co-benefits, e.g., health, the ease of switching, and positive impacts of these mobility methods
  - Key for Supporters

SUPPORT NEEDED TO ENCOURAGE UPTAKE OF ELECTRIC VEHICLES OVER CONVENTIONAL VEHICLES

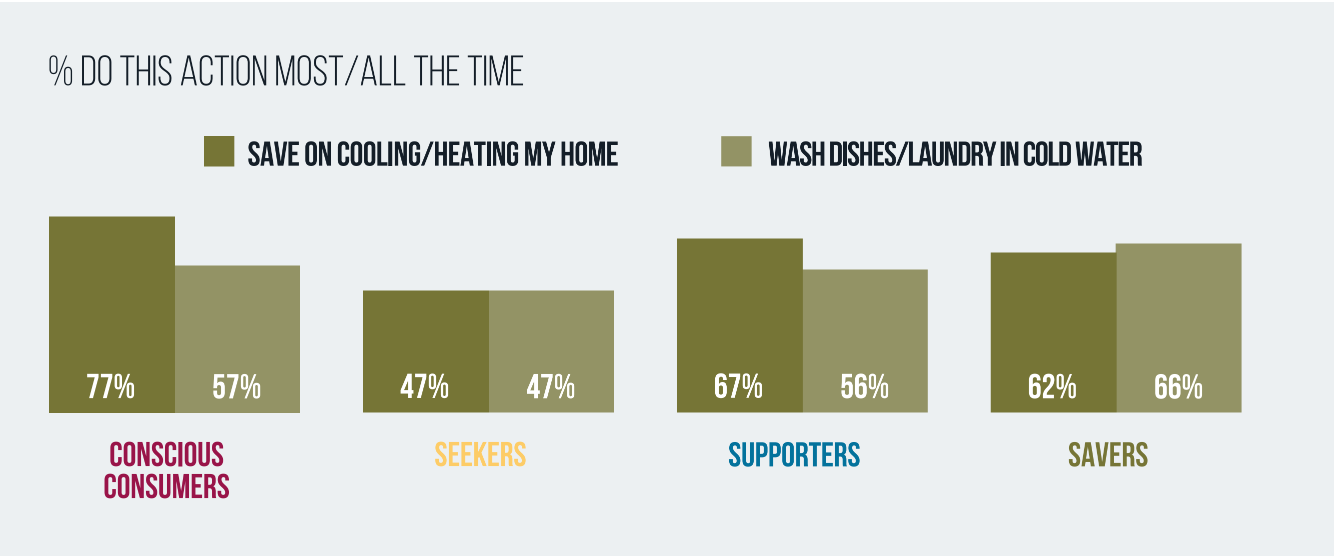
- Infrastructure investments, particularly charging infrastructure
- Monetary incentives to support upfront costs (grants, subsidies, etc.)
  - Key for Conscious Consumers
- Develop policies to ensure a sustainable transition to EVs (e.g., ensure fleet replacement addresses existing fleets)
- Additional incentives (prioritised parking, road access, etc.)
- Campaigns promoting style and performance of EVs
  - Key for Seekers

ENERGY
ACTIONS, MOTIVATIONS, AND BARRIERS

Actions we know to be impactful (in priority order):

- Improving home insulation
- Adapting behaviours to the season, e.g., closing blinds in summer
- Reducing heat loss, e.g., by sealing windows, double glazing
- Changing habits, e.g., less time in the shower
- Creating own energy/resources, e.g., utilising solar power, collecting rainwater
- Using energy efficient appliances
- Using a sustainable energy provider

From our survey, we see that consumers are engaging in some sustainable home energy behaviours. Conscious Consumers are the segment most likely to save on cooling and heating their homes, while Savers are most likely to wash items in cold water to save energy.



Source for impactful actions: Anatomy of Action

ENERGY

ACTIONS, MOTIVATIONS, AND BARRIERS

ENERGY USE

- Our consumer interviews found that **most people are trying to save energy in their homes**, typically by limiting appliance use or choosing energy-efficient options.
- Despite 58 percent of consumers in our survey **believing that saving energy at home has a large impact** on protecting the environment, our interviews found that this was a secondary benefit. **Cost savings** are instead often the largest motivator for saving energy.
- However, among our interviewees in China, we found a relatively lower appetite for energy saving due to cheaper energy costs and a lack of awareness of its environmental impact.
- Our interviewees explained that **cost and convenience** drive the type and source of home energy they use, but many are **constrained by broader external factors** such as availability of providers (e.g., state-owned or monopolies) and are unable to choose alternatives.
- Most would be **happy to support choice editing** with renewable energy as the only option, but governments would need to provide support and address concerns around cost implications. There are strong beliefs that **consumers should not be impacted negatively**.
- Relying on renewables appeals to people's desire for **long-term cost savings** and environmental protection.
- Additional benefits are mentioned in Kenya, such as receiving reliable power and creating jobs.

> ***"If renewable energy was the only option, the planet would benefit from it, and people would have to get used to it."*** *(Spain)*

SOLAR POWER

- Our interviews found that most **want and expect solar power** to be utilised, especially those with sunnier climates (Spain, Kenya)
- Despite the appetite for renewables, people are facing **three key barriers** to utilising solar panels:
  - **Affordability** – upfront costs for equipment and installation are the biggest block despite acknowledging long-term savings
  - **Accommodation** – not all homes are believed to be suitable, e.g., apartments, limited roof space, rentals, some need community approval
  - **Awareness** – many have limited knowledge of where to start or whether it is available to them
- A few mention concerns about the technology and solar energy's reliability in countries with mixed weather, e.g., China

ENERGY
SUPPORT NEEDED AND TOPICS

SUPPORT NEEDED TO ENCOURAGE UPTAKE OF ENERGY EFFICIENCY

- Offer energy efficient options as the default option, with price caps so consumers are not impacted negatively
  - Key for all segments, but especially Supporters and Savers
- If defaults are not possible, ensure energy providers offer energy efficiency services as options
- Create incentives to encourage consumers to choose energy efficient options, e.g., lower prices, switching bonuses, etc.

SUPPORT NEEDED TO ENCOURAGE UPTAKE OF SOLAR PANELS AT HOME

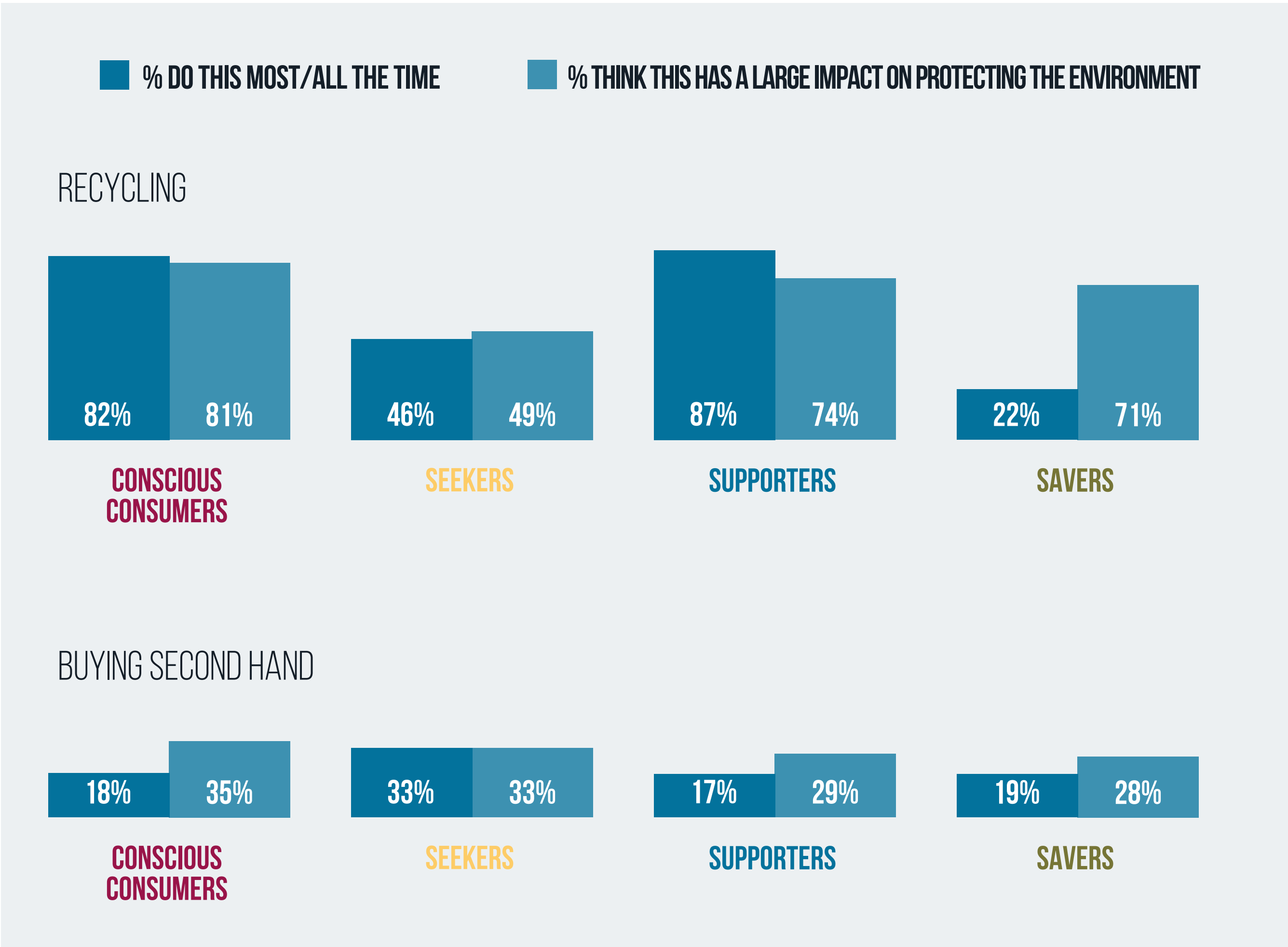
- Support with upfront costs associated with installation (e.g., subsidies, low-interest loans)
  - Key for Conscious Consumers
- Offer solutions that support uptake on more housing types, e.g., incentives to landlords or resident groups, offer short-term leases for renters
  - Key for Seekers
- Campaigns to raise awareness of offerings, the ease of uptake, and promoting the benefits
  - Key for Conscious Consumers and Supporters

MOBILE PHONES
ACTIONS, MOTIVATIONS, AND BARRIERS

Actions we know to be <u>impactful</u> (in priority order):

- Reducing the amount you buy
- Choosing long-lasting items and repairing when needed
- Choosing items made sustainably, e.g., that use recycled materials
- Buying second-hand
- Disposing of items by donating or recycling

Yet from our survey, we see there is a gap in consumer understanding of how impactful certain actions are, e.g., recycling is seen as very impactful by Conscious Consumers, Supporters, and Savers.



Source for impactful actions: Anatomy of Action

MOBILE PHONES

ACTIONS, MOTIVATIONS, AND BARRIERS

PHONE PURCHASING

- Our interviewees revealed that **sustainability currently has limited influence** on mobile phone choice. **Form and function** are key deciding factors, e.g., camera, battery life, screen size, brand, etc. **Durability** is one of the most important purchase considerations but is rarely associated with sustainability.
- However, the survey found that 76 percent think it is highly **important for companies to design more responsible and environmentally friendly products** – Conscious Consumers are even more likely to think this (85%).
- The interviewees had **little appetite for second-hand phones**, primarily due to concerns about phone quality, e.g., old technology, durability, battery life, and safety. Those who would consider second-hand wanted lower prices and assurances on quality.
- In India and Kenya, many were not just concerned about the phone, but also the **second-hand marketplace**. There is a lack of trust around the phone's origin (e.g., potentially stolen) or the price (risk of being overcharged).

> ***"I always try to give things a second life, for example giving it to someone in my family or a friend."*** *(Spain)*

PHONE END OF LIFE

- During our qualitative interviews, most people report **using their phone until it breaks or the technology/software declines**. Only a small proportion change their device before this.
- The majority are **already engaging in circular behaviours** to dispose of their phone, such as:
  - **Redistribution** – a large proportion give their phones to family members when they no longer need it, some sell to friends
  - **Return** – some are incentivised to return to a manufacturer or collection point for refurbishment, recycling, or resale
- Our survey found that 78 percent think it is highly **important for companies to address product disposal/recycling**, especially Conscious Consumers (85%) who already recycle often.
- The interviews found that economic incentives were the main motivator for mobile phone recycling, but there are certain **barriers limiting participation**:
  - **Awareness** – unsure what services are available, how to use them, and the benefits of doing so
  - **Privacy** – concerns around the secure removal of personal data, especially for interviewees in China
  - **Culture** – recycling e-waste is not yet a habit for all, e.g., experiences of burning e-waste in Kenya

MOBILE PHONES
SUPPORT NEEDED AND TOPICS

SUPPORT NEEDED TO ENCOURAGE UPTAKE OF SUSTAINABLE BEHAVIOURS LINKED TO MOBILE PHONES

- Sustainable phones as default – designed to be sustainable from the offset, not just at disposal
  - Key for Supporters and Conscious Consumers
- Ensure sustainable models also appeal to other priority needs (form, function) and provide a guarantee of quality for second-hand phones
  - Key for Seekers
- Increase recycling and resale points, whether through manufacturers, retailers, or municipalities
  - Key for Supporters and Savers
- Implement EPR policies to ensure manufacturer commitment
- Offer subsidies for manufacturers to enable recycling opportunities
- Campaigns to increase awareness of recycling services and reduce concerns, e.g., about legitimacy, privacy, etc.
- Campaigns to promote durability and longevity of phones to limit overconsumption
  - Key for Seekers
- Consumer incentives (e.g., discounts, cashback) to encourage use of phone-take- back schemes
  - Key for all segments

CONCLUDING REMARKS AND KEY QUESTIONS RAISED

CONCLUDING REMARKS

Our research takes the discourse forward of the current evidence on enabling sustainable living, emphasising the crucial role of consumer insights as a fundamental component of informed decision-making. In navigating the aspirations consumers face in adopting sustainable lifestyles, we highlight the strong influence of the ongoing cost-of-living crisis on these choices.

These findings underscore the need for and expectation of governments and businesses to implement the systemic changes required for a sustainable society, economy, and environment, that currently burdens consumers to take most action. It also raises the importance of tailored approaches to consumers, recognising needs of diverse consumer segments and their unique triggers for embracing sustainability. Low-carbon technology adoption can be a key lever, providing a pathway for consumers to align their choices with environmental consciousness.

The intertwining dynamics of consumer rights and trust in the marketplace cannot be overstated. Upholding consumer rights becomes a linchpin in fostering trust, essential for the successful integration of sustainable practices into everyday life.

As we envision a future where sustainable lifestyles become the norm, it is imperative that marketplace actors play an active role. Making sustainable living easy, affordable, and desirable is not just a responsibility but an opportunity for businesses and governments. By crafting scenarios and triggers that resonate with different consumer segments, these actors can catalyse the shift toward sustainable consumption.

In the green transition, collaboration across stakeholders is paramount. Governments, businesses, and civil society must join forces to create an ecosystem where sustainable choices are not only default but are also appealing. Through such collaborative efforts, we can pave the way for a future where sustainability is not just a choice but an inherent part of the fabric of our daily lives.

FUTURE CONSIDERATIONS AND NEXT STEPS FOR THE SEGMENTATION

The current report provides a broad overview of consumer attitudes and behaviours and what motivates consumers to adopt sustainable living. There is now an opportunity to build on this baseline segmentation and conduct deeper dives into the consumer segments including:

1. Regional and country-level explorations of the segments;
2. Examining other cultural, social, and life stage influences on the segments;
3. Analysis of segments' views in other sectors and categories beyond those explored in this study (e.g., food, personal and home care, apparel, etc.);
4. Analysis of past survey data to examine how the segments have evolved over time;
5. Conducting more in-depth qualitative interviews to explore topics further; and
6. Integrating the segmentation in future research to answer the questions raised below.

KEY QUESTIONS RAISED

1. Sixty-eight percent of consumers believe they should consume less to protect future generations. What are the realistic trade-offs consumers could be asked to make in the coming years, and how likely are they to be adopted day to day? How can wellbeing levels be improved through lower consumption levels?
2. What are the lifestyle-related environmental footprints of each segment and to what degree do they change following the interventions proposed in this report?
3. How do these segments evolve over time and change as countries develop?
4. What types of choice editing work most effectively for each segment to enable more sustainable living, and what safeguards are needed?
5. Why is uptake of the least environmentally impactful forms of mobility (walking, cycling, and public transport) lowest for the greenest segment (Conscious Consumers) and what interventions can be made to increase uptake?
6. What are the most common interventions from governments to enable sustainable living (awareness, choice editing, supporting businesses / incentivising green economy, supporting green entrepreneurs) and how effective are they in supporting consumers?
7. How do we make sustainable living aspirational/desirable and evidence-based?
8. What can be the effective alternate business models for sustainable living?

APPENDIX

CONSUMERS INTERNATIONAL
GlobeScan

GLOBESCAN'S HEALTHY & SUSTAINABLE LIVING RESEARCH

Healthy & Sustainable Living is GlobeScan's annual global consumer insights research programme designed to help organisations understand shifting preferences and behaviours among the general public related to healthy and sustainable living.

GlobeScan launched the research programme in 2019 with the purpose of helping companies better support consumers to change their lifestyles to become healthier and more sustainable. The research program builds on over 20 years of GlobeScan's public opinion research in the areas of sustainability, branding, and reputation, and is designed to help organisations better understand the diverse mindsets of consumers that shape their barriers to, and enablers of, more healthy and sustainable living.

The 2023 research covers 29,565 people in 31 critical global markets. GlobeScan surveyed approximately 1,000 adults in each market (500 each in Hong Kong, Kenya, Nigeria, and Singapore, 850 in Egypt), and 1,500 in USA (total *n*=29,565). The samples are representative of the online population and are weighted to reflect general population census data. Fieldwork took place in July and August 2023.

CONSUMER SEGMENTATION

By conducting advanced analysis on the 2023 *Healthy & Sustainable Living* global survey data, GlobeScan developed a bespoke 31-market consumer segmentation. **The segmentation is based on sustainability attitudes and actions, consumption habits, and perceptions of technology.**

Four segments were identified. GlobeScan cross-tabulated the survey data across the four segments to reveal more detailed insights and understandings of the segments.

HYPOTHESES

The research started with several hypotheses (listed below). These hypotheses helped to inform the design of the segmentation and the qualitative interviews. In addition, we analysed all questions within the HSL data set related to the hypotheses to profile the segments.

HYPOTHESES ON SUSTAINABILITY, CONSUMER RIGHTS, AND COST OF LIVING

- Affordability and accessibility are not enough to enable households to live sustainably (including Next Generation consumers).
- Having trust in marketplace institutions enables households to adopt to sustainable living.
- Cost of living has made it more challenging for consumers to live sustainably (i.e., making trade-offs).
- Most consumers would adopt more sustainable lifestyles if costs were equal, and their lifestyles did not have to be sacrificed.

HYPOTHESES ON CONSUMER CATEGORIES AND MARKET READINESS

- Consumers with direct experience of environmental degradation support stronger governmental policies.
- Consumers are more likely to adopt more sustainable lifestyles if they see others around them doing so.
- Highest spending consumers are also most enthusiastic about technology and see this as a solution to climate change.
- Consumers hold businesses more accountable for enabling their adoption of sustainable lifestyles.

This research has found that cost-of-living has indeed impacted the ability of consumers to adopt more sustainable living, and that consumers do need to consider the trade-offs. Many consumers do feel impacted by environmental degradation and want more support from government and business to live sustainably. There are segments of consumers that are optimistic about technology as a solution to climate change, but there are many that feel much more action and support is needed from institutions.

CONSUMER SEGMENTATION APPROACH

STATISTICAL METHODOLOGY

GlobeScan conducted a robust, bespoke 31-market segmentation based on the global data from its pre-existing 2023 *Healthy & Sustainable Living Research*. Market segmentation is a statistical process that divides a broad target market into a subset of smaller segments, or groups, based on natural points of differentiation between consumers.

GlobeScan used several statistical and analytical techniques to analyse the data: the data were centred to minimise response bias, then clustered using a K-means cluster analysis. To validate the results, Discriminant Function and PLS regression analysis were conducted. An increasingly rigorous approach was used to test different combinations of variables in several rounds to identify potential segments (including models that had upwards of five segments). Based on statistical analysis, the segmentation with the most robustly differentiated for the research objectives was a four-segment solution. The segmentation quality/robustness was tested using Discriminant Function Analysis, with 95 percent of cases correctly classified.

This analysis grouped similar consumers with similar characteristics into four distinct segments.

The variables included in the segmentation were chosen based on their ability to meet the research objectives and help answer the hypotheses posed. They included actions that are crucial to sustainable lifestyles, e.g., purchase behaviours, resource use at home, circular behaviours, waste management, and mobility methods. Attitudes linked to personal empowerment, willingness to change, the importance of technology, and perceptions of their own lifestyles were also included.*

Detailed profiles of each segment were developed based on consumers' differing sustainability attitudes, perceptions and actions, and their environmentally conscious behaviours and needs.

SEGMENTATION RESULTS

Following the creation of the consumer segmentation, GlobeScan then cross-tabulated the survey data to reveal a range of insights that are relevant to Consumers International's hypotheses. We explored insights related to trust in institutions, expectations of companies, support for policies, and support of technologies.

The insights provided GlobeScan with a thorough understanding of the following:

1. Level of action segments are undertaking in terms of sustainability and consumption
2. Motivations and barriers of sustainable lifestyles
3. Impacts of the cost-of-living crisis and role of economic savings
4. Consumers' levels of empowerment and willingness to change their behaviour
5. Role of advocacy, e.g., for climate solutions, green transition
6. Amount and type of support needed to aid consumer behaviour change for each segment

Limitations of the segmentation: As the segmentation analysis is based on a pre-existing survey and data, it is limited by the design and questions that were already within the 2023 GlobeScan *Healthy & Sustainable Living Research*. Sample sizes in some smaller markets were limited to *n*=500 or *n*=800 which reduces the ability to create a statistically robust segmentation with a larger number of segments (i.e., more than four).

**See next page for a more detailed list of examples of variables included in the segmentation*

SEGMENTATION APPROACH: LIST OF VARIABLES INCLUDED IN THE SEGMENTATION

BEHAVIOURS AND ACTIONS	ATTITUDES ON LIFESTYLES, CONSUMPTION, CLIMATE CHANGE, AND TECHNOLOGY
I try to save on cooling and/or heating my home.	I think people exaggerate the seriousness of environmental problems.
I use public transportation to get around.	I feel guilty about my negative impact on the environment.
I try to buy from brands/companies that I believe are environmentally and socially responsible.	I want to reduce the impact that I personally have on the environment and nature by a large amount.
I buy second-hand household items or clothing.	I am doing all I personally can to protect the environment and nature.
I recycle my waste.	I am willing to pay more for products or brands that work to improve society and the environment.
I avoid plastic items that will only be used once.	I believe that individuals cannot do much to save the environment.
I set aside food waste for composting.	I believe we need to consume less to preserve the environment for future generations.
I buy fashion and furniture items made from materials that are free of animal products (vegan).	In order to be happy, I need a lot of material possessions.
I turn the running water off when applying soap/shampoo/toothpaste.	Living an environmentally friendly lifestyle is good for my physical health.
I resell or donate products when done using them.	Living an environmentally friendly lifestyle brings my family closer together.
I rent items instead of buying them.	Companies must stop producing things made of plastic to save the environment.
I return items to the store where I got them for reuse, repair, or recycling.	My health is negatively affected by plastic waste in the environment and ocean.
I avoid buying home furnishings and accessories that do not last long or go out of fashion quickly.	New technology will solve the problem of climate change, requiring only minor changes in human thinking and individual behaviour.
I buy products with non-toxic ingredients.	The benefits of modern technology are greater than its risks.

CONSUMER QUALITATIVE INTERVIEWS

Qualitative interviews with consumers were conducted by GlobeScan to gain a deeper understanding of what sits behind some of the segmentation insights and to explore what support is needed to help consumers adopt more sustainable lifestyles.

GlobeScan conducted:

31 IN-DEPTH SEMI-STRUCTURED INTERVIEWS

WITH HOUSEHOLDS IN **BRAZIL, CHINA, INDIA, KENYA, AND SPAIN** (6–7 PER COUNTRY)

INTERVIEWS WERE CONDUCTED IN LOCAL LANGUAGES AND LASTED 45 MINUTES

FIELDWORK TOOK PLACE IN OCTOBER 2023

To avoid bias, the recruitment of participants was handled by a third party. To ensure a range of responses, participants were screened based on criteria including demographics, financial circumstances, shopping habits, and awareness of climate change.

While the size of the sample is unable to provide a conclusive set of results, the exploratory interviews are able to provide more understanding and help indicate key focus areas that should be explored in more depth.

DISCUSSION GUIDE CONTENT

1. Consumption behaviours and cost-of-living impacts

- Purchasing frequency and sufficiency
- Impact of cost of living on behaviours

2. Deep dives into mobility, energy, and mobile phones

- General behaviours and attitudes toward these areas
- Use and awareness of electric vehicles, solar energy, and mobile phone circularity
- Understanding enablers, barriers, and motivators to using more sustainable options
- Support needed in these areas

3. Sustainable lifestyles

- Interpretation of sustainability
- Sustainable behaviours in daily lives
- Motivations and barriers
- Feelings around climate change and the role of technology
- Support needed to live sustainably, specifically from governments and businesses
- Perceptions and roles of green labelling

CONSUMER QUALITATIVE INTERVIEWS

CONNECTING THE INTERVIEWS TO THE SEGMENTATION

GlobeScan conducted in-depth interviews to further explore the perceptions of sustainable lifestyles and the impact of the cost-of-living crisis, and what is needed to help consumers adopt more sustainable behaviours at home.

To understand how the interviewees fit in with the segmentation model developed from GlobeScan's *Healthy & Sustainable Living Research*, interviewees were asked to discuss the following topics in relation to sustainable lifestyles and the cost-of-living crisis:

- CONCEPT OF SUFFICIENCY – UNDERSTANDING CONSUMERS' SHOPPING STYLES, RELATIONSHIP WITH NEW THINGS, TRENDS, AND TECHNOLOGY
- CHANGES IN PERCEPTIONS OF MATERIAL POSSESSIONS
- CHANGES IN PURCHASE BEHAVIOUR
- MODES OF MOBILITY USED IN THEIR DAILY LIVES
- HOME ENERGY USE
- MOBILE PHONE PURCHASE CONSIDERATIONS AND END-OF-LIFE
- LEVELS OF EMPOWERMENT AND ADVOCACY

DEMOGRAPHIC INFORMATION ON INTERVIEWEES

GlobeScan interviewed consumers from five markets: Brazil, China, India, Kenya, and Spain. During the recruitment process, Consumers International and an independent third-party recruiter ensured that the sample of interviewees covered a range of different demographics and psychographics (interest & awareness around sustainability & climate-related issues) to ensure that the sample gathered a range of perspectives and avoided bias.

Interviewees were screened based on:

- Age
- Gender
- Location (urban vs rural areas)
- Income and recent household income loss
- Education
- Awareness of sustainability and climate-related issues

ANALYSIS OF THE INTERVIEWS

Interviews were conducted in local languages and were analysed by interviewers who applied their knowledge of the local market and context to each interview. During the analysis stage we explored how insights gathered during the interviews linked to the segmentation profiles to amalgamate the two phases of research.

IMAGE CREDITS

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