KANTAR

SUSTAINABLE TRANSFORMATION

BRIDGING THE GAP

INFUSING THE VALUE-ACTION GAP INTO SUSTAINABILITY SEGMENTATION

Introduction

This paper outlines ongoing work by Kantar to better understand people based on different views around the broad topic of sustainability.

Building on multiple global projects and fresh research, we have further sharpened an approach to capturing and making sense of claimed attitudes and behaviours in this increasingly important topic area. Our goal is to narrow the Value-Action Gap and we invite all to participate in achieving this vision. A working group within ESOMAR's professional standards board is being formed to carry this forward initially.

MARK FISHER,
SUSTAINABLE TRANSFORMATION PRACTICE

The Background

For quite a few years now Kantar has been looking at various groups of people based on their values, attitudes and behaviours related to sustainability. This has enabled understanding these groups of people, how they are evolving, how to target them as audiences and what appeals to them in terms of brands, advertising and products.

There have been many useful aspects of the ways we have been identifying these sustainability segments. Not least the simplicity of the survey questions, which has allowed us to embed the segmentation across Kantar's data assets and product solutions for the benefit of our clients. However, there are always aspects of any method that could be improved; in this case more granularity about the most actively engaged in sustainability issues and more clarity on the barriers to behaving more sustainably, for example.

To meet global sustainability targets, there is a need for more people to live a more sustainable lifestyle, especially as population growth continues. Properly understanding consumers' sustainable actions, and the barriers to doing them, is imperative to drive positive change. There is an opportunity to scale the impact we have as a marketing industry by aligning on how to achieve sustainable behaviour change, not just in research, but in brand strategy, in product development and how that is briefed to creative agencies; all these have enormous potential to inspire behaviour change.

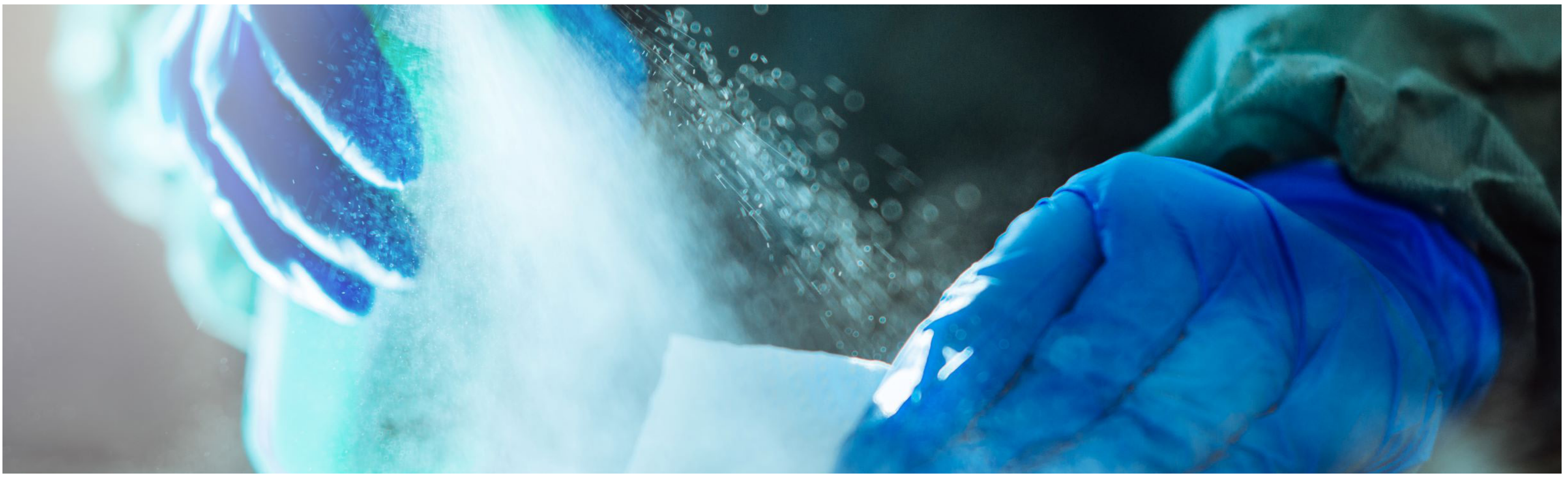
In publishing the findings of this work on improved ways to segment people based on sustainability values and behaviours, we aim to trigger industry alignment through new collaboration. The greater purpose is to create better and more consistent data to truly accelerate positive action on as wide a scale as possible. Interested parties will be able to consider these findings when developing specific segmentations that make sense for their organisations, but which ideally will share a common language across the industry. Kantar will fully launch its full new segmentation built from these findings in 2025.

25-30%

Individual and household actions have the potential to produce 25-30% of the total emissions reductions needed to avoid (>1.5 °C rise)

PROJECT DRAWDOWN -

The powerful role of household actions in solving climate change.



"Behaviour change is unavoidably a much more important part of the response to climate change than has been the case to date. A much greater proportion of changes in the next 15 years will be delivered by behaviour change than in the last 15 years. This cannot be avoided and must be part of any credible strategy."

BRETT MEYER & TIM LORD, PLANES, HOMES AND AUTOMOBILES:

The Role of Behaviour Change in Delivering Net Zero

Why we need better data

Many businesses, research agencies, non-profits and academics have developed sustainability segmentations.

Although built differently, most touch on two primary inputs: people's attitudes or values related to sustainability, and their behaviours related to sustainability. These are usually compared to give understanding of groups based on the alignment or gap between peoples' values and actions. This paper shows evidence on what best splits people apart with regard to their attitudes, values and behaviours, and what the best research approaches are to gather the data.

Attitudes & Values

How to refine what best splits people apart

Understanding different people's attitudes and personal values related to sustainability is relatively straightforward using traditional survey techniques. These typically are used to segment people based on a degree of engagement with the topic. For example, from being deeply concerned to being sceptical or denying the issue is a problem at all, and the persuadable people in the middle. There also has been a focus on understanding people mainly based on their values related to environmental sustainability issues (mostly climate change), but not including social sustainability issues, such as equality.

In this research we have included a variety of different question types related to both environmental and social sustainability issues. The aim has been to refine what best splits people apart, to better meet people's needs in the sustainability sphere, reduce the barriers to adopting positive behaviours and to help drive consensus in the wider industry.

Behaviours

How to develop a meaningful approach

Understanding the reality of actual sustainability behaviours has proved complicated using traditional survey techniques. There is now a clear social pressure on people to make more sustainable everyday choices and to behave in a more responsible way. In research, this can pressure respondents to answer questions in a specific way, resulting in potential over-claim of specific actions. This is clearly problematic when trying to understand the nuances between groups of people and how best to encourage more sustainable behaviours.

At Kantar we are fortunate to have access to real behavioural data through the Kantar Worldpanel division.

This tells us how shopping behaviours vary based on sustainability values. However, it is limited to purchases and isn't scalable beyond this dataset. There is therefore a need to develop a more scalable, survey-based approach. In our research, we have included different question cells with different behaviour questions to test which approaches generate less over-claim. Additionally, to enrich our data we complemented it with digital Google search data to uncover nuanced trends and insights on consumer motivations and barriers to a specific sustainability behaviour. Search data is based on search terms typed into Google - an ideal source for some behaviours, not influenced by research priming a specific response.

“Getting above the 25 percent tipping point, their efforts can have rapid success in changing the entire population.”

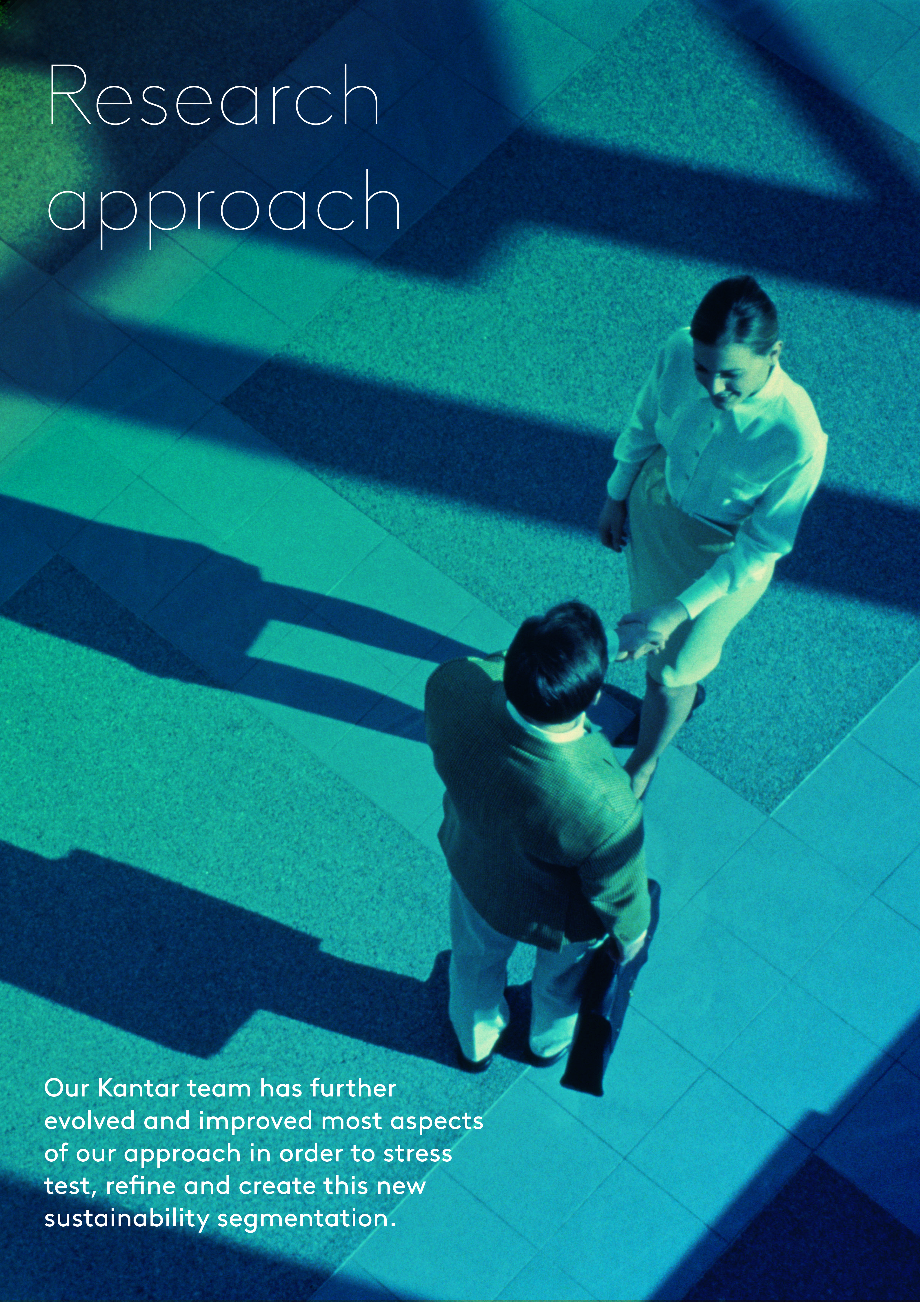
DAMON CENTOLA, ANNENBERG SCHOOL FOR COMMUNICATION

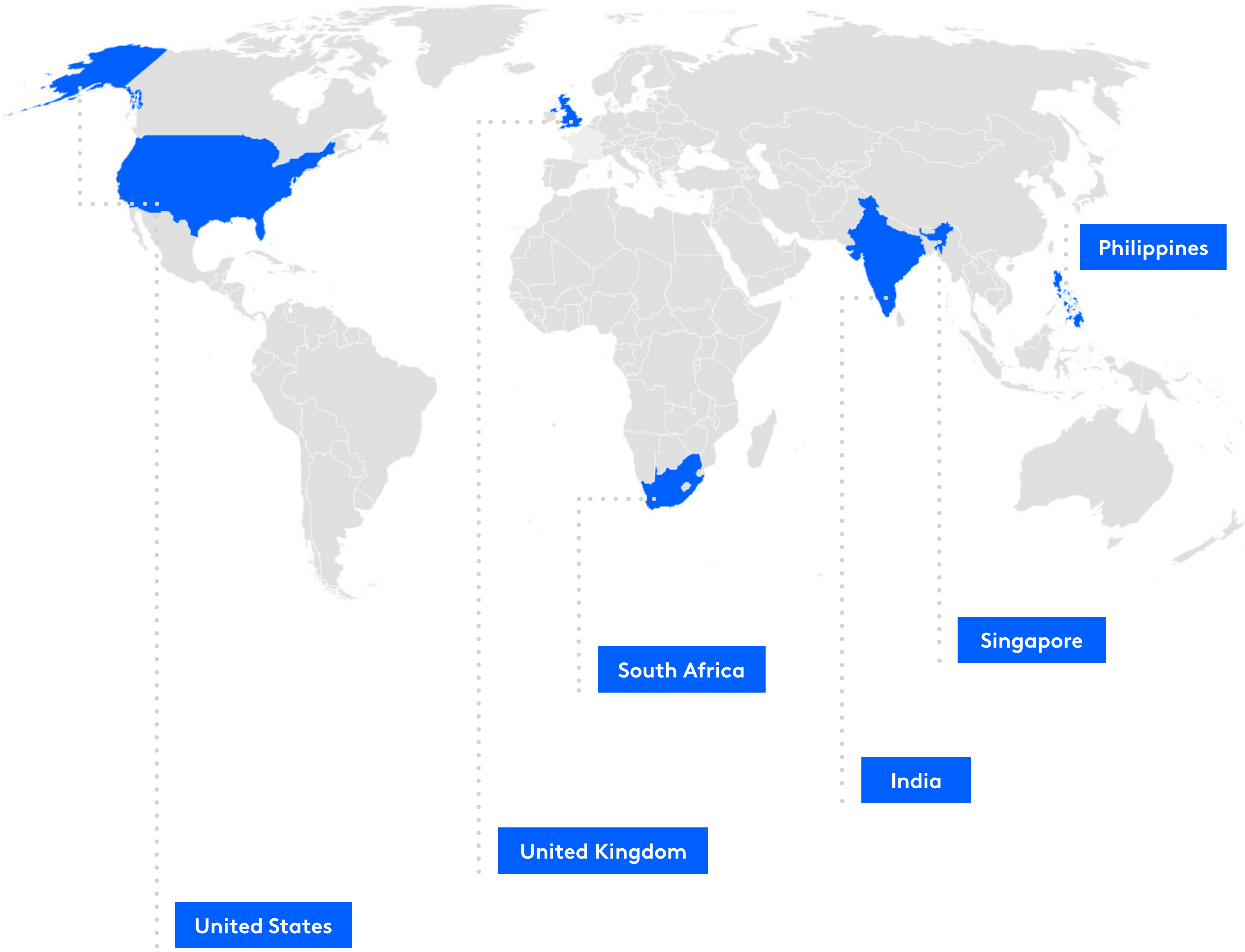
Tipping point for large-scale social change? Just 25 percent | Penn Today (upenn.edu)

Without better data we can have no way of knowing how far we are from the mass adoption for more sustainable lifestyle needed.

Research approach

Our Kantar team has further evolved and improved most aspects of our approach in order to stress test, refine and create this new sustainability segmentation.





Geographical Coverage

In previous Kantar sustainability segmentation work, we have used the large **Sustainability Sector Index** dataset covering over 30 markets. Whilst that gave global data inputs, it did not have the additional depth needed for this research. Initially this piece of work has focused on 6 markets, spanning different geographical regions. These 6 were chosen as a pragmatic way of covering different regions and cultures. The segments that Kantar are developing out of this work will be tested across a wider geographical coverage.

The Questionnaire

A specific survey was designed covering attitudes, values and behaviours, including cells of differently phrased questions to allow analysis on which questions generate more meaningful data and do not prime specific responses. The survey was conducted online by Kantar in August and September 2024.

The questions on attitudes & values reflect what we have learned from wider work about the need to engage people unprompted in order not to influence their responses, the need to include both environmental and social issues, as well as testing several other sustainability attitude & values to understand which best splits people apart.

The questions on behaviours test different approaches to reduce over-claim – for example, making it feel more acceptable to give a more honest answer and not influencing answers with an assumption that they will do behaviours. The questionnaire also tests responses to 10 clusters of consequential consumer behaviours that reduce negative impact in the world. We built this from our existing behavioural knowledge bank as well as by closely reviewing **The Low Carbon Lifestyles Wheel: Behaviours, Barriers and Benefits**, created by the World Business Council for Sustainable Development, BEWorks and Futerra. This was based on 33 specific actions as defined by **Project Drawdown**. Importantly, the behaviours included go beyond sustainability-related purchase behaviours e.g. buying bottles to be refilled or tote bags, which often are the main behaviours included in sustainability segmentations. To be of use in consumer research at scale, we honed this list by creating 10 clusters from the 33 specific actions. To achieve this, we developed clusters of behaviours written in everyday language built from the 4 overall topics covered in the wheel: Transportation, Housing, Diet and Purchases (including Waste). We then added 4 further consequential behaviours not covered by the wheel to be of use in consumer research:

- Collective action behaviours like campaigning (split by environmental or socially focused)
- Purchases related to social sustainability issues like equality
- Reducing water usage
- Investing money for positive impact

The aim of this was primarily to cover positive impact on social issues as well as environmental issues to allow the testing the hypothesis that some people will be more engaged, and active in social issues than environmental issues.

Aligned to low carbon action wheel

TRANSPORTATION

Travelling in ways to reduce environmental impact e.g. fly less, day to day travel more on foot, bike or public transport (use cars less), or switch to EV/hybrid.

HOUSEHOLD ENERGY

Using energy efficiently & sustainably e.g. renewable energy at home, install renewable energy sources like solar panels, or use less energy at home.

PURCHASES

Buying in ways to reduce environmental impact e.g. buy brands that have a more positive environmental impact, buy products that protect habitats and biodiversity, buy items locally made, reduce consumerism like fast fashion, buy less (for example renting or borrowing items not needed regularly).

WASTE

Reducing waste e.g. recycle more, use product refills, avoid food waste, buy more durable products/look after belongings so last longer or repair items, buy second-hand items, donate/sell unused items.

FOOD

Changing diet e.g. eat less meat and dairy, eat more of a plant-based diet.

Additional sustainable behaviours included

WATER

Reducing water use e.g. short showers minimise running taps

INVESTMENTS

Investing my money to have a positive impact on social or environmental issues e.g. move pension investments in a positive impact portfolio.

PURCHASES

Buying in ways to reduce social impact e.g. buy brands that have a more positive impact on people like fair trade and responsibly produced or focus on being inclusive and accessible to everyone.

COLLECTIVE ACTION

Making a difference in wider community on environmental/social issues e.g. contacting government to express support, campaign for issues, raise awareness, attend a protest or demonstration, volunteer for a charity or in a community group, raise money for a charity focused on the environment/social issues.

The Findings

The remainder of this paper will focus on what we have learned from this research, aiming to provide a foundation for industry collaboration on how best to understand consumers based on sustainability attitudes, values, and behaviours.

This will initially be through a newly formed working group in ESOMAR's professional standards board.

The findings are split by:

1. Firstly focusing on the attitudes and values
2. Then on the behaviour insights from the research

Findings on Attitudes & Values

Finding 1 – There is limited overlap in environmental and social concerns

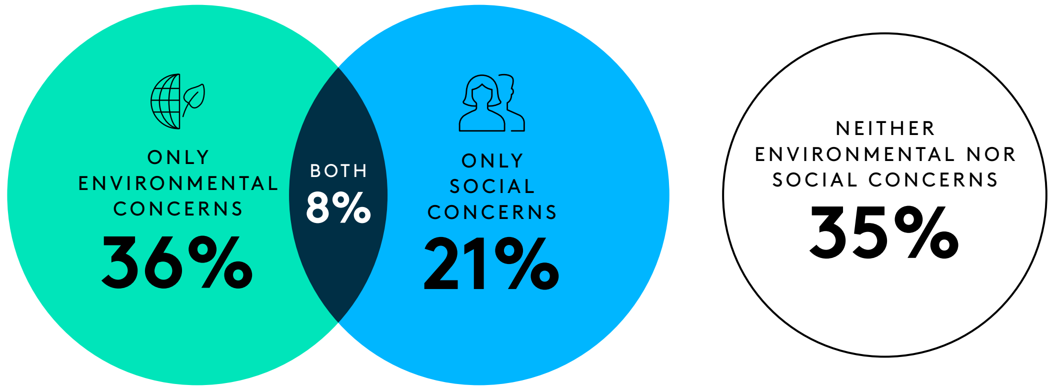
The term sustainability is very broad and means many things to different people. These people can also care about different aspects related to the broad topic. An important first point on understanding people based on their sustainability values is to do it by focusing on specific issues. In this research we asked people about issues in the world that need solving – firstly unprompted, then by prompting issues ranging from environmental issues to social issues such as health, the economy, immigration, migration and displacement issues.

Unprompted questioning is the best way to not influence responses, and Kantar's **Sustainability Sector Index** has previously used AI effectively to code open text data into broad topics like environmental concerns. To provide confidence in scaling this segmentation, we wanted to compare the prompted responses to these. Interestingly, these prompted responses provided similar findings as unprompted in this research, although environmental issues are more top of mind unprompted.

Around a quarter of people in all countries covered ranked environmental issues top of the list. Social issues vary in being ranked top for 10% of people in the UK and Singapore, to 20% of people in India. As shown in this chart, just because someone thinks environmental or social sustainability issues are the most important issues doesn't mean that they think social or environmental sustainability issues are the second most important. In other words, people can care about one and not the other, or at least have a lower priority. The intersectionality of the issues that those of us working in sustainability understand, simply isn't common knowledge at a general population level.

We can't assume people care about both environmental and social issues

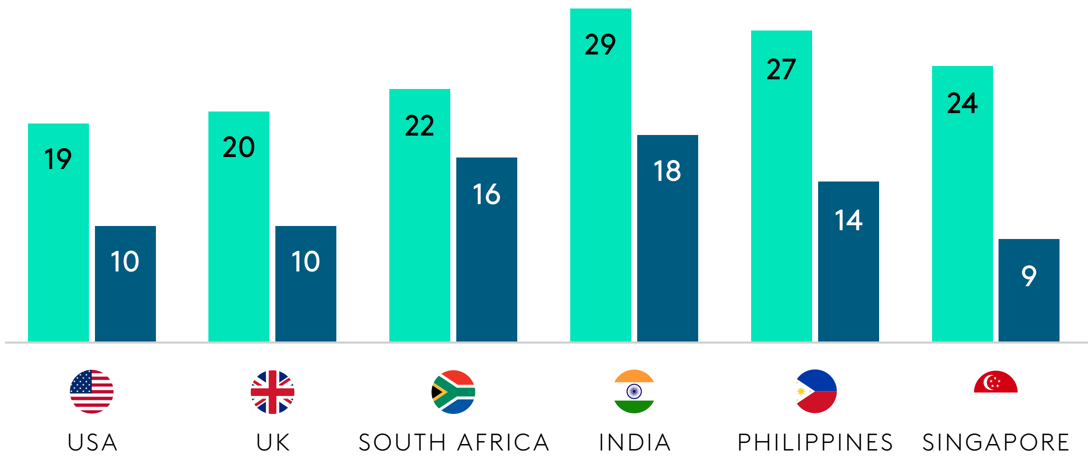
Overlap of issues in the world that need solving (unprompted)



Issues in the World that need solving (%)

Environmental issues

Social issues



	BIG IMPACT*	
THE WORLD The planet, the wider world, its issues and communities	47%	Not asked
OUR WORLD My part of my country	35%	34%
MY WORLD Me and my immediate family	29%	27%
	Environmental Concerns	Social Concerns

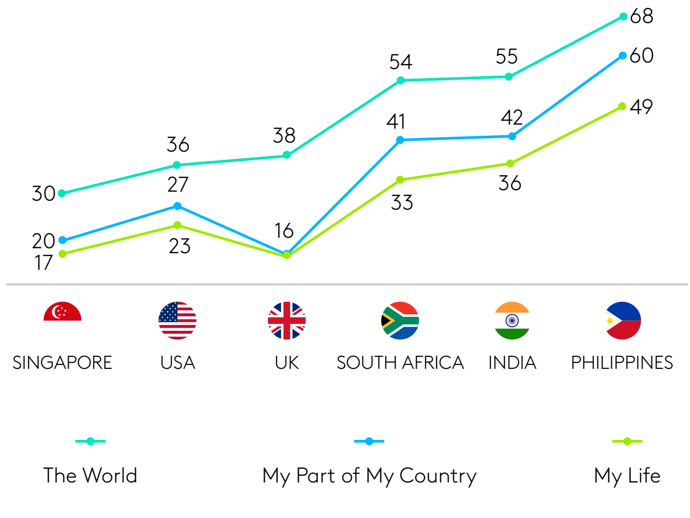
*Big Impact = 9/10 on a 10-point scale; mean score across 6 countries

Finding 2 – How impacted someone is by issues is key to how to motivate and influence them

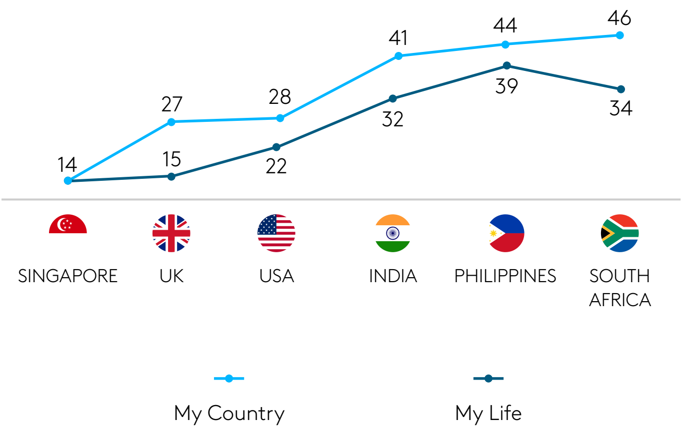
The impact of different issues in the world can be considered at different levels to the individual: from being remote from the individual and only impacting the wider world, to impacting an individual's wider community or country, to being very close to an individual by directly impacting them.

The overlay of this with sustainability issues has been widely written about, and is confirmed again as finding in this research. It remains an important dimension to measure, especially as the perceived proximity of issues gets closer to the individual, most notably climate change, which can drive engagement, anxiety and action. It also means when conducting research on sustainability issues, the time of year and world events leading up to or during fieldwork need to be considered – recent memories of flash floods or forest fires will likely spark a temporary increase in engagement that doesn't stick with all people in the long term. We also observed that this perceived proximity of impact follows the same pattern for environmental issues as well as social issues.

Perceived Big Impact of Climate Change (%)



Perceived Big Impact of Social Issues (%)



When we split apart the perceived impact of climate change and social issues, we see there are differences in how people in different countries feel about the impact and how they experience it in their own lives. Generally, the unequal impact based on country wealth is visible by more people in developing countries claiming big personal experience and perceiving a big impact in their country or wider world. Differences between countries on the social and environmental issues are also apparent*.

In all countries there are many more people that perceive the issues to have a big impact in the world, than personally experience the issues. This larger group are also engaged in the issues and can be thought of as a key influence-able group to consider when developing sustainability segmentations aiming to encourage sustainable behaviour change.

Finding 3 – Hope of finding solutions is key to unlock action

Optimism that there are solutions to the world's biggest issues is a key ingredient in unlocking action. Without it, there is little motivation for individuals to overcome the barriers to change their behaviours, even if they care deeply about the issues. Businesses, and specifically marketers, are in a good position to develop and show solutions, injecting hope and facilitating positive behaviour change. The good news in the data collected is that very few people have no hope. When asked about their feelings about the possibility of making real progress to solve environmental issues like climate change, damage to nature, water scarcity or pollution, only 1 in 10 people used 1-4 on a 10-point scale.

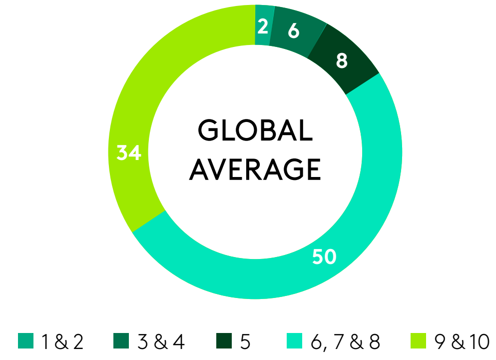
How many people are very hopeful varies enormously by country* and shows different people feel about this in very different ways. This has implications for any organisation wanting to promote sustainable behaviour changes. It is also worth reflecting that India and The Philippines both have fewer people very hopeful about social progress than environmental progress.

***PLEASE NOTE**

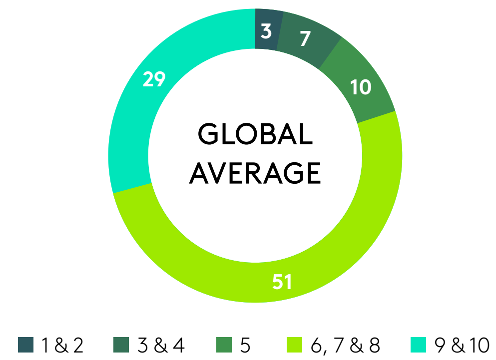
Different cultures respond to scale questions differently. In sustainability segmentations we are aiming to split people apart based on their responses so is important to bear this in mind.

It is recommended to normalise the data based on how respondents answered the questions within each country when segmenting people.

Environmental Optimism

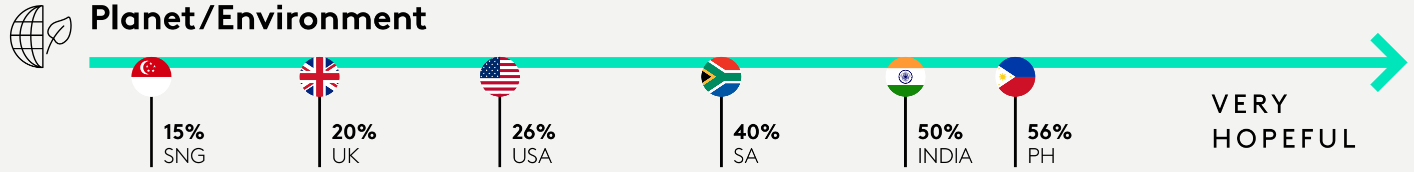


Social Optimism

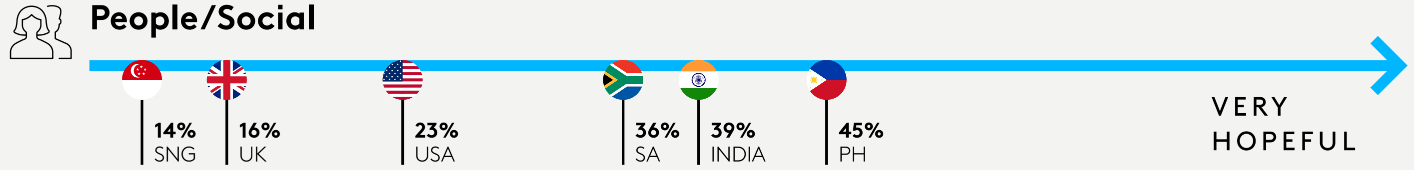


As there is an implication of this difference of hope between countries, it is worth adding this dynamic into any sustainability segmentation being developed. Within countries, there will also be extreme differences on level of hope between groups of people (consumer segments, for example), and the business actions required to encourage behaviour change will also vary.

Planet/Environment



People/Social



Finding 4 – Peer pressure and virtue signalling are motivators

People are influenced by what other people think so social factors are an important influence on some people. They want to appear more positively to other people, so can feel social pressure to signal that they care about sustainability issues but have little action to back it up.

This 'virtue signalling' can involve posturing, often online to have more scale, but lacks deeper real engagement in the issue and, importantly, any substantial action beyond what is being demonstrated. There are also negative perceptions from appearing to not care about sustainability, and therefore social pressure to signal that you do.

We can clearly see this motivation in the data. Most people in the survey agreed that sustainability purchase behaviours signal something about them to other people. Even more people claim to encourage others to behave more sustainably.

"I encourage my friends and family to behave more sustainably"

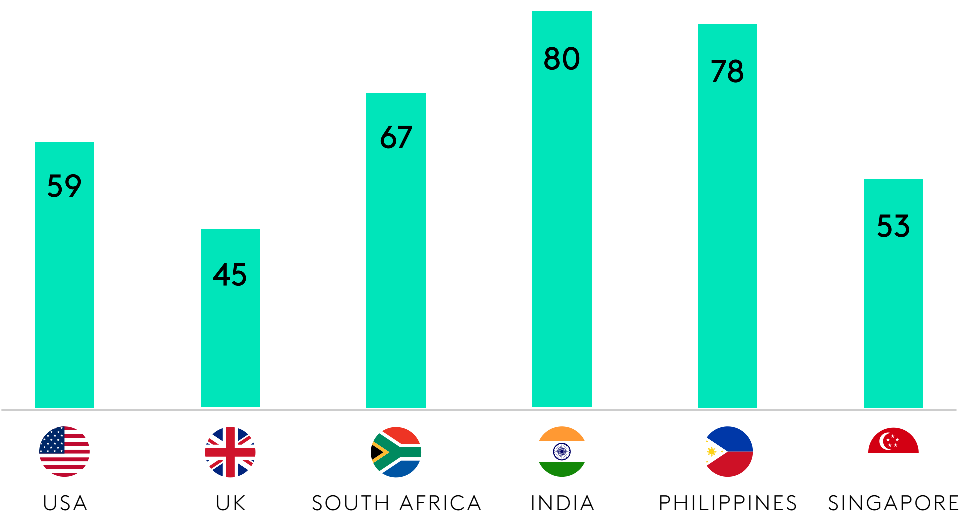
"My friends & family behave sustainably mainly to avoid negatively judged or appear positively to others"

34%

Global Average

These numbers are very high and give an indication that there are social norms forming to pressure people to behave more sustainably, but also that it is hard for people to objectively answer this question about themselves. This would be even harder if the question were more focused on a potentially negatively perceived motivation, like virtue signalling. Therefore, to understand this further, we also asked this in a projective way, about their friends and family.

Consistently, across all cultures we covered, there is a segment of people that are sceptical about their friends and family's deeper motivations. It is logical that their friends and family would say the same about them and is potentially a motivator for the respondent's own behaviour and expressed attitudes. This social pressure is clearly a motivator for a segment of people, so it is important to include in sustainability segmentations, especially when using segments to encourage behaviour change as this segment will require different approaches to meet this need.



"Buying sustainable products or choosing environmentally and socially conscious services shows others who I am and what I believe in"

64%

Global Average

Finding 5 – Denial remains for a small minority, in comparison to the majority who care about sustainability and want to act

There remains a minority of people who are sceptical of sustainability issues or don't think they are an urgent priority. This group are less likely to be responsive to sustainable behaviour change communications, which some interpret as an attempt to control them which they can react against. However, far more people around the world see environmental and social sustainability issues as the most important issues in the world that need solving. They are already experiencing the problems or are anxious that they will in their and their children's lifetimes.

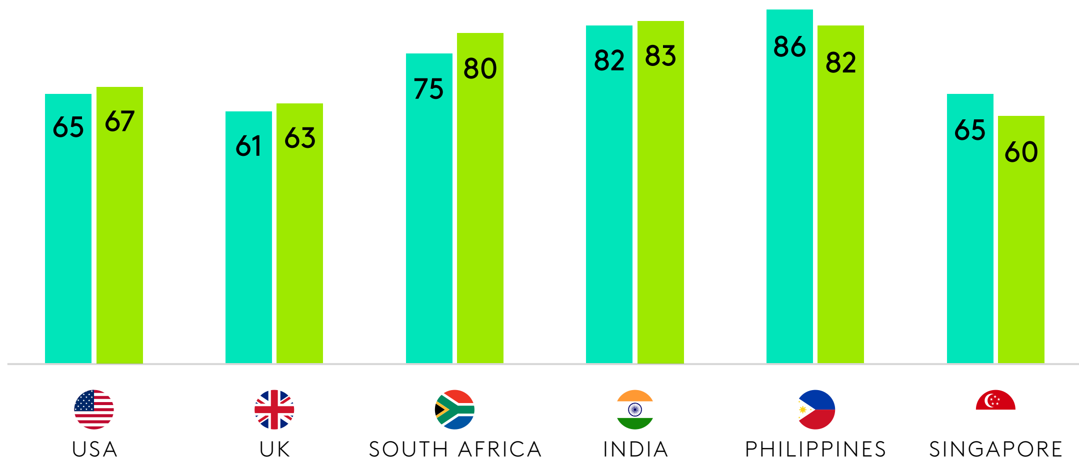
Beyond this, most people agree that they have a role to play in solving the issues. However, as we know, their behaviours don't come anywhere close to these intentions. Therefore, we must develop a better, more granular understanding of where people are on their sustainable behaviour change journeys, and the barriers to overcome. To come back to the people that deny or are sceptical of the issues, once sustainable behaviours become more common place, it is likely that even these sceptics will start to change their behaviours to fall in line with wider society.

"I think people are worrying about global warming more than they need to"

"People like me need to do whatever we can to..."

Fight the climate catastrophe

Fight social inequality and injustice



Findings on Behaviours

In many ways, people's behaviour is all that really matters, as it is only action that can make a difference. It is also true to say that measuring behaviours is much more difficult. The findings in this section will both cover approaches to measure the behaviours and what we have uncovered about those behaviours to use for sustainability segmentations.

As a reminder, these broad behaviour groups were inspired by **The Low Carbon Lifestyles Wheel: Behaviours, Barriers and Benefits,** plus some additional consequential behaviours not covered by the wheel which we wanted to measure for sustainability audience understanding.

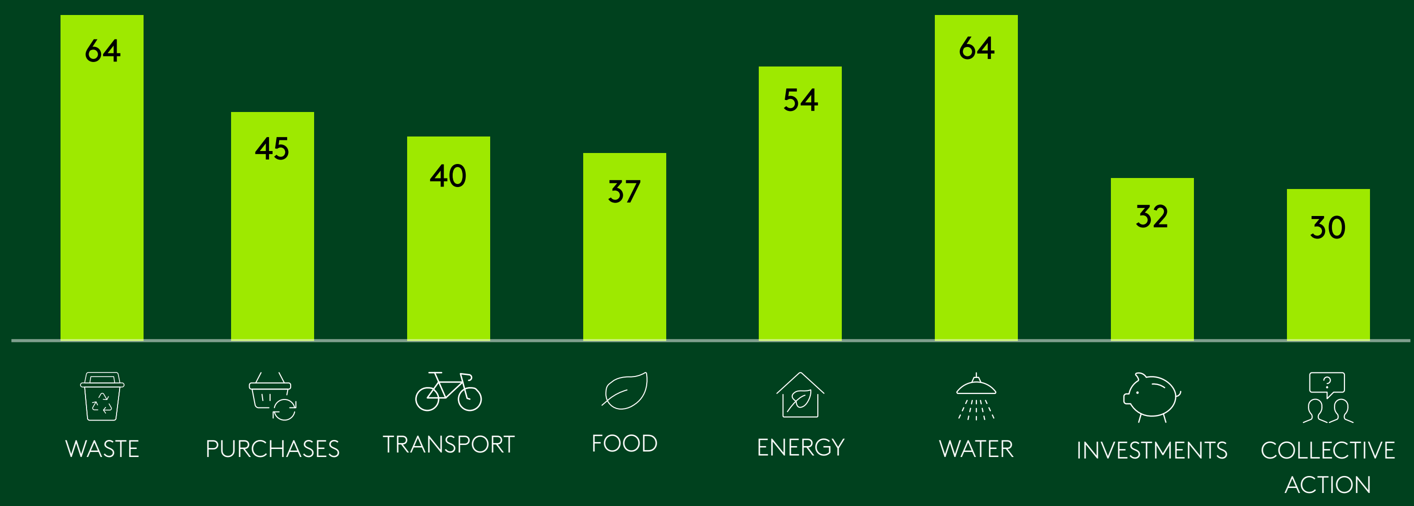
Finding 1 – Indirect questioning in context of frictions gives lower claimed action

The research covered several clusters of sustainable behaviours summarised in the chart below and explored different approaches when asking about people doing these behaviours. The approach of asking about behaviours, indirectly, in the context of barriers to action, was based on the principles that:

- **Most people are not doing these behaviours,** so assuming action in the question is leading. Only 27% in Kantar's Sustainability Sector Index have changed their behaviour to be more sustainable, on average, across different sectors.
- **Most people do want to live a more sustainable lifestyle** (84% in Kantar's Sustainability Sector Index)

The approach gives this result:

Global Average,
"I try my best to do this" (%)

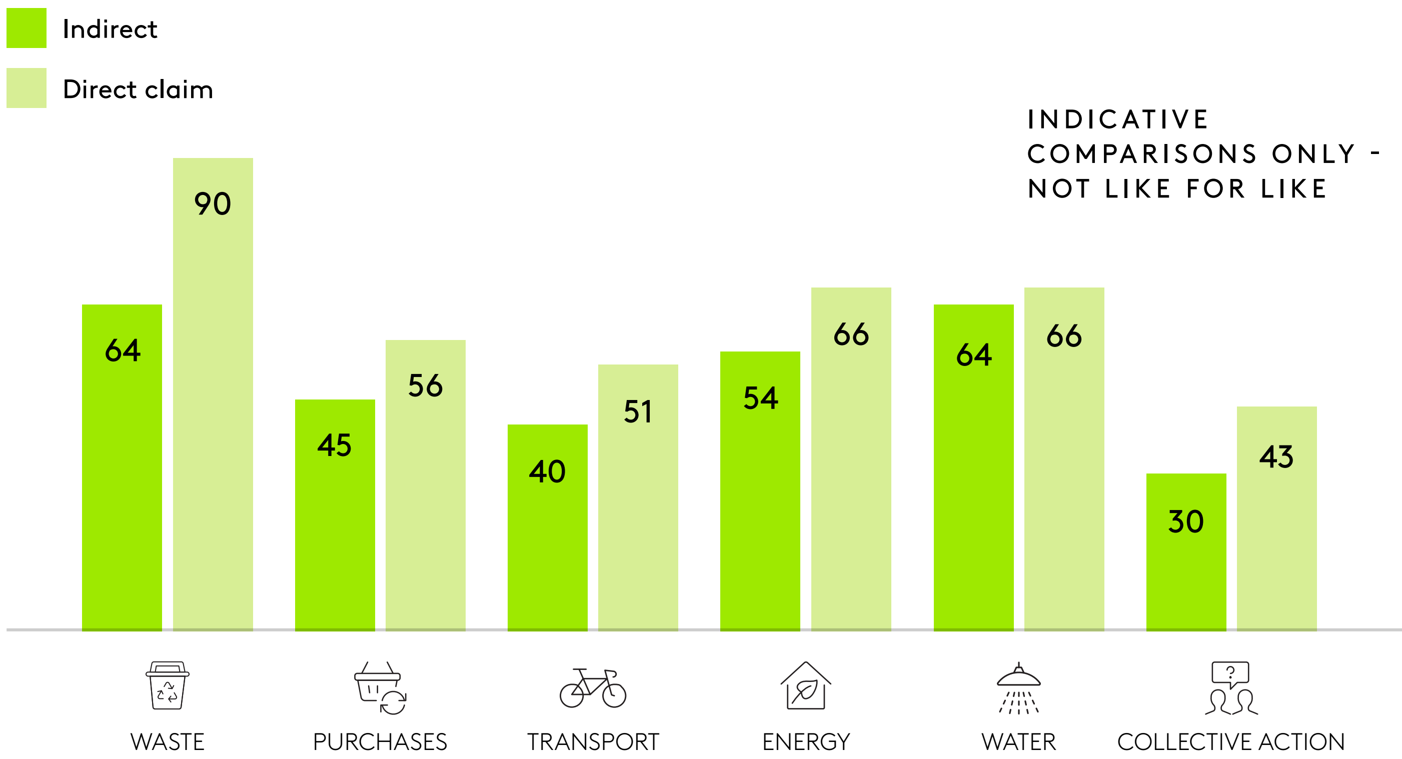


This has been compared to other data sources where more direct questions were asked, for example doing the behaviour within a period of time. The indirect approach gave lower claimed action than other indicative sources. We cannot definitively say this is more accurate, or elicits less over claim than other claimed data responses, because not all are like-for-like comparisons.

Lower claims are intuitively more accurate given the extensive work done on the sustainability value-action gap. In addition, the added insight gained regarding barriers to action provides highly valuable insights on how to close the gap.

When asked directly if do action, then generally claims are higher

Global average (%)



Finding 2 – Sustainability behaviours measured need to go beyond waste reduction

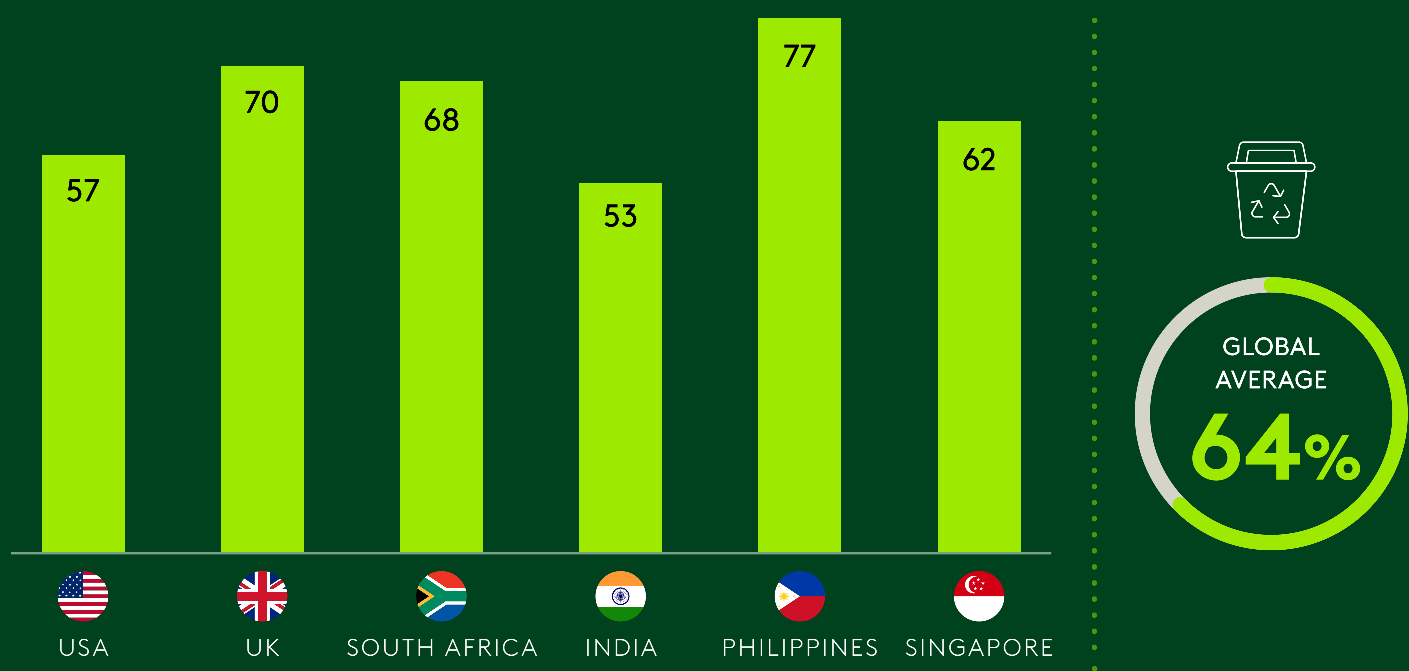
As an issue, waste is very broad, encompassing problems like plastic pollution, the amount of material going to landfill and food waste. These problems are very visible to people, have been widely communicated for many years, and many markets have started to legislate on the issues. In Kantar's Sustainability Sector Index, the issues of waste, packaging and plastic pollution are among the top issues consumers rate as relevant to many different business sectors, hence waste is an issue that many businesses are working on.

Waste reduction behaviours similarly are often central to the way many businesses segment consumers on sustainability. This research has found waste reduction to be almost normalised, at least to the extent that most people in all markets covered say they are reducing their waste. This is an example that when behaviours are scaled to the degree of being commonplace, even people not particularly engaged in environmental issues will participate to an extent.

If waste reduction is being used as a primary way to segment people based on their sustainability engagement, then it isn't a broad enough topic; many other sustainable behaviours should also be considered. There are more findings on this coming later in this paper.

Reducing Waste has become close to normalised across most countries so doesn't split people apart well. Essential to explore broader aspects in addition to waste behaviours

Waste Reduction Action (%)



Finding 3 – Honesty priming gives lower claimed action on specific waste reduction behaviours

Because waste reduction is such a broad issue, many businesses clearly need to understand this in more detail and have some sense of the degree to which people do this behaviour. In this research we also compared 2 approaches to ask about several common waste reduction behaviours:

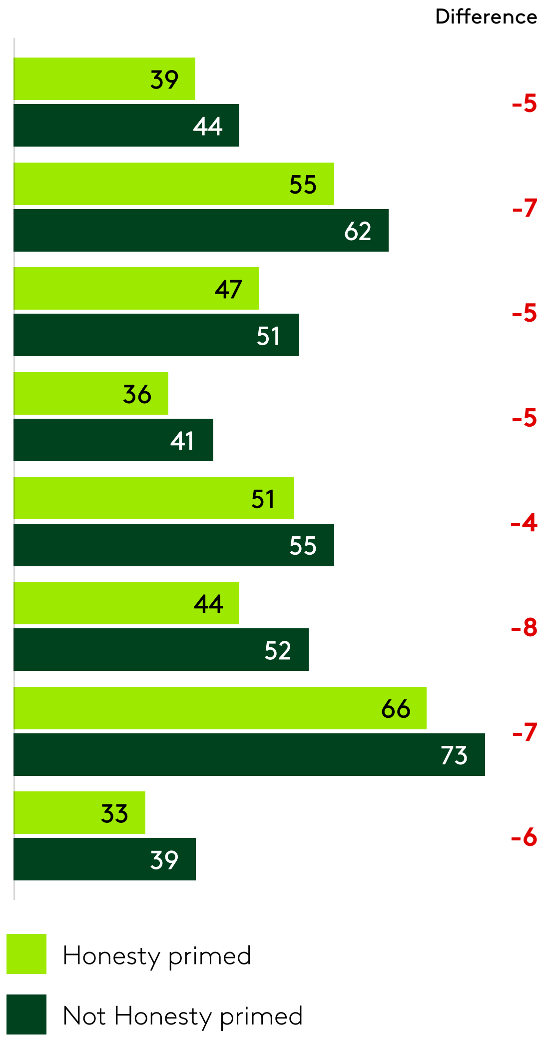
1. **NOT HONESTY PRIMED:** We simply asked how often people do 8 waste reduction actions, from not at all to all the time.

2. **HONESTY PRIMED:** We asked people to give an honest assessment of how often they do the 8 actions, including an honesty priming statement to give permission to say they don't do this.

We found across all markets and behaviours that the honesty-primed approach generated a 6 percentage points lower average claim to doing the behaviours most of the time. As we know, there is social pressure to respond positively, hence we therefore suggest the lower scores are a better reflection of reality and that honesty priming is a useful technique to use when asking about specific behaviours. We have proven this here with the waste topic, but the implication is for any behaviour.

Additionally, this data on waste reduction behaviours reveals different levels of action, including huge differences across different countries on these behaviours, based on culture or policy that has been implemented locally. To contrast just 3 behaviours across markets, these range from over half of people in the UK always bringing bags when grocery shopping, to 1 in 10 people in most markets always avoiding drinks in plastic bottles.

To bring this back to segmenting people by their behaviours, specific waste reduction actions remain a useful approach but should be considered alongside other sustainable behaviours, which we will explore in the next finding.



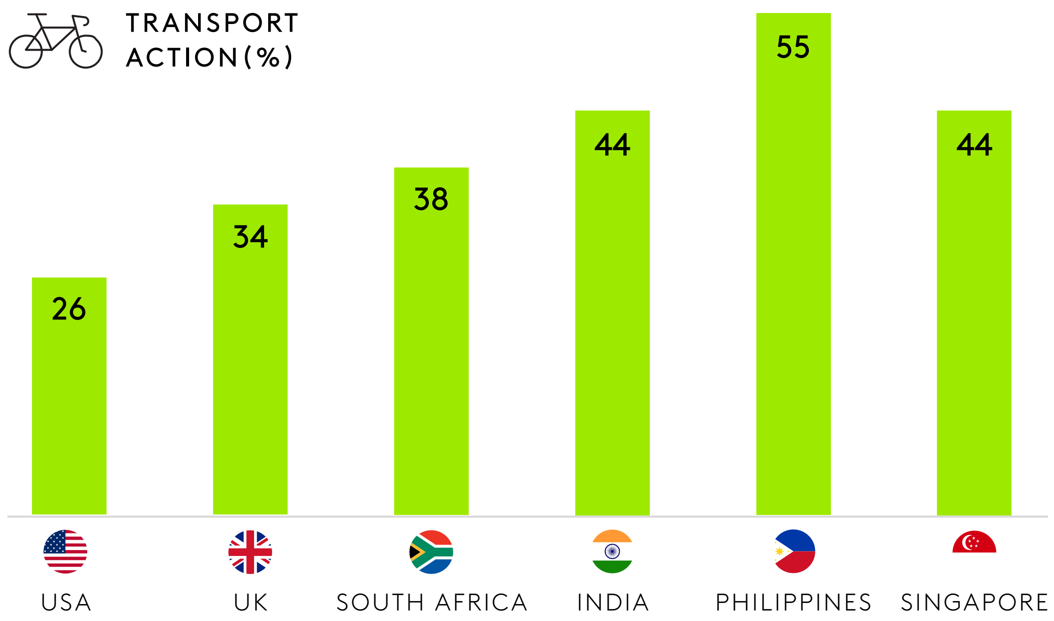
	AVERAGE ACROSS 6 COUNTRIES	RANGE ACROSS COUNTRIES
Always bring a bag/basket for purchases	35%	UK - 56% USA - 25%
Always use refillable drinking bottles	22%	UK - 30% Singapore - 13%
Always avoid buying drinks in plastic bottles	13%	India - 25% Singapore - 9%

Finding 4 – More impactful behaviours, that require more effort, are important to segment people

Consumption-related behaviours, such as waste reduction or buying more sustainable products and services, are in many ways amongst the easiest behaviours for people to do. However, the reality is that other actions would have a much bigger impact on reducing carbon emissions. Changing how we travel and what we eat are accepted as two of the more impactful behaviours. Although not directly related to all sectors, these have a big impact in carbon reduction, and are good to split people apart based on level of engagement and behaviours.

Travel/transport was asked about very broadly initially from flying less, using cars less, or switch to EV/hybrid. There are fewer people saying they do this than behaviours that require less effort, like waste reduction. Only 1 in 10 say they have made a switch to EV cars, and 1 in 4 say they have already reduced their air travel.

Living car-free can reduce your annual carbon footprint by up to 3.6 tons! (UN)

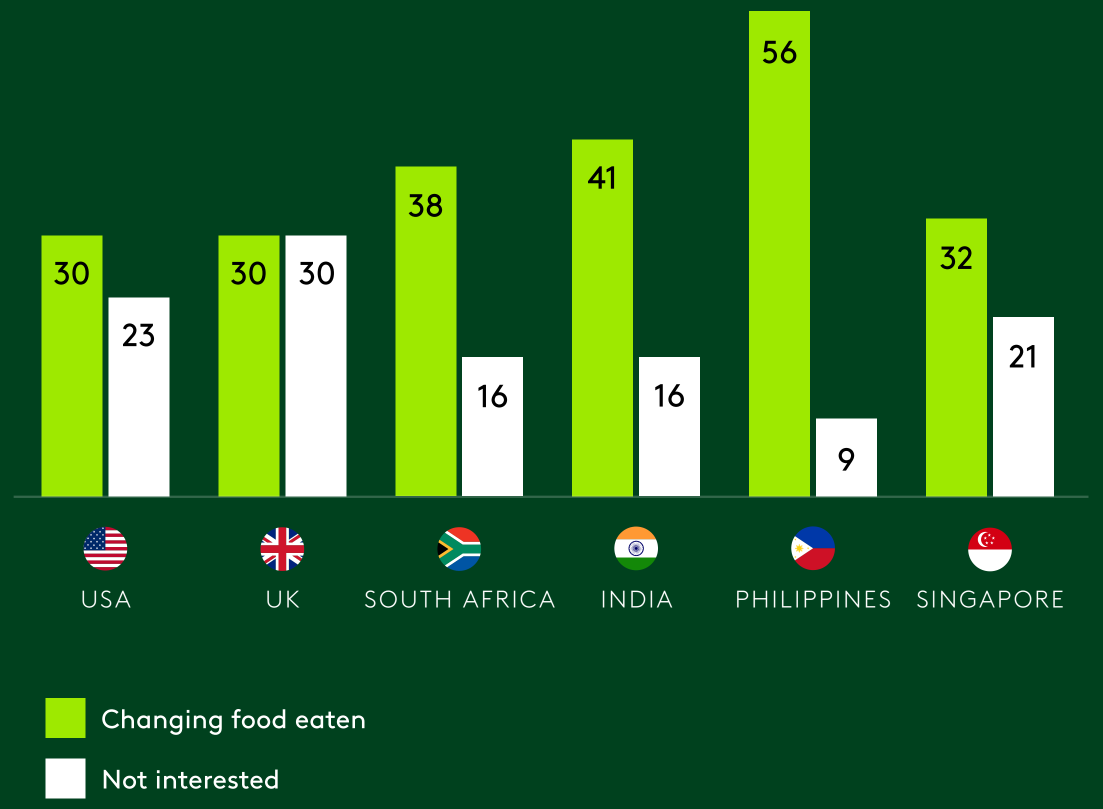


Similarly to travel/transport, changing what we eat requires more effort, which means there are fewer people doing this. This behaviour doesn't require everyone to become vegan 100% of the time, but in line with the recommendation to adopt a reduction of meat and dairy consumption (Tony Blair Institute for Global Change). That could be what we observe anecdotally as self-licencing of known negative behaviours e.g. giving licence to eat the steak on Sunday because of eating a vegetarian food for the rest of the week. In our survey we asked about a more realistic behaviour of eating less meat and dairy/eating more of a plant-based diet.

Even this articulation of the action which required relatively small change, elicited relatively few people doing this in some countries. In the UK, US and Singapore there are only a third of people doing this currently, and between a fifth and third of people say they have no interest in doing this. Purchase data from Europanel's Who Cares Who Does shows flattening sales of meat or dairy alternatives in European markets (2022 vs 2023). In some countries there are more people doing these behaviours – likely for cultural reasons or for financial reasons as public transport and plant-based diets are simply what many can only afford to do anyway. Including a mixture of behaviours such as these in a segmentation is a good way to make sure we are splitting people apart globally, as different behaviours will require different effort depending on where someone lives.

Shifting to a vegetarian diet can reduce your carbon footprint by up to 500 kilograms of CO_2e per year (UN)

EATING LESS MEAT AND DAIRY (%)



Finding 5 – Frictions vary and are useful to segment people

Understanding the barriers which consumers face in adopting more sustainable behaviours supports greater actionability, hence this is undoubtedly a useful data source. This research has also shown that barriers vary by behaviour, often across markets, and between consumer segments as well.

Let's take consumer interest in more sustainable transport options, such as buying an EV, as an example:

	TOP FRICTION FOR TRANSPORT BEHAVIOUR	TOP FRICTION FOR FOOD BEHAVIOUR
USA	Not Interested (21%)	Habits (26%)
UK	Don't travel much (22%)	Habits (23%)
SOUTH AFRICA	Convenience/Affordability (24%)	Habits (29%)
INDIA	Effort (31%)	Habits (30%)
PHILIPPINES	Convenience/Affordability (21%)	Habits (22%)
SINGAPORE	Don't think about it (17%)	Habits (24%)

The barriers for higher effort actions, like changing transport and eating behaviours, differ from the lower effort consumer-related behaviours. In the US, the most commonly stated transport barrier is not being interested in doing this. In the UK it is about not thinking it would make a difference, and in Singapore it is simply not thinking about it at all. The more developing markets are a bit different, as the barrier is more related to the effort or practicalities of this behaviour change. There is also a stark difference between the more developed and developing countries on EV consideration – consistently about 40% reject EVs in the US, UK and Singapore, more than double what people in South Africa, India and The Philippines say.

The most stated barrier in all countries for changing what we eat is struggling to change day-to-day eating habits. Addressing this barrier would require different approaches and shows the value of including barriers to drive action. More nuance on barriers is useful for businesses wanting to focus on a specific behaviour and might not be possible in a segmentation. In this case, search data is often a great additional way to unpick the barriers to action and get a sense of the opportunity in a given market.

Regarding adopting more sustainable eating habits, search data reveals an important insight: Sustainable diets are of growing interest to all consumers (even meat and dairy die-hards), and accessible, realistic options are needed to fuel a large-scale change of dietary habits.

(Source: Kantar Digital Analytics)

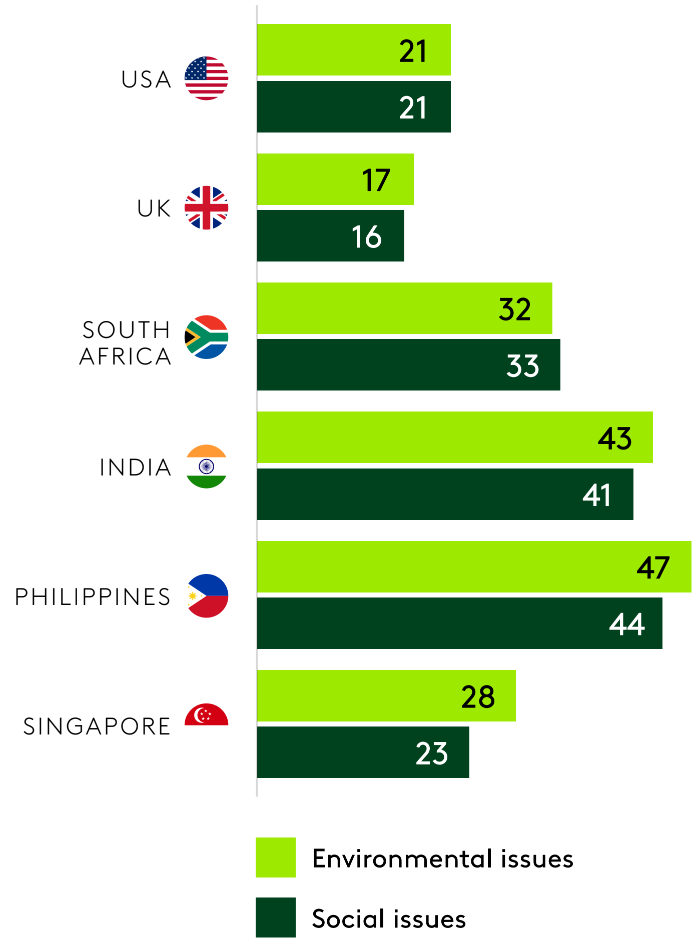
I STRUGGLE TO CHANGE MY NORMAL EATING HABITS

Finding 6 – Collective action or citizenship behaviours uncover a specific consumer segment

In 2024, more people cast votes in elections than at any other point in history. This collective action was voted by the most climate scientists (74% of them) as what people could do to have the most impact against climate change **(The Guardian, 2024)**. With this in mind, as well as understanding that there are many more collective actions people can take that can make a difference to sustainability issues, we made sure this was covered in the research. It was asked about in very broad terms, from contacting their government to campaigning, protesting or volunteering. Despite the range of activities within this group, comparatively few people are doing these actions.

Whilst not relevant for every brand, more activist brands might want to consider the nuances of the barriers to trigger action, and all brands might want to consider these more activist consumers in their categories as a way of understanding some of the most engaged on sustainability issues.

COLLECTIVE ACTION (%)



Summary & Call to action

Segmenting people based on sustainability attitudes is well established and many segmentations exist.

There is broad alignment on identifying groups of people who care about the topic, people who don't, and a large group somewhere in-between. Much attention is given to the "value-action gap" between many peoples' sustainability values and their behaviours. To meet sustainability targets there is an urgent need to support people to behave more sustainably and stick with their new behaviours. Businesses have a responsibility to support their consumers on some of these behaviours, and there are clearly business opportunities in addressing these, often unmet, needs.

Therefore, there is a need to understand people based not just on their sustainability attitudes, but their behaviours, and the barriers to doing those behaviours.

Hence our 6-market research, conducted across 4 continents, was shaped to:

Refine

The most important attitudes and values regarding sustainability that split people apart. This was done by experimenting with a broader selection of question types across both environmental and social sustainability topic areas. We also incorporated key learnings from partners and leading sustainability bodies to ensure we could build the most robust output.

Develop

A meaningful and scalable approach to asking people about their sustainability behaviours, which are often over-stated. This was done using an approach where behaviours were asked in the context of barriers to not assume positive action, as well as testing an approach to prime respondents to be honest in their responses.

Create

More granular consumer segments which pull people apart more clearly and accurately focused on behaviour change. It is no longer adequate to identify very high-level groupings of people – those who believe and act on Sustainability, those who are on the fence, through to those who do not. Our segments will be shared broadly in 2025.

Many sustainability segmentation studies have focused on sustainability in an overly narrow way e.g. just on environmental issues. This work clearly found that engagement in social & environmental sustainability cannot be assumed based on engagement in one of the issues. It also has shown that virtue signalling and social pressure are dynamics that cannot be ignored in this topic – they are a motivation for some, and impact survey responses. There are also two other suggested dynamics that are useful to support the behaviour change end objective – the perceived impact of sustainability and hope of finding solutions.

The behavioural findings from this work firstly inform us that a much wider variety of behaviours should be included, and these must go beyond the easier to achieve, normalised behaviours, such as waste reduction. The research has proven that different question types and phraseology elicit different responses and recommends priming respondents to not feel pressured to respond in a specific way.

Some behaviours are very relevant for business e.g. purchases, investments or energy/water usage, and remain useful as businesses can have more impact on these, especially if they understand the barriers to action.

More outlying behaviours such as collective action were also included in this survey and activist brands may wish to consider this. The approach of broadly asking people about their behaviours in context of the barriers tested in this work gave lower claimed action than other indicative sources; and provided an understanding of the barriers consumers face, which supports more actionability and focus on facilitating sustainable behaviours.

There is an opportunity to scale the impact we have in the marketing industry by aligning on these approaches, not just in research, but in brand strategy, in product development, and advertising to inspire behaviour change. These findings similarly aim to provide a foundation for industry collaboration and the building blocks for sustainability segmentations that are more equipped to bridge the gap between sustainability values and action. We welcome all collaboration on achieving this vision and anyone is welcome to follow the recommendations that emerge from the ESOMAR working group that will build on this foundation.

We look forward to releasing the full segment details in 2025.