

# SOCIO-CULTURAL TRENDS 2020

Analysis & Insights on Consumer Sustainability Intentions & Actions

**BRANDS  
FOR  
GOOD+**

 **The Harris Poll**  
Harris Insights & Analytics, A Stagwell LLC Company

*Brands for Good: Accelerating Culture Change | September 15<sup>th</sup>, 2020*





# Introduction

*Understanding consumer intentions and actions towards sustainable lifestyles, and how brands can strengthen consumer relationships by helping them achieve their sustainability goals.*

**Brands for Good** is on a mission to make sustainable living easier and more rewarding for people around the world. To further that objective, Brands for Good Partners and **The Harris Poll** worked together to better understand consumer intentions towards sustainable lifestyles, and which actions they are taking to make sustainability a reality.

We surveyed thousands of American consumers to measure their intentions towards adopting sustainable lifestyles, determine which actions they are taking across the **Nine Most Impactful Sustainable Behaviors**, and understand the areas where

consumers aspire to do more. Importantly, we've also contextualized this data in the value consumers place on both environmental and societal aspects of sustainable living.

This report details those findings and reveals critical implications for any brand, regardless of whether they seek to directly engage with their consumers on these issues. One of the most significant findings: **Over 95% of Americans said they try to live sustainable lifestyles at least some of the time.** Even among those who are not intending to live sustainably, many say they are taking actions that benefit the planet, its people

and its resources through behaviors like **Reducing Water & Food Waste** or **Eating More Plants**.

It's clear that consumers view sustainability as part of their daily lives, and they are looking to the brands they trust to be allies in this mission. To the extent they can help make sustainability the "default" for their consumers, brands will succeed not just in reaching their own sustainability goals, but in fundamentally strengthening the relationship with their customers.





# What are consumers saying and doing when it comes to sustainable behaviors?

## *Research designed to...*

Assess consumer values around sustainability, their supporting behaviors, and understand the gap between intentions and actions.

Use the Brands for Good 9 Sustainable Behaviors as our yardstick.



Field Dates

**July 29 - August 10, 2020**



Total Completes

**N = 3,700**

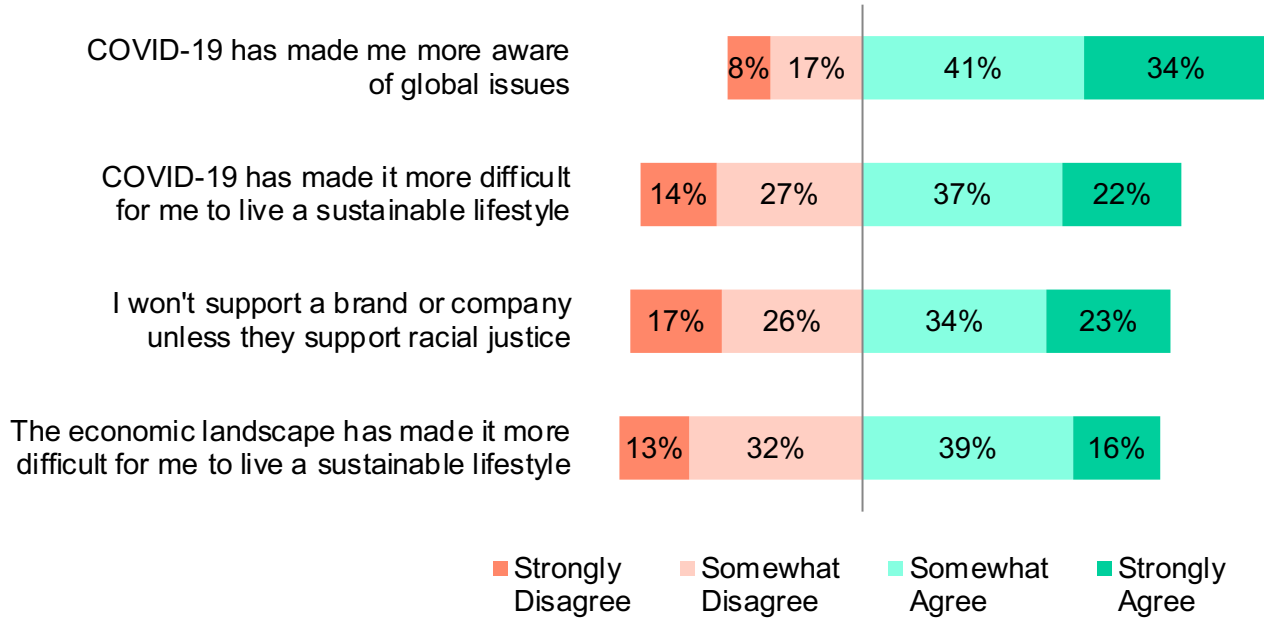


Sample

**U.S. General Public**



# A 2020 preamble: Protecting people, the planet, and resources feels different today.



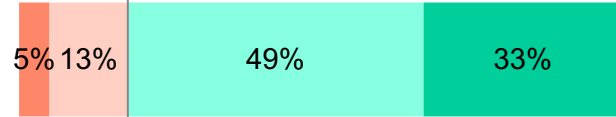
### Harris Poll Covid Tracking

- 56%** Fear personal death
- 73%** Fear leaving home for essential errands
- 59%** Fear losing their jobs

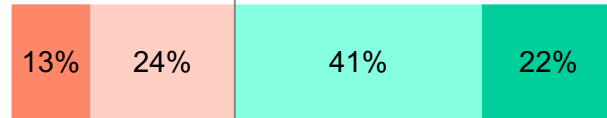


# A disruption becomes a recalibration?

Given all that's going on in the world, I find myself just wanting to go back to basics



I feel the good life is further out of reach than it used to be



Strongly Disagree    Somewhat Disagree    Somewhat Agree    Strongly Agree



To understand Americans' intentions vs. actions we use the framework of the 9 Sustainable Behaviors.

ADDRESS CLIMATE CRISIS

PRESERVE RESOURCES FOR LIFE

FOSTER RESILIENT SOCIETIES



**Eat More Plants**

Eat more fruits, vegetables, and plant-based foods



**Reduce Water & Food Waste**

Reduce water and food waste



**Support Women & Girls**

Support causes and products that educate girls, aid family planning, or support women-owned business



**Be Energy Smart**

Switch to renewable energy sources and conserve energy



**Go Circular**

Recycle and choose products made with recycled content whenever possible



**Expand Equity & Opportunity**

Support brands offering inclusive and equitable products, policies and practices



**Think Durable**

Purchase durable, reusable products instead of disposable ones



**Choose Nature Friendly**

Choose nature-friendly products that protect habitats and biodiversity



**Show Up**

Vote, actively participate in organizations, and buy from companies that support sustainable living

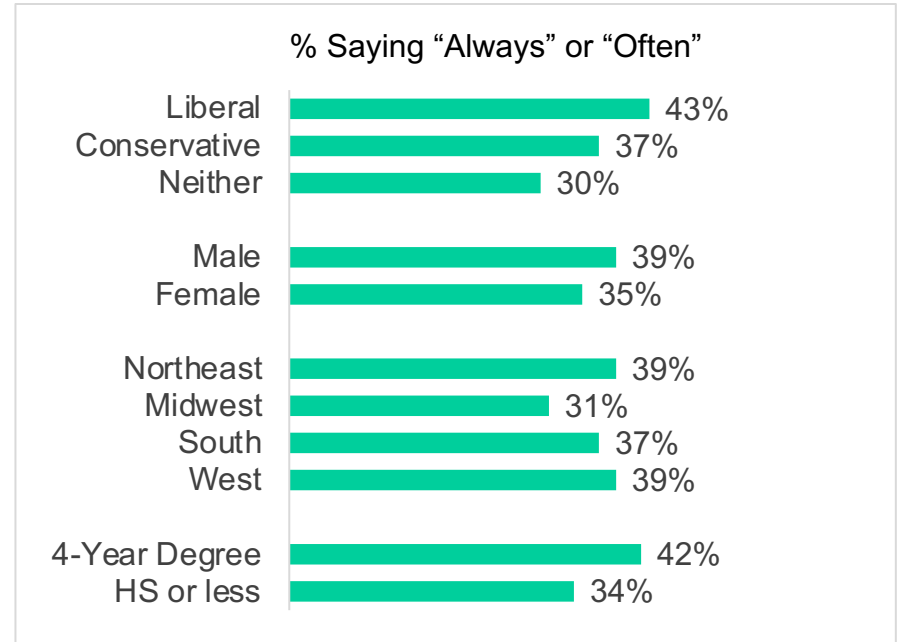


Some Americans have strong intentions to live sustainably, but for most it's a “sometimes” pursuit.

### Frequency of Trying to Behave in Ways that Protect the Planet, Its People and Its Resources

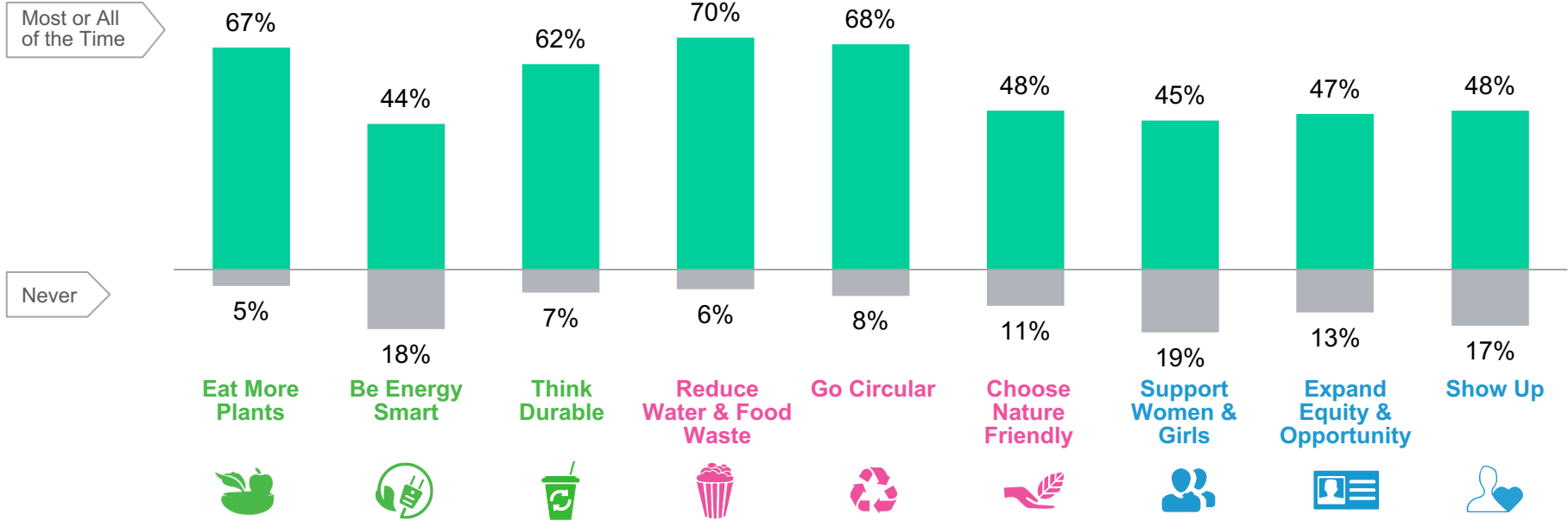


36% Always or Often →  
 60% Sometimes  
 4% Never or Rarely





Our actions reveal well-worn paths to some sustainable behaviors, less to others.

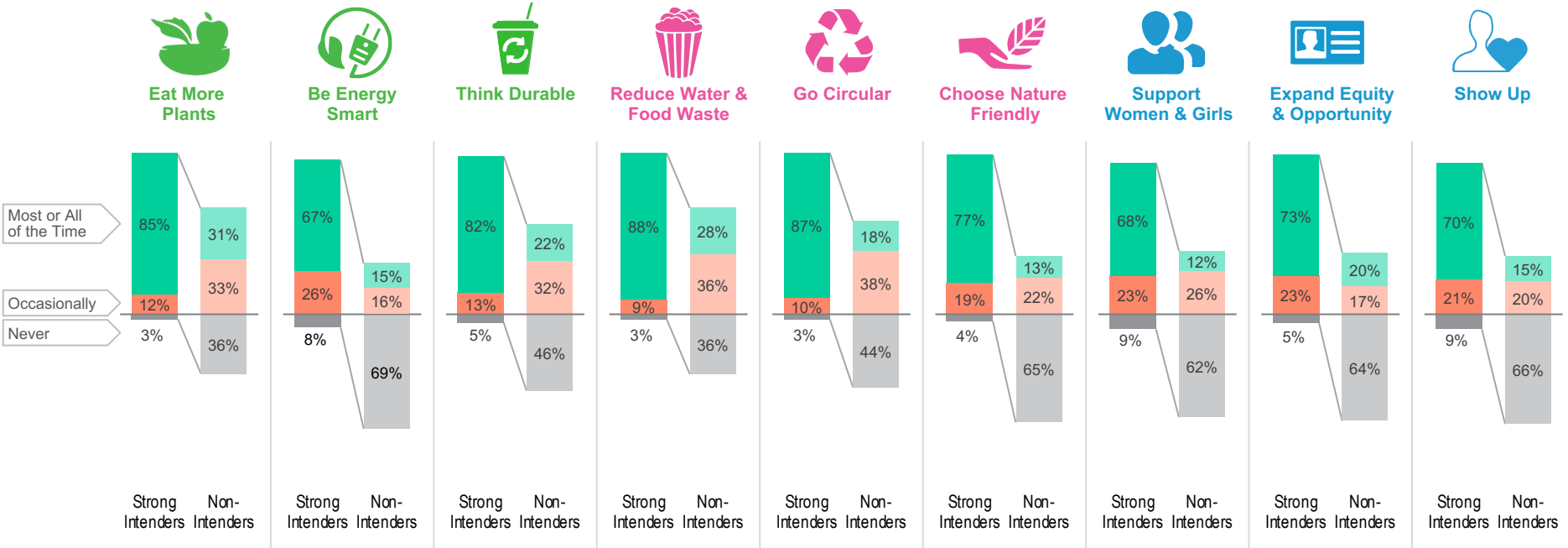


Of note, the frequency of undertaking sustainable actions isn't that different for conservatives vs. liberals (56% vs. 62% on average, respectively).





Many 'non-intenders' nevertheless behave sustainably. So, motivations vary.



Strong Intenders = Top 2 for Overall Intentions (N= 1,350)  
 Non-Intenders = Bottom 2 for Overall Intentions (N=161)



Americans live out their sustainable intentions in some areas, but there's real opportunity for brands to help close the gap in others.

INTENTION-ACTION GAP



Intention-Action Gap Score  
(-100 to +100)

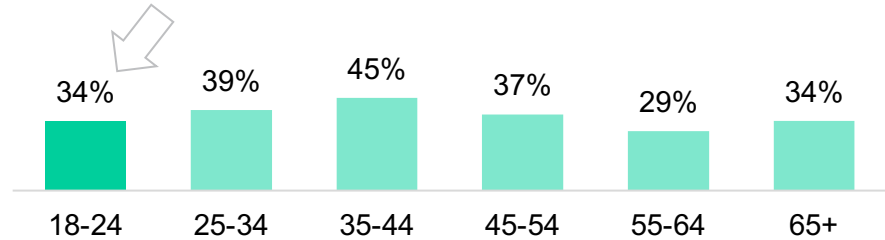




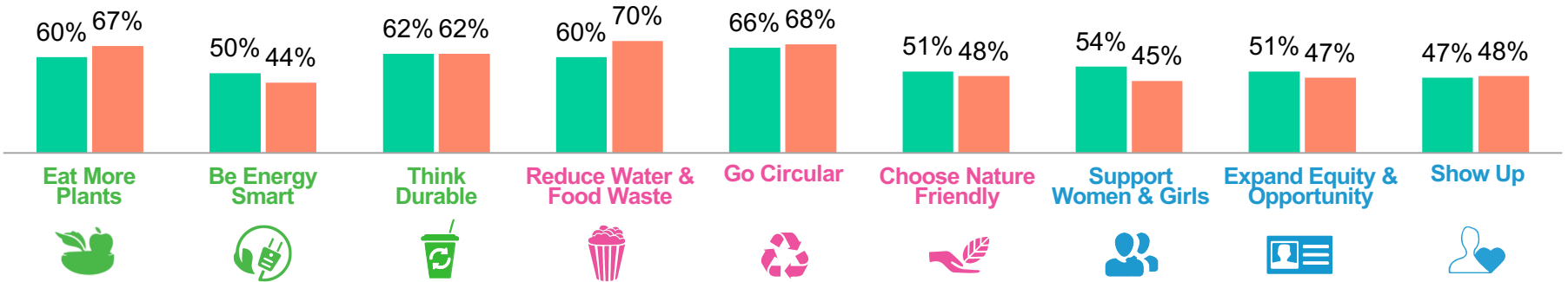
Perhaps unexpectedly, America's youngest adults don't come with wildly different sustainability intentions or actions than older cohorts.



**Intention:**  
**Always/Often Try to Behave in Ways that Protect the Planet, Its People and Its Resources**

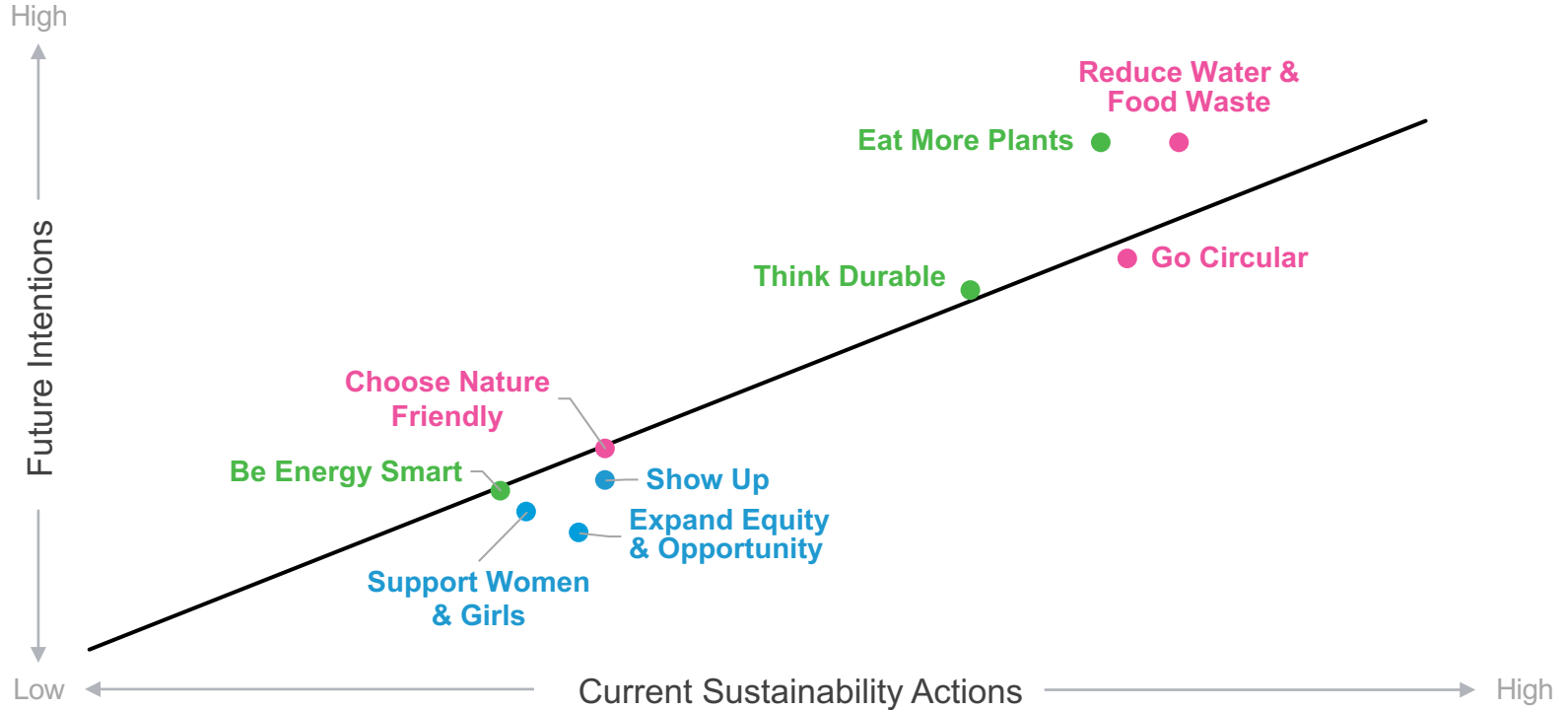


Action: % "Most" or "All" of the Time Take Action in this Area | ■ 18-24 ■ Total





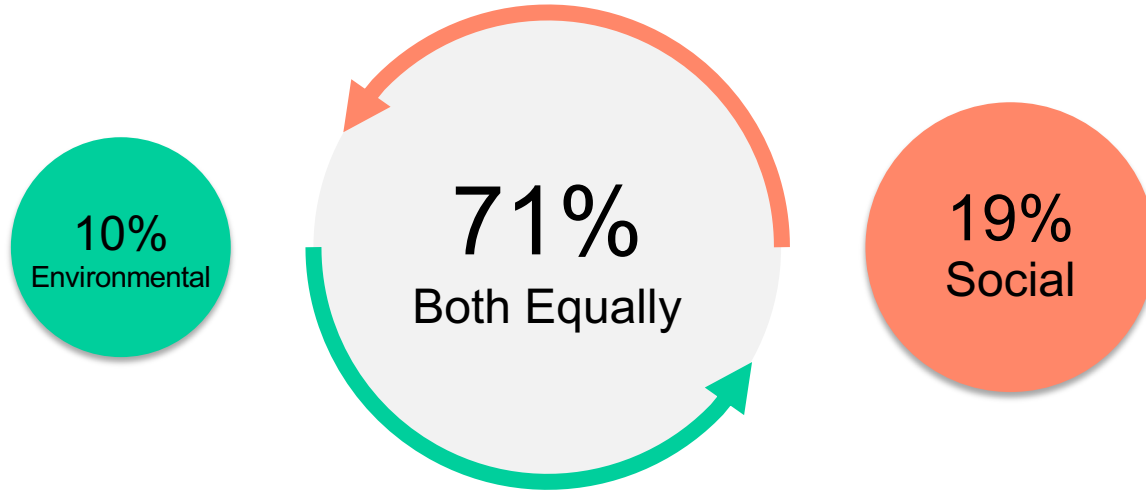
What do Americans aspire to do more of in the future? Largely, more of the same.





Main Street sees the interconnectedness of the environmental and the social.

### Which is More Important to Address: Social or Environmental Issues?

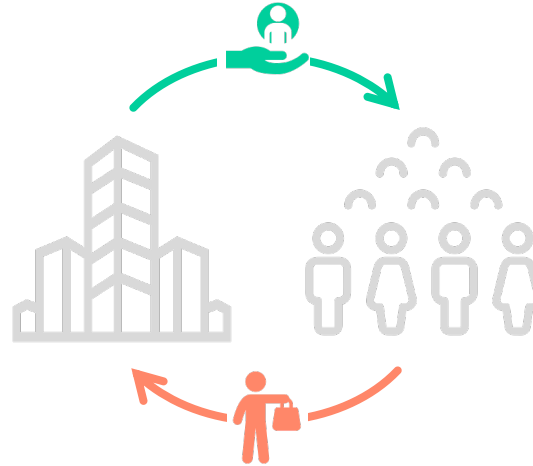


And, **76%** believe that solving environmental issues will require solving social issues (and vice versa).



The public increasingly assumes good intent from business, and often sees how they can impact that good behavior.

**64% Agree**  
Companies care  
about the well-being  
of their customers  
(+7% from 2017)



**63% Agree**  
Believe they can  
influence companies to  
do better by buying from  
them when they do  
(-2% from 2017)

Brands for Good partner brands touch 99% of Americans. In aggregate they are:

- Highly trusted,
- Recognized as doing good themselves, and
- Credited with creating opportunities for consumers to make sustainable choices.



## Worth taking away:

- For most, living sustainably is a ‘sometimes’ priority.
- Americans engage in some sustainable behaviors more than others, and these affinities also influence which behaviors people aspire to do more of.
- We’re better at eating less meat, reducing food/water waste and recycling, less so supporting women or expanding equity and opportunity.
- Not everyone who acts sustainably has explicit intentions to do so – even people without such intentions frequently act in sustainable ways.
- There are opportunities for brands to help consumers do better, especially around areas where our actions lag intention (nature friendly choices, energy conservation & support for resilient societies).
- Nearly all see the importance and interconnectedness of environmental and social challenges.



# **+** GET INVOLVED WITH BRANDS FOR GOOD

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