



SUSTAINABILITY SPEAKS

BREAKING THE BARRIER OF
CLIMATE COMMUNICATION

M/GNA MEDIA TRIALS

Teads

PROJECT
DRAWDOWN.

**Both individuals
and companies
possess
remarkable
power to mitigate
the impact of
climate change**



30%

Total emissions reductions that can be produced by **individual and household actions to avoid dangerous climate change (>1.5 °C rise).**



70%

Total emissions reductions that can be produced by **industry (i.e., brand, government, etc.) actions to avoid dangerous climate change (>1.5 °C rise).**



Our goals

1

Understand why companies and people are not doing more to be sustainable

2

Identify what is and is not working for brands when it comes to implementing sustainability goals

3

Demonstrate how effectively communicating climate action supports brand growth

Our approach



Qualitative

Focus group interviews to inform the scope of the quantitative survey

Diverse representation across age, race/ethnicity, income, geographic location, political affiliation, and education

Duration for Each Interview: **1 Hour**
Focus Group Interviews: **5 groups, n=28**

US Only

Quantitative

Survey to understand and quantify perspectives around sustainability, as well as identify sustainability actions brands can take

Nationally-representative across age, gender, race/ethnicity, and income

Ages 16+

United States n= 5,061
United Kingdom n= 2,024
Australia n= 2,027

Total n=9,112





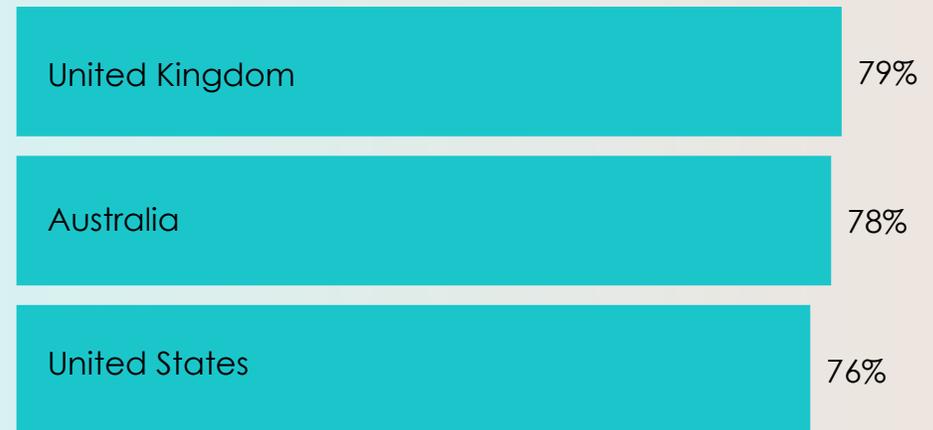
PEOPLES' VOICES,
S U S T A I N A B L E
C H O I C E S

People universally see sustainability as important

Sustainability: practices to support the environment, people, and the economy over time



Importance of sustainability, by country
Scale 1-10 (% Range 7-10)



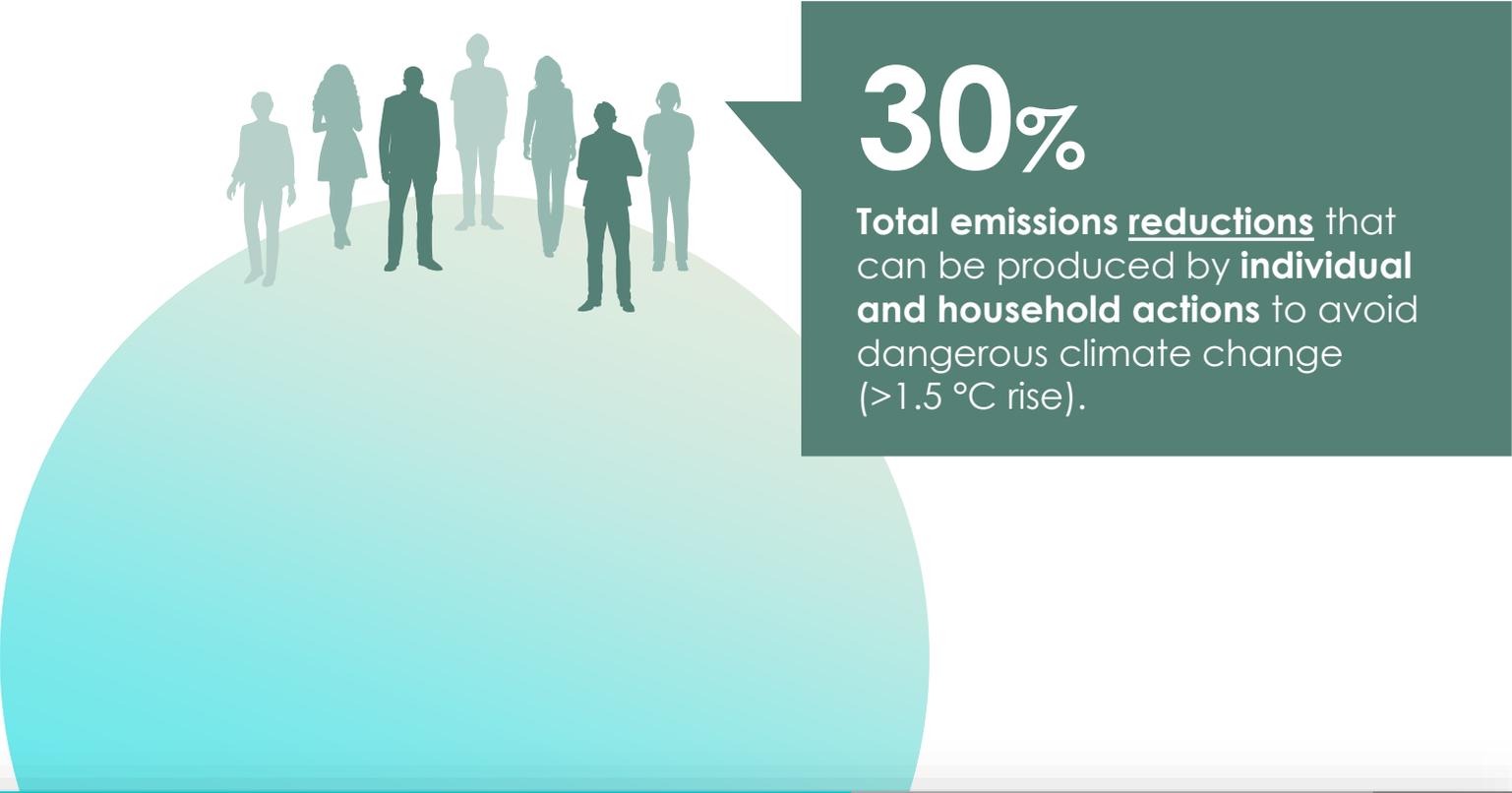
Total N= 9,112

Q: Please rate how important each of the following are to you, from 1 (Not Important) to 10 (Very Important).

Comparisons: Sustainability: Practices to support the environment, people, and the economy over time; Data privacy: Control your personal information online; Equality: Being equal in status, rights, and opportunities; Equal access to food: All people have equal and sufficient access to food

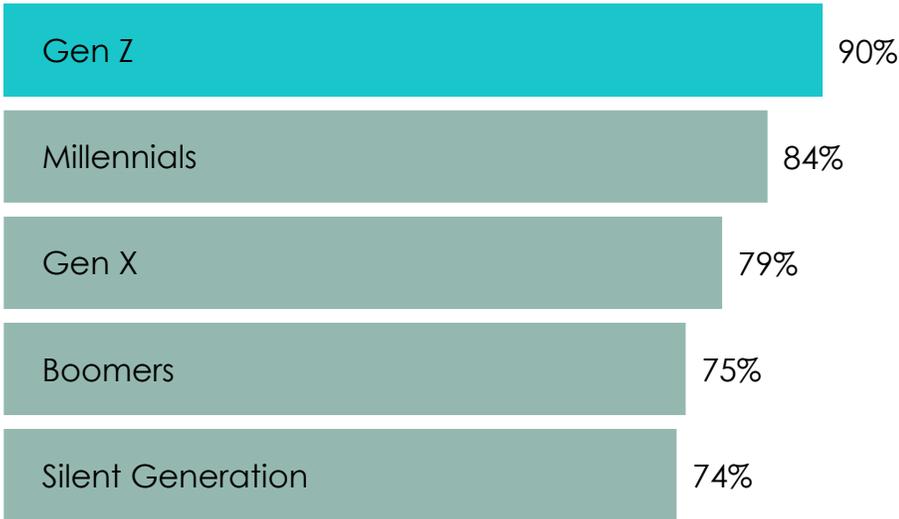
People underestimate the impact they have on this earth

Perceived impact on how much individuals contribute to pollution
Scale, 0%-100%



Perceived barriers to action are rampant, especially among younger generations

Perceived barriers when attempting to live more sustainably, by generation
Net Score



Perceived barriers when attempting to live more sustainably
Net Score



It's the perceived barriers, not beliefs or values, that hinder peoples' efforts at living more sustainably

Perceived barriers that have prevented people from living more sustainably, by generation
% Selected

	Gen Z	Millennials	Gen X	Boomers	Silent
Too expensive	Dark Teal	Dark Teal	Dark Teal	Dark Teal	Dark Teal
Don't have access to the right resources	Dark Teal	Dark Teal	Teal	Light Teal	Light Teal
Not practical to incorporate into daily life	Light Teal	Light Teal	Teal	Teal	Teal
Don't think about it enough	Light Teal	Light Teal	Light Teal	Teal	Light Teal
Takes too much effort	Light Teal	Light Teal	Light Teal	Light Teal	Light Teal
Don't trust in the quality of sustainable products/services	Light Teal	Light Teal	Light Teal	Light Teal	Dark Teal
Don't know how to	Light Teal	Light Teal	Light Teal	Light Teal	Light Teal
Don't believe it'll make a difference	Light Teal	Light Teal	Light Teal	Light Teal	Light Teal
Doesn't align with personal values	Light Teal	Light Teal	Light Teal	Light Teal	Light Teal

LESS

MORE

The belief that being sustainable is expensive prevents many people from realizing their sustainability goals



“I think that a [problem] lot of people have is everything costs money. With living [expenses] going out through the roof...people aren't able to do the things that they want to do to maybe contribute. So I think that **the lack of funds and the lack of resources** honestly are what's standing my way to really make that, you know, that big change that I'd like to make...”

Daniel
Male, Millennial



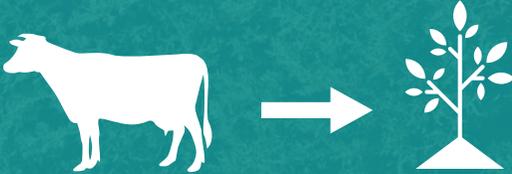
“I think that is the major issue [is] the cost and keeping the cost reasonable. We have so many people who are, I mean...they just can't sustain their daily life...So, you know, it's a struggle on that end. **So perfecting or improving the environment, as much as we want it to be a priority, can't be a priority because people are struggling just to make it from day to day.**”

Tajuana
Female, Gen X

Better communication can help address perceived barriers



Source: The Global Commission on the Economy and Climate. Unlocking the Inclusive Growth Story of the 21st Century: Accelerating Climate Action in Urgent Times. Aug. 2018.



Shifting away from animal-based foods to plant-based foods – especially beef – could save consumers almost **\$1 trillion per year by 2050** globally



Switching to LED lighting can offer **energy cost savings of up to 50-70%**, and up to **80%** when paired with smart systems

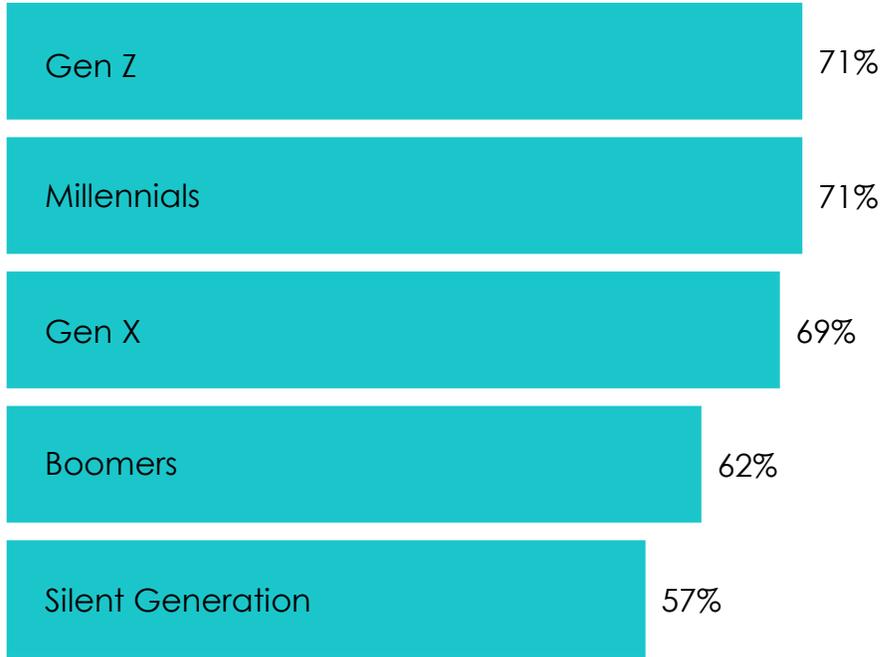
People know that the environment is being damaged, but believe they can have a positive impact

Environmental damage is on the rise
% Strongly/Somewhat Agree

78%
AGREE
Environmental damage is on the rise



Environmental damage is something I can impact in a positive way, by generation
% Strongly/Somewhat Agree



Total N = 9,112
Total N = Gen Z: 1,628; Millennials: 2,593; Gen X: 2,259; Boomers: 2,337; Silent Generation: 295
Q: How much do you agree or disagree with the following statements about environmental damage (through pollution and/or resource depletion)?

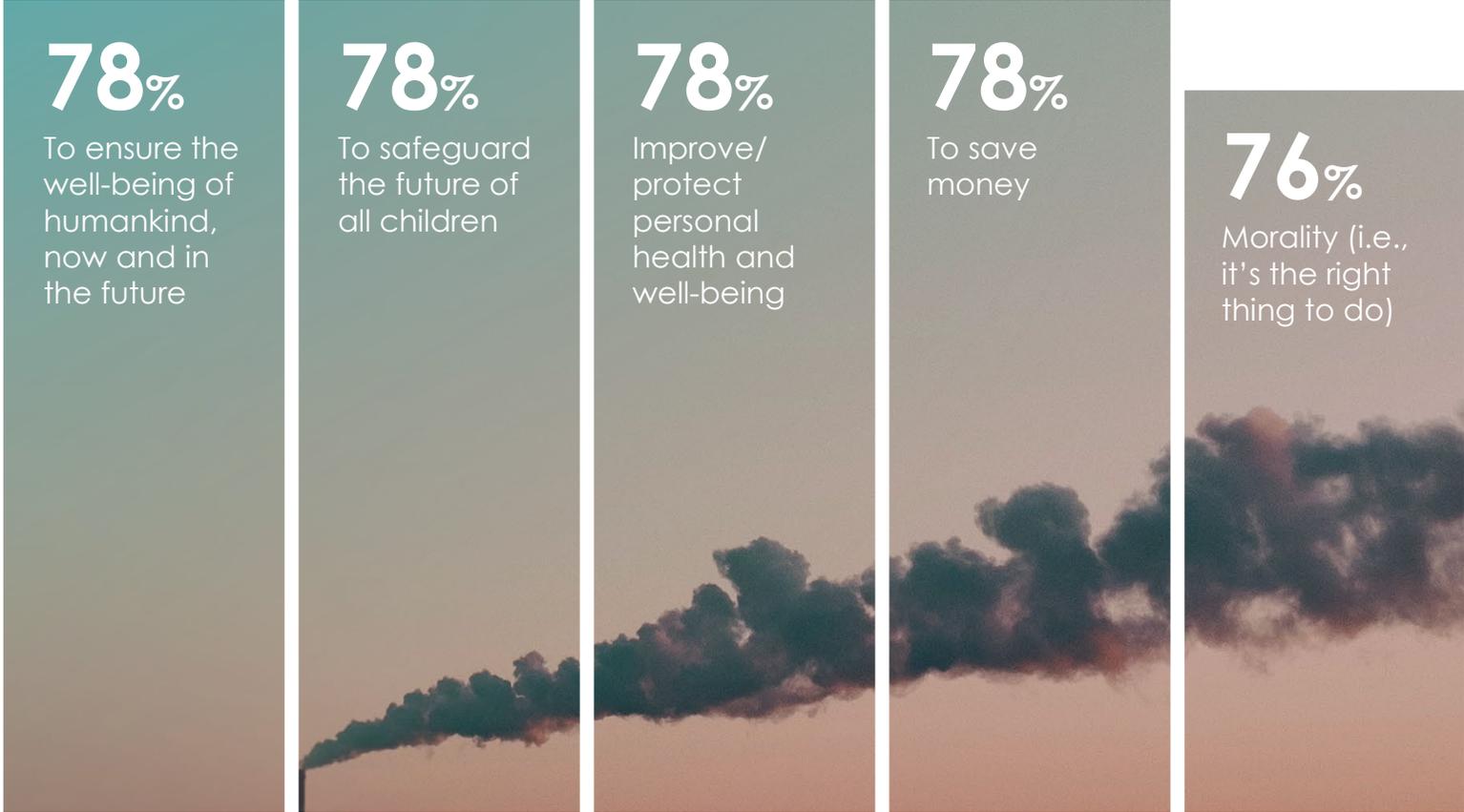
People are motivated to reduce their impact on the environment for many reasons

What motivates people to act sustainably
Rating Scale, 1-10 (% Range 7-10)



"I mean, the main reason I do it is just because I'm trying to think ahead because I know that our actions now will have a really big impact down the road in the future. And so like it's really easy just to look short term...but it's kind of hard to look long term."

Sunny
Female, Gen Z



Most are willing to do more to reduce their impact on the environment

Actions willing to engage in to reduce impact on environment

Net Score



Activities

Recycle or composting

Cut food waste

Reduce at-home energy consumption

Purchase sustainable brands

Reduce impact when travelling (e.g., walk instead of drive)

Reduce online shopping

Shop for secondhand clothing

Eat vegetarian or vegan (even if it's once a week)

However, peoples' perceptions do not align with what has been proven by science

Actions people think have the most impact, ranked

1. Recycle or composting
2. Reduce at-home energy consumption
3. Cut food waste
4. Reduce impact of travelling*
5. Purchase sustainable brands
6. Shop for secondhand clothing
7. Eat a plant-rich diet
8. Reduce online shopping

Actions that actually have the most impact, ranked

1. Cut food waste
2. Eat a plant-rich diet
3. Reduce at-home energy consumption
4. Reduce impact of travelling*
5. Recycle & reduce waste / composting

*e.g., walk instead of drive, fly less

Sample Size N= 9,112

Q: If everyone did the following actions, what impact, if any, would they have on the environment?

Frischmann C. and Chissell C. "[The powerful role of household actions in solving climate change.](#)" Featured in drawdown.org on October 27, 2021

There's a communication problem

"The climate crisis is, in part, a communication crisis. We already have the solutions we need to turn things around, but we are still paralyzed by misinformation and fear. We need a clear and compelling vision to move forward – a vision of a better future..."

Dr. Jonathan Foley
Executive Director, Project Drawdown

To overcome people's perceived barriers to living more sustainably, we must consider what they perceive would be motivating, namely affordability and convenience



Highly motivating	% Motivated by this
Make it affordable	81%
Make it convenient	74%
Provide evidence that doing action(s) make(s) a difference	61%
Offer incentives	58%
Offer more information on how to carry out action	47%

A woman with long blonde hair, wearing a white long-sleeved top and light blue jeans, sits in the center of a large warehouse. She is surrounded by massive bales of fabric, some wrapped in white plastic with green straps. The bales are stacked high, creating a sense of scale and abundance. The lighting is somewhat dim, highlighting the textures of the fabric and the woman's presence in the space.

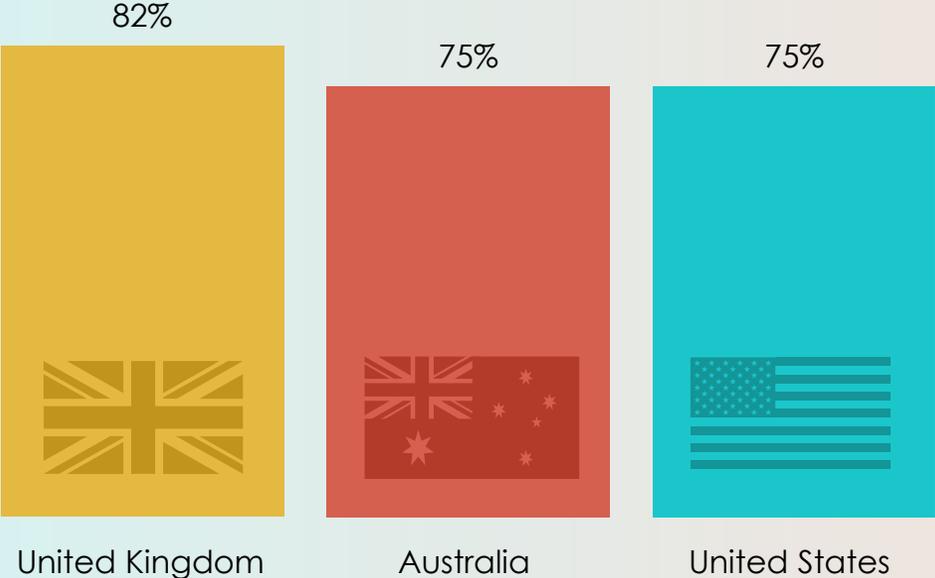
ECO-NOMICS:
THE BUZZ
ON COMPANY SUSTAINABILITY

People are eager for companies to actively join the sustainability conversation

% Strongly/Somewhat Agree



Want to see more companies take a stance on sustainability, by country
% Strongly/Somewhat Agree



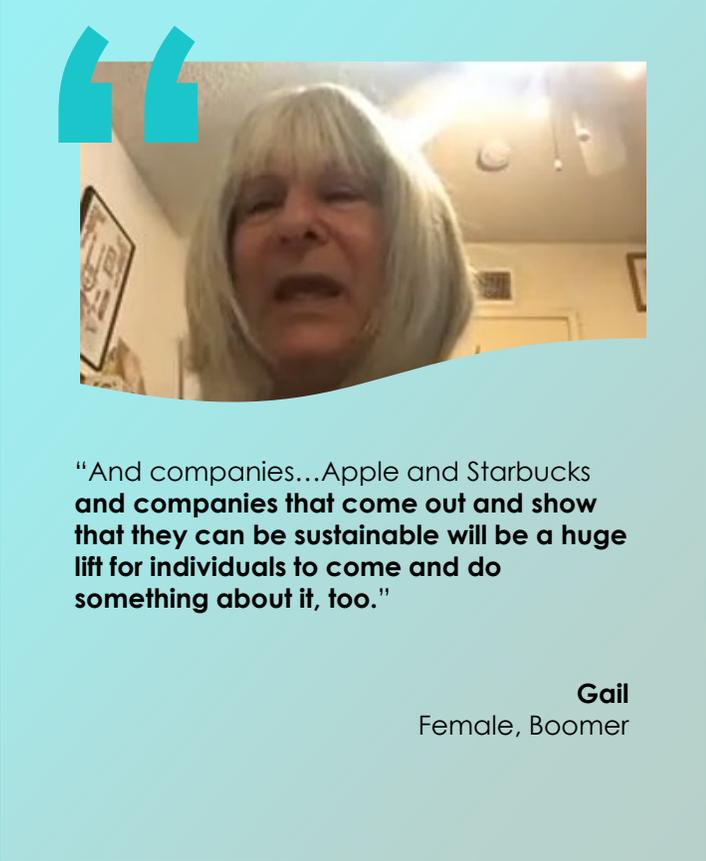
Companies across the board are being asked to take meaningful sustainable action

Types of companies people want to see take meaningful action toward sustainability
Rating Scale, 1-10 (% Range 7-10)



Companies inspire people to live more sustainably

% Strongly/Somewhat Agree



“And companies...Apple and Starbucks and companies that come out and show that they can be sustainable will be a huge lift for individuals to come and do something about it, too.”

Gail
Female, Boomer



75%
Agree that if more companies took a stance on sustainability, it'd have a tremendous impact on the environment



35%
Can be motivated to take sustainable action when they see companies doing so

Some companies are getting sustainability right

Products, Partnerships and Procurement

“Like, I think about Patagonia, how they offer recycling of their products. **They show how the products are made. Many of the products themselves are made out of recycled plastic or other sort of quasi organic materials.** So I think in that case, it makes a difference.”

Incentivizing sustainable consumer behavior(s)

“...**one of the things Starbucks did now is if you bring in a reusable cup, you get 10 cents off of the drink and 25 stars in the month of April for Earth Day.** And I think that this may help people to realize what's going on in the world, because it is Earth month, earth day on the 22nd. So hopefully that will raise some awareness as well.”

Promoting sustainable behavior and environmental awareness

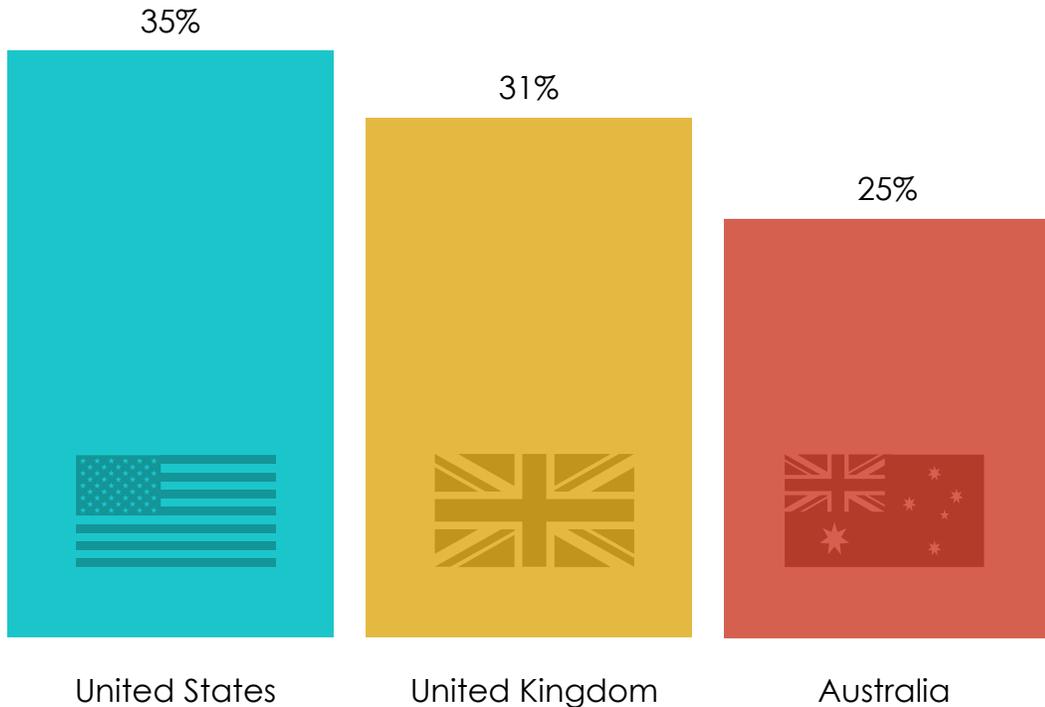
“**I learned that [using dishwashers saves more water] through Procter & Gamble's website.** You know, so there's a lot of things that I'm learning and I need to take more of a proactive step into doing my part to help save environment for future generations.”

Showing dedication to sustainability by going above and beyond

“I personally buy Neutral. It's a milk that I think **has done a really good job at displaying their packaging that they're the first carbon neutral foods company in the United States. So to me, you know, that's a big first and it's very admirable.** And so whenever I see that on the packaging, it just makes me wanna, buy a Neutral's product.”

Almost 1/3 of people have perceived greenwashing, highlighting need for brand authenticity in their sustainability communications

People who have witnessed companies engaged in insincere sustainable action(s), by country
% Selected



Behaviors that reek of greenwashing:

- ✓ Prioritizing profit over sustainability goals
- ✓ Not practicing what they preach when it comes to sustainable practices
- ✓ Lack of transparency around sustainable practices
- ✓ Engaging with sustainable behaviors that actually aren't sustainable (e.g., high production of "sustainable" products)

The intent behind sustainable actions is crucial in shaping public opinion



59%

Of people think worse of companies that appear to engage in insincere sustainability efforts

% Selected

“



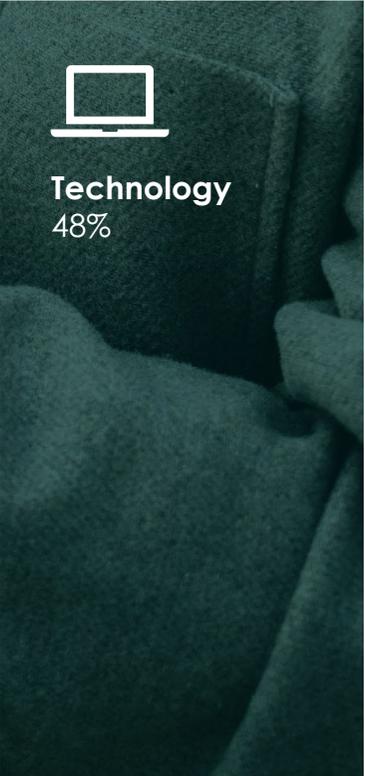
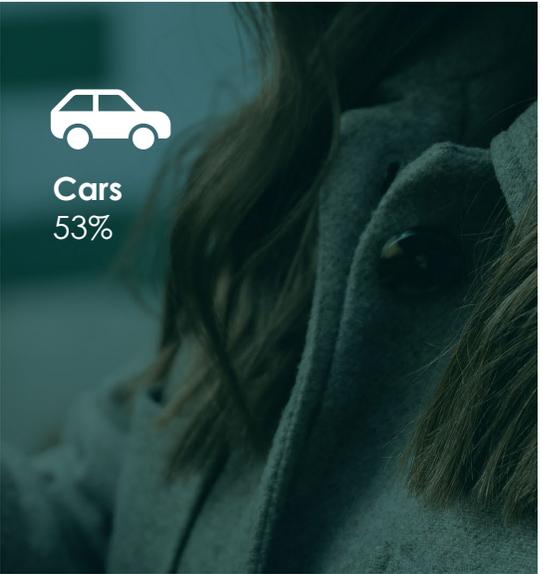
“...It almost feels like bandwagoning. It almost feels like a trend...but a lot of it is **greenwashing as well...huge companies are claiming they're making these claims as to being more sustainable...and then you look a little deeper and you look into these details and then you're seeing just how less sustainable they actually are.**”

Enoch
Male, Millennial

Sustainability drives purchase intent in many categories

Sustainability is a priority when making a purchase, by category

% Highest Priority or Among Top Priorities



Sample Size N= 9,112
Q: When you're thinking about making a purchase in the following categories, how much of a priority does the product's sustainability play into the decision?



UNVEILING THE
KEY DRIVERS
OF BRAND SUSTAINABILITY

How do company climate actions impact purchase intent and favorability?

Conjoint Methodology



4

Categories of company climate actions

-  Education
-  Innovation
-  Collaboration with leaders/public
-  Going beyond the bare minimum

10

Verticals tested

- ✓ Fashion/apparel
- ✓ Personal care
- ✓ Auto
- ✓ Wireless services
- ✓ Tech
- ✓ Pharmaceuticals
- ✓ Financial services
- ✓ Quick service restaurants
- ✓ Oil and gas
- ✓ Marketplace

Brand Ratings:

- ★ Favorability
- ★ Purchase intent

Defining company climate actions



Education

What companies do to connect with and teach people about sustainability initiatives



Innovation

Sustainable initiatives enacted through innovative production and/or actions



Collaboration with leaders/public

What companies say and do about sustainability in the social context, in addition to how they engage the public in these initiatives



Going beyond the bare minimum

Actions companies take to add credibility to their sustainable efforts, as well what they are doing to enact meaningful change

Certain brand sustainability actions hold greater preference amongst people

Top brand climate actions preferred by people
Ranked

Education



1. Helps people to waste less
2. Makes being environmentally responsible fun and easy
3. Communicates the positive impact of buying the product or service (e.g., less carbon emitted, water saved)

Innovation



1. Develops innovative, new formulation or material to be most sustainable
2. Sources sustainable materials and packaging
3. Donates a percentage of profits to environmental causes

Collaboration with leaders/public



1. Is transparent with information/data on their sustainable efforts
2. Partners with the public to identify sustainable practices they can take up as a company
3. Works with climate experts and thought leaders to take part in sustainability campaigns

Going beyond the bare minimum

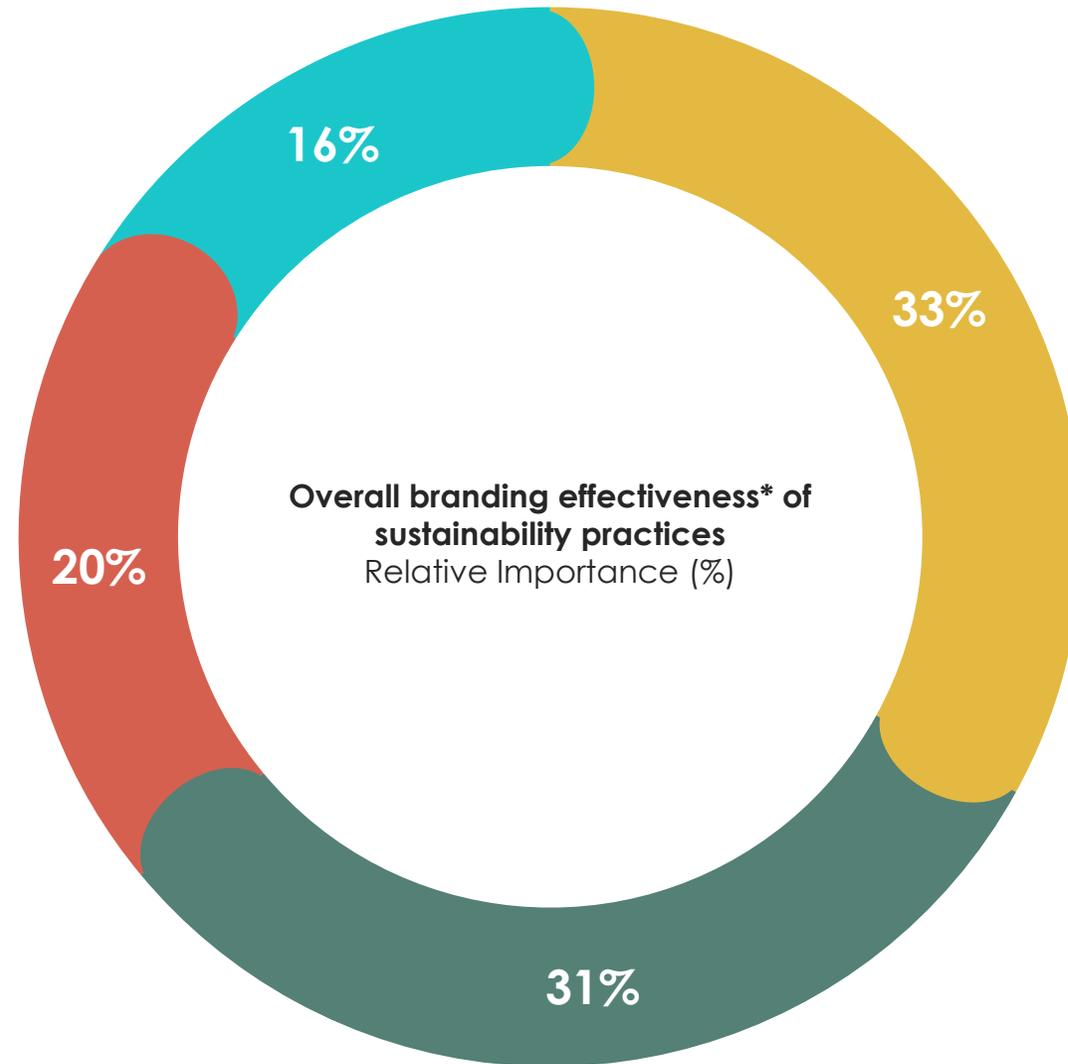


1. Sets ambitious sustainability goals and holds themselves accountable with third-party verification
2. Takes part in pushing nationwide policy for eco- and/or socially-conscious practices
3. Obtains sustainability certifications, such as B Corp certification or Science-based Target Initiative

Innovation and doing more than the bare minimum have the most impact on overall effectiveness*

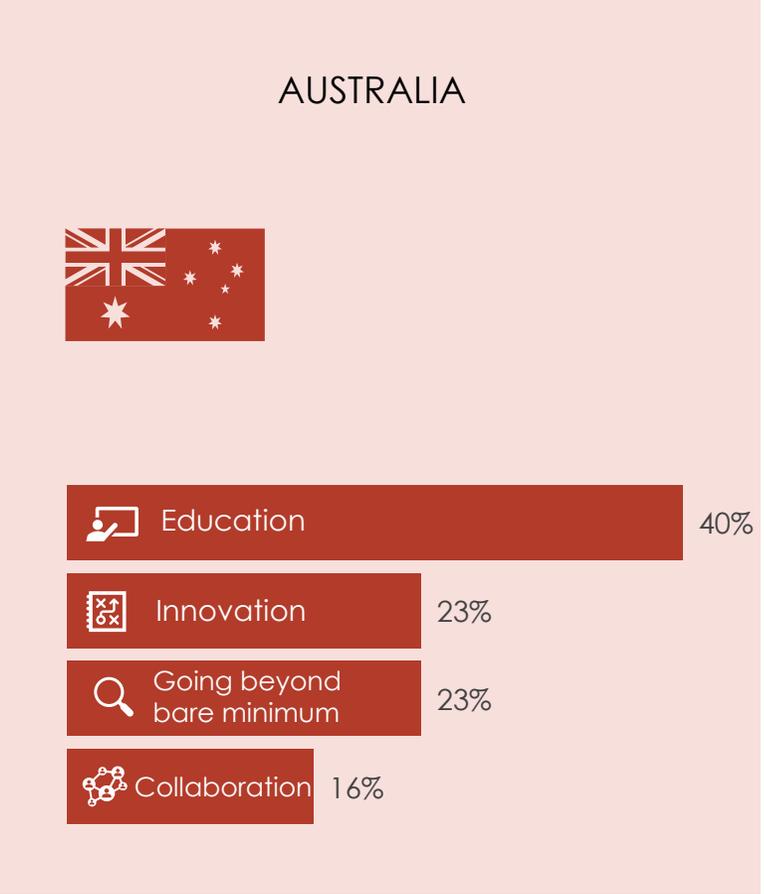
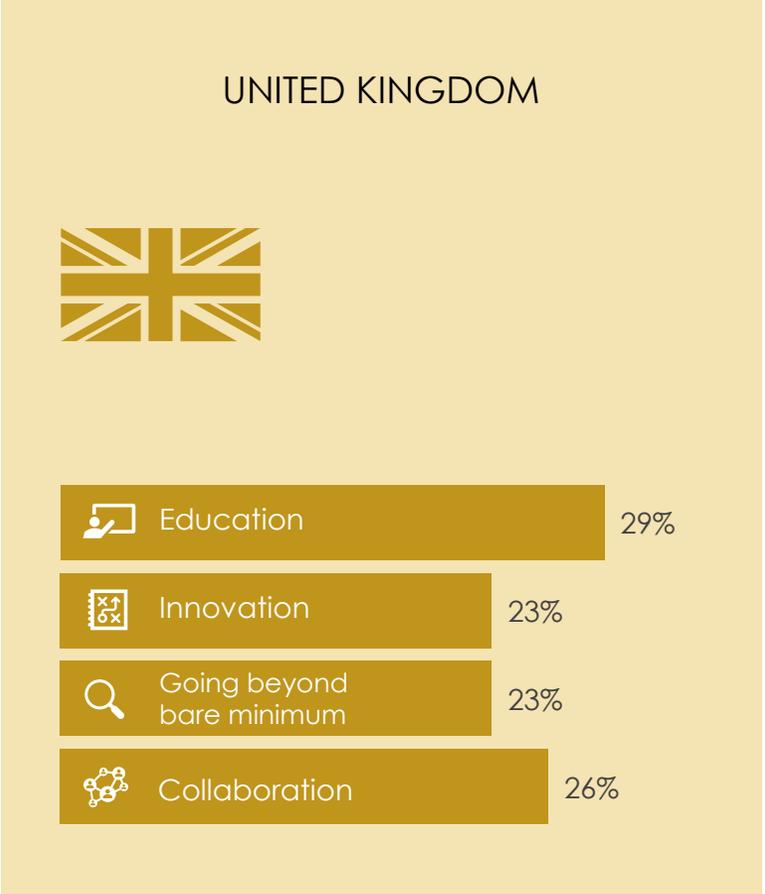
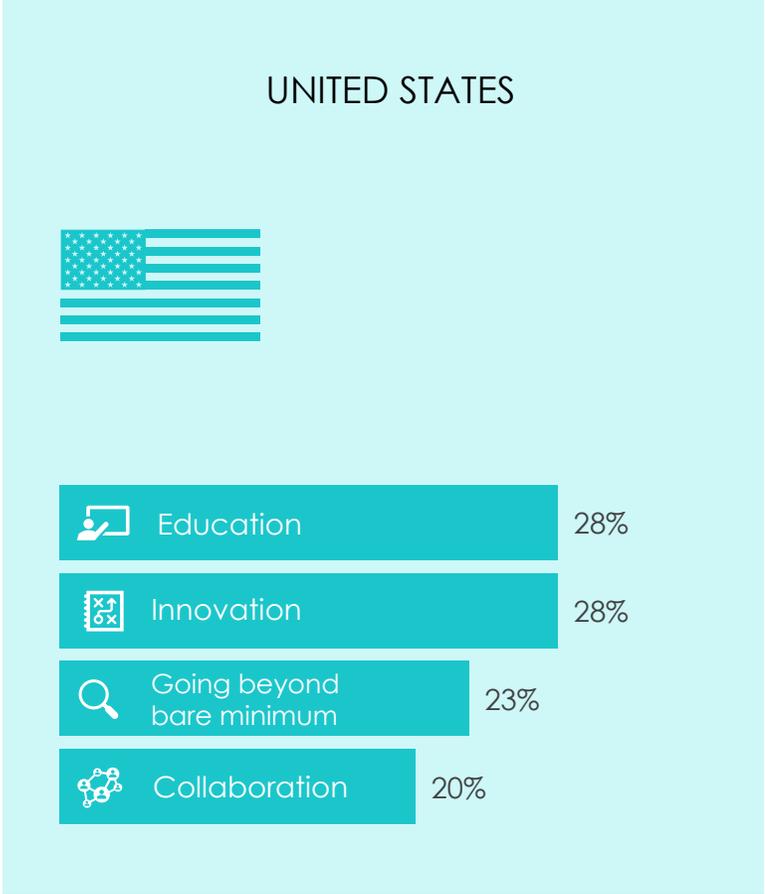
*Effectiveness = brand favorability and purchase intent

- Going beyond the bare minimum
- Innovation
- Collaboration with leaders/public
- Education



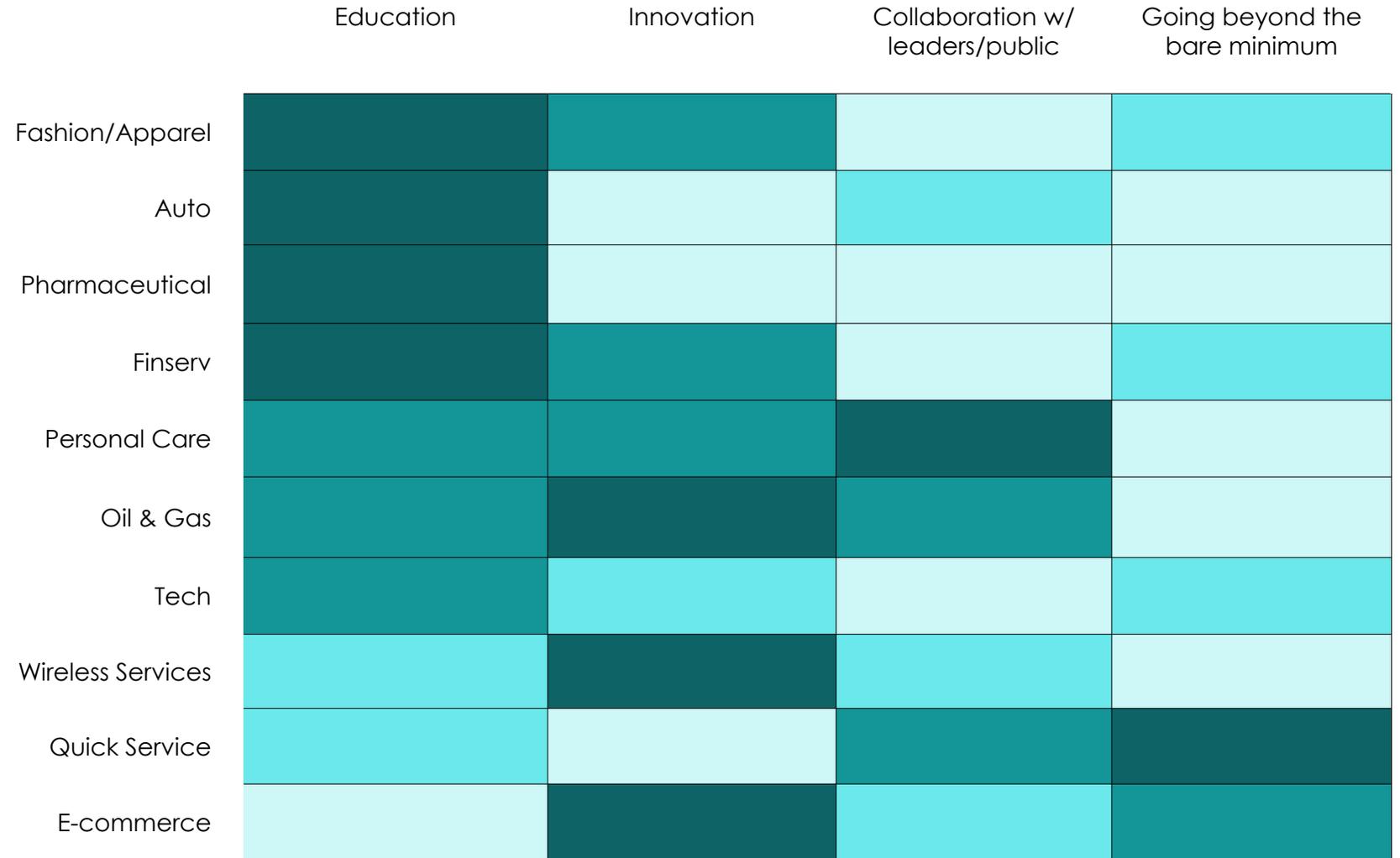
Favorability is driven by education: connecting with and teaching people about sustainability initiatives

Sustainability practices that drive favorability
Relative impact



Educating people and innovation work together to enhance favorability for most verticals

Sustainability goals that have the largest impact on favorability
Relative impact



Advertisers have the power at their fingertips to enact change using existing channels

Importance of communicating sustainability message through _____
Scale 1-10, (% Range 7-10)



Separating myth from fact

MYTH

People have minimal impact on climate in their personal lives



Individuals & household actions have the potential to produce roughly **25-30% of the total emissions reductions needed** to avoid dangerous climate change

FACT

MYTH

Being sustainable is too expensive!

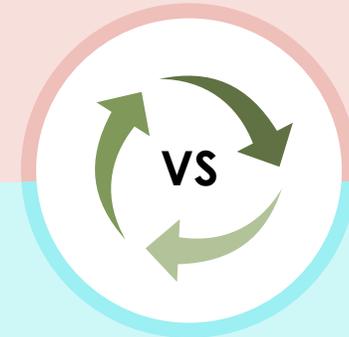


Sustainable actions can **save money!**

FACT

MYTH

Recycling and composting have the most impact in solving climate change



Recycling and composting have a smaller impact in solving climate change than reducing food waste

FACT



Takeaways

1

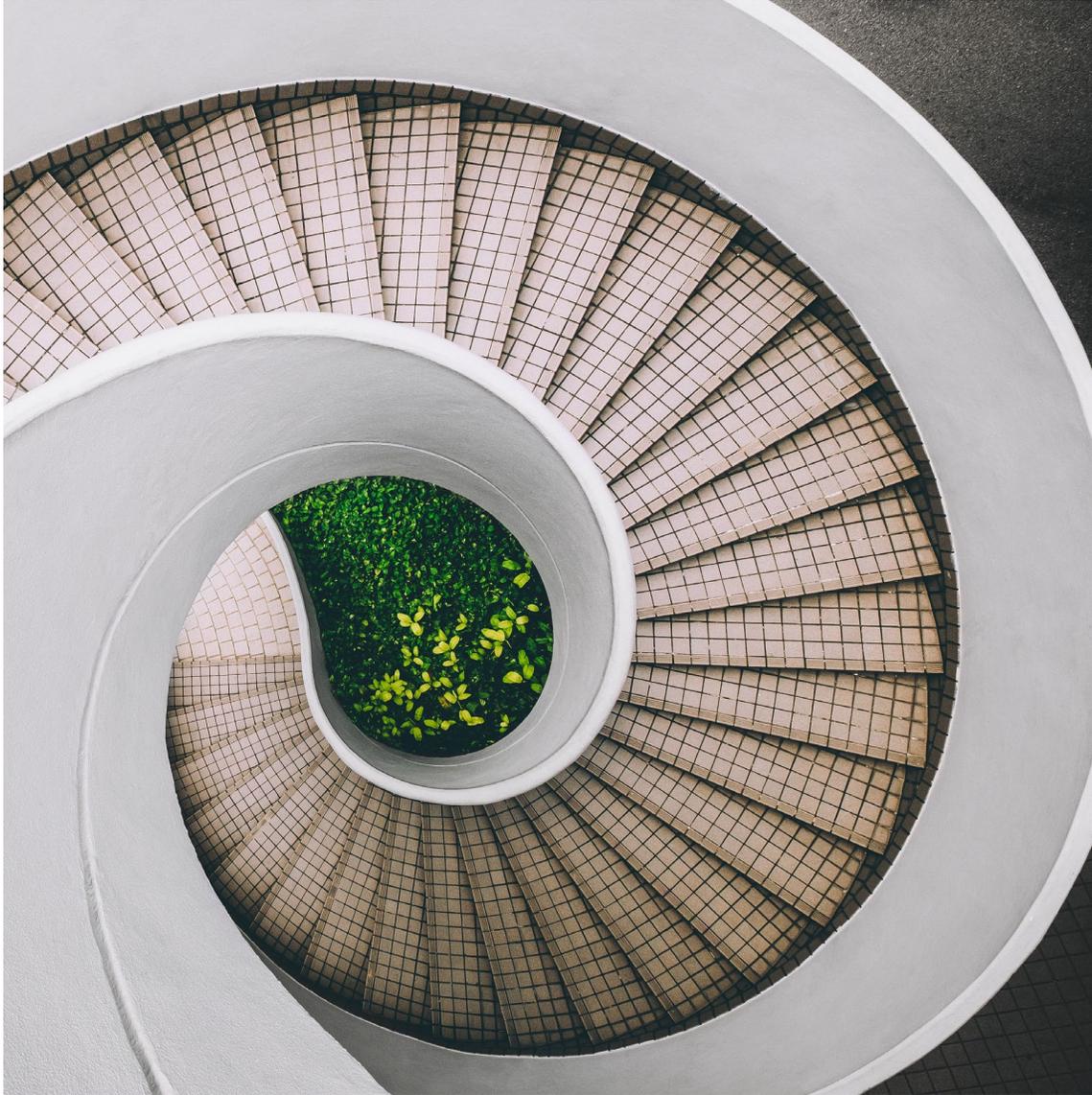
There are barriers that we need to resolve, especially around communication, to enable people to live more sustainably

2

Companies possess incredible power to sway public sustainability practices and can inspire people to follow suit

3

Not all sustainable action is created equal and brands should prioritize science backed solutions (e.g. Drawdown-Aligned Business Framework)



What's next?

The **most important** brief of our lives

#1

IPG Mediabrands will leverage these insights and develop a global climate action campaign

#2

We need your support. Brands, media partners, industry leaders... Join us!

THANK
YOU

M/GNA MEDIA TRIALS

Teads

PROJECT
DRAWDOWN