



CONSULTING

Mintel Sustainability Barometer 2021





Mintel Consulting provides custom deliverables to meet our clients' sustainability briefs.

LANDSCAPING



Objective: Know your customers and competition

What we will do: Run consumer research segmentation studies to reveal purchasing drivers and use our GNPD database to track product launches and claims. Conduct social media listening surveys to measure consumer conversations.

What you will get: Reports, presentations and databooks revealing white spaces in product markets, new consumer groups to target and the best strategies for reaching them.

FORESIGHT



Objective: Future-proof your business

What we will do: Leverage our framework of macro drivers, consumer trends, 100 weekly innovation observations, consumer data trackers and patent analyses to quantify the world of 2030 and beyond.

What you will get: A trends framework quantified with data-driven projections to help you navigate the risks and opportunities ahead and ensure that you remain relevant. Inspirational, early signal showcases of the products and services that will mainstream in future.

CREATIVITY



Objective: a list of what you offer/provide and clients receive

What we will do: Facilitate co-creation workshop sessions structured around a framework designed to cover all consumer needs. Render design prototypes. Concept debrief presentations evaluating potential in the context of the current consumer and product market.

What you will get: Propositions quantified by data, forged to meet consumer needs and evaluated against the competition.

SOCIALISATION



Objective: Achieve a sustainable culture

What we will do: Deliver inspirational C-suite, conference key note kick-off presentations and panel discussions in person —or virtually— with our expert speakers and analysts.

What you will get: Sustainable thinking activated, communicated and cascaded internally to ensure it runs through every part of your business.

VALIDATION



Objective: Maximise impact and investment

What we will do: Test your product and service ideas with qualitative concept groups. Build, conduct and analyse bespoke consumer research surveys to spec. Use survey benchmarking against your consumer panels to track product launches and performance.

What you will get: Initiatives and launches pre-validated by consumer analysis and evaluated by ongoing market product tracking thereafter.

Find out more: [mintel.com/mintel-consulting](https://www.mintel.com/mintel-consulting)

WAR IS OVER

IF YOU WANT IT

CLIMATE CHANGE IS OVER

IF YOU WANT IT

'We're trying to sell peace, like a product, you know, and sell it like people sell soap or soft drinks.'

- John Lennon, 14th June 1969

Welcome to the Mintel Sustainability Barometer 2021

Simply 'doing good' wasn't enough to get people to buy sustainable goods and services fifty years ago, and that's still the case today.

The truth is that while consumer choices are integral to reducing inequalities and emissions (being linked to 55% of the cumulative reductions needed by 2050 according to the **IEA**, for instance), they're driven by much more than altruism alone. We need data to help us figure out how else to get our policies and products to resonate with people if they are to accelerate us towards a better and more equitable world.

As the experts in what consumers want and why, Mintel has launched a new Sustainability Barometer to track consumer behaviours, purchase preferences and attitudes regarding sustainability and to offer lessons to be learned from best-in-class innovations, communications and campaigns. It provides valuable and

actionable consumer insights and expert recommendations that—when combined with other credible market, environmental and policy data—help companies and brands make better, sustainability-driven decisions about the future of their business and its impact on society.

You've taken the first step by reading this introduction, but the real lessons begin in the pages that follow: namely, how to better appeal to consumers and sell sustainability to align with their understanding, expectations and sense of self.

Mintel is here to help you—your policies, products and services—be credibly and profitably sustainable as quickly as possible. We hope this report gives you some new ideas. If you'd like to build on those and/or create new ones, please get in touch with your Account Manager or [contact Mintel Consulting](#).

Best wishes,



Richard Cope
Senior Trends
Consultant

Content

PART ONE

Consumer beliefs and behaviours

Consumers seek protection from climate change

Figure 1:1	Ownership of and interest in air conditioning	8
Figure 1:2	Current and potential share of homes with air conditioning	9
Figure 1:3	Ownership of and interest in air purifiers	10
Figure 1:4	Current and potential share of homes with air purifiers	11

There's still time to make a difference

Figure 1:5	Consumers' sense of optimism and impact	13
------------	---	----

Sustainable purchasing now and in future

Figure 1:6	Most important factors for consumers when choosing to buy one product over another	15
Figure 1:7	Most important factors when choosing one at-home coffee product to buy over another	16
Figure 1:8	EV ownership and potential	17
Figure 1:9	EVs' share of all cars owned and car penetration level, 2021 Europe	18
Figure 1:10	EVs' share of new purchases considered in the next 1–3 years in Europe	18
Figure 1:11	Home solar panel ownership and potential	19
Figure 1:12	Current and potential share of homes with solar panels	20

Sustainable behaviours and their drivers

Figure 1:13	Sustainable behaviours in the past 12 months	22
Figure 1:14	Transport behaviours in the past 12 months	23

Consumers hold companies responsible

Figure 1:15	Who consumers think is most responsible for sustainability issues	25
Figure 1:16	Types of companies ranked 'most responsible' for protecting the environment	26

PART TWO

Challenges for companies

Consumers' environmental concerns

Figure 2:1	Consumers' top environmental concerns	30
Figure 2:2	Share of annual GHG emissions by sector	31
Figure 2:3	Movement of carbon between land, atmosphere and oceans	32

How consumers' concerns match up with emissions

Figure 2:4	Consumers selecting air quality (e.g. exhaust fumes, industrial emissions) as a top three environmental concern	34
Figure 2:5	Consumers selecting deforestation, loss of biodiversity or chemicals entering the environment (e.g. pesticides) as a top three environmental concern	36
Figure 2:6	Consumers selecting plastic pollution (e.g. ocean plastic) as a top-three environmental concern'	37
Figure 2:7	Consumers' attitudes to climate change	38

Solutions consumers think will save the planet

Figure 2:8	Environmental solutions perceived by consumers as having 'high to moderate impact'	41
Figure 2:9	Consumers selecting deforestation as a top three environmental concern	42
Figure 2:10	Consumers perceiving planting new forests as having 'high to moderate impact' and percentage of land covered by forests, Europe, by country, 2021	43

PART THREE

Approaches for success

Understand consumers' characterisation and touchpoints

Figure 3:1	How all vs sustainable consumers describe themselves	50
Figure 3:2	The differences in how sustainable consumers describe themselves	51
Figure 3:3	What European sustainable consumers are driven by	52

Educate on impact

Figure 3:4	Consumers' sense of climate change by country and total GHGs	55
------------	--	----

Sell in the science

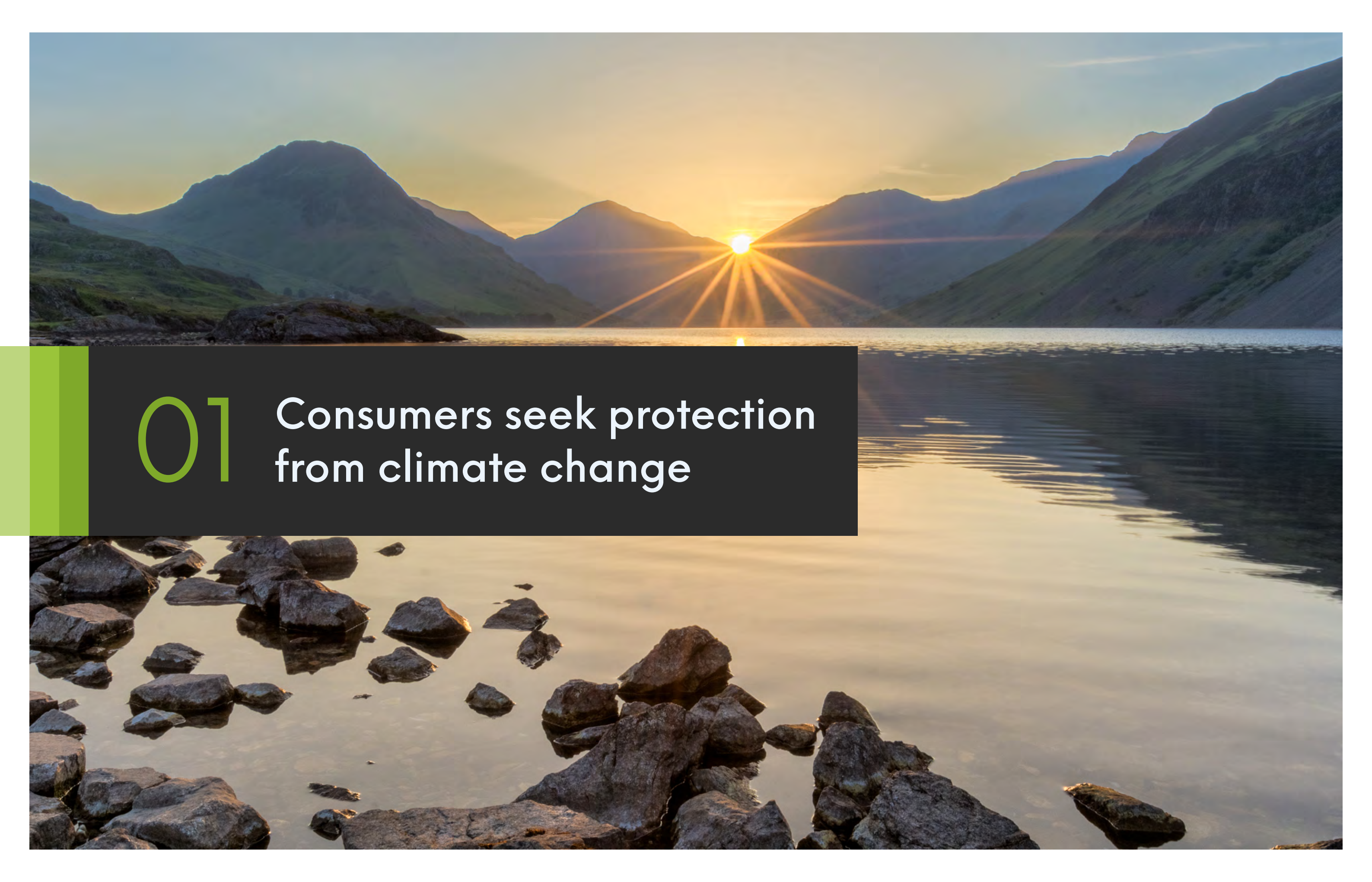
Figure 3:5	Consumers agreeing that 'science can provide solutions to the climate crisis'	57
------------	---	----

Use clear metrics and language

Figure 3:6	Factors that would encourage consumers to buy products or services that claim to benefit/protect the environment	59
Figure 3:7	What encourages consumers to buy products or services that claim to benefit/protect the environment	60

A hiker with a backpack is walking on a grassy ridge, looking out over a vast landscape of mountains and a valley. The scene is captured in a soft, golden light, suggesting either sunrise or sunset. The hiker is wearing a light-colored sweater and dark pants. The background shows rolling hills and a body of water in the distance.

Consumer beliefs and behaviours



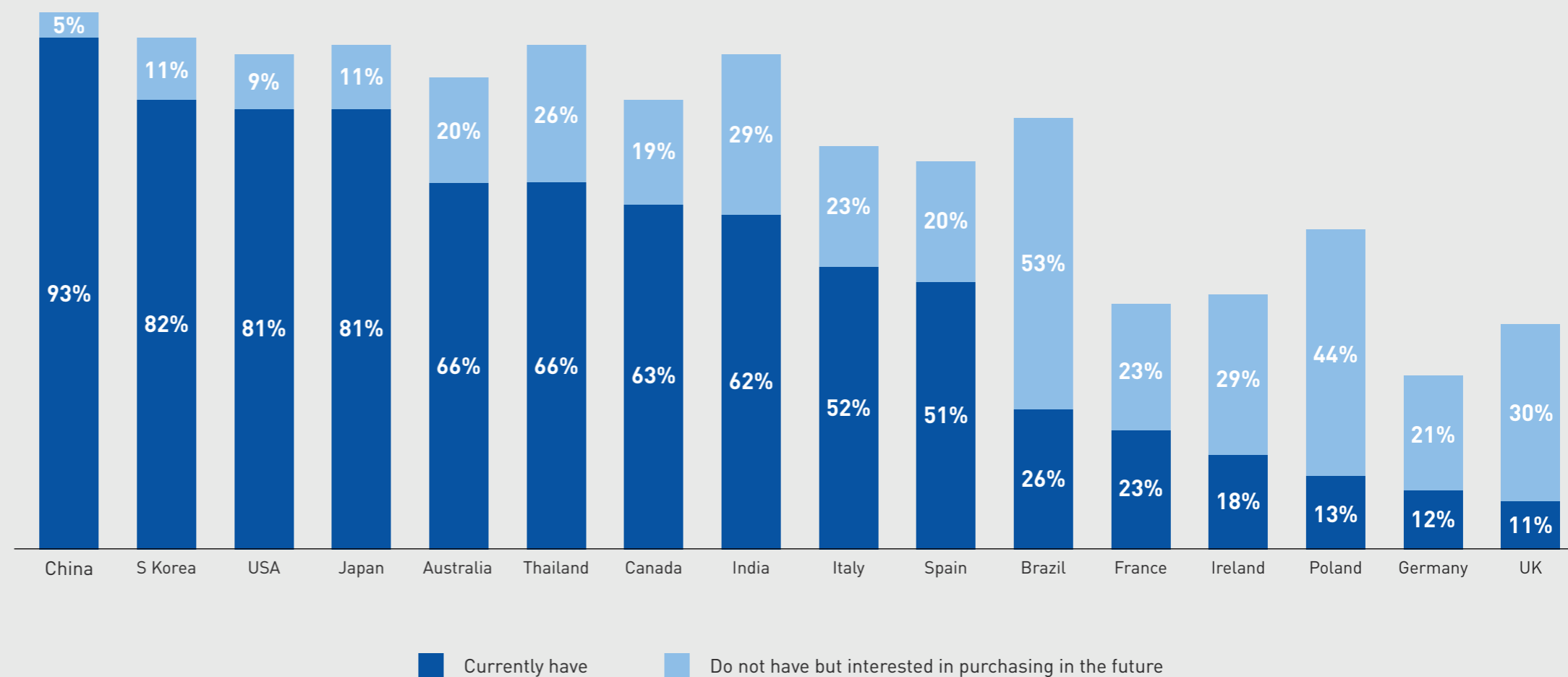
01 Consumers seek protection from climate change

Beyond any concerns voiced, a clear indication of just how seriously consumers are taking climate change and pollution is the proportion of them expressing an interest in buying air conditioning units and air purifiers in the future.

In this context, global warming creates a vicious circle by increasing demand for air conditioning, which then uses more energy. Aspiring to have air conditioning is a practical reaction to—and recognition of—climate change, as well as an indication of how protection, comfort and a desire for higher living standards are major drivers that cannot be disregarded in positioning sustainable products.

FIGURE 1.1

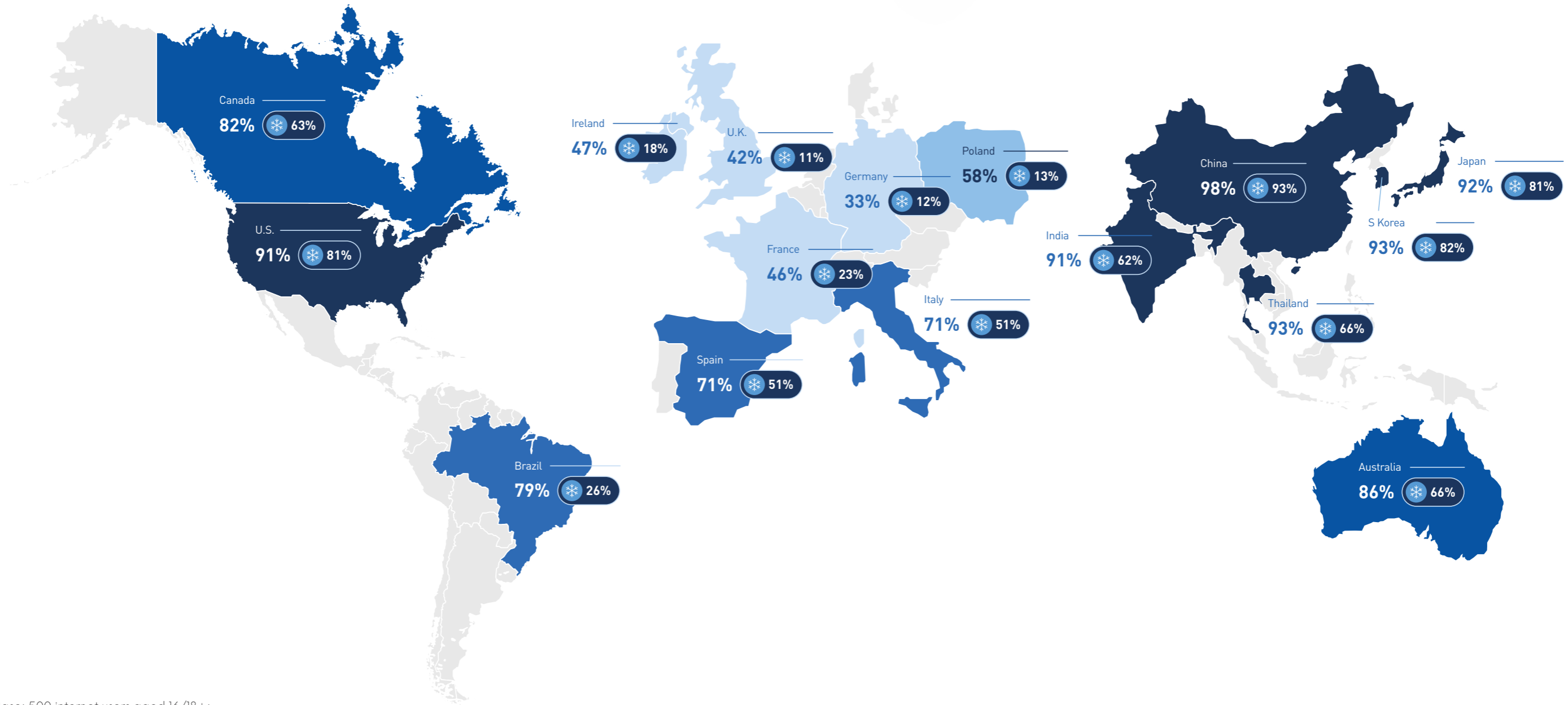
Ownership of and interest in air conditioning



Base: 500 internet users aged 16/18+;
Source: Dynata/Lightspeed/Mintel March 2021

FIGURE 1:2

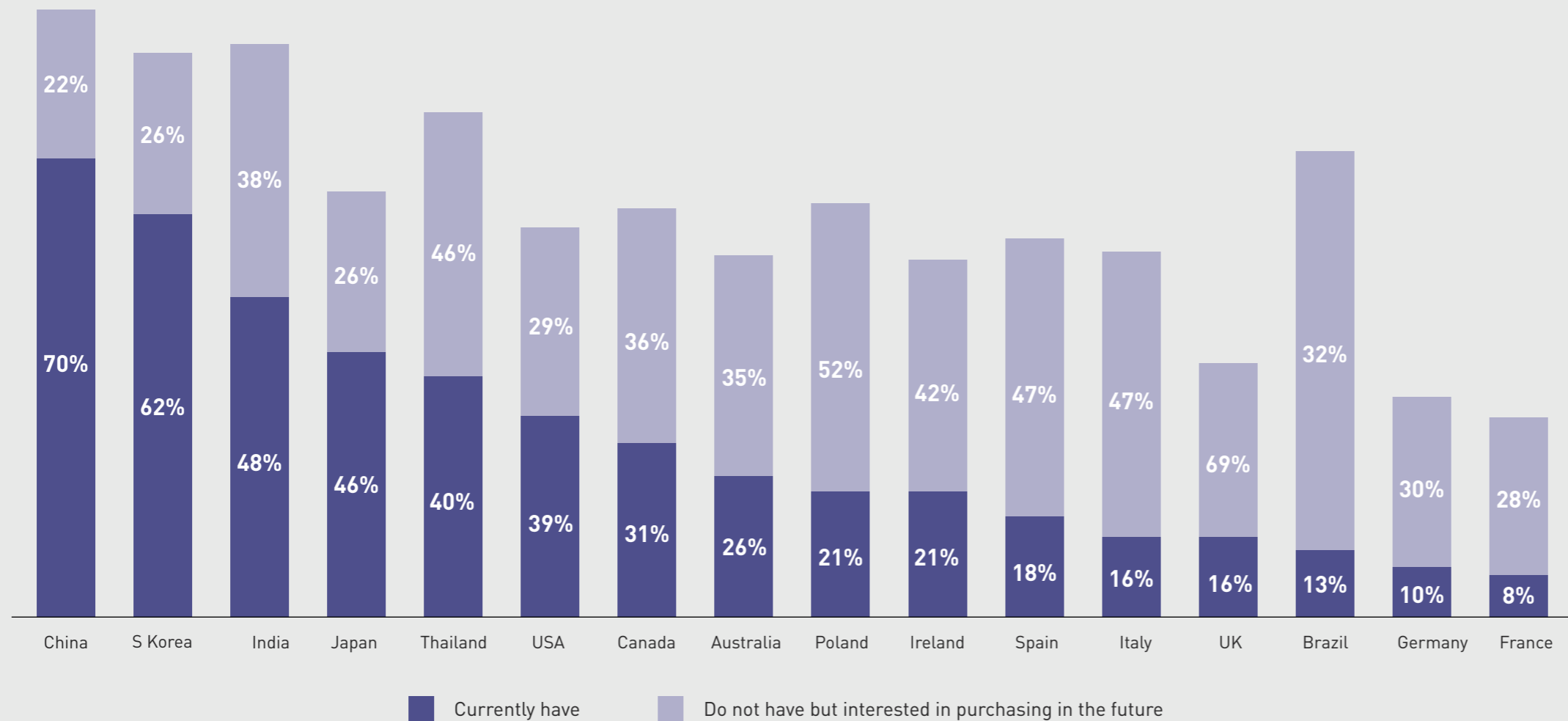
Current and potential share of homes with air conditioning



Base: 500 internet users aged 16/18+;
Source: Dynata/Lightspeed/Mintel March 2021

FIGURE 1:3

Ownership of and interest in air purifiers



Base: 500 internet users aged 16/18+;
Source: Dynata/Lightspeed/Mintel March 2021

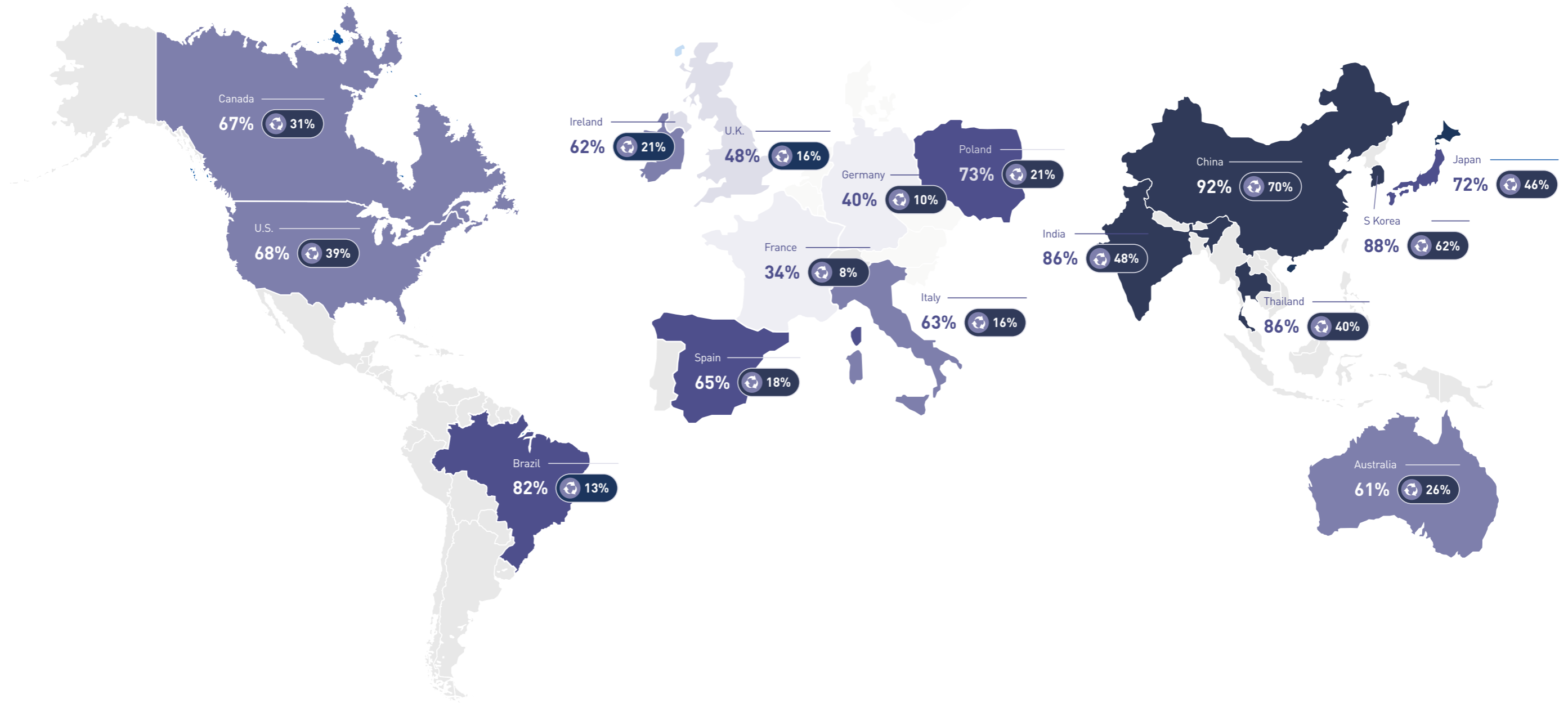
Demand for air purifiers illustrates how seriously people are taking pollution as a threat to health. Again, it underlines the general importance of self-preservation and health as key drivers for the future uptake of environmentally beneficial products, not just those designed to counter threats.

FIGURE 1:4

Current and potential share of homes with air purifiers



Air purifier penetration 2021 %



Base: 500 internet users aged 16/18+;
Source: Dynata/Lightspeed/Mintel March 2021



02

There's still time to
make a difference

In most countries, a small majority still believe that we have time for redemption, and that optimism is closely related to a sense that consumer behaviours can make the difference. For brands, the opportunity here is to become the chosen partners of those consumers looking to make a difference. The challenge thereafter is for brands to maintain those relationships by proving what difference they've made and reporting back on that impact.

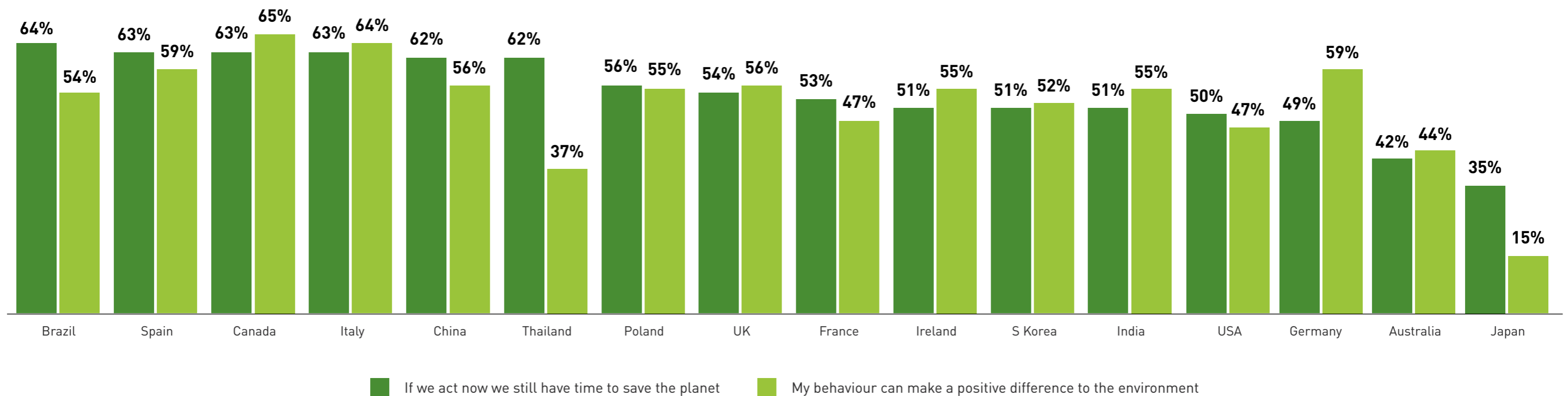
We're talking to the wrong people

Marketers are fixated and focused on Millennials as the core sustainability target market, but almost without exception the 55+ segments agree most strongly that their behaviour 'can make a positive difference to the environment'. Over 55s' scores are at least six percentage points higher than average across all markets.

That hasn't yet translated into strong ownership of big-ticket, high-impact products like solar panels for the home or electric vehicles (both of which are accented towards 25–34s), but potential interest in both—while slightly below average—presents an opportunity, especially when we consider the superior spending power of over 55s generally across our featured countries.

FIGURE 1:5

Consumers' sense of optimism and impact



Base: 500 internet users aged 16/18+;
Source: Dynata/Lightspeed/Mintel March 2021



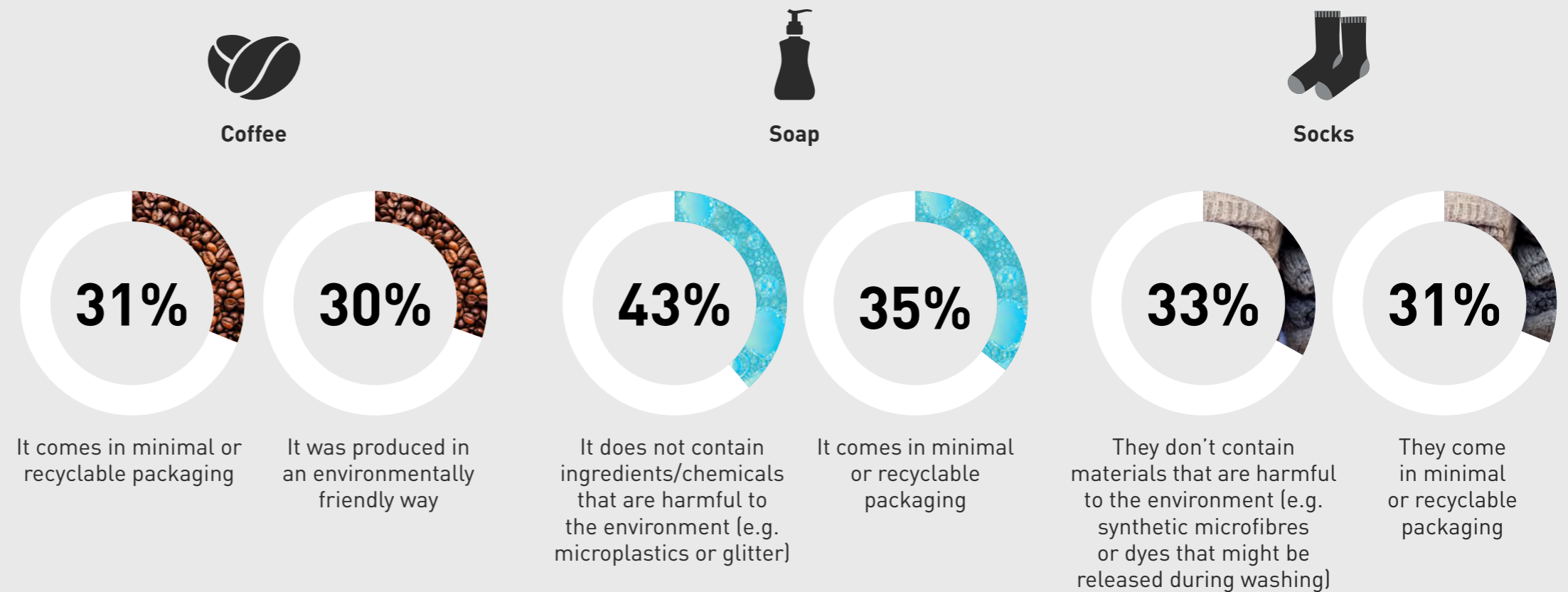
03 Sustainable purchasing
now and in future

Now: FMCG staples

When purchasing fast-moving consumer goods (FMCG) staples, consumers do consider sustainability factors. When asked to choose their top five considerations when making FMCG purchases, consumers typically select two or more related to sustainability when purchasing coffee, soap or socks. These priorities often lean towards packaging considerations, as do consumers' concerns (Figure 2:1), when in reality resource impact might be greater.

FIGURE 1:6

Most important factors for consumers when choosing to buy one product over another



Base: 500 internet users aged 16/18+;
Source: Dynata/Lightspeed/Mintel March 2021

Now: Red lines consumers won't cross

This data is equally useful in showing that consumers won't compromise on quality or brand familiarity in the name of sustainability. A product's positioning should never discount the 'pleasure principle'. Looking at the example of coffee, we should never forget that a sustainable coffee is first and foremost a coffee. It must deliver pleasure, taste and quality before anything else. Likewise, sustainability is important when it comes to packaging, but the practical, fundamental elements are just as crucial. The cardinal rule of packaging should be that it protects the product and secures its shelf life so that the energy and other resources that went into its production aren't wasted.

FIGURE 1:7

Most important factors when choosing one at-home coffee product to buy over another

It is made from high quality ingredients



It is from a brand that I have bought before



It comes in minimal packaging or packaging that can be recycled



It was produced in an environmentally friendly way (e.g. without causing deforestation)



The packaging makes it easy to keep the product fresh (e.g. is air tight/resealable)



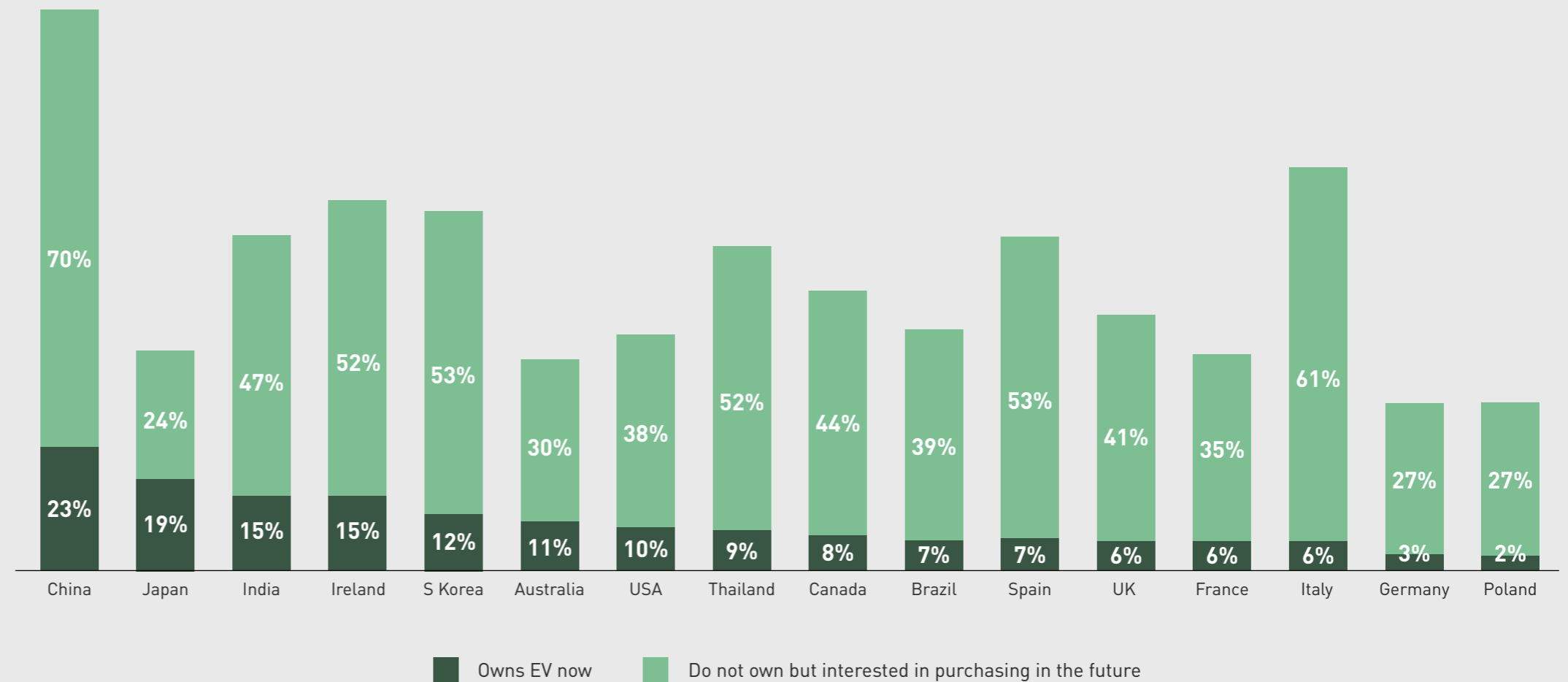
Note: Coffee is defined as ground beans, pods or instant granules.
 Base: 500 internet users aged 16/18+
 Source: Dynata/Lightspeed/Mintel, March 2021

Future: Electric vehicles

Ownership of hybrid and fully electric vehicles (EVs) remains weak outside northern Asia, but the proportions of people who are 'realistically interested in buying in the near future (i.e. in the next 1–3 years)' are huge. Entry-level costs and the rate of technological change are current obstacles, but the potential market share of EVs in Europe is significant (Figures 1:8 to 1:10).

FIGURE 1:8

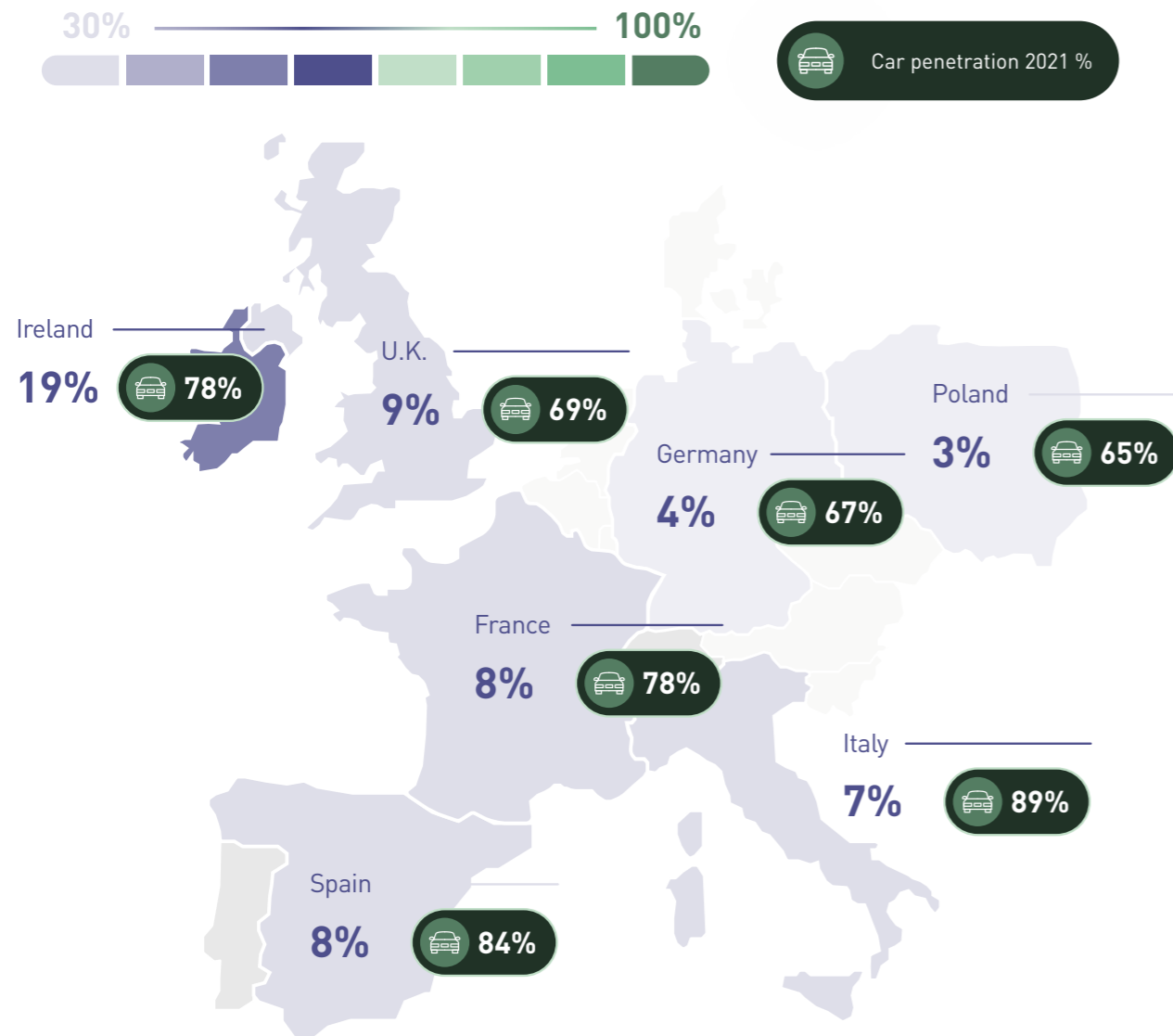
EV ownership and potential



Base: 500 internet users aged 16/18+;
Source: Dynata/Lightspeed/Mintel March 2021

FIGURE 1:9

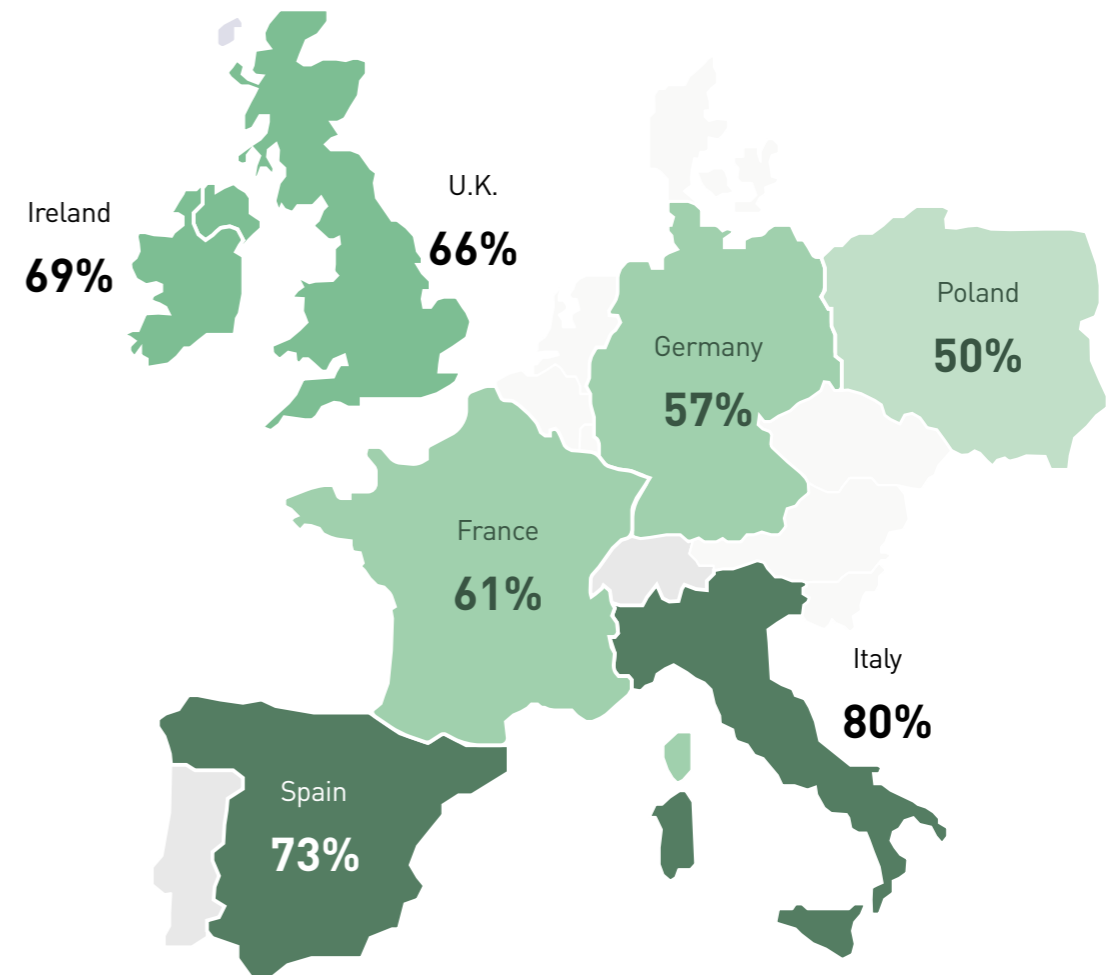
EVs' share of all cars owned and car penetration level, 2021 Europe



Base: 500 internet users aged 16/18+;
Source: Dynata/Lightspeed/Mintel March 2021

FIGURE 1:10

EVs' share of new purchases considered in the next 1-3 years in Europe



Base: 500 internet users aged 16/18+;
Source: Dynata/Lightspeed/Mintel March 2021

Future: Home solar panels

Ownership or usage of solar panels in consumers' main homes is also low, but again the potential is strong. In all but a couple of Northern European countries, the proportion of people expressing an interest in purchasing solar panels in the future exceeds those with no interest in doing so.

What factors can help solar power grow?

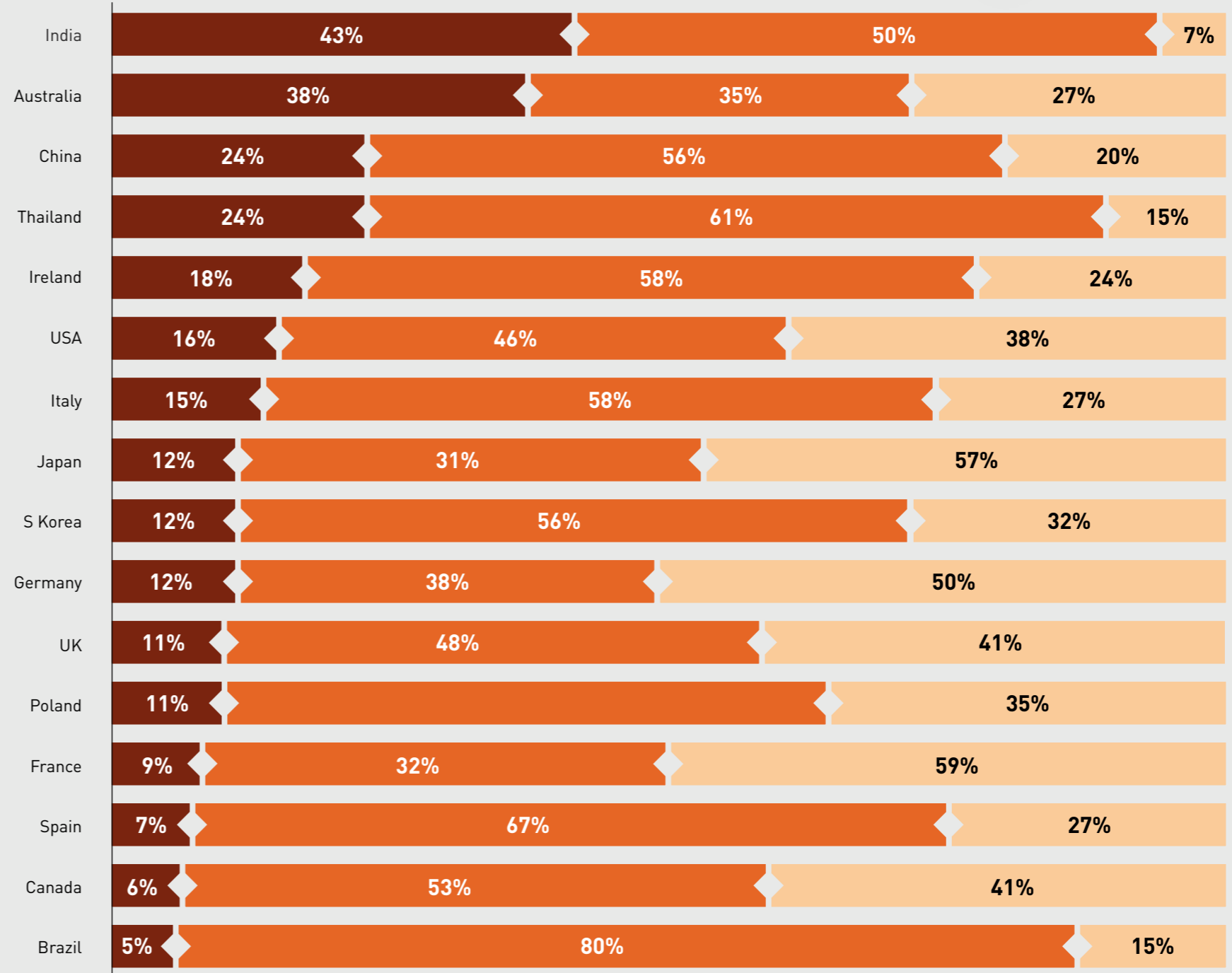
The aspiration to own or use solar panels is driven in part by climate change feeling tangible and local. Those who believe that the country they live in is suffering from climate change are more likely (by five percentage points on average) to be interested in purchasing solar panels in the future.

In terms of touchpoints, interest in owning solar panels also increases (by four percentage points) among those who 'like to be among the first to try new technologies' and to a lesser degree (by two percentage points) among those who 'have a budget that I try to stick to as much as possible'.

As with EVs, brands need to appeal more to these sentiments if aspiration is to be converted into ownership.

FIGURE 1:11

Home solar panel ownership and potential

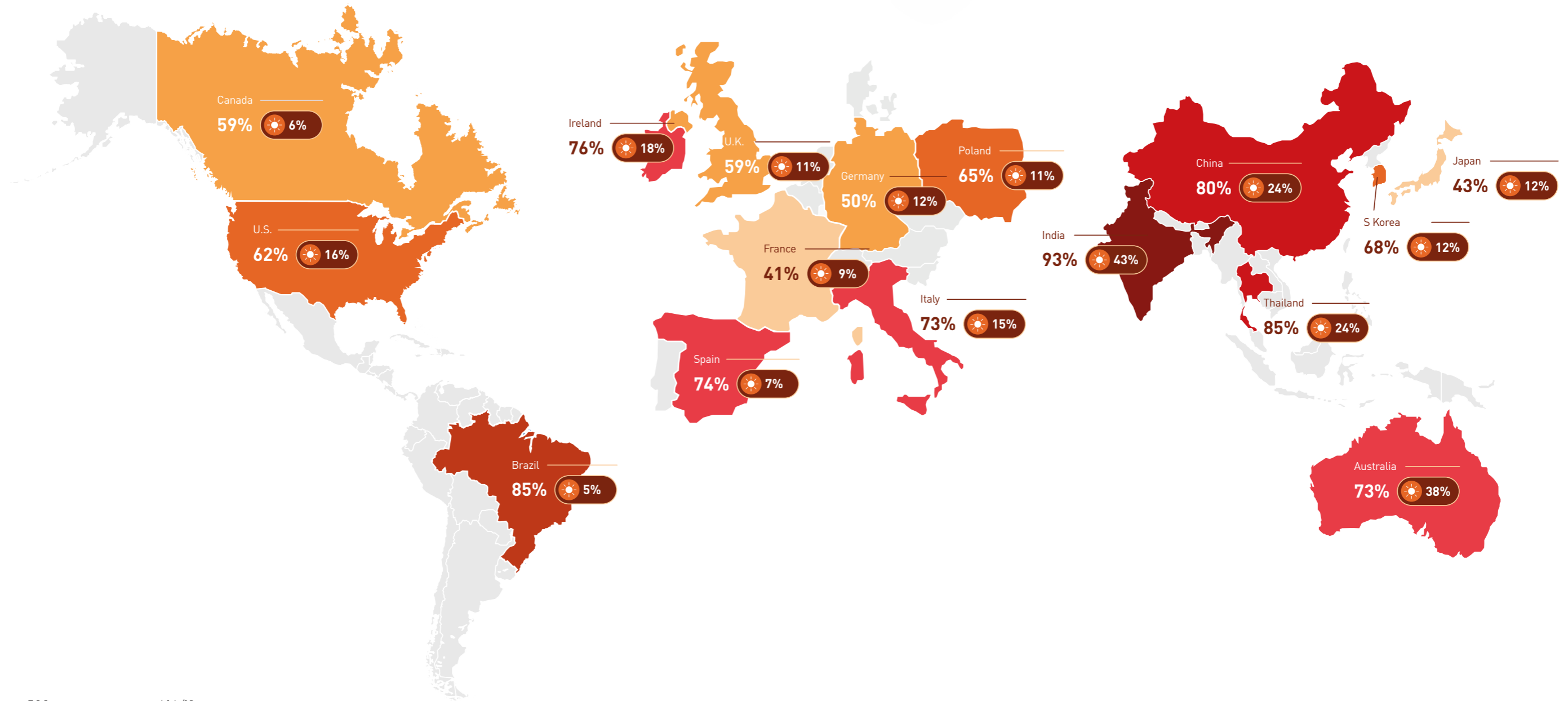


Currently own
 Do not have but interested in purchasing in the future
 Do not have and not interested in purchasing in the future

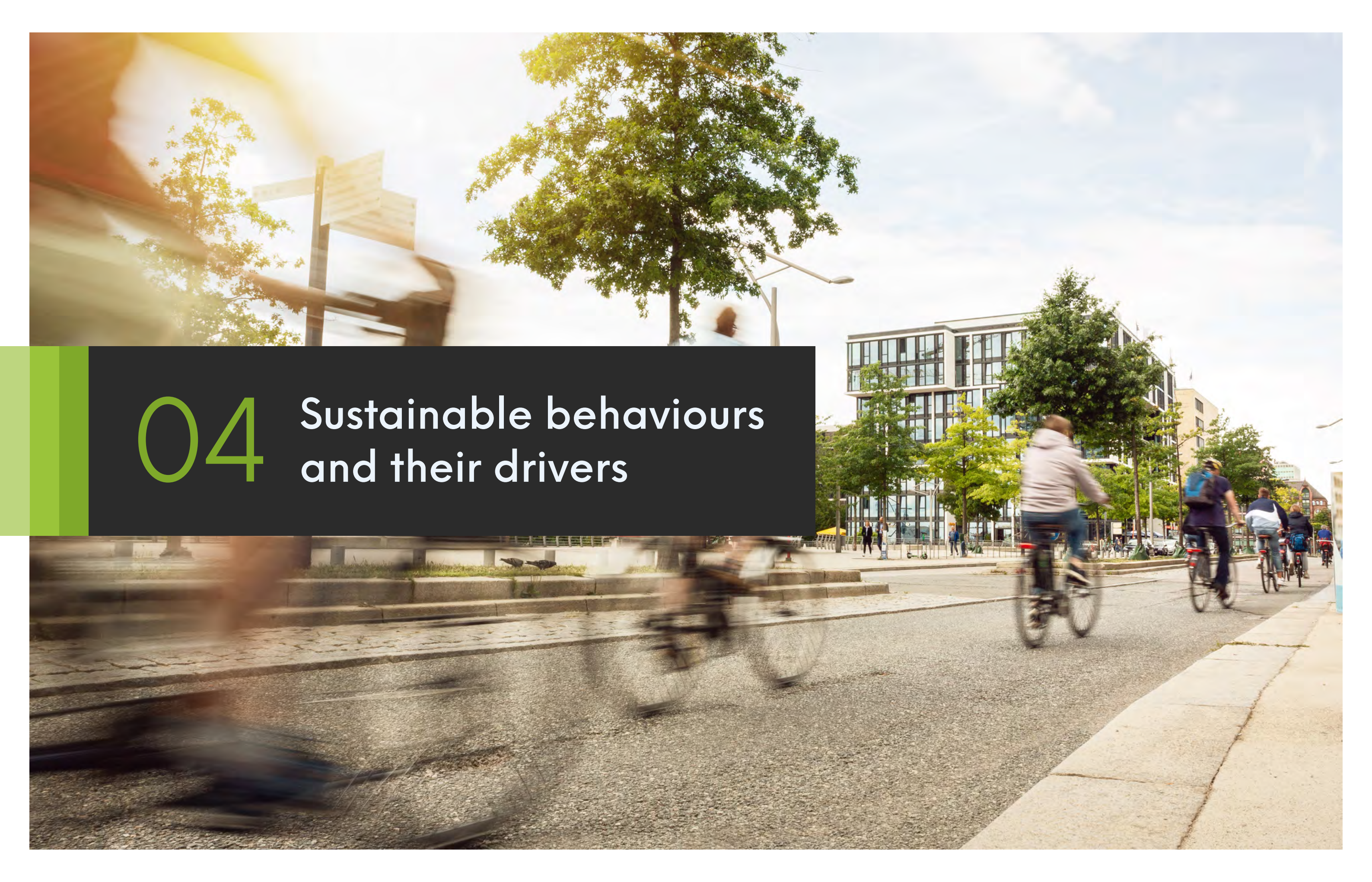
Base: 500 internet users aged 16/18+;
Source: Dynata/Lightspeed/Mintel March 2021

FIGURE 1:12

Current and potential share of homes with solar panels



Base: 500 internet users aged 16/18+;
Source: Dynata/Lightspeed/Mintel March 2021

A blurred city street scene with cyclists and a modern building in the background. The image is a long-exposure shot of a city street. In the foreground, several cyclists are riding away from the camera, their figures blurred. The street is paved with asphalt and has a concrete curb on the right. In the background, there is a modern building with large glass windows and a flat roof. There are trees and a street sign on the left. The sky is blue with some clouds. The overall atmosphere is bright and active.

04 Sustainable behaviours and their drivers

Simplicity and frugality

The most popular behaviours are those that are simple and frugal, in other words, where consumers can have a positive impact by following straightforward processes or by cutting back on spending. Where they do spend their money or time, there is a clear bias towards initiatives with a strong human—and not just environmental—component or benefit.

Recycling (at kerbside) is the most commonplace sustainable behaviour, closely followed by returning packaging to stores. There is a stark cultural contrast between Asia-Pacific and European markets in rates of 'returning' versus 'recycling' packaging, but the relationship with the retailer is key. Accepting returned packaging is the clearest and most popular example of companies partnering with consumers on an issue they feel concerned about and fulfilling consumers' desire to make a difference with their behaviour (Figure 1:5).

Frugality also informs attitudes to food waste, with meal planning increasing significantly amongst those consumers who also state 'I have a budget that I try to stick to as much as possible'. Growing food, however, is a behaviour based on experience as much as economics. What's more, Mintel's characterisation studies (see Figure 3:1) confirm that sustainable consumer groups are more likely than average to agree that they're 'actively seeking ways to reduce stress' and that 'experiences are more important to me than material possessions'.

Abstinence costs nothing, and reducing consumption is one way for people to reduce their emissions and conserve resources. The success of fashion resellers like Depop (18 million users and counting) is built on their appeal to a combination of consumers' sense of individuality, authenticity and sustainability, and Mintel's characterisation studies (see Figure 3:1) confirm that a key tenet of sustainable consumer groups is that they 'like to stand out from the crowd'.

FIGURE 1:13

Sustainable behaviours in the past 12 months

Recycled packaging



60%

Returned packaging (e.g. retailer bags) to a store to be recycled



55%

Bought fewer new clothes



52%

Planned meals at home to avoid wasting food



52%

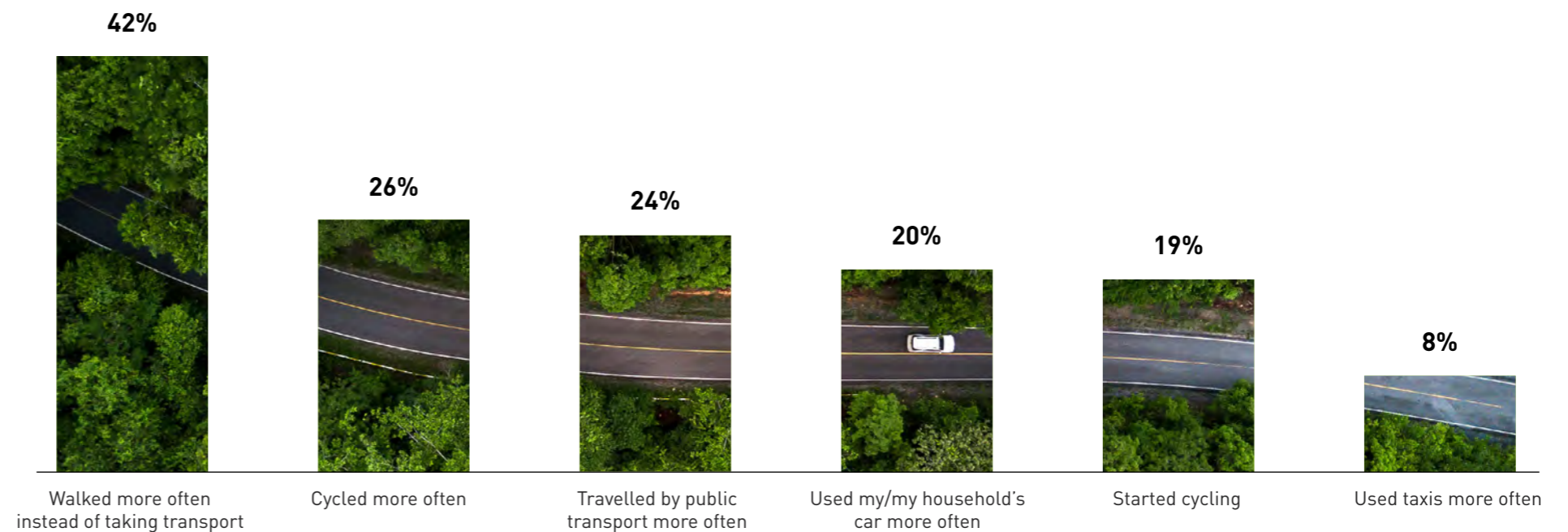
Base: 500 internet users aged 16/18+;
Source: Dynata/Lightspeed/Mintel March 2021

Health

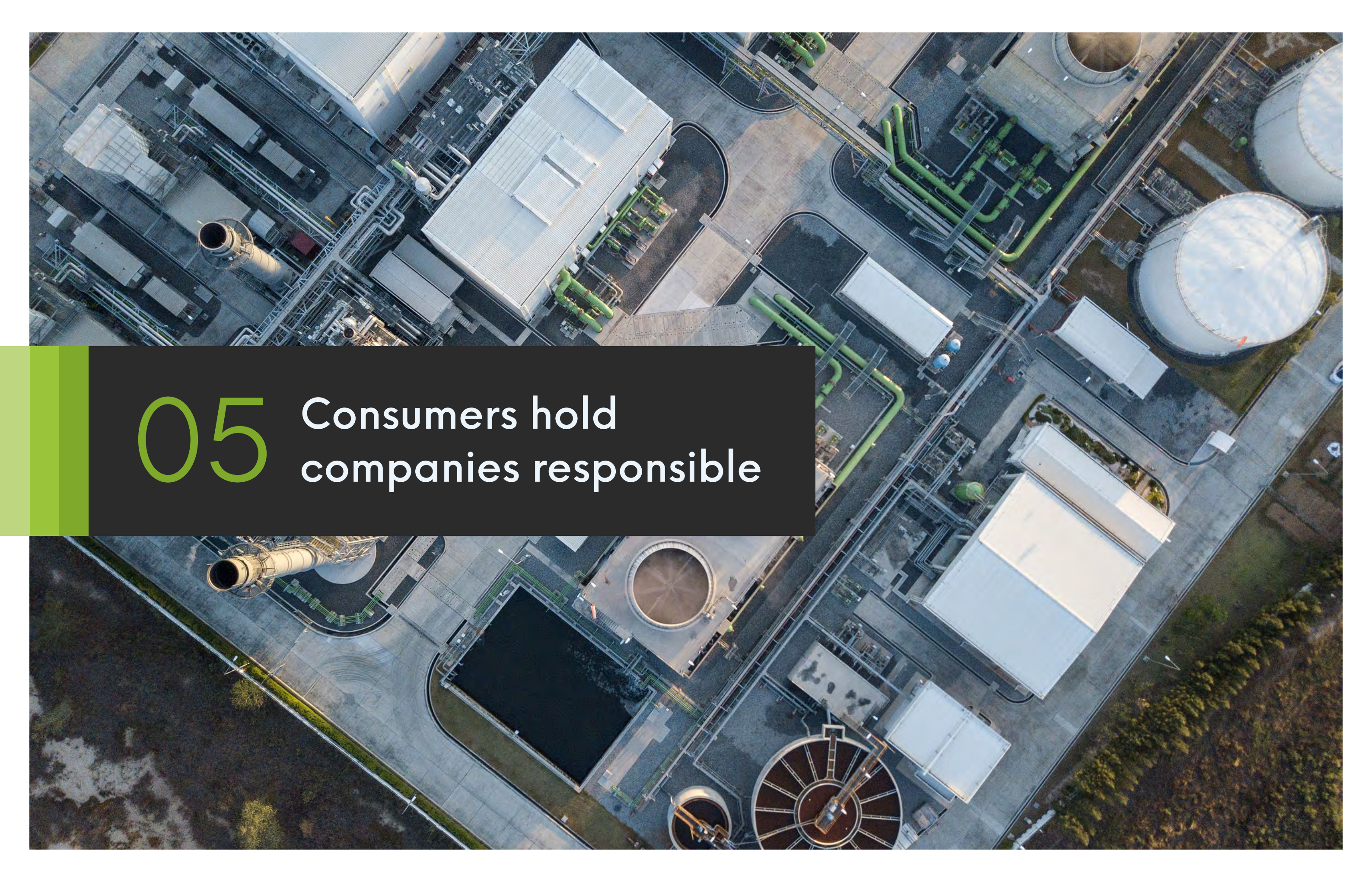
Despite reports that people are turning once again to cars and taxis, the biggest shift in transport behaviours has been towards micro-mobility and zero-emission modes of transport. Consumers who agree that 'it's important for me to lead an active lifestyle' are more likely to have adopted more environmentally friendly transport behaviours in the past 12 months, thus reinforcing the observation that many sustainable behaviours are driven by self-preservation and the urge to protect oneself. This ethos of 'good for me, good for the planet' suggests that sustainable products and services should appeal to people's desire to feel—and look—in good health.

FIGURE 1:14

Transport behaviours in the past 12 months



Base: 500 internet users aged 16/18+;
Source: Dynata/Lightspeed/Mintel March 2021



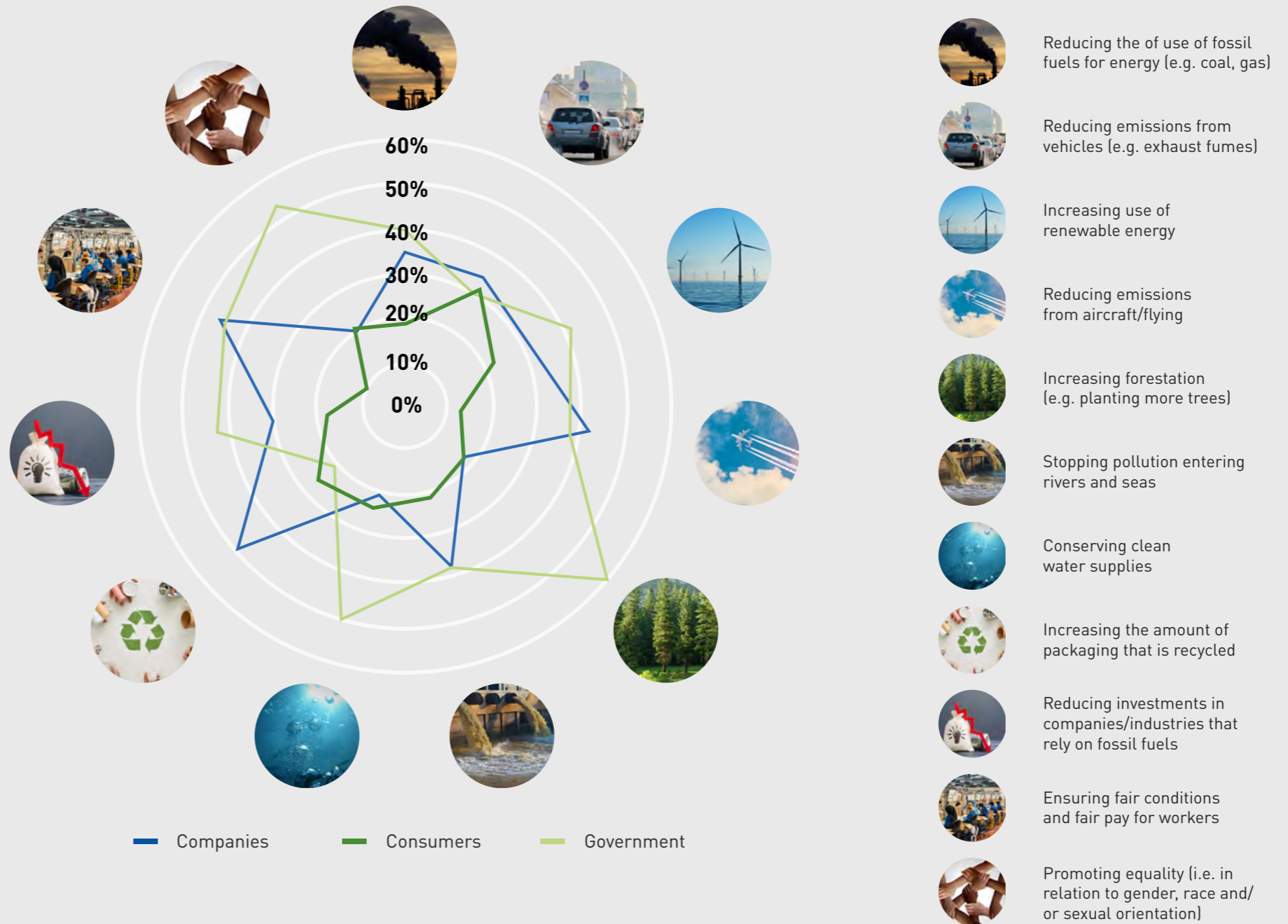
05 Consumers hold companies responsible

Issues

Consumers hold companies most responsible—i.e. more responsible than governments or themselves—for a host of environmental and social targets and standards. A big majority of consumers hold companies most responsible for increasing recycling. A slight majority hold them responsible for ensuring fair conditions and pay for workers and for reducing emissions from road and air transport. Even on issues where a minority of consumers hold companies most responsible, they still amount to almost a fifth of respondents.

FIGURE 1:15

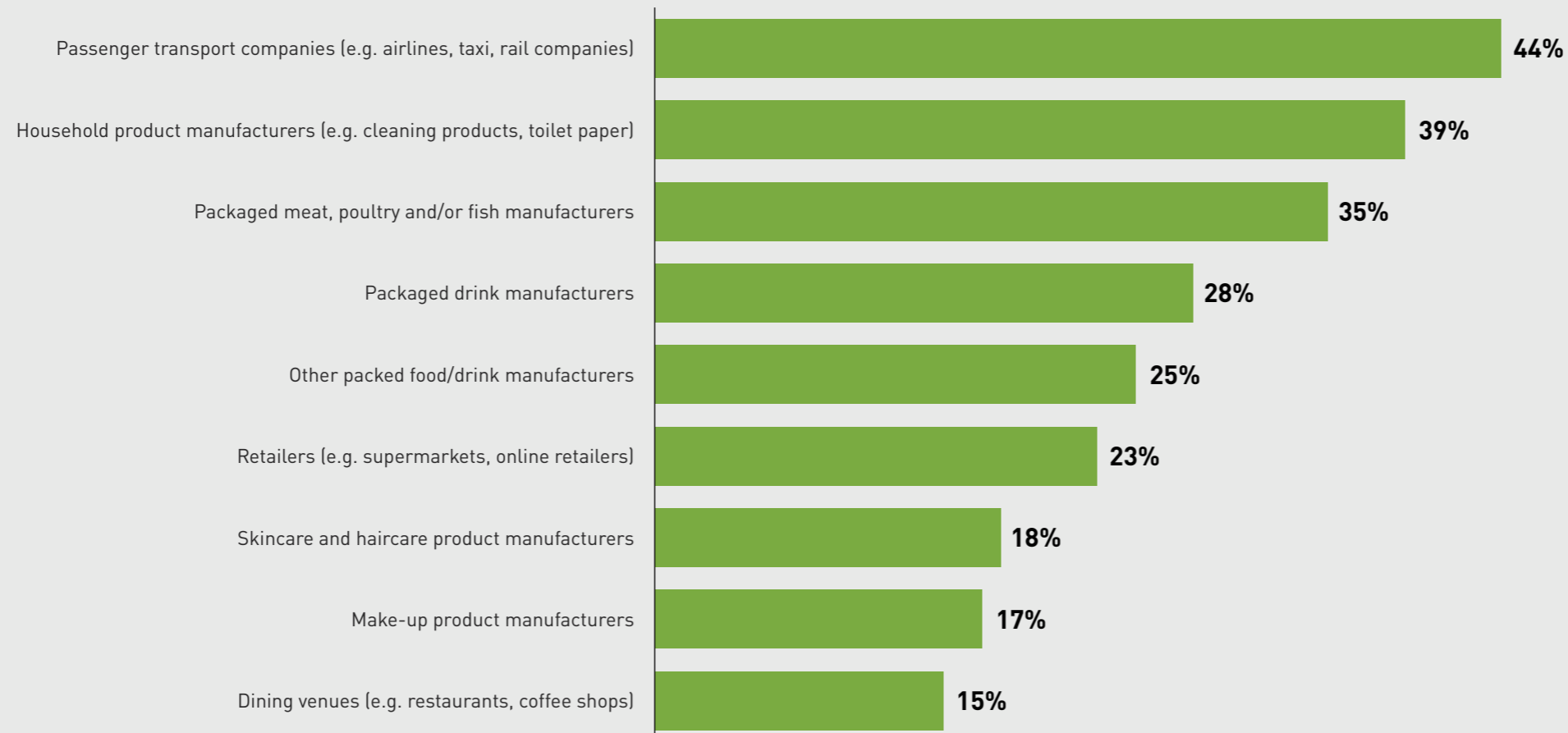
Who consumers think is most responsible for sustainability issues



Base: 500 internet users aged 16/18+; Note: social questions not asked in China
Source: Dynata/Lightspeed/Mintel March 2021

FIGURE 1:16

Types of companies ranked 'most responsible' for protecting the environment



Note: Figures for 'any rank' for question Please rank 1-3, where 1 has the most responsibility; Base: 500 internet users aged 16/18+;
Source: Dynata/Lightspeed/Mintel March 2021

Sectors

Companies—especially those in certain sectors such as transport and household—are being held accountable for their action. Failure to react to this reality will ultimately hit their bottom lines.

Key Takeaways

01

The huge proportions of consumers aspiring to buy air conditioners and air purifiers confirms their belief in climate change and pollution, but it also demonstrates the importance of 'non-sustainable' considerations, like well-being, as key purchasing drivers.

02

Consumers still feel they can 'be the change'—but only just. The opportunity here is for brands to become the chosen partners for those consumers looking to make a difference.

03

Are we talking to the wrong people? Marketers are fixated and focused on Millennials, but consumers' sense of personal impact increases with age.

04

Consumers buy staple products sustainably, but they have 'red lines' and won't compromise on quality or brand familiarity in the name of sustainability.

05

Consumers are gearing up to invest in bigger-ticket sustainable home and transport purchases.

06

The most popular sustainable behaviours are simple, frugal or healthy.

07

Consumers hold companies most responsible for increasing recycling and at least as responsible as governments for ensuring fair conditions and pay for workers and for reducing emissions from air transport and vehicles.

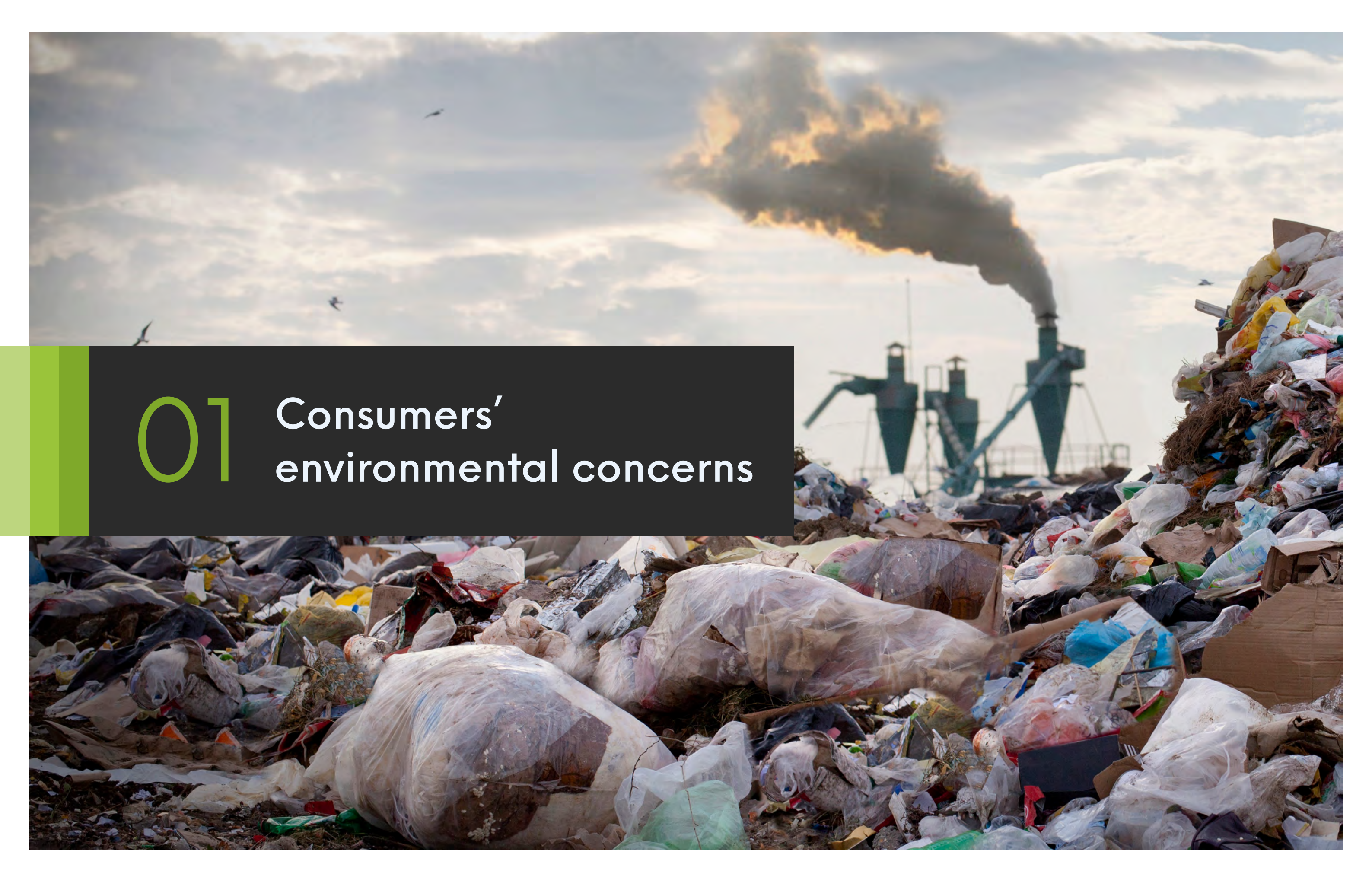
08

Some companies are deemed more accountable than others, especially passenger transport companies, household product manufacturers and packaged meat, poultry or fish manufacturers.





Challenges for companies

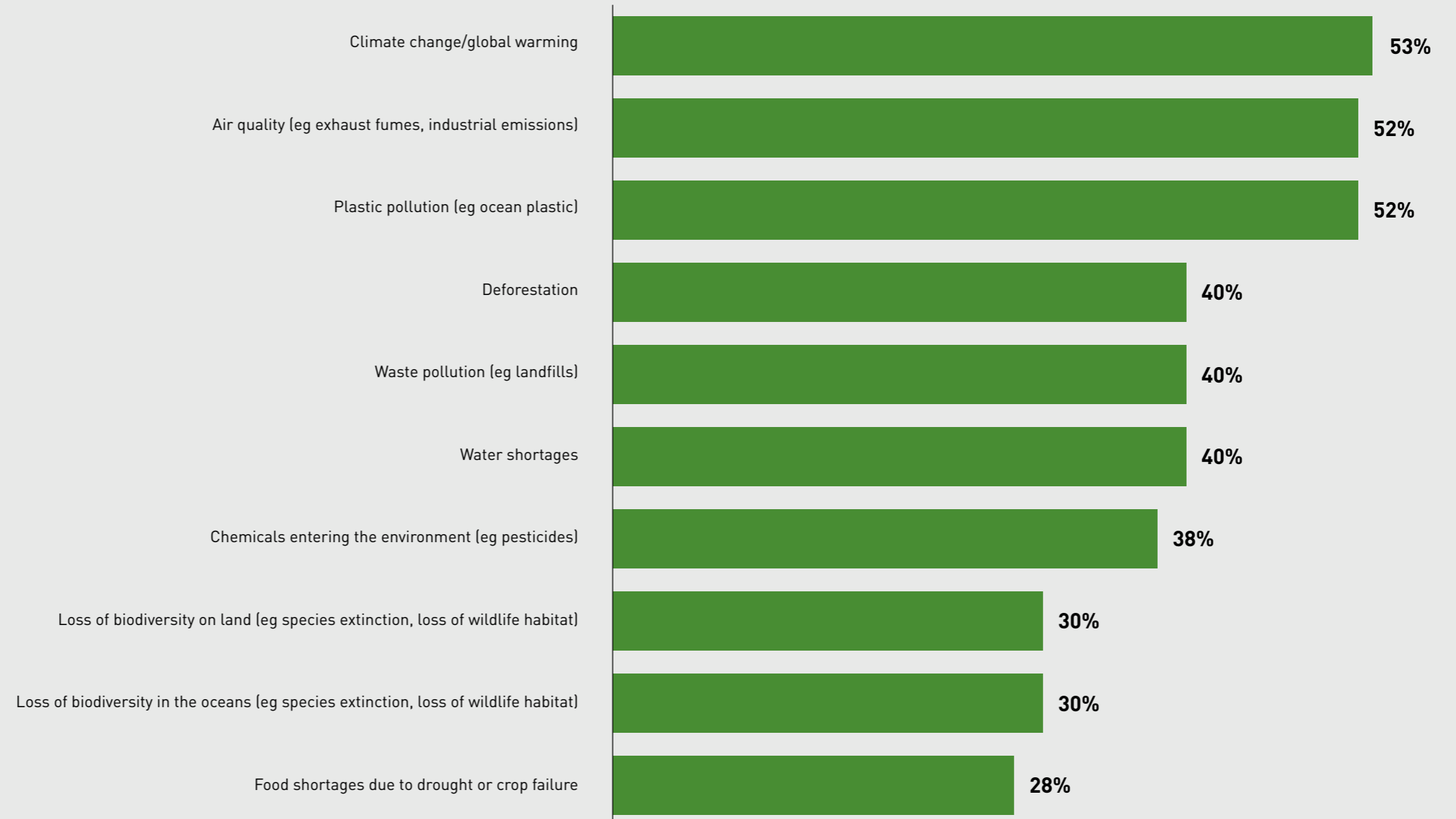


01 Consumers' environmental concerns

When consumers are asked to select up to three environmental concerns, it's unsurprising that the concerns that are the most tangible (climate change), threatening to one's health (air quality) and visible (plastic pollution) are out in front by some distance. Consumers aren't environmental scientists, and, with their current levels of understanding, these factors will always precede considerations around GHG emissions when it comes to ranking their concerns.

FIGURE 2:1

Consumers' top environmental concerns



Note: Consumers were asked to choose up to three concerns. Results show 'any ranking'.
 Base: 500 internet users aged 16/18+
 Source: Dynata/Lightspeed/Mintel, March 2021

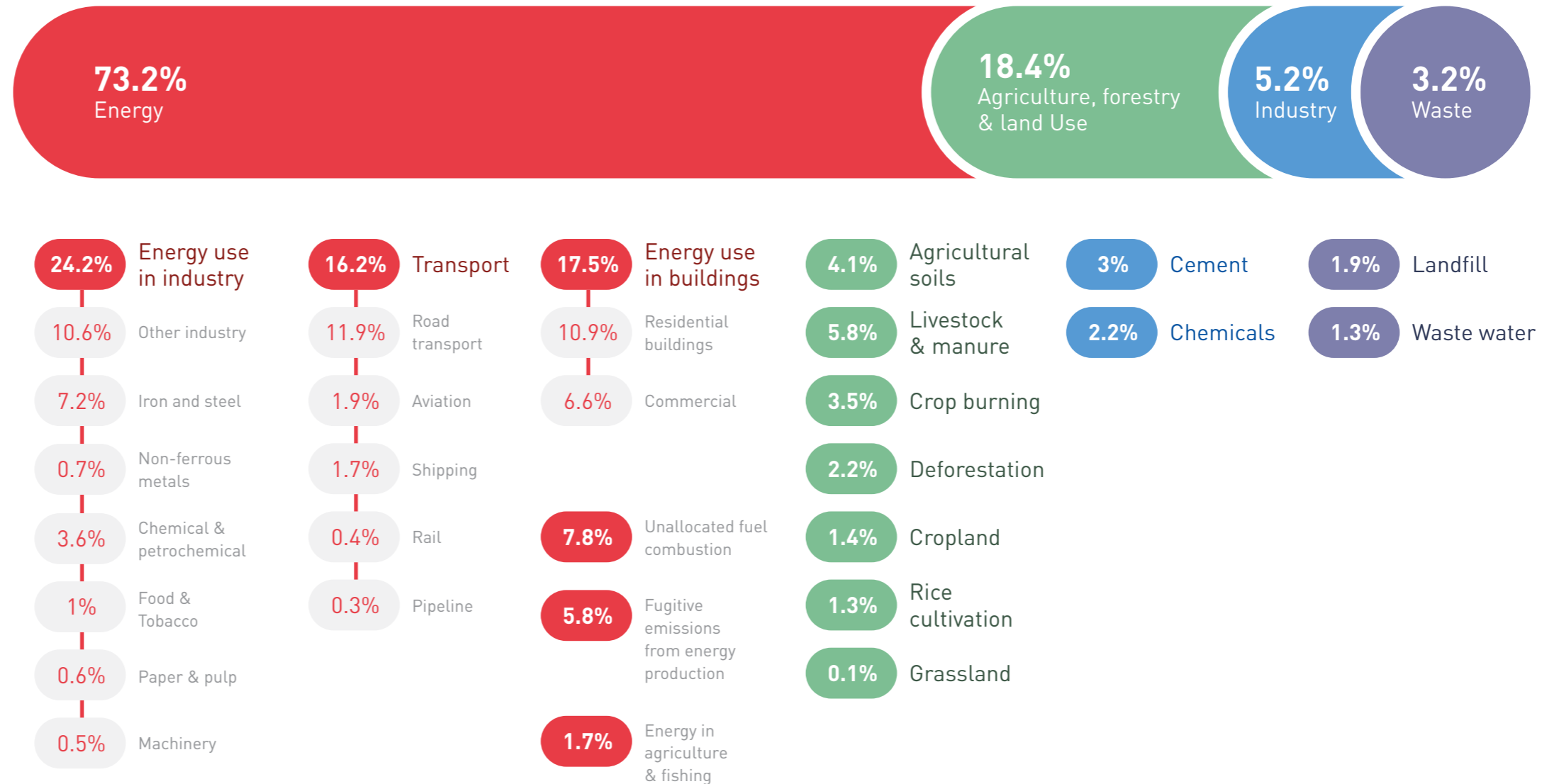
Considering carbon emissions

The negative impact of consumer-facing products and services can be gauged in terms of their contribution to the share of GHG emissions by sector shown in Figure 2:2.

In this regard, waste (including ocean plastic) and deforestation have a relatively low emissions footprints compared with that of agriculture as a whole or indeed energy use in consumer-facing areas such as transport.

FIGURE 2:2

Share of annual GHG emissions by sector



Note: Annual total estimated at 51 billion gigatonnes (Gts).
Sources: Adopted from Climate Watch; World Resources Institute

Considering carbon storage

Emissions related to consumer-facing products and services (covered in Figure 2:2), and environmental solutions, can also be evaluated by how they affect the amount of carbon stored in the sea, soil, plants and animals.

The Earth holds 65,500 billion metric tonnes of carbon, most of which is stored in rocks. The remainder flows between the 'reservoirs' of the ocean, atmosphere, plants and soil. The human-generated activities covered in Figure 2:2 remove carbon from the reservoirs of fossil fuels, soil and biomass, adding it to the atmosphere and raising the temperature.

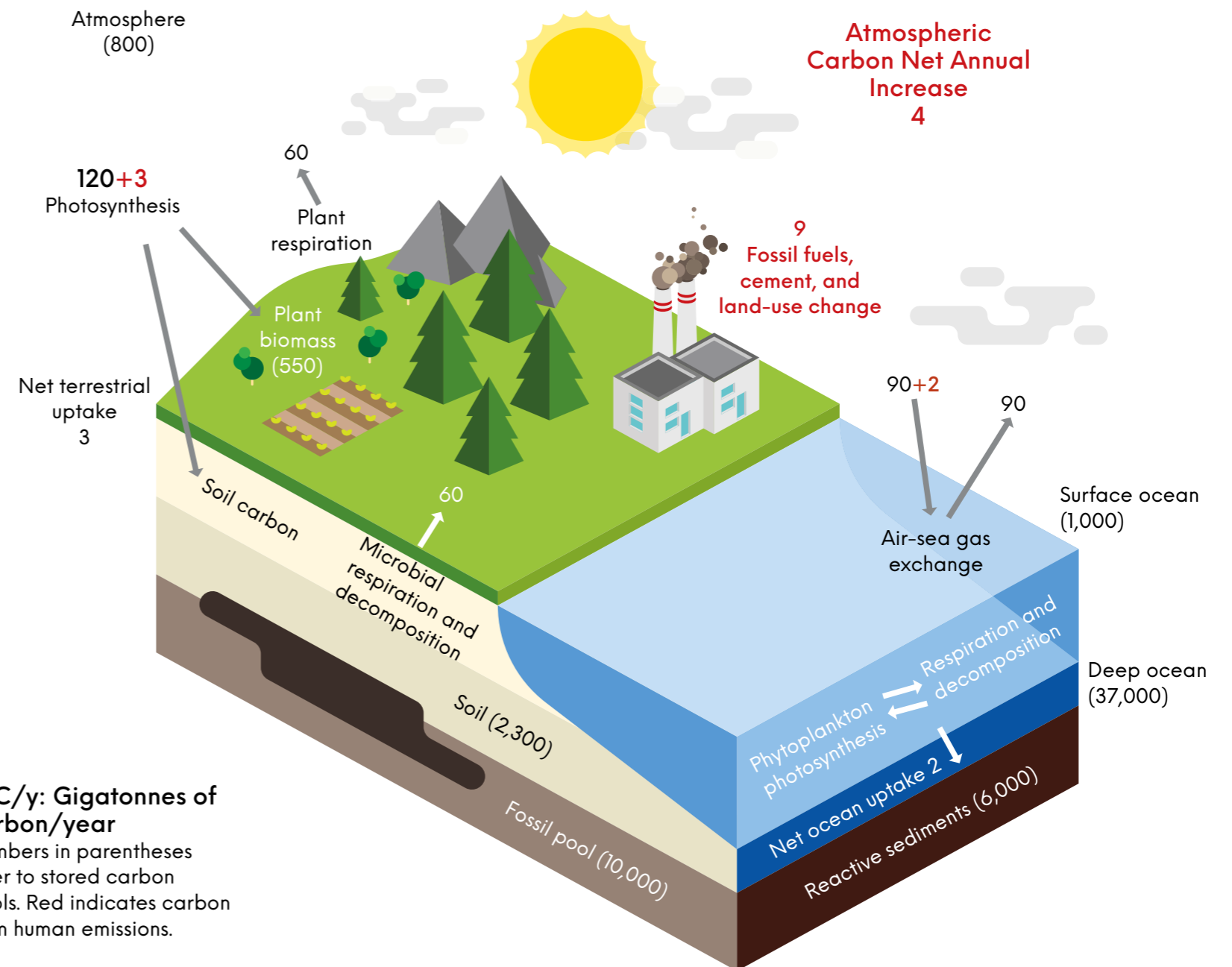
Earth's plant biomass holds 500 billion tonnes of carbon and the soil 2,300 billion tonnes. These figures demonstrate how agricultural cultivation and deforestation practices can potentially release carbon into the atmosphere.

By comparison, the ocean is a giant: it holds 37,000 billion tonnes of carbon, but only 1,000 billion tonnes of that is close to the surface, where it's used by phytoplankton for photosynthesis, transferred to fish and other animals up the food chain, then back down to the deep ocean when they die. Carbon is also stored (very efficiently) in mangrove forests, seaweeds, seagrasses and corals.

The implications in the ocean are the same as those on land: changes to habitat and biodiversity—through activities like overfishing and fertiliser run-off (where the excess can cause bacteria and algae growth and toxify water ecosystems)—transfer this stored carbon into the atmosphere and raise the temperature.

FIGURE 2:3

Movement of carbon between land, atmosphere and oceans (Gts)



Note: Annual total estimated at 51 billion gigatonnes (Gts).
Sources: Adapted from Climate Watch; World Resources Institute



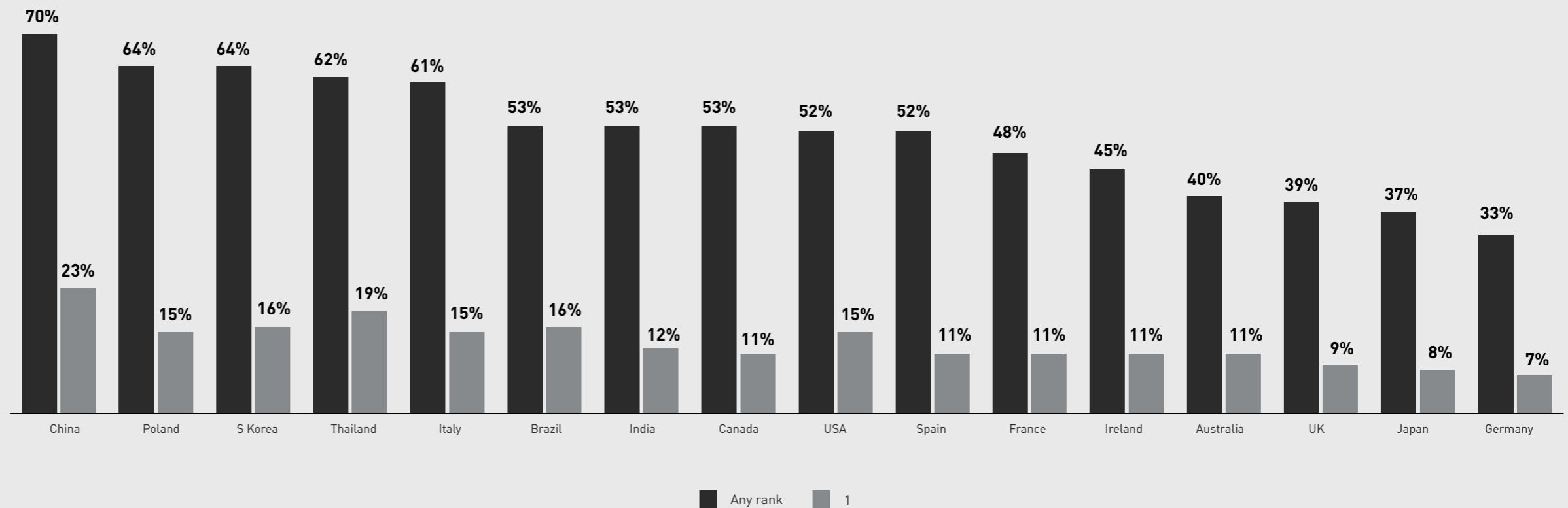
02 How consumers' concerns match up with emissions

After climate change, air quality is the second most likely issue to be a top-three concern for consumers. There is a good reason for that since emissions from energy usage alone in industry and road transport generated 36.1% of global GHG emissions in 2016.

36.1% of global GHG emissions come from industry and road transport energy emissions.

FIGURE 2:4

Consumers selecting air quality (e.g. exhaust fumes, industrial emissions) as a top three environmental concern



Note: Consumers were asked to choose up to three concerns. The figure shows air quality selected first and 'any ranking'. Base: 500 internet users aged 16/18+
Source: Dynata/Lightspeed/Mintel, March 2021; Climate Watch; World Resources Institute.

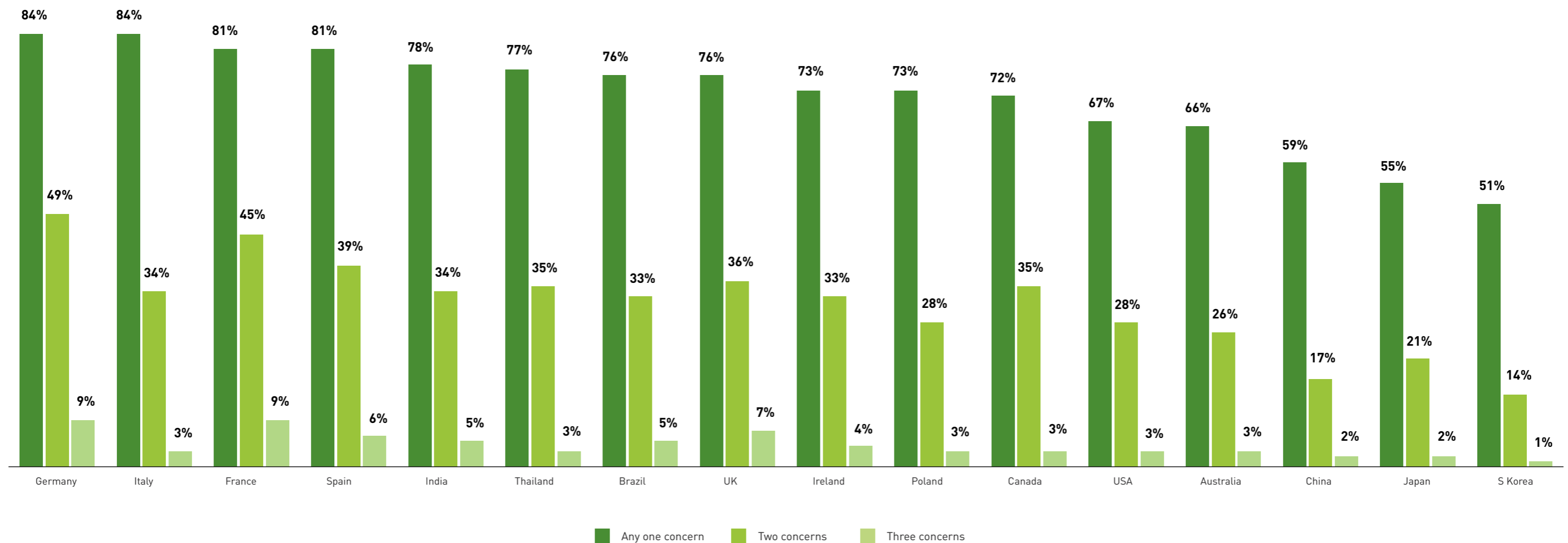
18.4% of global GHG emissions come from agriculture, forestry and land use.

Agriculture, forestry and land use all release carbon stored in soil and biomass, and together they generate 18.4% of annual GHG emissions. If we combine consumers' concerns related to this sector, then 72% select at least one of these factors (deforestation, loss of biodiversity or chemicals entering the environment) as a top-three concern. High proportions of consumers select two of these concerns in their top three, underlining how seriously consumers take these issues, particularly in relation to food and drink.



FIGURE 2.5

Consumers selecting deforestation, loss of biodiversity or chemicals entering the environment (e.g. pesticides) as a top three environmental concern



Note: Consumers were asked to choose up to three concerns. The figure shows 'any ranking' for deforestation, loss of biodiversity or chemicals entering the environment (e.g. pesticides)
 Base: 500 internet users aged 16/18+
 Source: Dynata/Lightspeed/Mintel, March 2021; Climate Watch; World Resources Institute.

The most generous estimate for emissions from plastic (even accounting for its production using fossil fuels, its incineration and disposal) is a tenth of that of industry and road transport energy emissions, yet ocean plastic is a priority for many consumers. Understandably, people don't think in terms of GHGs, but more consumers prioritise ocean plastic than a loss of biodiversity in the oceans when,

in reality, these are overlapping concerns. Sea Shepherd's revelation that 46% of plastic in the Great Pacific Garbage Patch is actually fishing nets, confirms that fishing and food have a far greater impact than packaging when it comes to damaging the ocean and the role of its biomass in storing carbon.

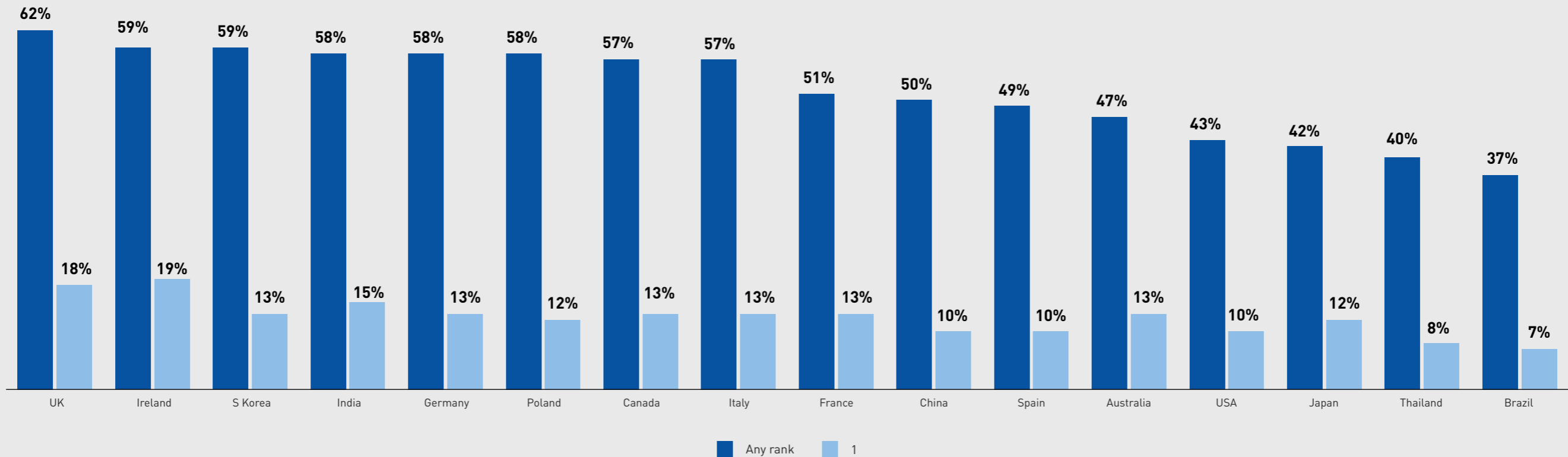
3.6% of global GHG emissions came from the production and incineration of plastic in 2015.

90% of excess heat from GHGs since 1971 has been absorbed by the ocean.

Source: Intergovernmental Panel on Climate Change (IPCC)

FIGURE 2:6

Consumers selecting plastic pollution (e.g. ocean plastic) as a top-three environmental concern'



Note: Consumers were asked to choose up to three concerns. The figure shows plastic pollution selected first and 'any ranking'.
 Base: 500 internet users aged 16/18+
 Source: Dynata/Lightspeed/Mintel, March 2021; UC Santa Barbara; Climate Watch; World Resources Institute; Sea Shepherd.

Seeing is believing

National levels of concern around climate change appear grounded in what consumers experience in their own countries. Tangibility is key to why consumers buy into or engage with some issues more than others.

That may hardly seem an earth-shattering insight, but it signifies the importance of tangibility and localism when it comes to

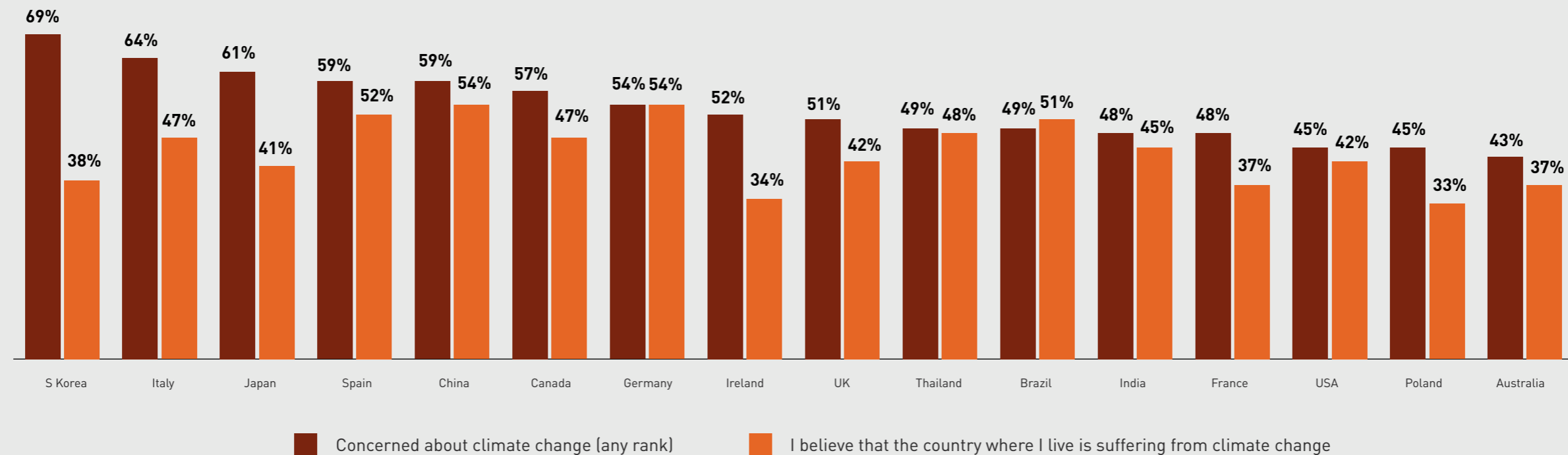
delivering solutions or sustainable products, as is confirmed in our characterisation studies in Chapter 3 (see Figure 3:1), where sustainable consumers are distinguished by the high emphasis they place on values like 'community' and 'localism'.

This theme of localism also has historic and political significance. While the 2005 Kyoto

Protocol encouraged an international approach with emission-reduction projects in developing countries counted as part of a 'donor' country's targets, the 2015 Paris Agreement promotes doing things in one's own backyard to avoid any 'double counting' (i.e. where countries can allow an emission reduction to be claimed by another party and also count it as part of the reduction towards its own target).

FIGURE 2:7

Consumers' attitudes to climate change



Base: 500 internet users aged 16/18+;
Source: Dynata/Lightspeed/Mintel March 2021

Concerns: Loss of biodiversity in the oceans

Consumers are more concerned about ocean plastic than a loss of biodiversity in the oceans (see Figure 2:1), yet the destruction of marine habitats is more worrying, especially as it diminishes the planet's power to store carbon and decelerate climate change.

The good news is that marine conservation can boost carbon sequestration. Mangroves cover 2% of marine environments but account for 10–15% of the carbon stored, while seagrasses cover just 0.2% of the seafloor yet absorb 10% of the carbon dioxide stored by the ocean. To put things into context, a typical square kilometre of territorial forest stores 30,000 metric tonnes of carbon. The figure for seagrass is 83,000.

In Kenya, **Mikoko Pamoja** is a community-led, Plan Vivo-certified mangrove conservation and restoration project that provides long-term incentives for mangrove protection and restoration through community involvement.

In the UK, the four-year **ReMEDIES** project has begun to plant eight hectares of seagrass meadows in Plymouth Sound and the Solent Maritime Special Area of Conservation. The project is aimed at starting to redress the loss of an estimated 92% of the UK's seagrass, caused by pollution and physical disturbance from boats. The project is supported by the Marine Conservation Society.





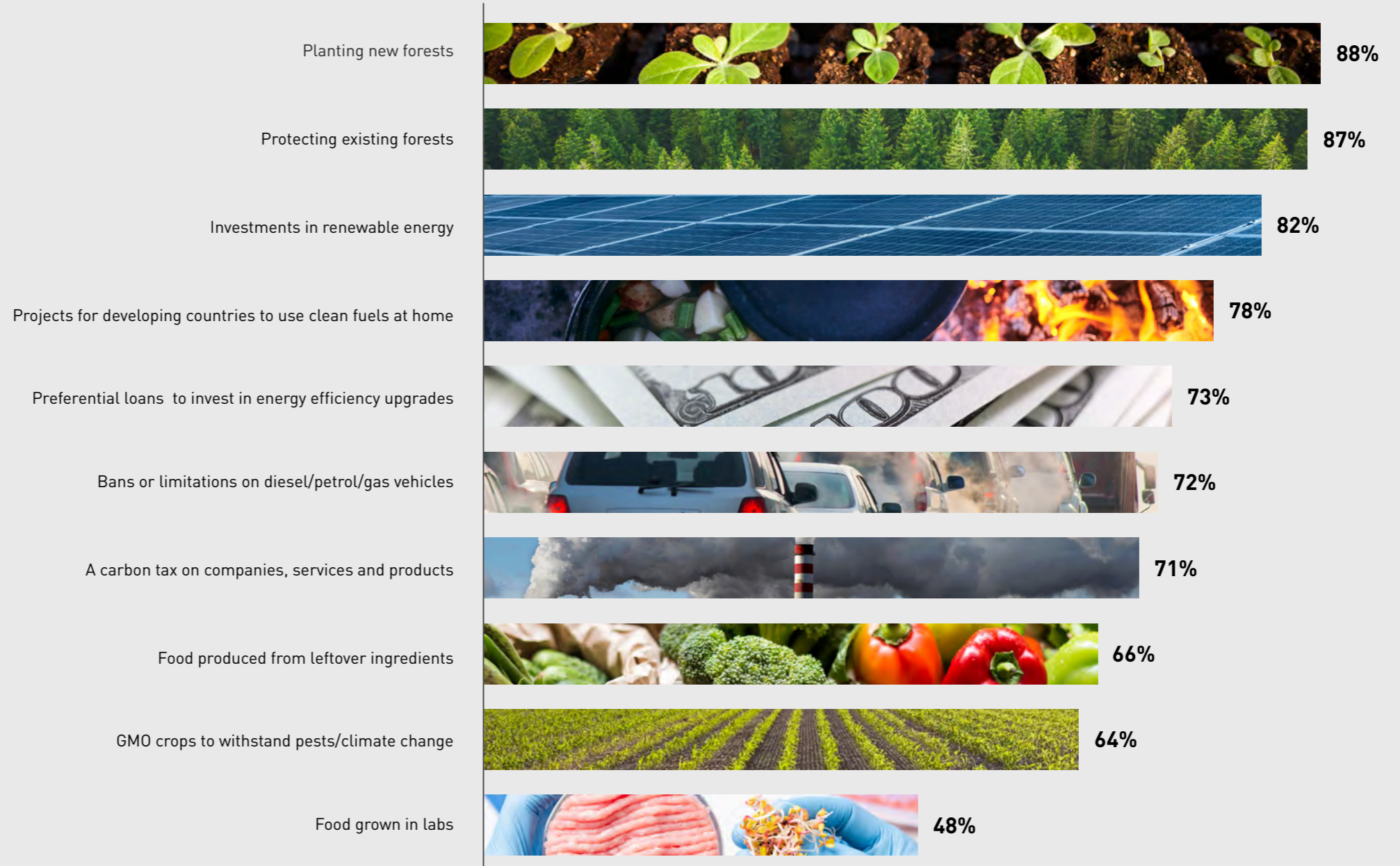
03

Solutions consumers think
will save the planet

Environmental innovations perceived as having a ‘high to moderate impact’ can be quick wins for companies looking to roll out a consumer-friendly strategy that doesn’t require explanation or sales skills. However, as with consumers’ priorities, the real question is what is most impactful—or relevant—for a business’s sector. The results in Figure 2:8 help to identify laudable, high-impact solutions that require greater education and better positioning by businesses if they’re to resonate and succeed with consumers.

FIGURE 2:8

Environmental solutions perceived by consumers as having ‘high to moderate impact’

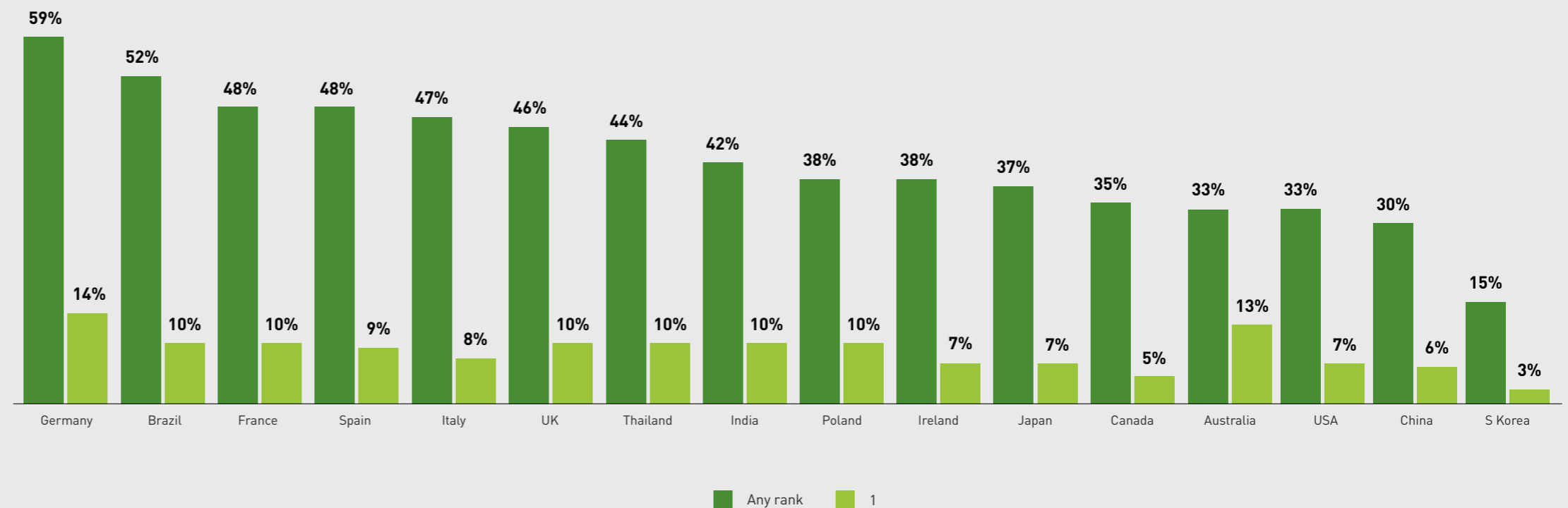


Base: 500 internet users aged 16/18+;
Source: Dynata/Lightspeed/Mintel March 2021

Planting trees is the cornerstone of many businesses' efforts to offset emissions, and it understandably resonates with the high proportions of consumers citing deforestation as a top-three concern (Figure 2:1). This is laudable and much needed, but protecting existing forests is an even more impactful solution, since saplings won't absorb as much carbon dioxide as cut-down mature forests would've released. In storage terms, the older the forest, the greater the impact. For example, a one-hectare commercial conifer plantation grown over 50 years will store between 50 and 100 tonnes of carbon, but that rises to 250 tonnes for a plantation that is 300 years old.*

FIGURE 2:9

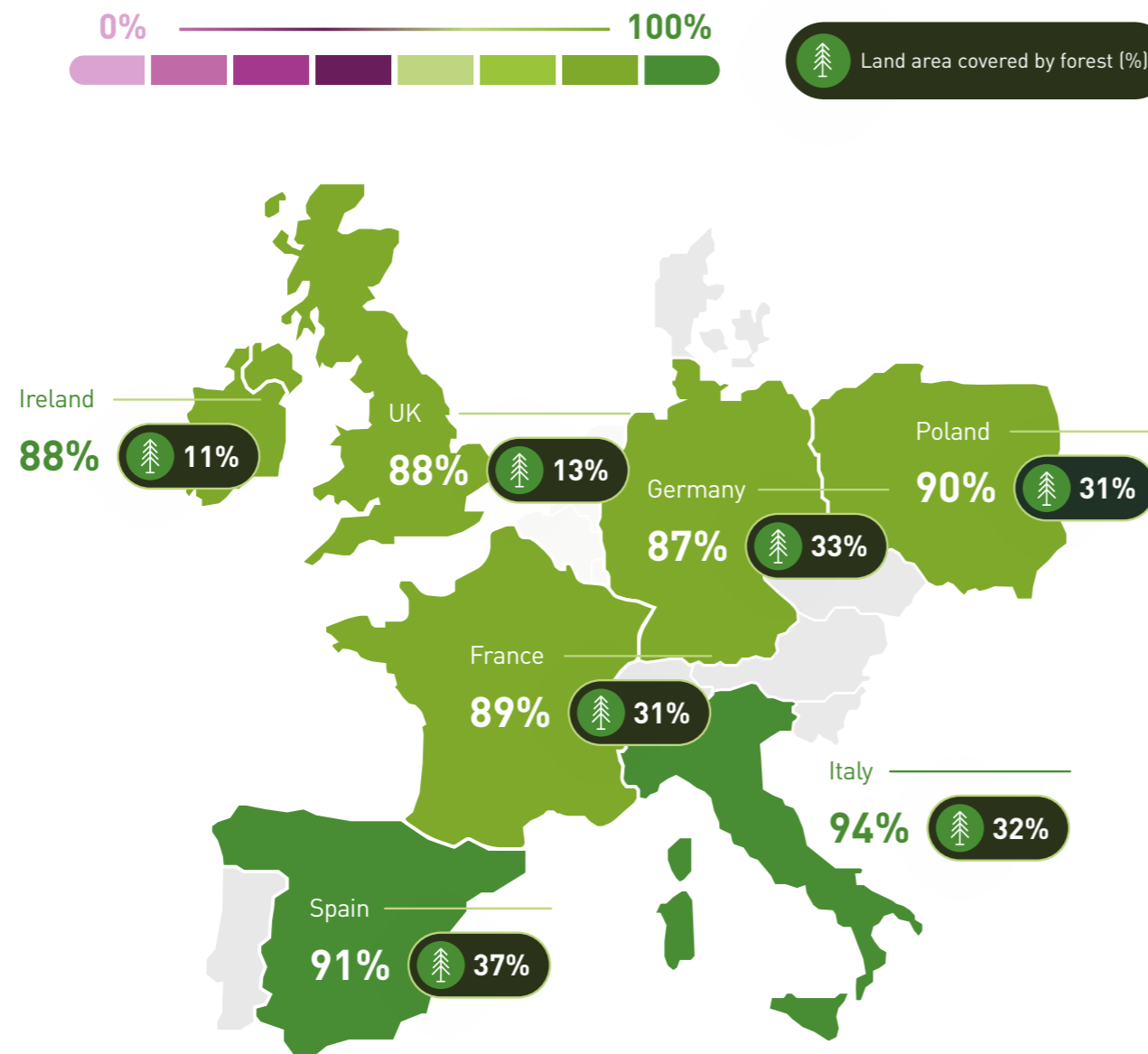
Consumers selecting deforestation as a top three environmental concern



Note: One tonne of carbon is equivalent to 3.7 tonnes of carbon dioxide.
 Base: 500 internet users aged 16/18+
 Sources: Dynata/Lightspeed/Mintel, March 2021; Eurostat; *Forestry Commission

FIGURE 2:10

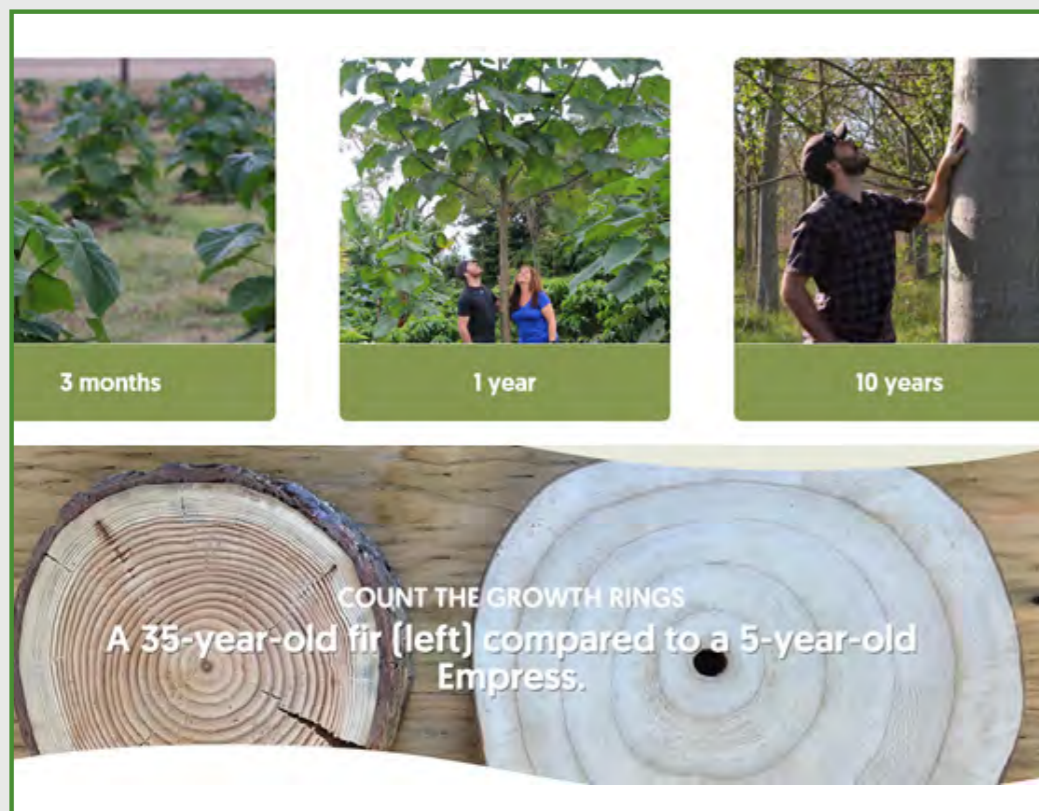
Consumers perceiving planting new forests as having 'high to moderate impact' and percentage of land covered by forests, Europe, by country, 2021



Planting new forests

With trees and carbon sequestration, it's about species too.

World Tree's programmes use the fastest-growing hardwood tree in the world, the Empress Splendor. It can grow 10 to 20 feet tall in its first year and reach maturity in 10 years, with an acre typically capturing 103 metric tonnes of carbon dioxide. That compares very favourably with 9.5 for most species. What's more, if an Empress is cut down, it regrows from the stump and will regenerate up to seven times, continuing to absorb carbon for over 50 years.



Source: World Tree

Solutions: Investments in renewable energy

After forest planting and conservation, 'investments in renewable energy' are most likely to be perceived by consumers as having a 'high to moderate' positive impact on the environment. However, many of these schemes are based on 'offsetting'—as opposed to actually reducing—a company's carbon emissions footprint.

The NGO RE100 shows how things can be different by helping companies along a stringent, direct route to taking responsibility for zero emissions across their entire supply chain.

By pledging to transition to 100% renewable electricity within their operations and their global supply chains by 2050, brands can't simply offset their operations by investing in someone else's renewable project on the other side of the world.

Instead, they must invest in putting solar panels on the roofs of their offices and those of their third-party factory suppliers.

RE100 partner Burberry demonstrates just how far companies need to go. It already sources 90% of its electricity from renewable sources, but a lower proportion, 41%, of its products are manufactured in facilities 'where a significant portion of the energy used is renewable, either on-site or procured'.



Sources: RE100; Burberry

Solutions: Food grown in labs

Consumers favour supposedly more 'natural' solutions over lab-grown foods, which tend to focus on realistic-looking meat alternatives.

But Solein from Solar Foods is lab-grown food with a difference, and it aims to deliver on a huge scale. In a twist on traditional fermentation techniques, water is taken from the air for microorganisms to live in. They're then fed bubbles of carbon dioxide, nitrogen, calcium, phosphorus and potassium so that they grow and multiply. This process generates 1kg of nutrient-rich powder from two ingredients: water and renewably sourced electricity.



Source: Solar Foods (<https://solarfoods.fi/>)

Key Takeaways

01

Consumers are most concerned by the environmental issues that are the most tangible (climate change), threatening to one's health (air quality) and visible (plastic pollution).

02

Companies must address these concerns but still engage on the issues that are most impactful and relevant to their business.

03

'Seeing is believing': national levels of concern around climate change are closely linked to what consumers experience in their own countries, making tangibility—and locality—key to which issues and solutions consumers buy into.

04

Consumers perceive planting new forests, protecting existing forests, and investments in renewable energy as the highest-impact solutions.


05

These solutions, along with lab-grown foods, present opportunities for tangible, local solutions.



An aerial photograph of a two-lane asphalt road cutting through vast, vibrant green agricultural fields. A single dark-colored car is visible on the road, moving away from the viewer. The road is lined with a dense row of lush green trees. The overall scene is bright and clear, suggesting a sunny day.

Approaches for success



01 Understand consumers' characterisation and touchpoints

Who are the 'sustainable' consumers?

Mintel's driver statements—where consumers answer whether characteristics do or don't describe them—can answer this question and suggest touchpoints for how to engage with them.

For instance, EV/hybrid vehicle ownership increases (by an average of four percentage points) amongst consumers who identify with the statement 'I like to be amongst the first to try new technologies', but it only increases amongst those who agree with the statement 'I have a budget that I try to stick to as much as possible' in the more developed markets of China and Japan. Progressive tech-savviness defines the EV owner, but a focus on the superior return on investment resulting from ownership is yet to appear in the 'developing' markets of Europe and the Americas.

The same characteristics hold true for those aspiring to own EVs. Aspiration levels are even stronger (by an average of eight percentage points) amongst consumers who identify with the statement 'I like to be among the first to try new technologies'.

Potential ownership is also stronger (by four percentage points) amongst those who identify with the statement 'I think that it's worth paying more for products of a higher quality'.

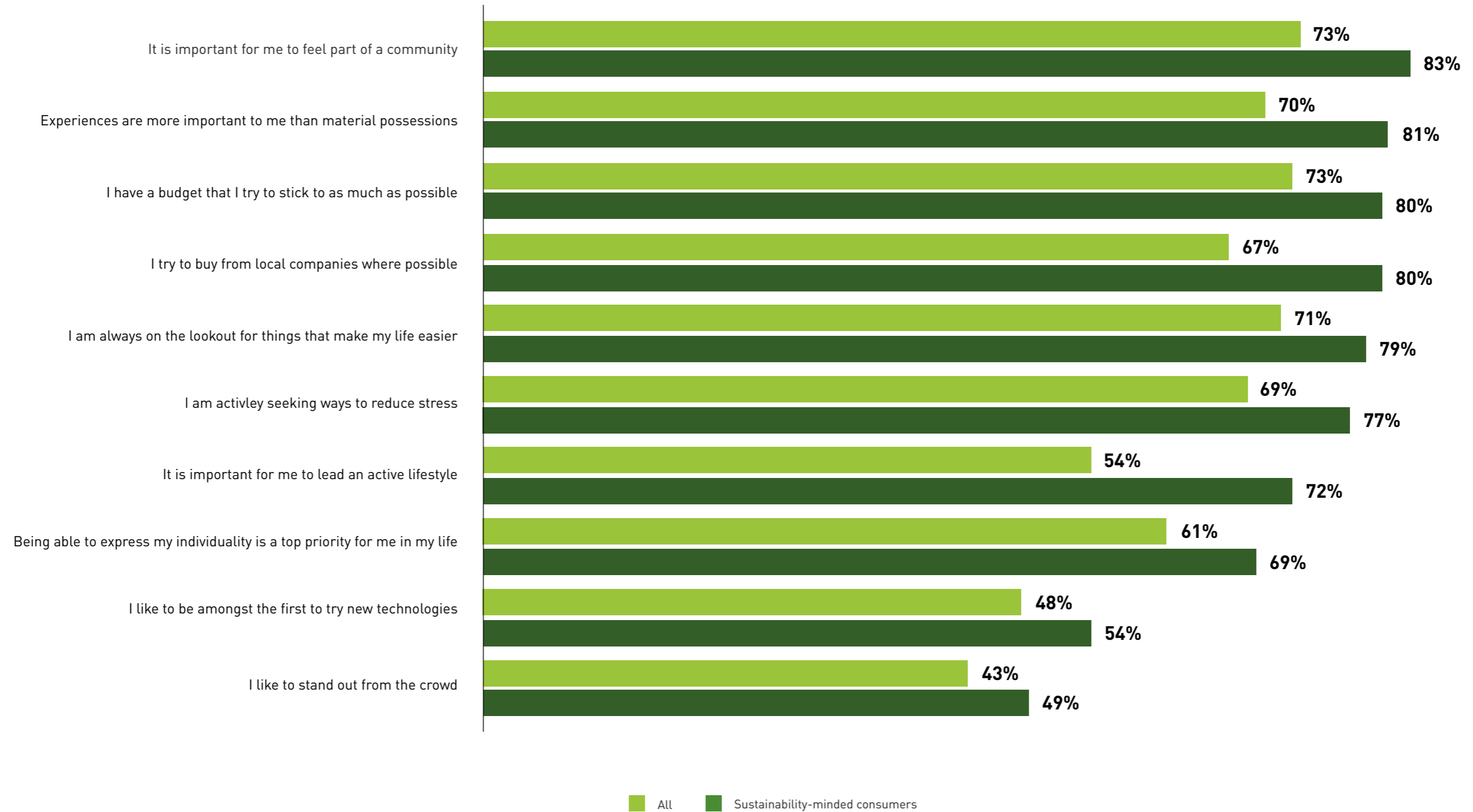
The key opportunity here is for financial services companies to explain and quantify the short-term benefits of EVs to budget-minded drivers, then align themselves with products that promote the leasing or purchasing of cleaner vehicles.

What is the characterisation of, and what is most important to, a sustainably minded consumer? By building a sustainably-minded consumer group and comparing it against the average, we can see that this group identifies especially strongly with commonplace factors like sticking to budgets and convenience ('I am always on the lookout for things that make my life easier'). Sustainable products and services should ignore these essential qualities at their peril in the same way that they should heed consumers' red lines about what they won't sacrifice for sustainability (Figure 1:7).



FIGURE 3:1

How all vs sustainable consumers describe themselves

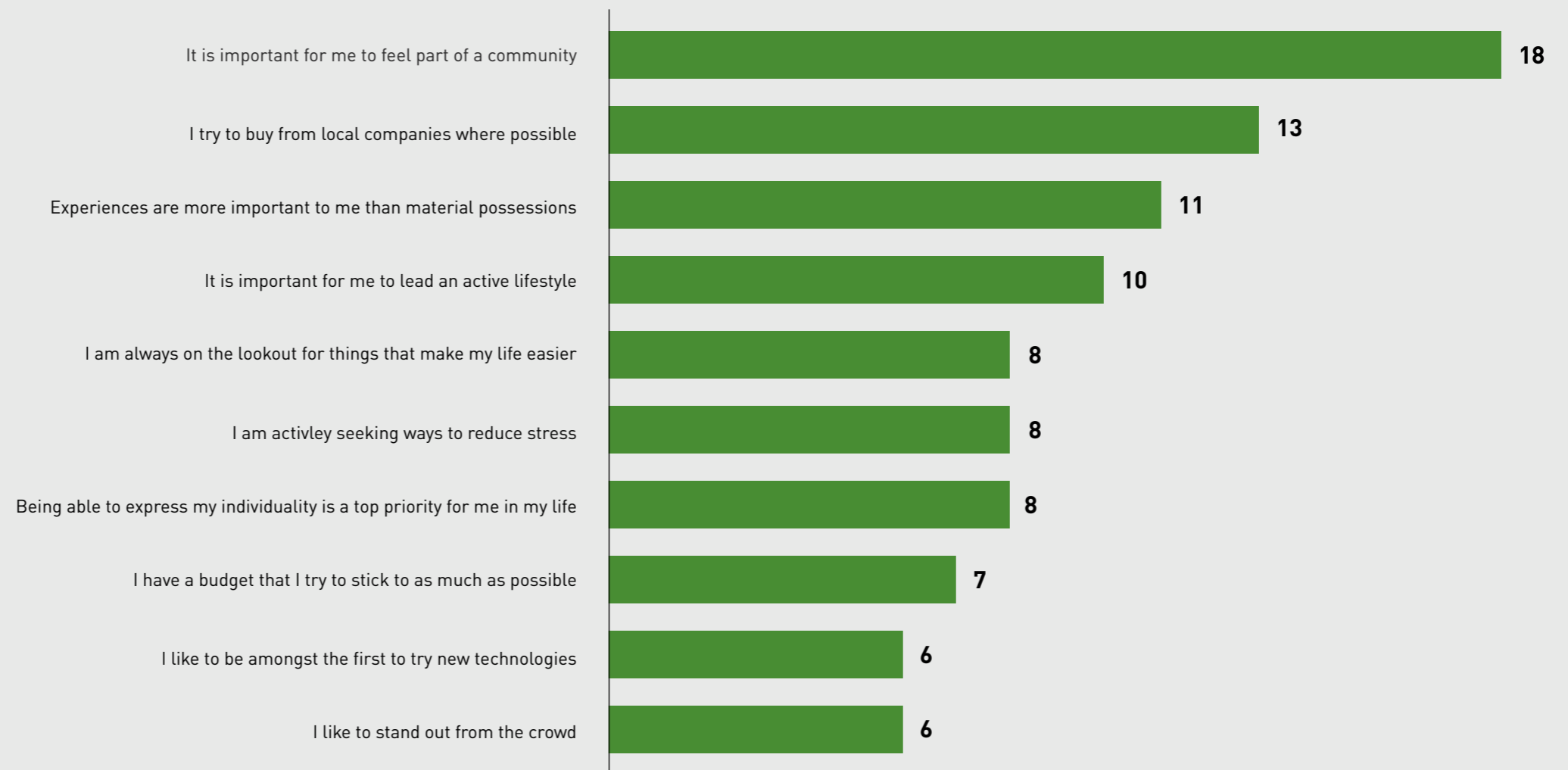


Base: 500 internet users aged 16/18+;
Source: Dynata/Lightspeed/Mintel March 2021

When it comes to what most distinguishes a sustainably-minded consumer from an average consumer, we see: the importance of human elements around 'community' and 'localism'; a reaffirmation that healthy, active lifestyles also resonate; and that there are other touchpoints to explore around reassurance (reducing stress), individuality, early adoption and egotism ('I like to stand out from the crowd'). Appealing to these touchpoints is crucial if we're to position sustainable products and services successfully and 'sell them like soap or soft drinks'.

FIGURE 3:2

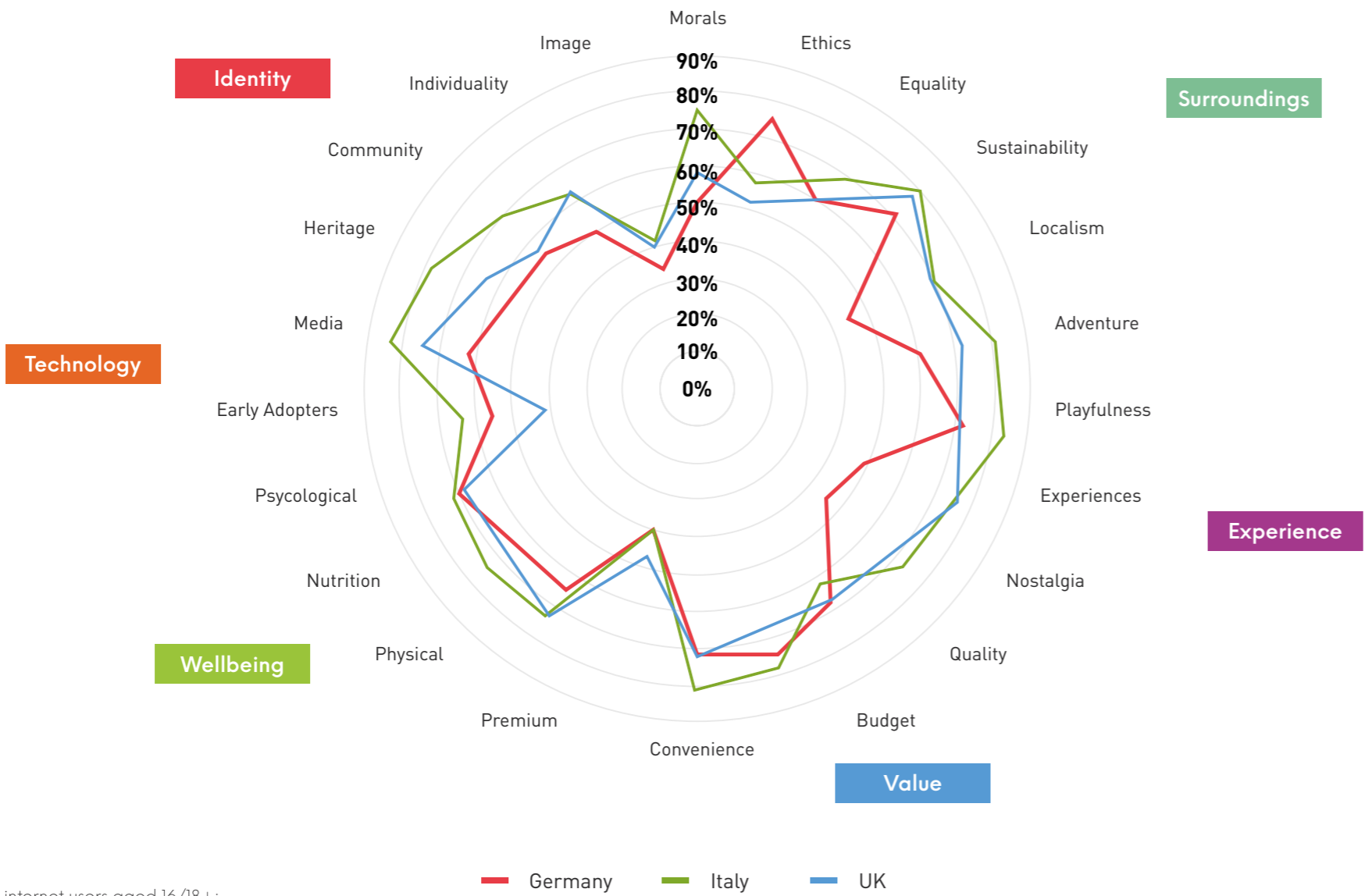
The differences in how sustainable consumers describe themselves (percentage points change versus all consumers)



Base: 500 internet users aged 16/18+;
Source: Dynata/Lightspeed/Mintel March 2021

FIGURE 3:3

What European sustainable consumers are driven by



Base: 500 internet users aged 16/18+;
Source: Dynata/Lightspeed/Mintel March 2021

Applying this approach to western European consumers, we can see that Italians might react best to playful or moral positioning that emphasises community benefits while also appealing to the progressive tech-savviness of 'early adopters'.

Germans show standard levels of pragmatism but are more disposed to the human rather than environmental element of messaging and identify less with technological or experiential drivers.

UK consumers are least inclined towards early adoption and focus on premium qualities and those that boost their sense of image and individuality.

Characterisation: Standing out from the crowd on a budget

We began with the premise that simply 'doing good' isn't enough for goods and services to sell and succeed. The sustainably-minded consumers we've identified are notably characterised by being more budget conscious and keener to express their individuality than the average consumer. They also have stronger peacock tendencies ('I like to stand out from the crowd').

Refurbished tech reseller Back Market appeals strongly to these values with a compelling proposition that addresses the growing problem of e-waste while promising a 'fairer, more sustainable future by allowing very high-tech products to be sold at up to 70% cheaper than new ones'.

Its 'Freedom' campaign extols the virtues of democratically priced devices and being 'different', while trolling Apple—and those who line up for its devices en masse—in the process.



Back Market
backmarket.fr

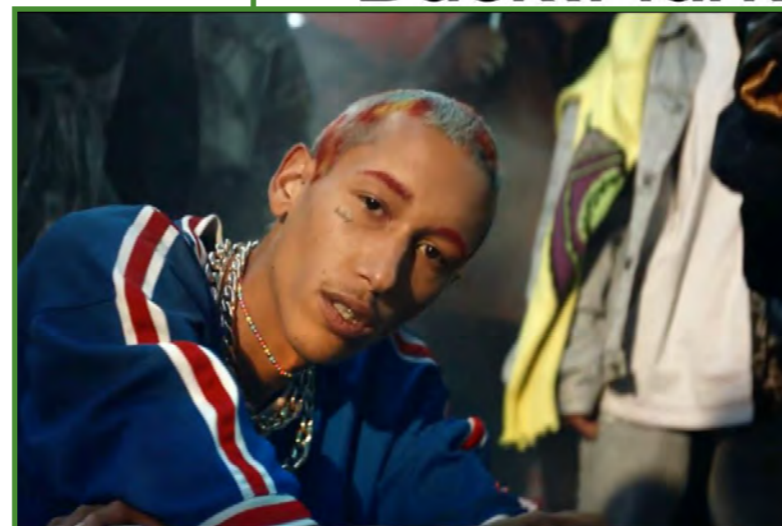
Buy different.

iPhone X 64Gb refurbished

From **379€**
Original price: 589€

Back Market
backmarket.fr

Source: Back Market, 'Freedom' campaign





02 Educate on impact

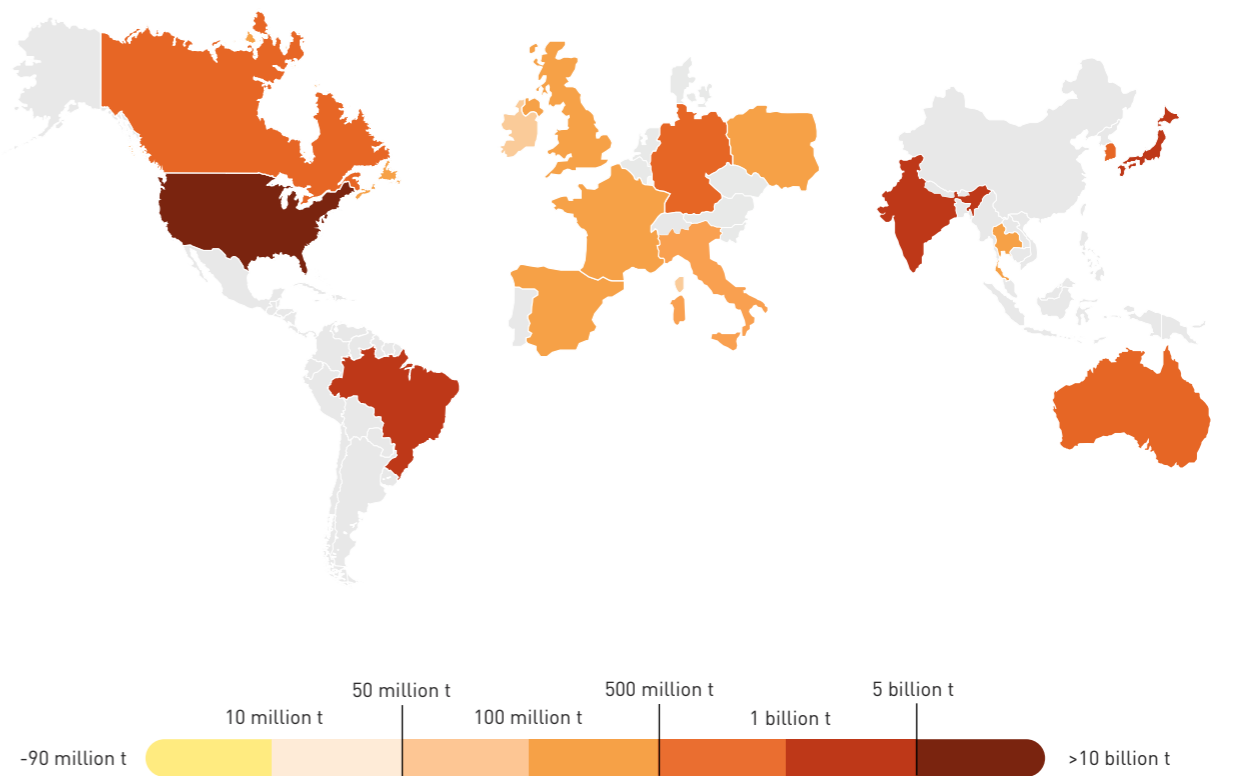
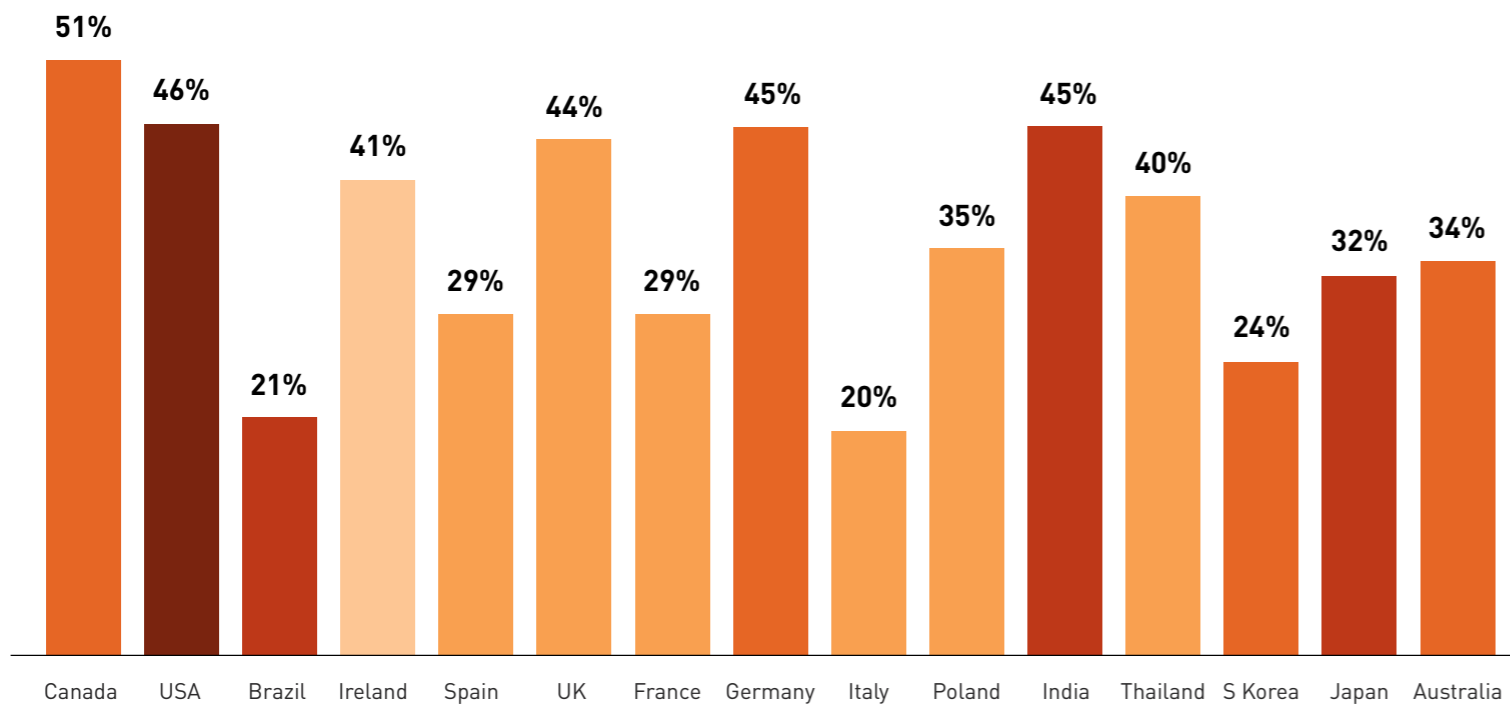
Looking at consumers' favoured causes (Figure 2:1) and solutions (Figure 2:8), it's evident that companies need to inform more on the impacts of both. Figure 3:4 matches consumers' sense of national responsibility for causing climate change with the realities of their country's total emissions

(expressed in tonnes of GHGs per annum). We see striking discrepancies between awareness—or acceptance—of national and personal impact that necessitate more education around uncomfortable realities if more consumers are to engage with issues and environmentally beneficial products.

FIGURE 3:4

Consumers' sense of climate change by country and total GHGs

'I believe that the country where I live is contributing to climate change'



Note: Question not asked in China.
 Base: 500 internet users aged 16/18+
 Sources: Dynata/Lightspeed/Mintel, March 2021; Our World in Data 2016



03

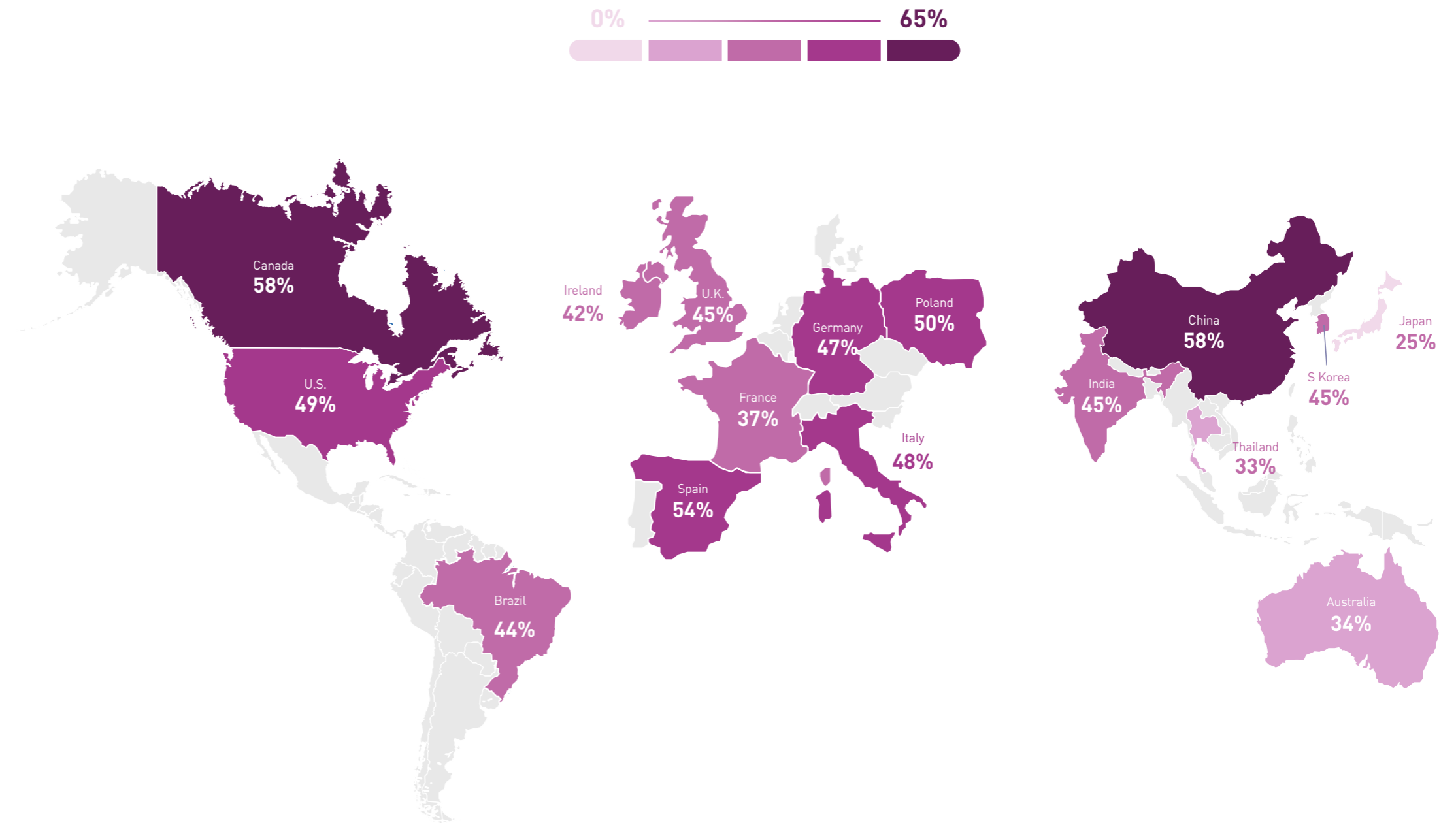
Sell in the science

Sell in the science


Available technologies (solar panels, batteries, fuel cells and hydroponics) and those still in development (carbon capture, climate engineering, zero-carbon manufacturing materials, chemical recycling and lab-grown foods) are going to be crucial to achieving sustainability, but consumers' trust in science needs to be built up to achieve that.

FIGURE 3:5

Consumers agreeing that 'science can provide solutions to the climate crisis'



Base: 500 internet users aged 16/18+;
Source: Dynata/Lightspeed/Mintel March 2021



04 Use clear metrics
and language

FIGURE 3:6

Factors that would encourage consumers to buy products or services that claim to benefit/protect the environment



Base: 500 internet users aged 16/18+;
Source: Dynata/Lightspeed/Mintel March 2021

To build belief in science and to convert potential into actual purchases, companies need to offer a new sustainability lexicon and use simple data that consumers can understand. In addition to consumers' desire for third-party accreditation, it's notable that they want to understand their personal impact through purchasing to fulfil their belief that their behaviours can have a positive impact on the environment (Figure 1:5).



Source: cocokind

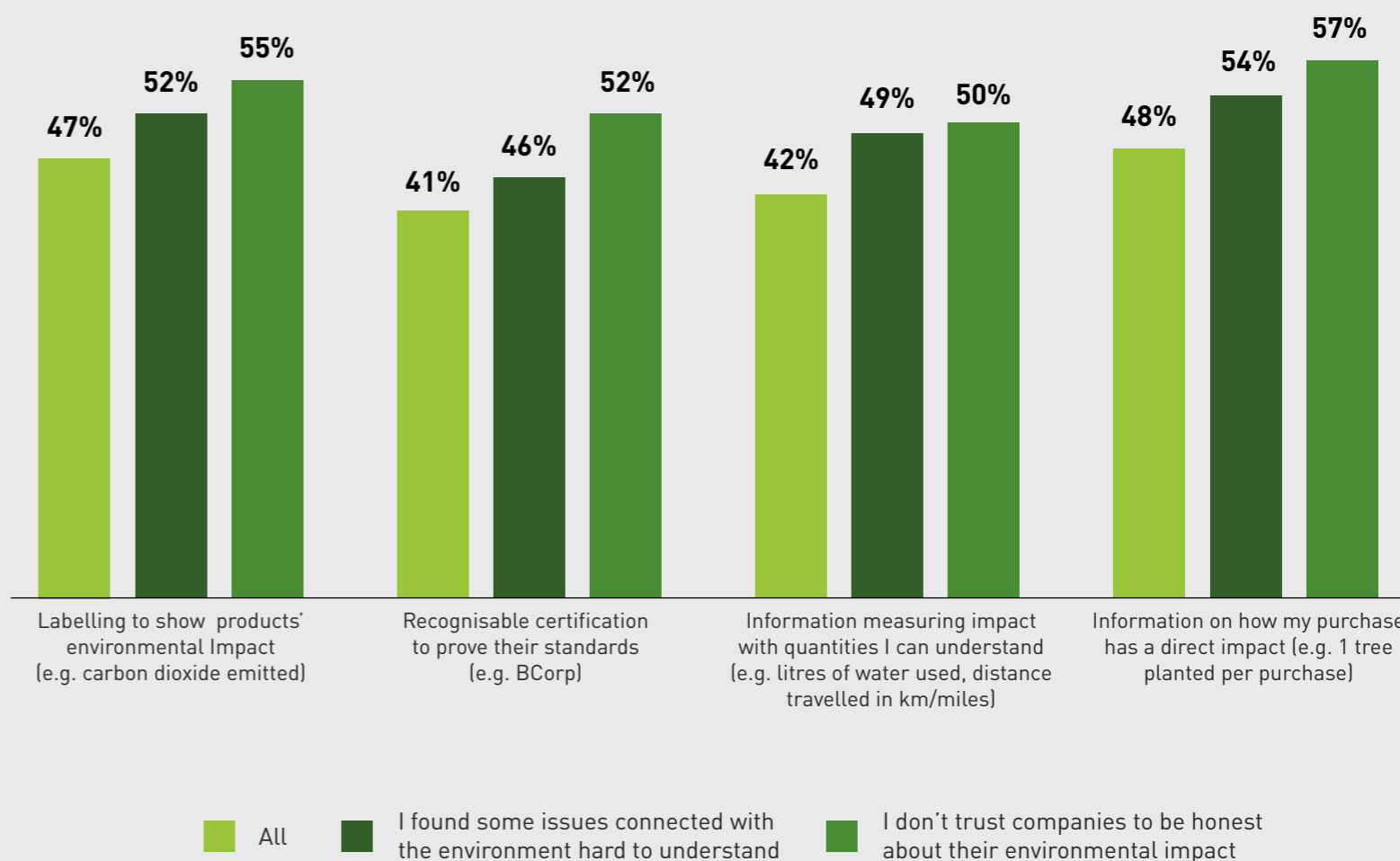
This demand for clearer language and metrics grows amongst those admitting they find some issues difficult to understand, even more so among those voicing distrust of companies' claims, so addressing such communication challenges is going to be key for companies to grow their sustainable consumer base.

Consumers need more clarification, quantification and certification if they're to buy into sustainable products, and those need to be delivered through marketing communications and on packaging.

Beauty brand cocokind is striving to achieve this by explaining a product's environmental impact at every stage of its life cycle: the sourcing of ingredients and packaging materials in pre-manufacturing, and emissions from the production, distribution and disposal processes.

FIGURE 3:7

What encourages consumers to buy products or services that claim to benefit/protect the environment



Base: 500 internet users aged 16/18+;
Source: Dynata/Lightspeed/Mintel March 2021

Key Takeaways

01

Sustainably-minded consumers are the same as everyone else, only more so, expressing above-average interest in sticking to budgets and convenience. Sustainable products and services must deliver these essential qualities.

02

Products and services must appeal to sustainably-minded consumers' other distinguishing, 'non-sustainable' characteristics, such as how they identify especially strongly with early adoption of technology, human elements around 'community' and 'localism', well-being through active lifestyles, image and egotism ('I like to stand out from the crowd').

03

Companies must educate consumers about emissions and explain scientific solutions to build understanding and trust.

04

Using a new sustainability lexicon and simple metrics that people can understand on packaging is essential for companies to grow their sustainable consumer base.

05

Consumers want to understand, quantify, compare and contrast their personal impact through purchasing and fulfil their belief that their behaviours can make a positive difference.





CONSULTING

About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster. Our purpose is to help businesses and people grow. To find out how we do that, visit [mintel.com](https://www.mintel.com).

Follow us

 @MintelGroup

 @mintelnews

 @mintelnews

 Intel

[mintel.com](https://www.mintel.com)

