

Attitudes of younger generations towards the environment are changing: Conscious Consumption

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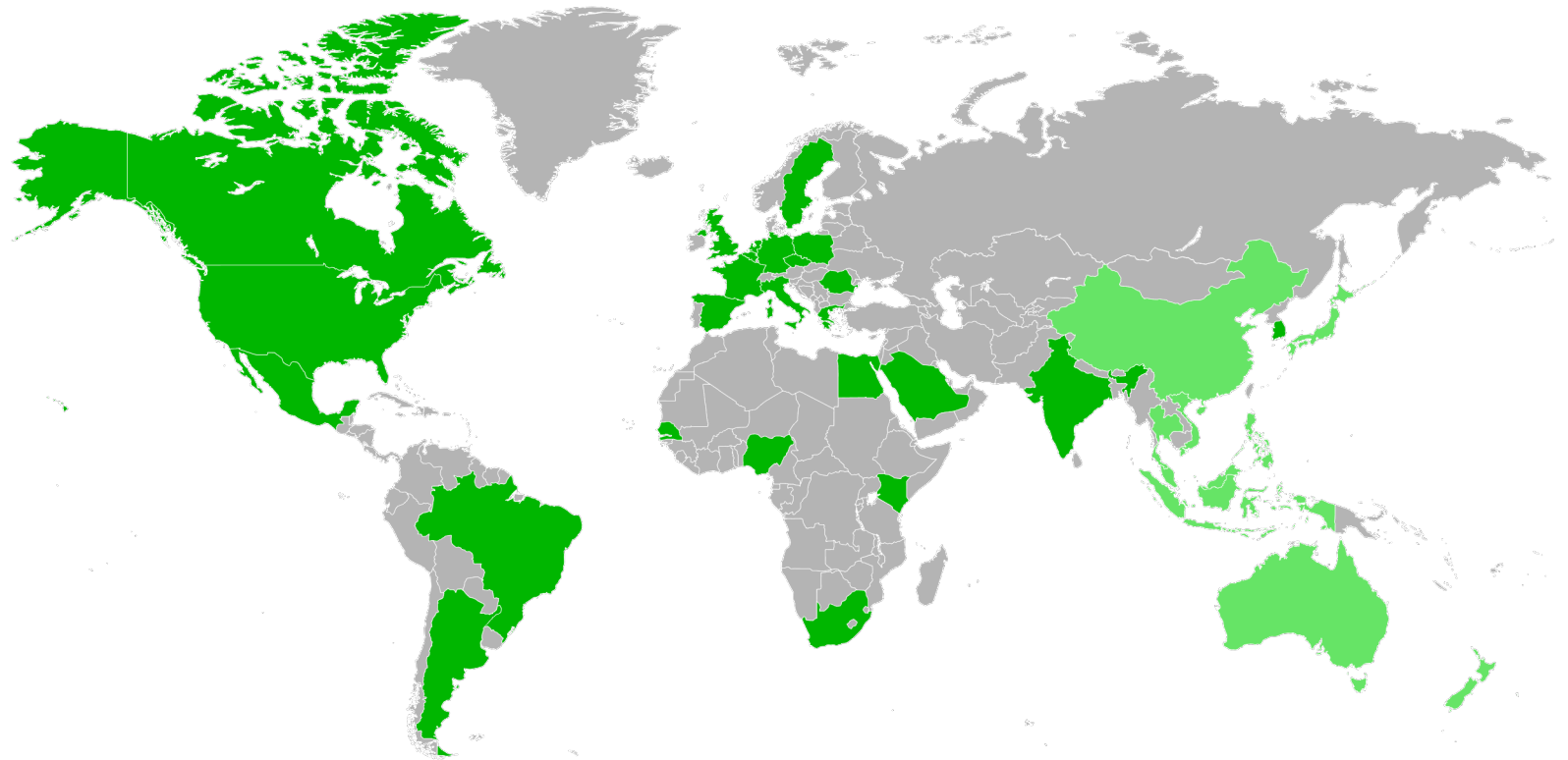
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Sustainability Sector Index - An ecosystem of global knowledge to support global and local sustainability strategies

Over 34,000 consumers interviewed in 35 countries in all four regions Europe, Americas, APAC and Africa.

 2020
 2021



KANTAR



Everyone has their own reality when it comes to sustainability

SUSTAINABLE DEVELOPMENT GOALS

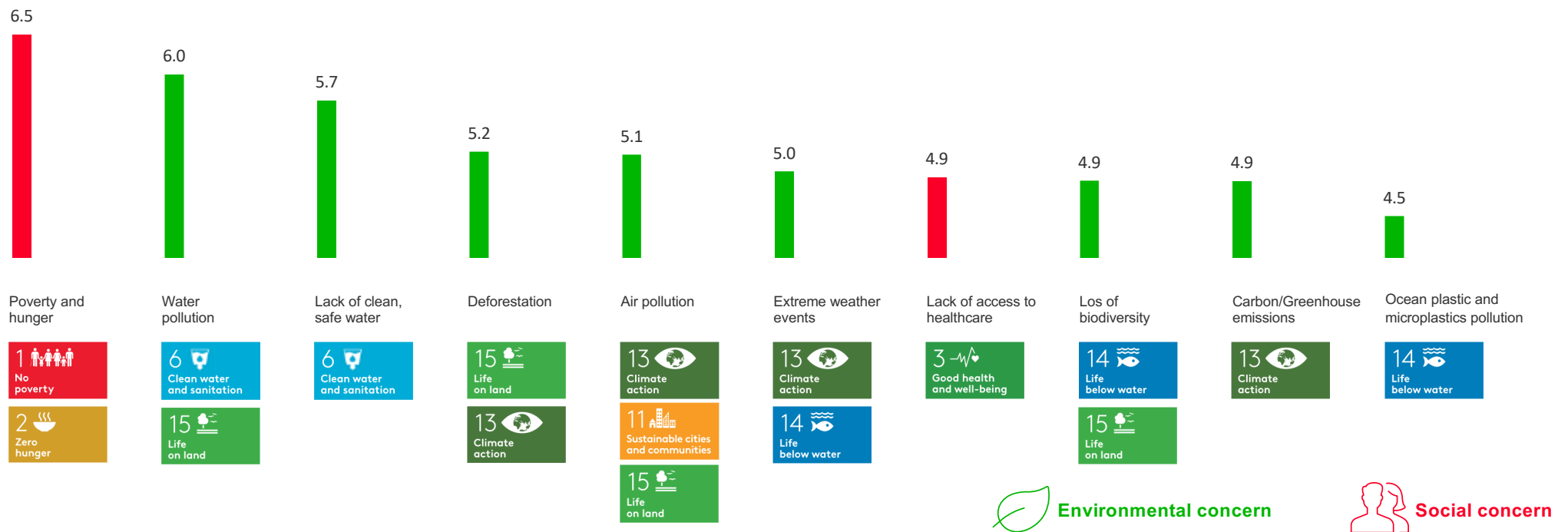


The 17 UN's SDGs provide the framework to structure the different aspects of sustainability.

Across the respective countries we see people showing most concerns in 7 areas of the SDGs framework

Top concerns of consumers show a strong focus on environmental issues, although social issues, notably poverty and hunger, are also of importance

Top concerns on sustainability (out of 32 topics – Max Diff mean score of importance)



Source: Kantar Sustainability Foundational Study 2021
 Q7a. Which of these issues are you most concerned about and which are you least concerned about? (MaxDiff)
 Total n=34,938

Younger generation of consumers herald a new way of thinking about climate change

Younger consumers (18-34)

vs.

Older consumers (55+)

are more to **make changes to their lifestyle** in response to climate concerns, such as avoiding products which use excessive water in production, buying second hand or becoming vegan/vegetarian.

are **active in adopting sustainable behaviours** – the ones that they do choose tend to be actions which fit into their existing lifestyle, like minimising food waste, recycling, and taking reusable shopping bags.

Source: Kantar Sustainability Foundational Study 2021
Q25a There are a number of things we could do as individuals to improve the sustainability of our world. Which of these things would you be most willing to do and which would you least willing to do? (MaxDiff)
Total N=34,938, 18-34 N=14,506, 35-54 N=15,030, 55+ N=5,402

We are, capitalism is fast reaching a point where the problem cannot be solved

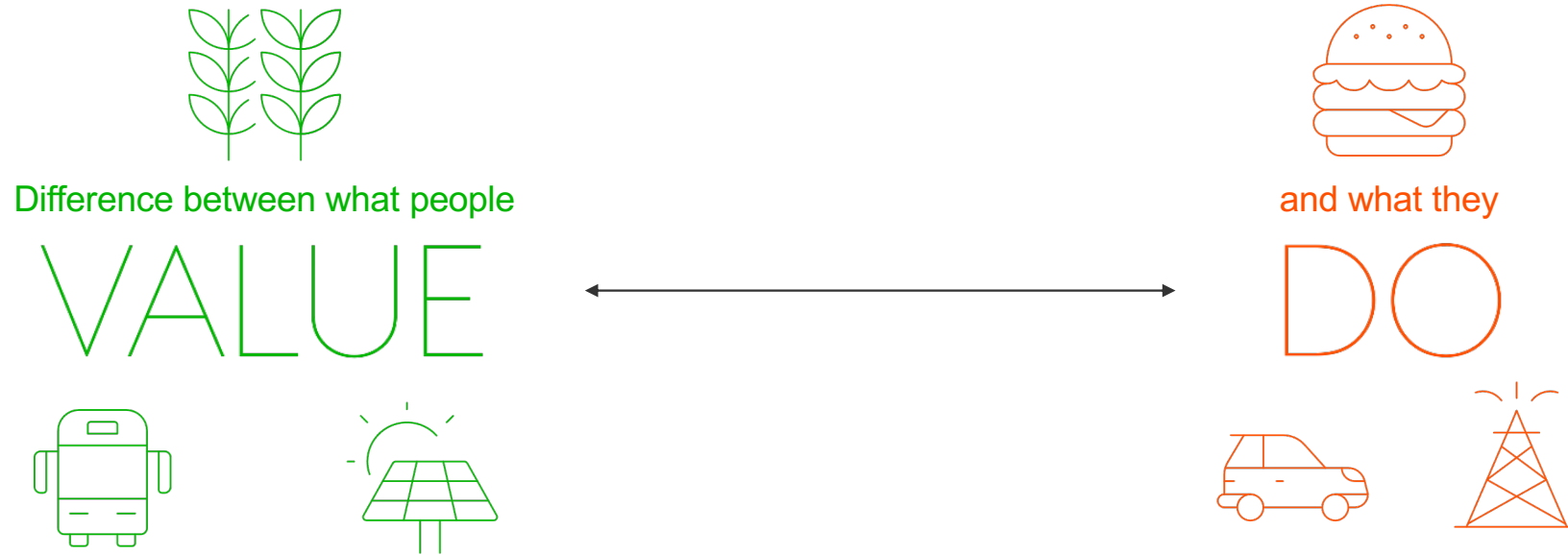
Why no alternative to plastic?

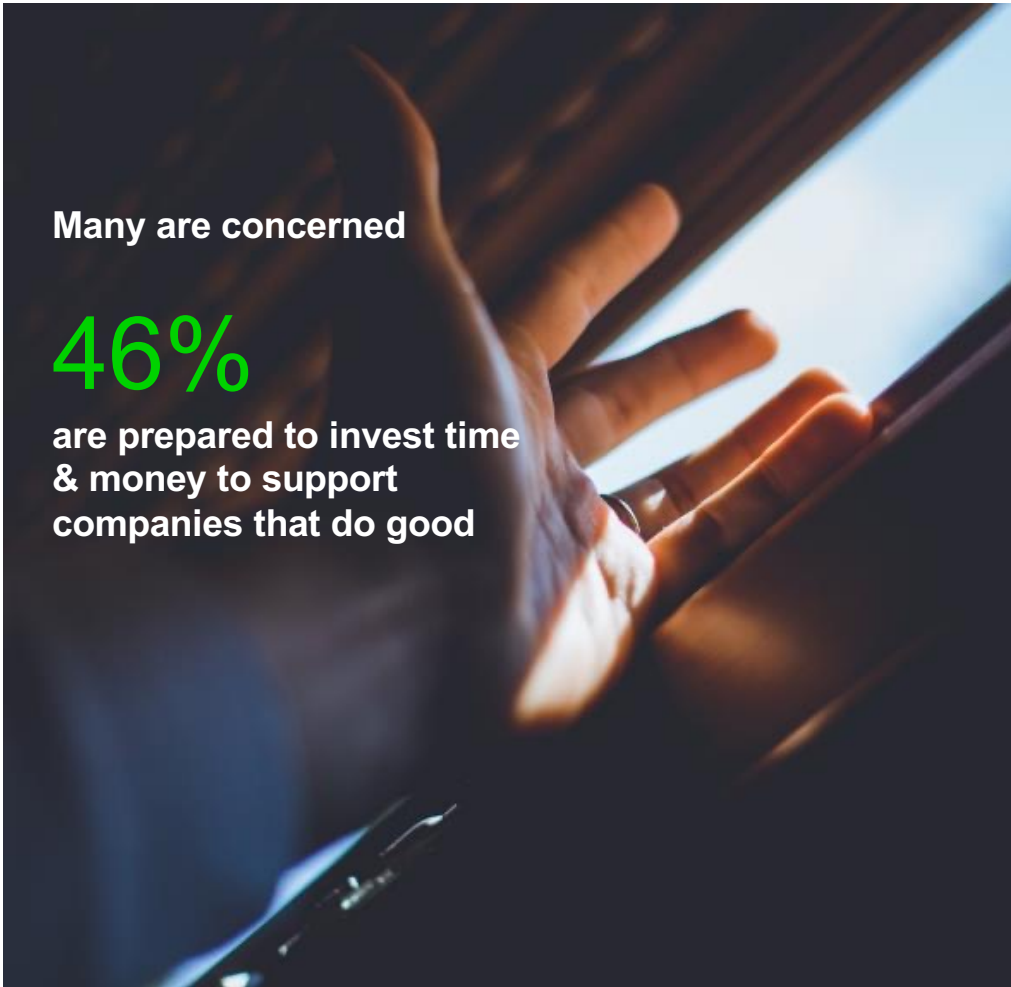


Why abnormal logistics?



The Value-Action Gap: We live in a world of tradeoffs





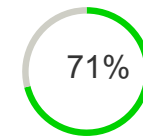
Many are concerned

46%

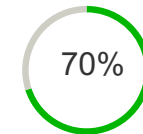
are prepared to invest time & money to support companies that do good

Many people struggle with the value-action gap, so they need help for turning thoughts into action

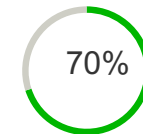
But taking the right action is not so easy



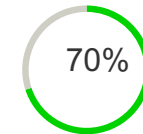
Buy something without checking if it's locally produced



Buy products without checking whether they're using very high quantities of water in their production



Stick to the diet you know, rather than trying the vegetarian or vegan option



Buy something without checking if it's Fairtrade

Source: Kantar Sustainability Foundational Study 2021

Q82: To what extent do you agree with the following statements? (Top 2 Box Strongly agree/agree)

Q23a: We are going to show you some things that other people have admitted that they do, but we recognise can be hard to personally confess to. How often do you also...(I sometimes do that – do that all the time) / Average values across Germany, France, Italy, Poland, UK, USA, China, Brazil



Consumers have concerns regarding a sustainable transformation...



82%

think that when people shop, their mind is on saving money more than saving the planet



75%

think that the sustainable/ethical products are always more expensive



70%

think that people don't have enough information about how ethical/sustainable different products are



51%

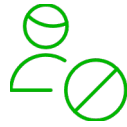
I want to do more to be more mindful of the planet and the environment, but my day-to-day priorities get in the way

... and businesses and brands need to (and are expected to) take leadership



61%

of consumers feel like sustainability isn't their responsibility...it's up to businesses/producers



60%

agree that companies must make sacrifices to end racism, xenophobia and other forms of hate even if that means losing a brand name, advertising icons, or business from some customers



51%

think that brands have an important part to play in the social conversation about issues like gender equality and race or immigrant relations



65%

worry brands are involved in social issues just for commercial reasons

In my opinion

No real sanctions and sufficient incentives for progressive new ideas

bureaucracy and existing power structures suppress profound changes

Forcing powerful corporations to be sustainable results in greenwashing

they influence laws and regulations through lobbying

Short term orientation of many company goals

the highest dividend wins

Knowledge and education of the consumer

one is unconsciously sustainable in some areas, but not in others

Everyone is a multistakeholder

employee, investor, consumer, producer, legislator, profiteer, sufferer...



Conscious Consumption – no new idea

12th century
European merchant manual

Ludwig Erhard

Michael E. Porter



RESPONSIBILITY



THE HONOURABLE MERCHANT

SOCIAL MARKET ECONOMY

SHARED VALUE



Consciousness and
Consistency
in the actions of
each one of us



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