

# *Human Signals: Promoting Sustainable Behaviours*

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Edition 2, Issue 2

June 2021

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# ●●● Welcome to our new edition of Human Signals, focusing on the human experience of sustainability

Where previous versions of Human Signals have focussed on the impact of COVID-19 on human behaviour, this edition expands our view of the human impact of climate change in what is a pivotal year for sustainability. As the US re-joins the Paris Climate Agreement, firms commit to net-zero carbon targets, and preparations are underway for the COP26 climate conference in November, it is critical now, more than ever, to support our clients navigating this space.

The climate crisis is perhaps the most urgent aspect of 'sustainability'; however, for the planet and its occupants to thrive long-term, we also need the sustainability agenda to protect biodiversity and address social inequalities.

These are complex issues. Governments, regulators, investors, employees and consumers are pressuring organisations of all sizes to address these challenges, act in more sustainable ways and create positive outcomes for all.

Businesses are increasingly expected to take a lead role in change, rather than relying on their customers to signal a desire for sustainable choices.

This issue focuses not on how businesses can create sustainable propositions, but how they can engage consumers in actively selecting sustainable alternatives. We have drawn on the growing wealth of research into sustainable behaviours and highlighted a number of themes organisations need to consider when tackling this agenda. We also showcase a range of practical frameworks and techniques to help you to respond to and lead sustainability in your sector.

This research comes from EY Seren and EY's commitment to build a better working world, by thinking beyond short-term returns and creating long-term value.

View EY's thinking on [long-term value](#) and its [commitments to being sustainable](#)

## Human Signals: A rolling research project

EY Seren helps organisations achieve growth by serving the needs of people, communities, and the planet.

Human Signals is EY Seren's proprietary thought leadership series, which focuses on the key issues and trends shaping our society from a human-centred research perspective.

If you want to [share your opinion](#) or find out more about this research, please let us know.



Peter Neufeld | Partner  
FSO Lead | Head of FS CX  
[pneufeld@uk.ey.com](mailto:pneufeld@uk.ey.com)  
[LinkedIn](#)



Sergei Isakov | Manager  
Business Design  
[sergei.isakov@ey-seren.com](mailto:sergei.isakov@ey-seren.com)  
[LinkedIn](#)



Emmelle Wilson-Raymond |  
Senior Consultant  
Research & Insight  
[emmelle.wilson-raymond@ey-seren.com](mailto:emmelle.wilson-raymond@ey-seren.com)



Tom Statters | Consultant  
Research & Insight  
[tom.statters@ey-seren.com](mailto:tom.statters@ey-seren.com)  
[LinkedIn](#)



Francesco Cagnola | Consultant  
Service Design  
[francesco.cagnola@ey-seren.com](mailto:francesco.cagnola@ey-seren.com)  
[LinkedIn](#)

# ●●● Sustainability in the UK: The story so far

The UK government has recently pledged to be a world leader in reducing carbon emissions. Regulations focusing on decarbonising the economy have been increasing steadily, culminating in 2020's ambitious 10-point Green Industrial Plan

## Sustainability milestones in the UK

- 1948
  - Oxfam opens the first 'modern charity shop' where second-hand goods are sold to raise money for their parent charity. Sustainability *'ante litteram'*
- 1956
  - Areas of Outstanding Natural Beauty created, with the first in Gower Peninsula, South Wales
- 1961
  - Based on UN data, the now famous Overshoot Day is calculated for the first time
 
- 1970
  - The first Earth Day is celebrated
- 2008
  - Climate Change Act introduced
- 2014/15
  - Cowspiracy is released
  - Too Good To Go and OLIO are established
 

- 2016
  - After COP 21, the Paris Agreement is released
  - The Brexit vote boosted a series of regulatory reviews and releases with the aim of establishing the UK as a trendsetter in environmental law

## ● 2020

- Boris Johnson's 10 point Green Industrial Plan launched
- The Carbon budget for 2033-37 published by the govt.
- Energy Act
- A ban on the sale of petrol and diesel cars from 2030 is announced
- Environment bill to 'Build back greener': The Government set out legally binding targets, including for air quality, water, waste and biodiversity.
- Under pressure from Citizens Assemblies, the govt. and more than 300 local authorities declared a Climate Emergency

## ● 2019

- Extinction Rebellion's two weeks of actions and protests worldwide called 'International Rebellion'
- The biggest supermarkets in the UK release various commitments and target related to their packaging



## ● 2017/18

- Blue Planet 2 is released by the BBC
- 25 years Environmental plan published by UK govt.
- Greta Thunberg gives her speech at the COP24 summit
- Extinction Rebellion forms and launches

## ● 2021

- COP26 to be held in Glasgow in November
- More than 100 local grassroots environmental campaigns are going on in the UK as February 2021



## ○ 2023

- Forecasted increase in policy announcements as world starts to approach 2030

## ○ 2030

- Review of Paris agreement and assessment of achievements
- Petrol and diesel car sale ban in place in the UK

# ●●● What do we mean when we say 'sustainability'?

Consumers have many ways of interpreting what sustainability means to them

*'Meeting our own needs without compromising the ability of future generations to meet their own needs.'*

1987 Bruntland Commission Report

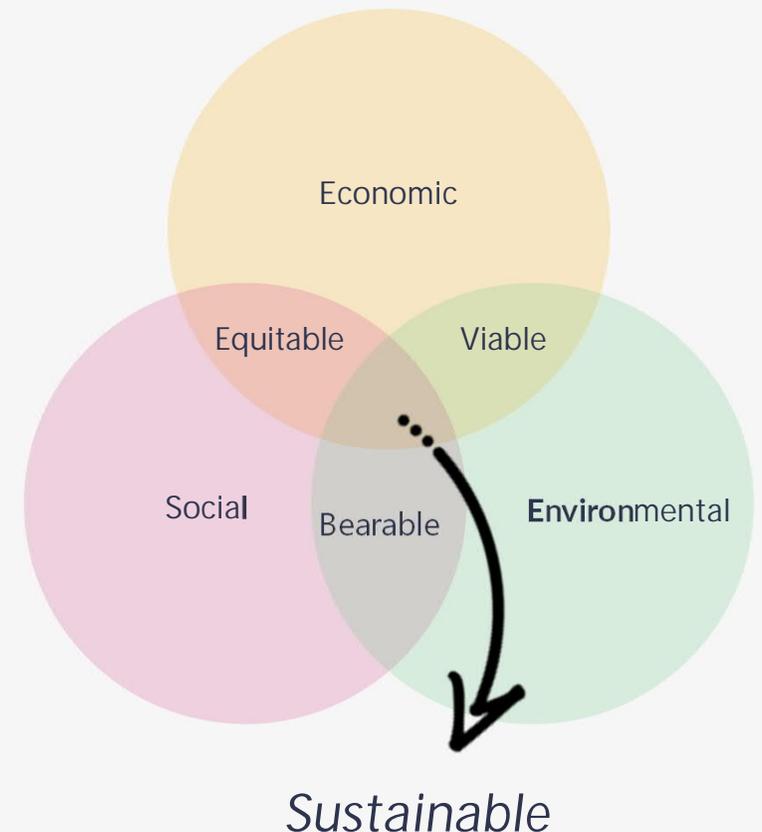
At its core, sustainability is about thinking long-term and not short-term. However there are many domains where sustainability can apply. The UN has defined 17 Sustainable Development Goals, from alleviating poverty to promoting justice, including focusing on environment and climate change.

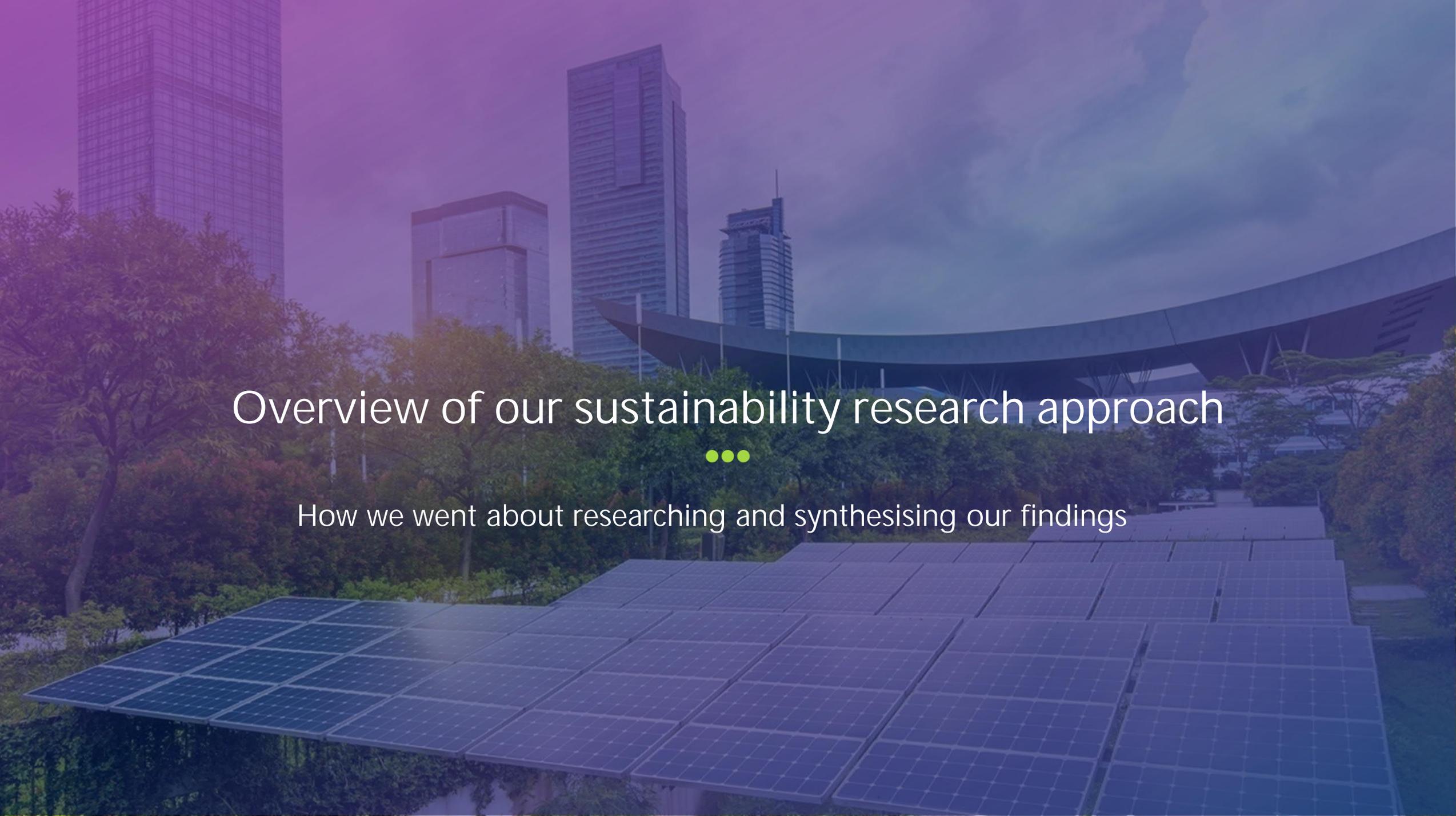


For this issue, we framed sustainability as aiming for a future that balanced environmental, social, and economic factors.

Our research participants saw 'sustainability' as wider than just decarbonisation and climate change – it included themes of biodiversity and pollution, social welfare (such as slavery in manufacturing), and ensuring long-term financial viability. This was especially evident in climate change sceptics who still wanted to have a positive impact on the environment (e.g. through reducing pollution) and society, whilst challenging the science of global warming.

Three pillars of sustainability





# Overview of our sustainability research approach



How we went about researching and synthesising our findings

# ●●● An overview of our research approach

We wanted to understand what consumers thought about sustainability, what drove their behaviours, and what got in the way of being more sustainable. Following this, we wanted to identify the techniques and frameworks that help shift behaviour to sustainable options.

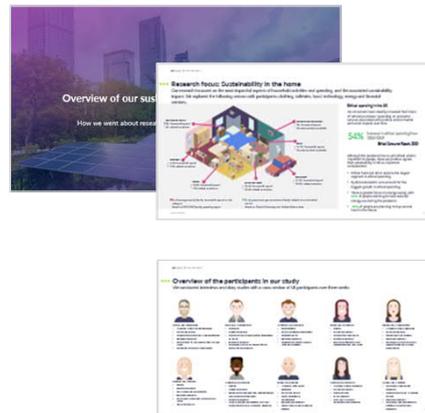
1. We started with secondary desk-based research, to identify psychological frameworks around behaviour, and (to see) what current sustainability research highlights for us develop a set of hypotheses.
2. We conducted a diary study with 10 participants over 3 weeks, conducting initial interviews, daily check-ins, and exit interviews for final testing of hypotheses and concepts. Our diary study explored various lifestyle areas where consumers can be sustainable (see [pg. 8](#)).
3. Throughout the diary study we iterated our hypotheses, and these emerged into 5 broad themes and sub-themes (see [pg. 11](#)). In addition, we pulled out sector specific insights based on our findings.
4. For each insight we developed a set of 'mindsets', that outlined how consumers think about sustainability, and a set of design principles and frameworks to help shift consumer behaviour to choose sustainable alternatives (see [pg. 41](#)).
5. Our last stage involved personal reflections on what we've learned and what we can carry forward to future issues (see [pg. 51](#)).

Research approach



Issue sections

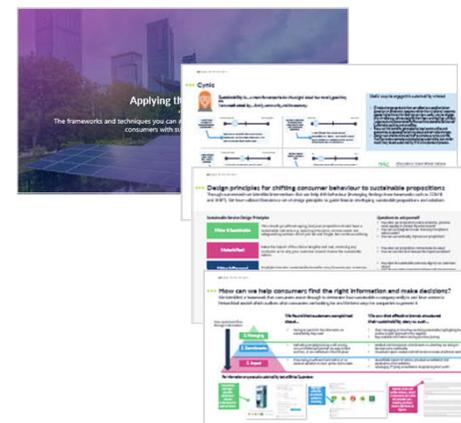
Overview of our sustainability approach



Sustainability Themes & Sector Specific Insights



Applying our insights

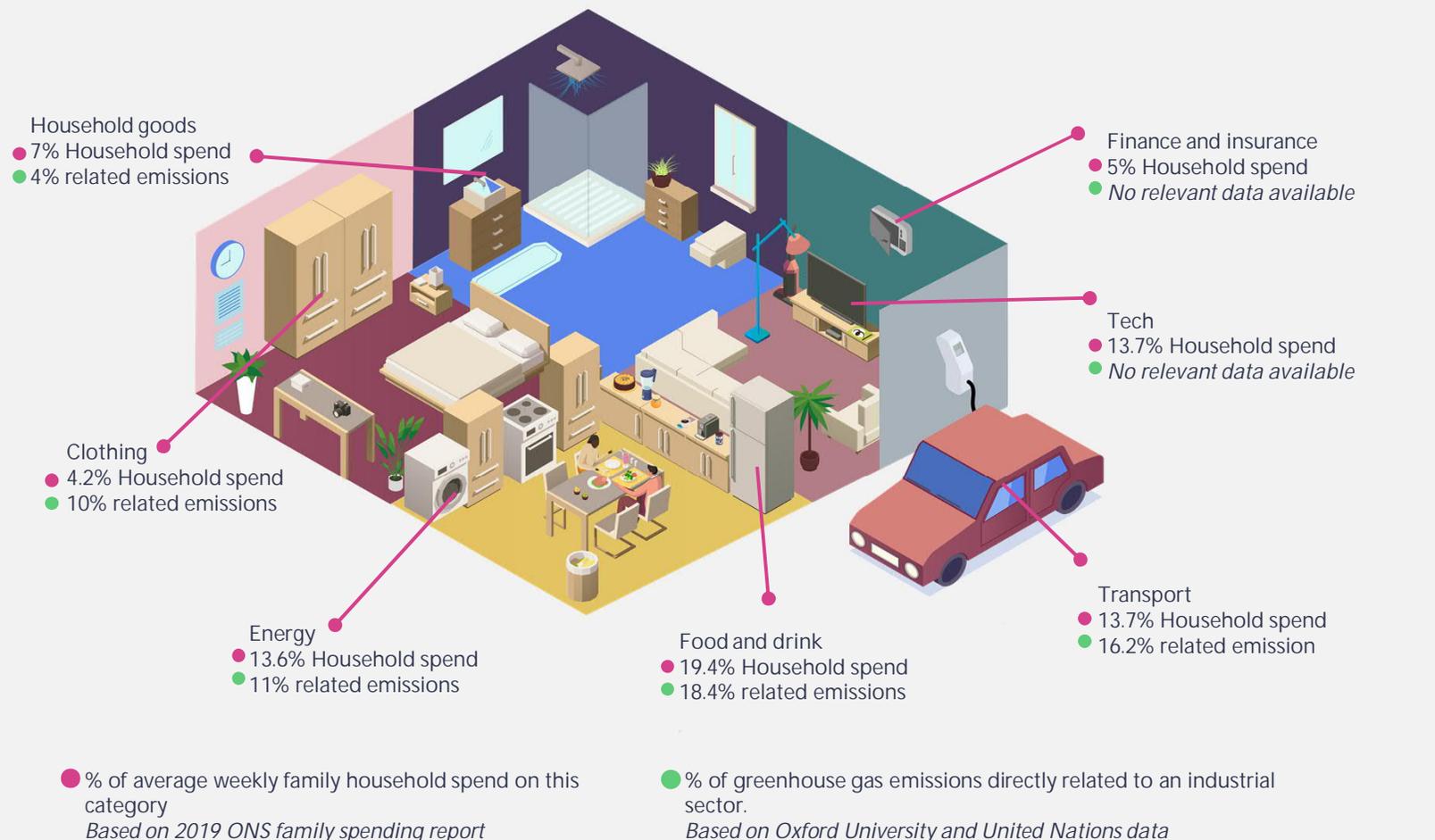


Notes from the Field, Next Edition and References



## ●●● Research focus: Sustainability in the home

Our research focussed on the most impactful aspects of household activities and spending, and the associated sustainability impact. We explored the following sectors with participants: clothing, toiletries, food, technology, energy and financial services.



### Ethical spending in the UK

UK consumers have steadily increased their share of 'ethical purchases' (spending on products/services associated with positive environmental and social impact) over time.

**54%** Increase in ethical spending from 2010-2019

Ethical Consumer Report, 2020

Although the pandemic has re-prioritised what is important to people, there are positive signals that sustainability is still an important consideration:

- Ethical food and drink remains the largest segment in ethical spending
- Hybrid and electric cars account for the biggest growth in ethical spending.
- There is greater focus on energy saving, with **44%** of people claiming to have reduced energy use during the pandemic.
- **42%** of people are planning to buy second hand in the future.

## Overview of the participants in our study

We conducted interviews and diary studies with a cross section of UK participants over three weeks



Steve, 54, Edinburgh

- Married with 2 adult children
- Owns his home
- Account manager — Manufacturing
- £40-49k income
- Commutes by car across the UK for work
- Supports his family financially



Sean, 36, Manchester

- Engaged
- Rents his home
- Unemployed at present — retraining as TEFL
- £10-19k income
- Planning a move overseas to be closer to his fiancée



Matthew, 31, London

- Co-habiting
- Owns multiple properties
- Director — IT
- £80-89k income
- Planning to start a family with his partner



Laura, 35, Liverpool

- Single
- Owns her home
- Product Owner — IT
- £60-69k income
- Travels nationally and internationally for work



Helen, 41, Manchester

- Married with 3 children
- Owns her home
- Cabin Crew — Airline
- £20-29k income
- Husband works for same airline; both have been furloughed



Sophie, 29, London

- Single
- Rents her home
- Bar worker — Hospitality
- £10-19k income
- Has been vegan for a number of years
- Loves to travel



Michael, 31, London

- Single
- Rents his home
- Train driver for TfL and International Development student
- £50-59k income
- Enjoys health and fitness - is very motivated to live a healthy lifestyle



John, 61, London

- Married with adult children
- Owns his home
- Sales Director - Healthcare
- £100-150k income
- Enjoys travel and being in nature



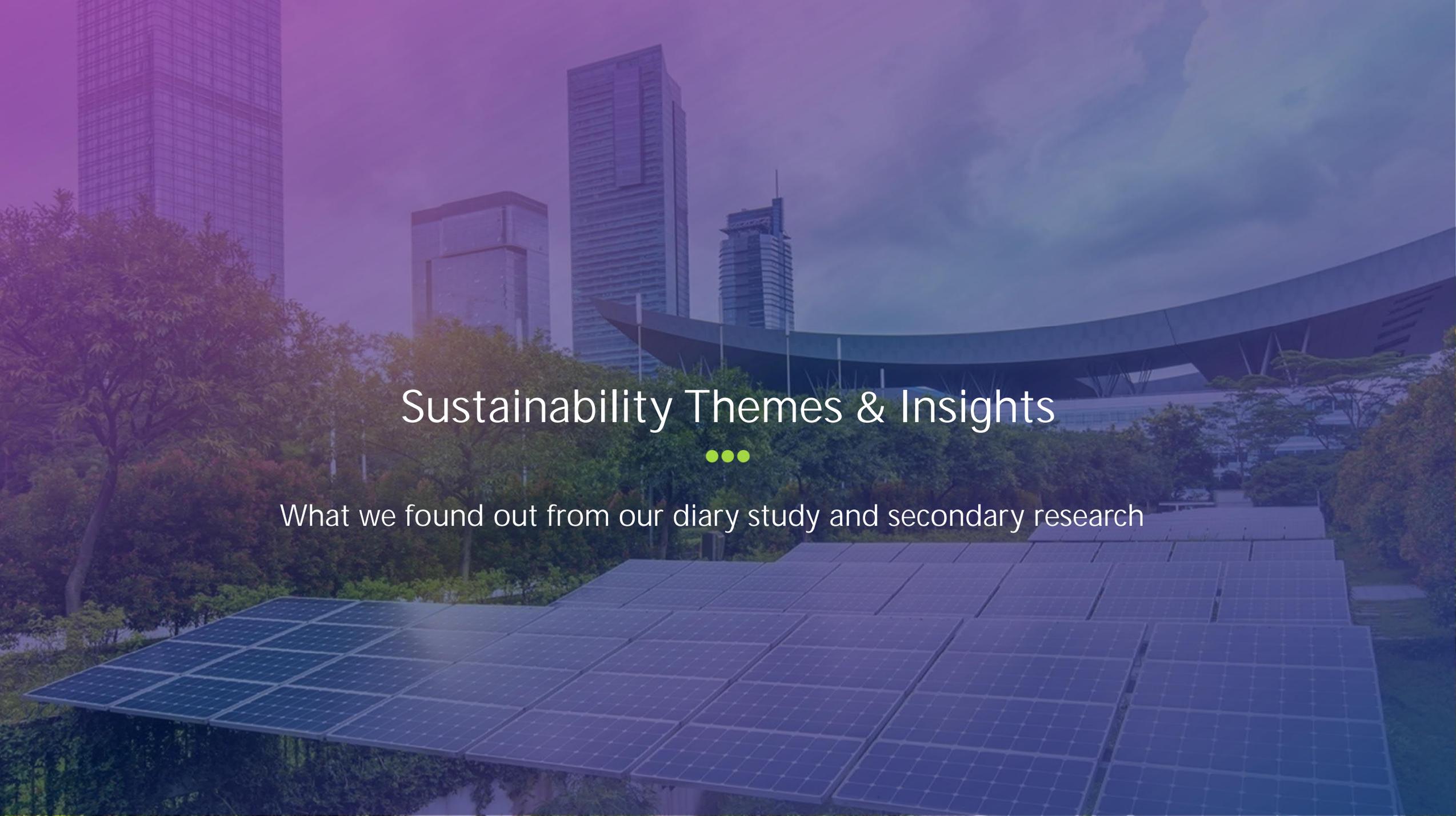
Melissa, 45, Glasgow

- Married with 3 children
- Owns her home
- Homemaker
- £<9k income
- Has always home educated her children



Marie, 64, Watford

- Divorced with adult children
- Self-employed — Wedding stylist
- £20-29k income
- Upcycles and repurposes bottles as part of her business



# Sustainability Themes & Insights



What we found out from our diary study and secondary research

# Executive summary of themes and insights

The primary and secondary research we carried out for this issue surfaced a number of insights

1. Information & education	2. Intention - action gap	3. Authenticity gap	4. Burden of responsibility	5. Re-imagining the future
<p><i>Make it clear for me (pg. 13)</i></p> <ul style="list-style-type: none"> <li>There is a proliferation of sustainable terms, labels and concepts that ultimately leads to confusion and doubt. There is a need for clarity and simple communication.</li> </ul> <p><i>Make it real for me (pg. 14)</i></p> <ul style="list-style-type: none"> <li>There is a lack of education at the point of purchase about the impact of their choices, either on a human or environmental level.</li> </ul> <p><i>The Netflix effect (pg. 15)</i></p> <ul style="list-style-type: none"> <li>Consumers are being educated <b>through multiple alternative sources including Netflix and Reddit, creating powerful sentiment that leaves brands out</b> of the discourse.</li> </ul>	<p><i>Principles vs priorities (pg. 17)</i></p> <ul style="list-style-type: none"> <li>When sustainability aligns to consumer principles, they are more likely to buy 'sustainably'. Until that point, other priorities will win out. Especially during COVID-19, 'survivability' has trumped many decisions.</li> </ul> <p><i>Inaccessible sustainability (pg. 18)</i></p> <ul style="list-style-type: none"> <li>For certain groups, sustainability is inaccessible because it is seen as too 'costly' or something only the affluent can afford and therefore they are sustainable 'by accident'.</li> </ul> <p><i>Lack of control (pg. 19)</i></p> <ul style="list-style-type: none"> <li>Thinking about sustainability causes some consumers to lose hope in their ability to have an impact as they see themselves lacking any control over the issue.</li> </ul>	<p><i>Tokenism is a turn-off (pg. 21)</i></p> <ul style="list-style-type: none"> <li>Consumers are mistrustful of vague terms and 'marketing-style' language which can feel like inauthentic 'greenwashing'.</li> </ul> <p><i>What's left unsaid? (pg. 22)</i></p> <ul style="list-style-type: none"> <li>Companies that cherry-pick which 'green credentials' to publicise create suspicion among consumers, who question what is being left unsaid.</li> </ul> <p><i>Lack of visionaries (pg. 23)</i></p> <ul style="list-style-type: none"> <li>The mass-market consumer doesn't see enough companies in the market who are truly driving the agenda. Most sustainability brands are either niche or inaccessible.</li> </ul>	<p><i>Don't shift the blame on me (pg. 25)</i></p> <ul style="list-style-type: none"> <li>The overwhelming feeling is that the onus is on business to take responsibility for tackling climate change, and discourse shouldn't always be focussed on the 'consumer choice'.</li> </ul> <p><i>Tough choices for government (pg. 26)</i></p> <ul style="list-style-type: none"> <li>Participants also feel that the government can play a bigger role in mandating more sustainable practices for businesses and individuals.</li> </ul> <p><i>It takes a village (pg. 27)</i></p> <ul style="list-style-type: none"> <li>Consumers feel their decisions are disproportionate to the impact they can have. However, there is a growing recognition that many small decisions can contribute to an overall sustainable outcome.</li> </ul>	<p><i>Local first (pg. 29)</i></p> <ul style="list-style-type: none"> <li>Consumers are now more focussed on their local community and shopping locally. Going forward, they will expect their brands to benefit local communities and produce locally.</li> </ul> <p><i>Conflicting behaviour change (pg. 30)</i></p> <ul style="list-style-type: none"> <li>Whilst there is a wish to have sustainable products and services, consumers also want reliable, low-cost solutions. Firms will have to combine carrot &amp; stick methods to shift behaviours.</li> </ul> <p><i>From products to services (pg. 31)</i></p> <ul style="list-style-type: none"> <li>New businesses will emerge to meet the need of delivering new sustainable services to consumers. One model is Product-as-a-Service, which leverages circular economy principles.</li> </ul>

## Information & education

- > Make it clear for me
- > Make it real for me
- > 'The Netflix effect'

'Sustainable', 'environmentally friendly', 'ethical', 'locally sourced'...

There is a saturation of 'green' terminology and there are no end of new terms, frameworks and certificates emerging. This can get very confusing and, especially for those new to trying to live a sustainable lifestyle, difficult to engage in.

Questions like 'What is sustainable?', 'How are companies are being sustainable?', and 'What choices should I make ...?' are constantly being re-asked.

This is only accelerated by the growing prevalence of sustainability in the media, especially throughout the pandemic. Popular media is disseminating stories faster than brands can keep up with them.

To properly engage in more sustainable behaviours, consumers need help in understanding the implications of their actions, and have information to make the right choice that is structured correctly.



Information & Education:

## ●●● Make it clear for me

Recycling logos, packaging information, carbon emission impact, supply chain provenance... Consumers are suffering from information overload and paralysis due to the proliferation of different sustainability messaging.

Consumers are expected to conduct their own research into what all sustainability symbols and terms mean. This creates a cognitive load on consumers that, at best, confuses them and, at worst, switches them off from making empowered choices.

Consumers need intuitive sustainability information and iconography across the products they buy and websites they use. They look to their brands to provide educational detail about what the terms actually mean. Having different levels of information at point of sale (e.g. more depth via websites; QR codes to scan to gain more data) promotes better decision making.

““ *If I had seen the ethical information presented on [these] products I would be more considerate in my choices...* ””

Michael, 31, London

““ *There needs to be something other than/in addition to symbols to make clearer to everyone what they are buying.* ””

Marie, 64, Watford

““ *It should not be my responsibility to look for this [sustainability] information. A company should be transparent about every part of their production processes.* ””

Sean, 36, Manchester



47% of consumers would like to live more sustainably but it seems too complicated.

3 in 10 don't feel they have enough information about what packaging can be recycled, and of those...

41% say it's because brand campaigns don't give them enough information.

▣ The amount of logos and the diversity of systems (and the associated user actions) they refer to is overwhelming and confusing for most consumers.

Implications:

- Ensure that your sustainability information is easily accessible so your customers don't have to look for it.
- Layer your information so more detail can be found if sought (see [pg.49](#) for a potential data framework).

- Provide insight into what your different accreditations/ labels mean to educate your customer during the experience, and show how they can act on the information e.g. provide local recycling centre guidelines.
- Work towards using standardised, easily recognised and understandable icons and terms in your industry to build consistency.

Information & Education:

# ●●● Make it real for me

Consumers have a broad understanding of what sustainability is, usually focusing on what is tangible and 'visible'. Many consumers, whilst understanding terms such as Green House Gas (GHG) emissions, aren't as engaged with them.

People react more to what they can see and empathise with and, whilst some want to work towards reducing global warming, they can't see how their choices drive towards that outcome.

Even climate sceptics, who doubt the existence of human-caused global warming, react positively to brands that showcase how the consumer choice helps reduce plastic waste, protects biodiversity, and promotes ethical and humane practices.

To promote sustainable choices, brands need to make the benefits of these choices visible and real so that it creates a greater emotional impact.

““ *The prospect of us using all of our limited resources on the planet (land we use, water we drink, air that we breathe) has more impact to me than the weather changing/getting a bit warmer.* ””  
Matthew, 31, London

““ *I'm really aware of how unaware I am of manufacturing processes and I need to do more research.* ””

Michael, 31, London

In many countries, the national minimum wage is below the actual cost of living. And that's a gap we all can help to mend.



Since 2013, we have been paying our share of living wages for our products at selected Indian suppliers, and during the last years just over 2450 workers have received an additional amount from Nudie Jeans, as a step toward increasing wages at selected suppliers. For part of the Indian supply chain, we pay our share of living wages to employees from the raw material stage throughout the supply chain, to the final garment.



63%

of young consumers would reconsider their purchasing decision if retailers better communicated the impact they have on the environment.

55%

of participants indicated that their awareness of environmental, social and governance (ESG) issues had been heightened since COVID-19.

Nudie Jeans provide powerful visuals of their process and impact they were having on their suppliers and the world.

### Implications:

- Don't just focus on emissions or waste but also consider social and biodiversity benefits in your design and messaging.
- Include stories and visuals to translate the impact of choice into 'real' outcomes e.g. show visuals of the forests that are benefiting.
- Showcase the impact of the sustainable product / service through the use of comparisons that are relatable to consumers at point of purchase (e.g. amount of plastic saved by choosing the alternative is equivalent to 30 cars).

Information & Education:

## ●●● 'The Netflix effect'

The prevalence of documentaries across platforms such as Netflix and Amazon Prime means that consumers are more exposed to emotional stories of the impact of unsustainable practices.

Documentaries such as 'Seaspiracy' and 'Gamechangers' ripple through social circles to create large scale behaviour change. Even those ambivalent to the topic get caught up in it as their social circles pull them into the discussion.

This was previously seen with the 'Attenborough Effect' that led to over half of people reducing their plastic waste in 2018-2019 in the US and UK, to combat plastic waste.

Whether all the claims presented in them turn out to be true or false, overall attitudes are impacted and it is important for brands, and industries, to be aware of the public discourse and how quickly it can shift.

“ *The Game Changers on Netflix had a huge impact on me as an individual... I now eat vegetarian meals a couple times a week and don't drink cow milk anymore.* ”

**Matthew, 31, London**

“ *I didn't realise how bad fishing was. I got quite upset because we give £35bn in subsidies to the fishing industry when it would cost £30bn to end world hunger.* ”

Sophie, 29, London on 'Seaspiracy'

“ *When we surveyed consumers after the release of Blue Planet, we found the majority changed their lifestyle habits after watching it.* ”

Emma Wall, Head of Investment Analysis at Hargreaves Lansdown – Oct 2020

**88%** of people who watched 'Blue Planet II' have since changed their behaviour as a result. Half of these people said they had 'drastically changed' their behaviour, and half said they had 'somewhat changed' it.



### Implications

- The best way to avoid potential backlash is to ensure sustainability is already engrained into every aspect of your business.
- Ensure you have the information and stories ready to back up your sustainability credentials and impact.
- Stick to principles of transparency and authentic communication (see Authenticity Gap theme [pg.20](#)).
- Always be aware of the public discourse and track what your consumers are talking about.

## ●●● Intention-action gap

- > Principles vs Priorities
- > Inaccessible sustainability
- > Lack of control

Many claim to want to be sustainable, but when push comes to shove, sustainability takes a back seat to other priorities. This is what is called the intention-action gap, and it is key to bridge this gap to create sustainable behaviours. Information alone isn't enough to convert good intentions into sustainable behaviours.

Some of the challenges that create friction in the decision making process include:

- Cost Accessibility
- Lack of key features
- Mistrusting quality / reliability

For companies to engage consumers in new sustainable behaviours, they need to focus on removing any barriers to ensure frictionless engagement.

In addition, constant focus on sustainability can create 'green fatigue' and a sense of helplessness. To meet their sustainability ambitions, businesses should focus on building sustainable processes and 'architecting out' the unsustainable choice from consumers, so it becomes part and parcel of standard behaviour.



Intention-Action Gap:

# Principles vs priorities

Few people would ever say they are actively choosing decisions that will harm the planet, destroy species, or injure others. 'Do no harm to others' is one principle that many hold.

However, lives are complicated and personal priorities will, more often than not, trump those principles, especially if the impact is far away or invisible. During COVID-19, many families have found prioritising financial well-being above all else.

The 'intention' can be explained in part by virtue signalling, before the real priority wins over. These priorities may be financial, social, or purely convenience led in nature.

Whilst there is a category of those who will override their own priorities or needs to actively choose sustainable alternatives, businesses should help their consumers see the benefits of the sustainable alternative.

“ *Surviving financially is a more pressing issue than making sure the planet survives.* ”  
Melissa, 45, Glasgow

\* Taken as of 2019 to avoid COVID-19 impact to figures

Sustainability focussed	VS	Personal priority focussed
<p>“ <i>I'm happier to pay for one that feels better...environmental reasons win out over cost.</i> ”</p> <p style="text-align: right;">Sophie, 29, London</p>		<p>“ <i>I'm not concerned about what's going to happen hundreds of years from now. My focus is on my family in the here and now.</i> ”</p> <p style="text-align: right;">Steve, 54, Edinburgh</p>
<p style="font-size: 2em; color: #4CAF50;">61%</p> <p>of consumers say they're likely to switch to a brand that is more environmentally friendly than their current brand.</p>		<p style="font-size: 2em; color: #4CAF50;">0.07%</p> <p>'Ethical spending' as proportion of UK consumption 2019.*</p>



### Implications

- When designing the value proposition for new products or services, include a sustainability aspect and match that to the other customer value propositions e.g. does creating a sustainable service allow you to pass on savings to your consumer?
- When communicating the value proposition, highlight how the sustainable alternative has tangible positive impacts on the other priorities e.g. the sustainable choice has better experience / performance than the alternative.

Intention-Action Gap:

## ●●● Inaccessible sustainability

A major blocker to engaging in sustainable alternatives is cost and quality. For many, being sustainable is inaccessible. They are either priced out or find that the sustainable alternative doesn't align to their expectations of quality or reliability. This is most evident in those who are cost-conscious due to life situations e.g. looking after family during COVID-19.

Such occurrences develop an opinion that either sustainable, good-quality options are too expensive, or sustainable, affordable-options must be of lower quality.

This then creates long-term 'cognitive friction' in their evaluation of sustainable options, and drives all but the most ardent sustainability advocates away from considering such choices in the future.

However when further questioned, consumers can find these alternatives accessible due to long-term savings, or identifying other benefits not previously considered.

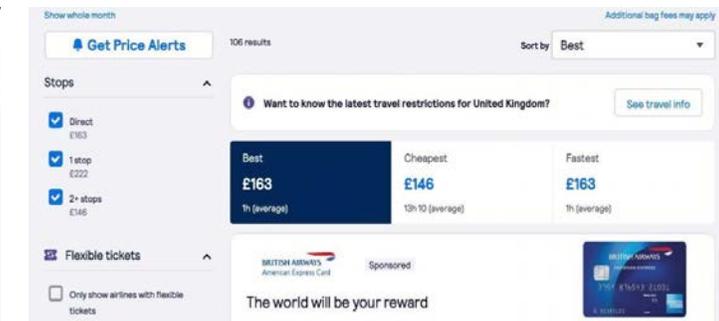
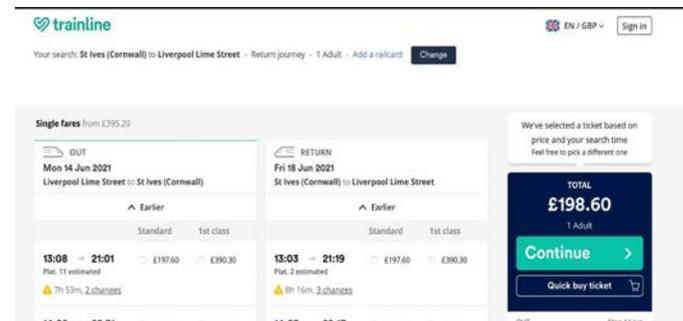
“ This may be sustainable for millionaires, but staggeringly unrealistic for regular folk like me. ”  
Steve, 54, Edinburgh

“ It's one thing to say people need to buy organic, but it needs to be affordable to the average man on the street. ”

“ Their credentials are committed to sustainability, but the question is whether this is at the expense of sophistication and performance of the product. ”

Marie, 64, Watford

John, 61, London



“ A train journey to Cornwall would cost me £199, the plane journey there would cost £146 ”

Laura, 35, Liverpool

### Implications

- Focus on capturing efficiencies in your process and design, to ensure that cost savings can be passed onto consumers.
- Show how the sustainable alternative can save time or money today, not just expected gain in the future.
- Communicate the quality or reliability of your product through comparisons to other alternatives during the 'evaluation stage' of the customer journey.
- Let customers test out your product to prove the value before investing in them.

Intention-Action Gap:

## ●●● Lack of control

Some consumers decide to opt out of the whole discourse because they feel their sustainability efforts are futile in the grand scheme of things.

This comes from their feeling of lack of control in the impact they can create, in contrast to the impacts of businesses or governments. It creates a sense of helplessness that switches them off from further engagement.

The lack of control seems to stem both from not seeing the impact of their choices ('all recycling goes to the same place') and also how 'it' is all connected together ('a tangled web').

As the adage goes, 'A little knowledge is a dangerous thing'. Without full appreciation of the power of choice, consumers can switch off completely. This is evident as consumers initially learn more about sustainability and supply chains, there appears a dip in their likelihood of engagement or sticking to permanent sustainable behaviours.

“ I'm not in a position to change policy, I'm just a small fish, I'm not an influencer but I feel like it needs to be done. ”

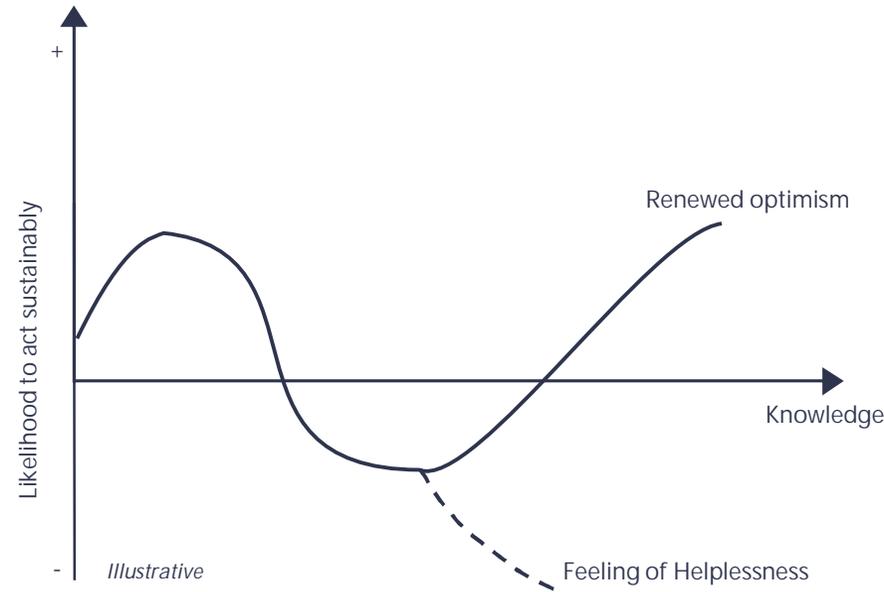
Laura, 35, Liverpool

“ After thinking about what I do to try and protect the environment, I realise that the efforts I make have a miniscule effect on global sustainability. ”

Sean, 36, Manchester

“ It just feels like the more reading you do, the more you realise that it's a tangled web of issues which all connect — I can't see it being untangled in my lifetime. ”

Marie, 64, Watford



- A basic level of knowledge about sustainability helps initially to change behaviours.
- As people increase their knowledge level of sustainability, there is a trend to lose the feeling they can actually have an impact.
- An inflection point happens when either they commit to behaving sustainably, or completely abandon engagement.

### Implications

- Make transparent the impact that consumers have on the planet and supply chains e.g. show on the packaging the benefit of purchasing the item.
- Leverage feelings of community, showing how an individuals actions can be aggregated with others towards a common goal e.g. feature a section on your website that highlights what impact consumers have had through supporting your brand.

## Authenticity gap

- > Tokenism is a turn-off
- > What's left unsaid?
- > Lack of visionaries

Though there is a plethora of information out there, consumers have become extremely savvy in finding out who is being authentic or not. Many firms claim to be sustainable, but either over-emphasise their activities or cherry pick certain practices, to hide the true picture.

Consumers see this as being inauthentic, where authenticity is defined as practicing the values that you claim to follow.

They would rather brands be honest about their practices, and focus on their ambitions and how they will achieve them. They would rather firms own up that they are not perfect, than pretend to be something they are not.



Authenticity Gap:

# Tokenism is a turn-off

Consumers are quick to see through 'green-washing' attempts by companies when the language is vague and non-committal.

Research shows that most consumers think that companies are disingenuous in their ambitions and promotions of sustainability. When there aren't concrete examples of actions being taken, evidence of impact or validation from other sources, consumers will switch off and disengage from the message.

This not only turns off consumers from specific brands, but can damage overall trust in business ambitions and actions which aim to develop sustainable outcomes.

*"[X brand] provides nothing but a single page without a single reference to being part of any foundation or act of any kind... This makes me think that any company can claim to care about sustainability, but there needs to be some proof for the consumer so that they can be trusted"*  
Sean, 36, Manchester

*"Sustainability is ubiquitous yet superficial - like naturalness and green before it, the term is being diluted by overuse"*

John, 61, London

*"The language is very loose and non-committal so I just don't trust the site at all really..."*

Melissa, 45, Glasgow



71% of consumers think companies are only promoting sustainability as a PR exercise to 'look good'.

69% are sceptical of whether sustainability and ethical sourcing claims made by companies are true.



## Implications

- Have clear commitments and targets, and demonstrate why they are important to your strategy, the customer and how it generates value for all stakeholders
- Provide clear demonstrations of your sustainability activities and actions in your marketing and branding materials; use storytelling to bring the information to life
- Showcase credentials or partnerships that help legitimise your processes

Authenticity Gap:

## ●●● What's left unsaid?

Many participants have expressed a mistrust in the sustainability 'promises' of companies when they do not consider the full spectrum of activities.

The concern is that the evidence or claims have been cherry-picked to make them appear more sustainable than they really are.

A small, yet consistent, example was that whilst many firms showcased sustainable production examples, consumers picked up that they did not mention the emission impact of transporting goods from their source of production.

Many participants preferred to see the whole picture of a business's practices and see progress against their ambitions. This built a sense of trust that firms were not hiding their actions from consumers. They saw imperfect transparent firms as more authentic than apparently sustainably perfect businesses.

“ I feel more respect for companies holding their hands up and admitting they haven't been perfect! ”

**Matthew, 31, London**

“ What is more troubling is the level of cherry picking done by companies to select only those sustainability criteria that they feel confident about and ignore the rest. ”

**John, 61, London**

“ The idea of transparency is appealing as many businesses although say they are acting in a sustainable manner often are not. The act of them showing customers where their money goes is a good idea. ”

**Michael, 31, London**

**51%** of consumers believe that service providers who communicate a clear message about sustainability stand out from their competitors.

**2/3** consumers think brands that make a public promise to be sustainable are more trustworthy.



### Implications

- To create an authentic connection, be transparent in your activities and engage your stakeholders frequently about your ambitions, plans, and progress.
- Showcase not just the sustainable methods of production, but where products came from and the carbon impact.
- Have a framework in place that allows the public to look at your sustainability activities and interrogate as needed.
- Leverage third parties to do the heavy lifting for you around information provision for individual products / services.

Authenticity Gap:

## ●●● Lack of visionaries

Whilst participants are wary of green-washing and in-authentic messaging, when pressed for examples of sustainable companies they liked or were impressed by, they struggled to identify any.

Research also shows that whilst consumers claim to care for sustainability, many cannot name brands that are environmentally friendly.

Whilst visionaries do exist, it could be consumers don't recognise them due to the lack of public discussion and celebration of their efforts.

It suggests that there is still opportunity to own the sustainability agenda within different industries, however it will require deft management to ensure the messaging is backed up by real evidence.

““ *I can't really think of anyone being sustainable right now.* ””  
Melissa, 45, Glasgow

““ *The idea of transparency is appealing as many businesses, although say they are acting in a sustainable manner, often are not. The act of them showing customers where their money goes is a good idea.* ””

Michael, 31, London



84% of UK consumers say that being environmentally friendly is important to them, yet

68% cannot name a single environmentally friendly brand.

70% stated that the sustainability reputation of the provider of a financial product mattered to them.

8% of participants perceived banks, insurers, and asset management firms to be playing their part in reducing the risks of climate change.

### Implications

- Work with third parties to certify your credentials and activities, and aim to showcase the impact you are creating in the market (not just what you're doing).
- Ensure that before you begin, you are backing up your claims with evidence.
- Work with others in your industry to build recognition and drive the agenda.

## ●●● Burden of responsibility

- > Don't shift the blame on me
- > Tough choices for government
- > It takes a village

Consumers are increasingly pushing for businesses to own the responsibility for tackling climate change. This is coupled with a sense of helplessness in thinking that their individual choices could never be anywhere near as effective as businesses making lasting change:

*'10,000 individuals are less effective than one company of 10,000'* — John, 61, London

Gen Z is currently the largest generation globally and, in years to come, will have the highest spending power. Businesses will need to place sustainability firmly on their agenda in order to appeal to this eco-conscious cohort, rather than keeping it as a 'nice-to-have'.

Consumers expect more of governments too, who they believe have a dual role to play as regulator of business in meeting sustainability requirements, but also as an educator.

Though there is a wish to see organisations 'pull their weight', when people see themselves as part of a community, they continue to contribute what they can.



Burden of Responsibility:

## ●●● Don't shift the blame on me

There is a growing resentment that it is down to the consumer to 'choose' the answer all the time; that the burden of sustainability is pushed onto them. In some categories, the concept of 'ethical consumerism' is being rejected.

Participants believe that businesses have a role to play in developing new and innovative solutions which will make it easier and cheaper for them to make sustainable choices.

In general, they'd prefer not to have to make the decision at all and expect brands that they engage with to ensure their products are sustainable whilst meeting their other priorities i.e. cost-effectiveness, convenience, quality, innovation.

“ *It should not be my responsibility to look for this [sustainability] information. A company should be transparent about every part of their production processes, and they should be actively trying to lessen the environmental impacts of their business.* ”

Sean, 36, Manchester

“ *Businesses need to get on with the doing. Don't tell me about it — just do it!* ”

Steve, 54, Edinburgh

“ *I think everyone plays a role in sustainability, and this should also come from the manufacturer as well as the supermarket, everyone could do a better job of educating us on our choices.* ”

Laura, 35, Liverpool

“ *Banks have a major role to play as they invest in what industries get developed.* ”

Melissa, 45, Glasgow

88% of consumers want brands to help them make a difference.

80% of consumers believe companies should act to improve sustainability now.



### Implications

- Integrate sustainability throughout all your products and/or services, don't just offer a sustainable alternative.
- Where possible, architect out the choice for consumers, making sustainability business as usual.
- Own the discussion. Showcase how you are being sustainable and what you are doing to drive the agenda within your industry.
- Make an investment and commitment to sustainability with pricing models which reward consumers for choosing a sustainable option.

Burden of Responsibility:

## ●●● Tough choices for government

The role of government and policy makers is a complex one. Voters have been holding the government accountable for leading the charge of sustainability measures and 2020 saw a raft of new regulations and promises by the government under Boris Johnson.

However, there is also a recognition that these measures will start to impact detrimentally on current consumer lifestyles and business practices alike. This leaves governments in the position of having to make choices for the future of the planet which could be deemed too radical by many voters whose lifestyles could be impacted by punitive measures.

In addition, a separate opinion emerged that there was a greater need for overall education around sustainability and that it should start in schools. An additional role that governments can play beyond a 'regulator' or 'enforcer' of standards is that of an 'educator'.

“ *The government needs to make it mandatory for companies to sell environmentally friendly options.* ”  
**Marie, 64, Watford**

“ *Once we become sustainable we have to repatriate our problems.* ”

John, 61, London

“ *The customer will be penalised when government put measures on business.* ”

Steve, 54, Edinburgh



### Implications

- As 2030 approaches, you will see more regulations and standards published, as well as a consolidation towards 'best practices'.
- Governments should provide ample time for consumers to change behaviour patterns, and provide incentives to transition before implementing punitive measures.
- Continue participating in trade body / regulator discussions to effect change in your industry.

Burden of Responsibility:

## ●●● It takes a village

Even though there is 'green fatigue' and a sense of hopelessness at times, our participants showed an emerging appreciation of what their actions could accomplish throughout the course of the research.

As they learned more about sustainability, there was a recognition that, whilst their individual actions may be small, by participating in a communal goal, it added up to a larger impact.

Interestingly, the value drivers behind this behaviour ranged from a 'hero mentality' of personal satisfaction from having contributed to something greater, to 'civic mentality' of doing the 'right thing' for the community (e.g. by reducing plastic waste and pollution).

“ I understand that my individual actions don't make a difference, but if I'm buying from a company whose practices are destroying the planet then I'm contributing in that way. ”

Michael, 31, London

“ It's the little things that make a big difference...things like buying cruelty free / vegan products. ”

Sophie, 29, London

“ It's the right thing to do and it makes me happy. ”

Matthew, 31, London

28% of people plan to purchase Fairtrade in the future, compared to just 15% pre-pandemic.



### Implications

- Showcase the collective impact that is being created from individual actions — *make it real* as per Theme 1.
- For those cynical of climate change, reframe sustainability choices as an appeal to their civic duty and community focus.
- Call out and recognise publicly the heroes and contributors who are helping to make a difference.

## ●●● Future re-imagined

- > Local first
- > Conflicting behaviour change
- > From products to service

The sustainability agenda will continue to impact consumers, businesses and governments as we approach critical milestones and we learn more about the impact of humankind on the planet.

One thing that is evident is that consumption patterns will have to change. Those businesses that provide a frictionless and enjoyable transition experience will be able to navigate the difficulties in changing consumer behaviour without punishing those that cannot easily change.

To meet the need of affordable sustainable solutions, new business models will emerge, prompted by bottom-line needs and regulatory requirements. Circular economy principles will help firms capture existing lost value, whilst moving towards 'as-a-service' models can help deliver the same, if not better experiences, whilst meeting sustainability ambitions.



Re-imagining the future:

# Local first

An emerging trend that appears to be getting stronger is the focus on local products and supporting the local community.

Consumers are becoming more aware that whilst products may be 'produced sustainably', many of them are transported over large distances.

This was further augmented by COVID-19, where consumers were encouraged to support local businesses.

This suggests that combining sustainable practices with supporting local businesses will continue, and consumers will expect to, and push to, have local alternatives.

“ A 'shop local' mentality has been highlighted in recent lockdowns — it makes sense to buy local as it is simple and practical. ”

Steve, 54, Edinburgh

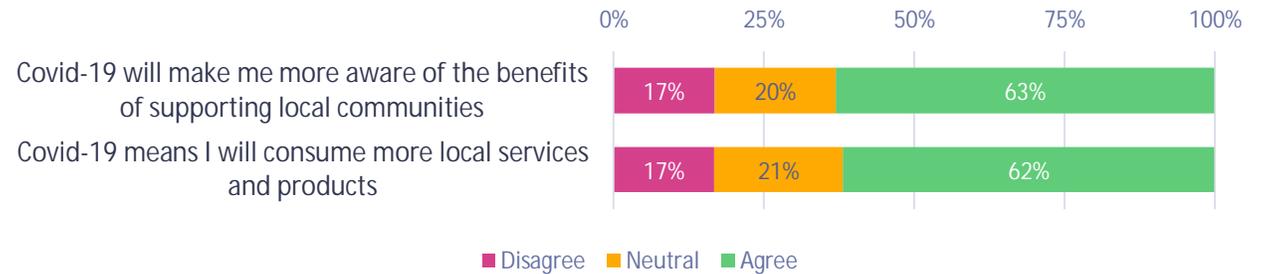
“ Why must my toothpaste be made in China and shipped to the UK...? I'm going to buy local, having learned this through these activities. ”

Marie, 64, Watford



1/3

of consumers will support food bank donations or donate more to charities when things go back to some form of normality post pandemic.



### Implications:

- See where you can 'onshore' activities, leverage local skills and communities. Be transparent about where you cannot because it still generates value for the consumer. As per the Authenticity Gap, don't hide the fact that you need to split production.
- Where possible, showcase how your activities contribute to the local economy or community.

Re-imagining the future:

## ●●● Conflicting behaviour change

As discussed earlier, sustainability will no longer be seen as a nice-to-have but a must-have of firms by all members of society. However, whilst sustainability will be the backbone of many firms, consumers will need to adapt their expectations.

Now, consumers expect everything on demand, reliably delivered, of consistent quality and at low cost. Whilst sustainable technologies are being innovated, we are not there. One path that society will need to take is to consume sustainably, but another is to consume less overall. Changing entrenched behaviours and expectations will be a great challenge.

At some point governments and firms will need to move away from purely incentivising sustainable practices to punishing non-sustainable ones to ensure a change in behaviour.

This is further compounded by the expected post-COVID-19 boom that may return us to a 'roaring 20s'-era of excess, specifically when the world needs to focus on hitting 2030 targets.

3 planets would be required to sustain current lifestyles across the 9.7 billion people we expect to have on Earth in 2050.

55% of people feel that climate change has impacted on their wellbeing to some degree.

“ I'm wary of incentives being offered to switch to sustainable products [for the home]. I can see it becoming quite unfair and people who can't afford to make big changes in their home will end up penalised with higher rates on everything. ”

Melissa, 45, Glasgow



“ All the policies that actually deliver on it are detrimental to people's immediate lifestyle — we are used to our lifestyles improving continuously and this would mean making some lifestyle sacrifices. ”

John, 61, London

### Implications:

- To balance different mindsets and priorities, leverage both pull and push incentives to change behaviours (see [pg. 48](#) for an example framework).
- Start off with 'pull' incentives to pave the way for positive behaviour.
- Find ways to 'internalize' the negative cost into unsustainable options.
- Remove the unsustainable choice, so that there is no comparison against 'what could've been'.
- Invest more into sustainable processes and technology.

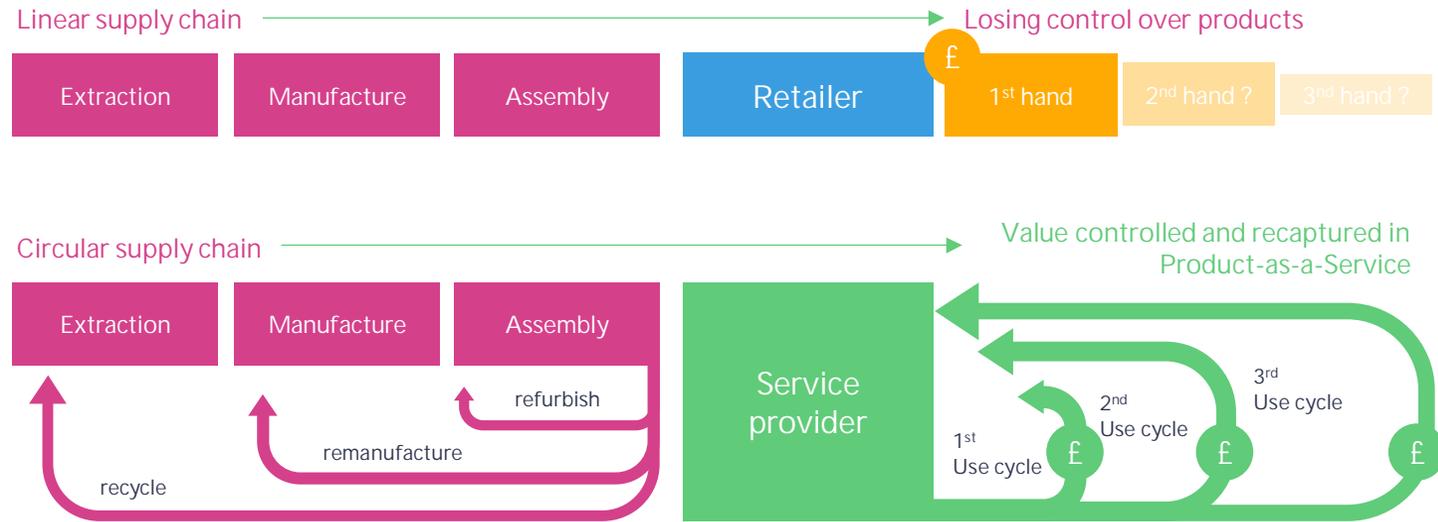
Re-imagining the future:

# From products to services

As mentioned earlier, consumers want to have their proverbial cake and eat it — have sustainable lifestyles whilst still maintaining the same level of experience or cost. The conversation around customer experience and value will continue to evolve, and new business models will emerge to fill those needs.

One model that is emerging Product-as-a-Service (PaaS). PaaS models remove the ownership of products from customers and turn it into a service, leveraging circular economy principles. This business model looks to recapture lost value of waste, and recycle / reuse materials where possible (e.g. Loop re-using the containers for food between customers). This allows businesses to hit their sustainability goals, whilst delivering the same experience at cost to customers.

One way to reduce costs is to distribute it over several 'users', removing the need for ownership. This supports the view that the sharing economy will make a comeback, supported by circular economy principles, despite the unpopularity during the COVID-19 crisis.



Circular systems, that also leverage PaaS, capture multiple points of value through out the value chain:

- It provides opportunities to reduce costs in production.
- It opens new services / channels for customers (e.g. repair).
- It can increase LTV of customers through more frequent touch points whilst opening new cross/up-sell opportunities.

“ Adopting circular-economy principles could not only benefit Europe environmentally and socially but could also generate a net economic benefit of €1.8 trillion by 2030. ”

## Implications:

- Explore how you can recapture value throughout your full value chain — where one person’s waste can become a resource for another. Understand what circular economy principles you can apply to your business model.
- Look towards building subscription based prototypes as a first step into PaaS. This will help instil new behaviours in customers.
- Once deployed, reduce the friction of use as much as possible to ensure consumers stick to the new behaviour.



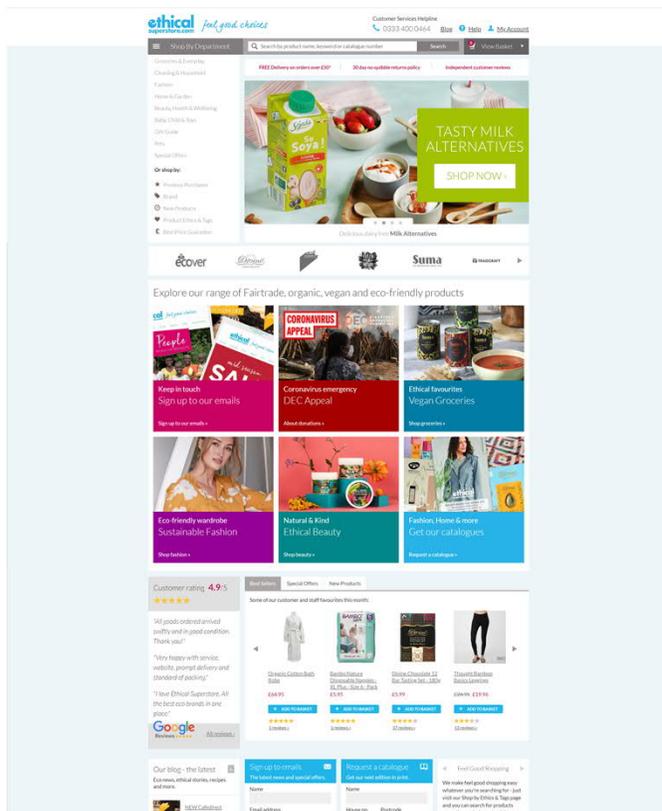
## Sector-specific insights



Insights across the target sectors we researched

# Consumer goods

The Task: We asked participants to research the sustainability impact of their food, clothing and toiletries in their home, and find sustainable alternatives



Ethical Superstore website home page

Watch out for the next issue of *Future Consumer Now: Wave 7 of Future Consumer Now*, EY's global consumer study of consumer intentions across 20 countries, will be published end of June. This issue will focus on consumer attitudes to sustainability and the implications they might have for consumer companies.

## Findings

The participants in our study expressed the view big businesses with mature stages of growth and extensive supply chains could never be as sustainable as smaller brands.

“ It's easy to be sustainable if you're producing small batches of products but as you scale up you become unsustainable. ”

Marie, 64, Watford

When brands release a sub-brand which is aimed at being 'ethical' or 'sustainable', this leads consumers to question the ethics or sustainability credentials of the main brand and what information they are choosing to leave out of the discussion.

“ I noticed that they [clothing brand] have a clothing line 'Shop Conscious' which is allegedly more sustainable than their other ranges. That just tells me that most of their stuff is not very ethical at all! ”

Melissa, 45, Glasgow

Finding information about the sustainability of products is a challenge due to similar sounding terms, lack of explanation of terms and lack of accreditation. Consumers had to work to find such information.

“ There are few hard metrics and no external verification to back up the claims. ”

John, 61, London

'Passive sustainability' was the natural outcome of many of the purchasing decisions in this product category.

“ I'm not going to spend 5 times as much on a pair of jeans just because they're sustainably made... but at the same time, I won't spend 5 times less on a pair of jeans if I found out that the brand was dumping waste into rivers. ”

Matthew, 31, London

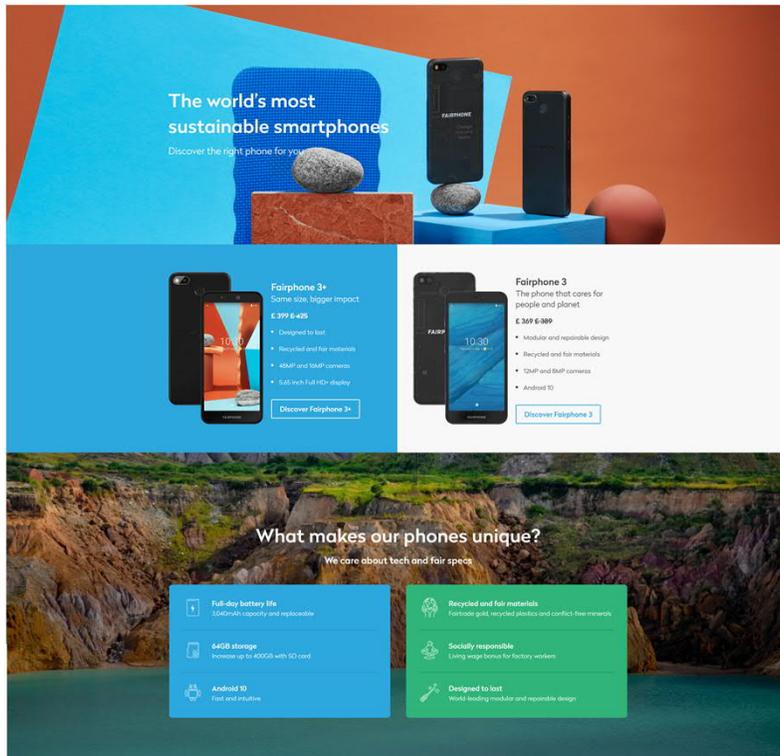
How might we encourage a change in consumer behaviours:

- Test sustainable behaviours with smaller bespoke brands and then integrate learnings into all business operations
- Engage consumers on the issues that truly align with the brand's vision and purpose rather than what feels trendy — This will be more authentic.

- Explore 'traffic light system' for sustainability across areas such as GHG emissions, supply chain practices, and biodiversity impact.
- Encourage consumers to try 'ethical' or 'sustainable' ranges by investing in tiered pricing – offer a discounted price for a more sustainable option.

# Technology

The Task: We asked participants to investigate an ethics-led electronics company and their behaviours in recycling technology



Best in the industry for greener electronics



See more of our EY technology research [here](#)

## Findings

We wanted to understand whether 'ethical tech' could be something that appealed to consumers, given the high investment cost.

In general, participants were intrigued by, and interested in, the brand proposition due to its modular design, durability and 'green' credentials.

However, they expressed reluctance to make a switch to a product like this for a few reasons:

- They placed a great deal of value on the reliability and brand power of tech giants like Apple and Samsung as well as the convenience of a complete ecosystem of products from one brand.
- In addition to this, the balance of risk and reward was perceived to be unfavourable. Participants are more likely to experiment with 'lower stakes' items like food commodities rather than higher value products within technology and financial services.

“ I'd try a sustainable cheese producer, as everything about the production process is universal across brands... but for technology, brand innovation matters far more. ”

John, 61, London

How might we encourage a change in consumer behaviours:

- Partnerships between more established brands and 'green' newcomers in the market.
- Offer risk-free trials to encourage adoption of alternative tech products.

Each participant in our study had a drawer in their home where 'tech goes to die' (Steve, 54, Edinburgh). This presents a loss of potential value, as:

100 times more gold in a tonne of e-waste than in a tonne of gold ore.

Their reasons for stockpiling their old devices rather than recycling them ranged from feeling unsure about how and where to recycle, concern about the security of their data, perceived inconvenience of recycling, and sentimentality for old photos and memories stored on the devices. However when prompted, they found services that could help them easily recycle them, however usually not from the OEM or the contract provider.

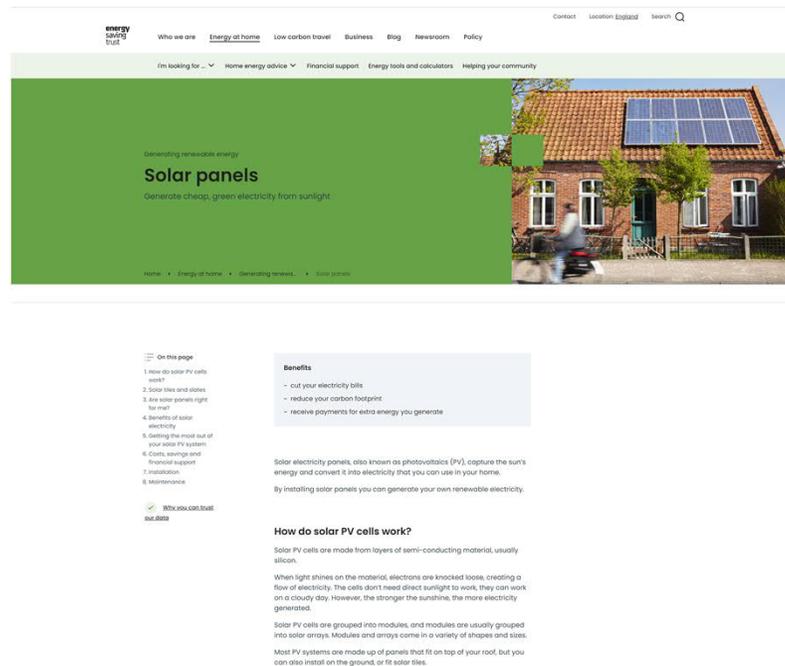
40m unused gadgets are sitting in UK homes. Elements used in consumer tech exist in the earth in tiny proportions... mining and refining them comes at considerable environmental cost.

Royal Society of Chemistry

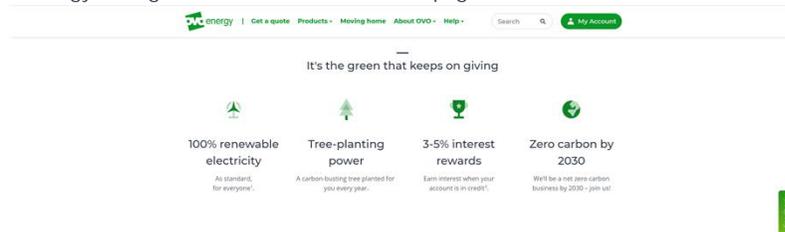
- Explore circular economy principles to capture value back by encouraging recycling and re-use.
- Include recycling old tech within the product purchasing journey and reward consumers who do.
- Re-assure customers about data concerns by spelling out what happens.

# Home and energy

The Task: We asked participants to investigate the reality of renewable energy in the home, and how likely they'd be to invest in Solar Panels



Energy Saving Trust website – Solar Panels page, 2021



See more of our EY energy research [here](#)

## Findings

The homeowners in our sample needed to be able to see the payoff in pounds and pence when considering investing in sustainable modifications to their home. Installing new systems solely for sustainability's sake was not enough of a draw for them.

Crucially they wanted to see the value realised in a number of potential ways:

- Ability to negotiate better interest rates on a mortgage upfront or when refinancing.
- A 'bonus' value increase when they came to sell their home in the short-to-medium term.
- Reassurance that making changes to their home would not decrease its value by creating an eyesore.
- Reassurance that they would be protected financially in the event of a repair or replacement.

The renters in our sample were not strongly motivated to change supplier in the name of sustainability, instead preferring to flex their sustainability muscles in other areas of their life.

They were also financially motivated, though leaned more towards the short-term benefit of saving money on bills today.

How might we encourage a change in consumer behaviours:

- Provide tangible benefits to 'green' retrofitting of the home, on a timescale that suits movers and not just 'forever home'-users. Use visuals and comparisons that can translate the benefits.

“ [Solar panels] cost £6000 upfront and will save us £300 a year — it's going to take 20 years just to break even! I'd sooner spend the money on family holidays. ”

Helen, 41, Manchester

67% of respondents solely selected price as their only reason for switching suppliers.

“ One way that would attract me is a massively illustrated example with images of an actual person, his house and the amount of panels installed and what it cost him per month for the installation and how much he was saving AND how much [energy company] was paying him for his energy sales back to the grid. ”

Marie, 64, Watford

- Work with local councils to understand how planning permission requirements could evolve to accommodate new types of PV technology.
- Offer bundled insurance products alongside to reassure homeowners that they will be protected in the worst case scenario.

# Transport and travel

The Task: We asked participants to plan their next holiday using their preferred route and provider and using alternative, 'greener' methods



Rome2Rio website home page, 2021



atmosfair - effective climate protection via CO<sub>2</sub> offsetting

Atmosfair website home page, 2021

## Findings

Participants found it difficult to find emissions data when booking using their preferred methods, and even more so when booking package deals.

In general, they had no real interest in mitigation or offsetting — and believed holidays to be about 'a vacation, not a David Attenborough masterclass'. Coupled with this, they would prefer to make donations to charities that are more aligned to their values (e.g. social causes) rather than carbon mitigation projects that they have no personal connection to.

Taking alternative 'green' routes is often more costly, time-consuming and negatively impacts the quality of experience and none of the participants in our sample would be willing to seriously try alternatives.

There were some negative perceptions about the reality of owning an electric car, namely:

- Restrictions on distance due to charging
- Unreliability
- Expensive and inconvenient to charge and upgrade
- Rental price was seen to be higher

However, the negative perceptions don't always line up with the realities of owning an electric vehicle in the UK.

How might we encourage a change in consumer behaviours:

- Reframe local holidays as being as luxurious as holidays abroad e.g. [German rail company](#) encouraged staycations. by showing how local landmarks look like famous international ones, so residents can have the same experiences but in Germany.

“ It is very easy to find alternative forms of travel but I cannot easily find accurate/any information on sustainability and the price of a carbon footprint.

Laura, 35, Liverpool

“ To be honest, holidays are about freedom and selfish pleasure so carbon mitigation isn't top of mind, nor is it something that can conveniently be achieved.

John, 61, London

49% of electric car owners in the UK say they are satisfied with their car because maintenance/upkeep is cheaper and less hassle.

46% say it is because it offers value for money.

- Governments can focus on subsidising more sustainable options or increase tax on non-sustainable routes (e.g. discounts on train travel, rebates on 'green' fuel etc.).
- Focus messaging on reliability of 'green' travel and the benefits it can bring.

# Finance

The Task: Participants were asked to explore some 'sustainable' finance providers and feedback on their thoughts



Ecology Building Society website home page, 2021



Triodos Bank website home page, 2021

Watch out for new EY research into *UK Consumer attitudes to sustainable finance products* to be published soon

## Findings

Green finance propositions were often overlooked as a potential spoke in the 'sustainable lifestyle' wheel — 'I'd never really considered my bank not being sustainable or even considered who they might be lending to' (Sophie, 29, London) — but many participants expressed their curiosity, although they had the following concerns:

- Perceived limited range of products compared to their current providers
- Perceived lack of guaranteed interest rates on par with larger institutions
- Perceived difficulty of access to their money
- Need to see a proven track record of safety and trust via customer reviews and feedback

Participants also expressed scepticism that banks like these could truly live up to their claims to 'make a positive impact on lives and protect the planet...'

Participants had mixed feelings about the role that banks should play towards being more sustainable. Some believed that banks had a duty to use their 'wealth of resources, influence and power' (Sean, 36, Manchester) to do more to help the planet and others were largely unconcerned about banks playing a role in this space, believing that banks have a duty to deliver returns for shareholders and nothing more.

How might we encourage a change in consumer behaviours:

- Consumers value the safety and security of traditional incumbent banks, but they are intrigued by the offerings of 'green' banks even if they don't yet want to take the plunge to switch. Show consumers the 'best of both' by pledging to

“ I'd be interested to know exactly how they are making a difference. They are making huge claims and it's a lot to live up to... almost far-fetched. ”

Michael, 31, London

70%

of the UK adults surveyed say that the sustainability reputation of financial product providers matters to them.

47%

had not bought sustainable financial products but would be interested in doing so.

divest from environmentally impactful projects and offer transparency into investment holdings.

- Showcase how investments or funds are being used from an ESG perspective; have the data readily available and easy to interrogate.
- To pull consumers towards sustainable options, ensure there is a clear benefit to using them above existing options.

# ●●● What do consumers expect from a 'sustainable' finance proposition?

We crafted some proposition statements, aligned to 5 key drivers of value, and tested these with our participants

## Financial benefit

We use your savings carefully to make a positive environmental impact and to ensure your money is working hard for the planet whilst generating a healthy return for you.

Participants liked the fact that this statement seems to imply that this bank would balance their personal benefit and wider benefit to the planet, but they would need to see more detail about how this provider could achieve this balance.

A proposition like this could appeal to the following sustainability mindsets:

- Cynic
- Ambivalent
- Amenable

## Community benefit

We believe that strong local **communities underpin the future** of the planet. So we use our savers' money to lend to local community projects and social enterprises – **building a lasting impact and stronger communities for years to come.**

Appealing to a sense of community spirit resonated strongly with most participants as it implied that this provider was doing tangible good. However, for a community-focussed statement to have real impact, it would need to define 'community' clearly and what scale these projects might operate on.

A proposition like this could appeal to the following sustainability mindsets:

- Cynic
- Ambivalent
- Amenable
- Advocate

## Global benefit

We're passionate about tackling the human impact of climate change. We only lend to businesses and organisations that promote lasting positive change across the globe and actively divest from projects which impact our planet.

This statement appealed strongly **to some of our participants who** found the messaging to be punchy, the commitment admirable and the **potential impact to be large and positive. However, others found** the messaging to be too 'radical and extremist' and this statement did not appeal to those who remain unconvinced about a human impact of climate change.

**A proposition like this could appeal** to the following sustainability mindsets:

- Amenable
- Advocate

## Safety + security

We're an alternative bank with a traditional approach to protecting your money. Our priority is keeping your deposits safe, guaranteed under the FSCS, so that we can continue using it to make an overall positive impact on the environment.

Many participants found this proposition statement to be too focussed on 'the money side of things rather than the sustainability side' and felt as though the final phrase was tagged on the end like a throwaway comment.

Some felt as though the proposition could be positioned as a 'traditional bank with an alternative approach' to take advantage of the perceived inherent security of a traditional bricks and mortar bank.

A proposition like this could appeal to the following sustainability mindsets:

- Ambivalent
- Amenable

## Future facing

A viable sustainable future for the planet starts now, with you, and we believe that choosing where you save your money is just as important as where you spend it. Join us today to do your bit towards securing the future of generations to come.

This statement resonated most strongly with our participants who were future-focussed, who found the calls to action effective and empowering — '*It makes you want to take that responsibility*'.

Others found the focus on the future to be at odds with their current priorities, and even meaningless and empty.

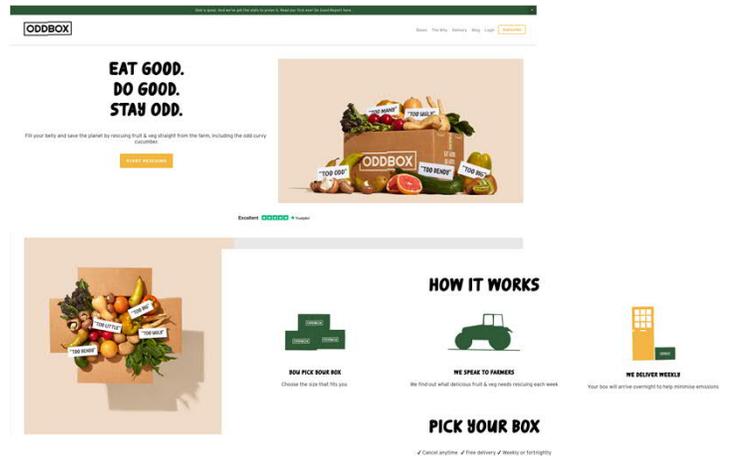
A proposition like this could appeal to the following sustainability mindsets:

- Amenable
- Advocate

# Examples of brands that are getting it right

Participants called out some brands who they believe are doing a good job of engaging them around sustainability

## Oddbox



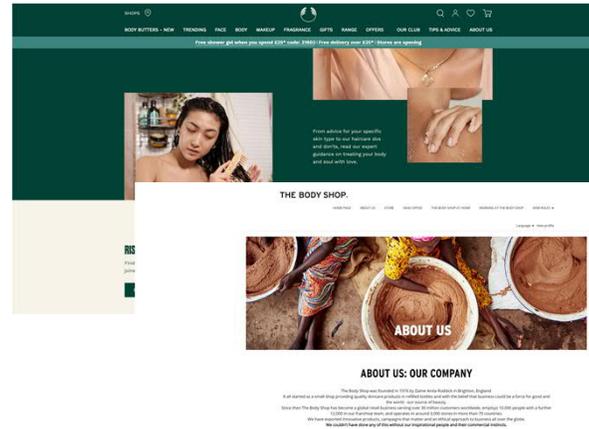
“ We get loads of veg for £6 a week each, which is great value as I would eat loads of veg anyway. They sent out a little leaflet showing all of the ways in which they are sustainable... If it was more expensive I would be prepared to pay the extra fee. ”

Sophie, 29, London

Resonated because:

- ✓ Focuses on value
- ✓ Transparency around sustainable **impact through information provided**
- ✓ Offered opportunities to 'test it out' first

## Bodyshop



“ I buy their products even though I can get cheaper toiletries from the supermarket. Their products are ethical and really good quality and I find I can make them last a longer time. ”

Sean, 36, Manchester

Resonated because:

- ✓ High quality products that last, creating long-term savings
- ✓ Focus on ethical supply chains, communicates their work and impact clearly

## Oatly



“ They have a confrontational approach by challenging the rest of the food industry in a long credentials piece on the side of the pack. For brands like Oatly that lack heritage and provenance, using sustainability to drive trials is a good idea. There's also reassurance on taste and versatility which is why I bought it. ”

John, 61, London

Resonated because:

- ✓ Strong and provocative brand personality and tone of voice
- ✓ Integrity and authenticity of 'green' messaging is clear
- ✓ Doesn't sacrifice quality

# Examples of brands that are getting it right

We found other brands in the market who are practicing the behaviour change techniques identified in the research

## Yuka

- Yuka is a mobile app which analyses and presents health risks of different food products and cosmetics
- The platform uses a simple to understand traffic-light system to help consumers evaluate the 'healthiness' of products and has a commitment to remaining unbiased and independent whilst protecting user data.
- The brand is also transparent about their sources and how they never compromise their objectivity.

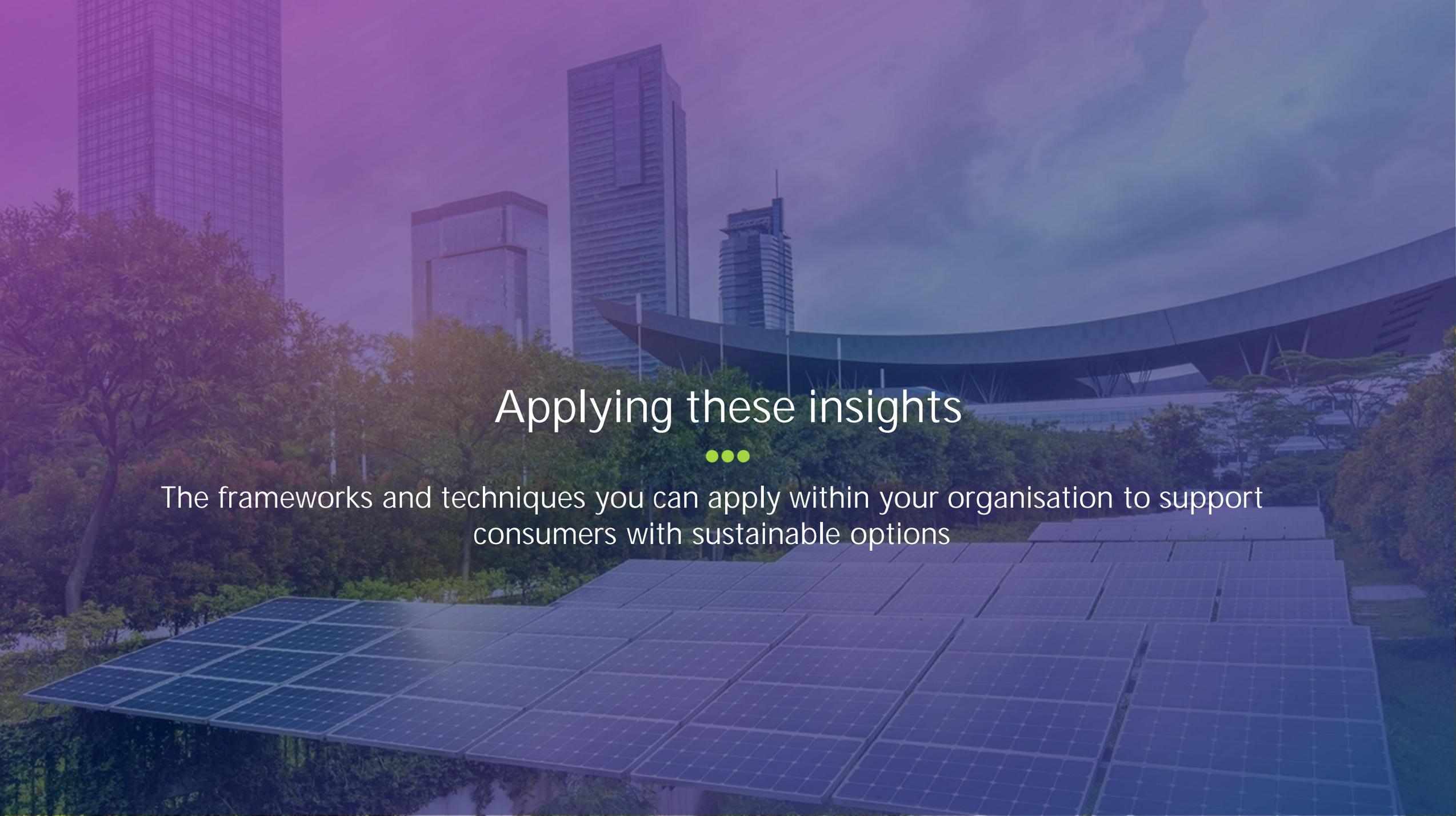
## Nudie Jeans Co.

- Swedish denim brand which focuses on quality and repair over re-purchase.
- Offers convenience to customers who are able to bring their denim in-store for repair, or to a mobile repair station instead.
- No risk of obsolescence of product as a new customer-brand relationship is established based on endurance and trust, opening up the opportunity for further up/cross-selling.

Potential annual benefit		
Potential CO <sub>2</sub> saving	Potential fuel bill saving	Potential payments from SEG (at 3.35 p/kWh)
809 kg / year	£91 / year	£84 / year
Potential lifetime benefit		
Potential CO <sub>2</sub> saving	Potential lifetime fuel bill saving	Potential lifetime payments from SEG (at 3.35 p/kWh)
19,029 kg	£2,236	£2,191
Estimated installation costs		
£5,419		
Estimated lifetime maintenance costs		
£1,450		
Potential lifetime net benefit		
£2,142*		

## Energy Saving Trust Solar Energy Calculator

- Customers stated a strong need for the benefits of solar panel installation to be spelt out to them clearly and simply.
- This tool provides a simple breakdown of costs and savings in real terms and walks customers through the process step-by-step, offering FAQs to support.
- Provides clear summary of savings gained through investing in solar panels (if applicable).



## Applying these insights



The frameworks and techniques you can apply within your organisation to support consumers with sustainable options

# ●●● Sustainability mindsets in UK consumers

What is a mindset?

Mindsets are attitudes, beliefs, assumptions and ideas that individuals have which shape their thought habits and affect how they think, feel and act.

Groups which are dissimilar across demographic and background may have similar mindsets about a particular topic.

Mindsets are situational and context-dependent, and a person's mindset can shift many times over the course of their life, depending on the external triggers that they face.

They capture a snapshot of a person at a particular point in their life.

We identified 4 different 'sustainability mindsets' in UK consumers:

- Cynic
- Ambivalent
- Amenable
- Advocate

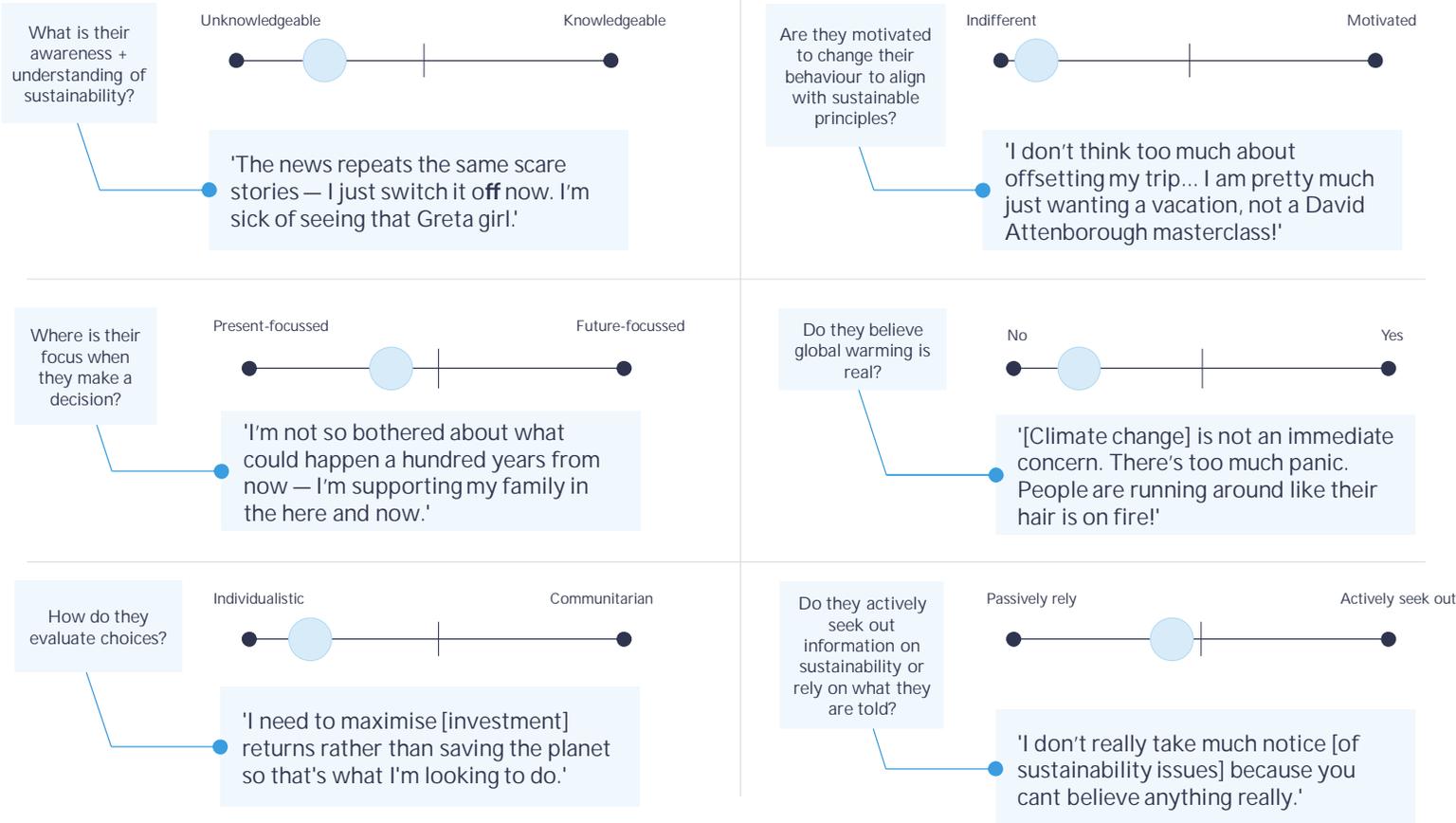


# Cynic



Sustainability is... a means for companies to virtue signal about how morally good they are.

I am motivated by... family, community, and the economy.



- ### Useful ways to engage this sustainability mindset
- Climate change contrarianism can often be a position taken based on an emotional response rather than a rational response. Appealing to the cynic's feelings can be a useful way to engage this mindset e.g. acknowledging their fears and feelings without judgement and demonstrating the real-time benefits to them of sustainable policies and practices.
  - Focus on the benefits generated to local communities and economies as opposed to talking about planet-wide changes.
  - Design out choice at the point of purchase as cynics are not likely to make a conscious choice to be sustainable, but are far more likely to act sustainability if it is the standard process.

2% of people in Great Britain believe that the climate is not changing.

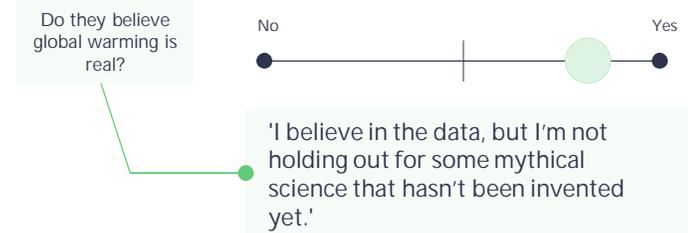
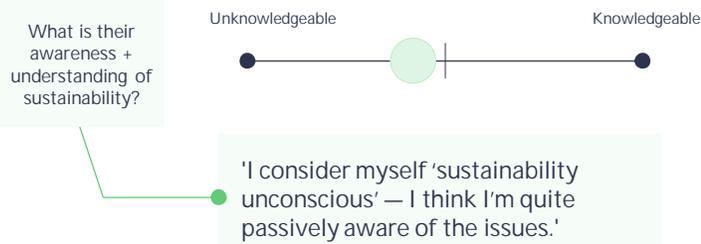
3% believe the climate is changing but human activity is not responsible.

# ●●● Ambivalent



Sustainability is... **not something I pay too much attention to – I have more pressing concerns in my personal life.**

**I am motivated by... optimising and improving my current lifestyle and maintaining convenience.**



## Useful ways to engage this sustainability mindset

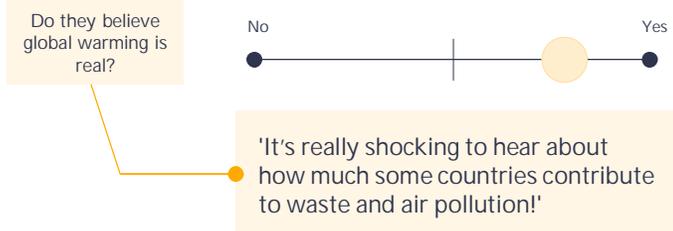
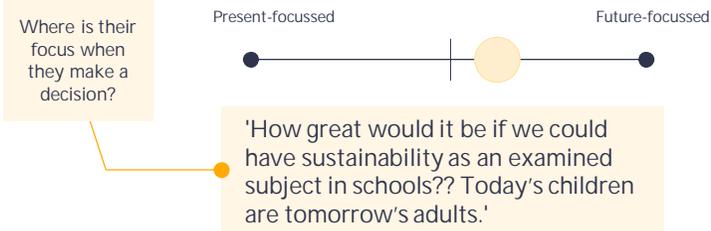
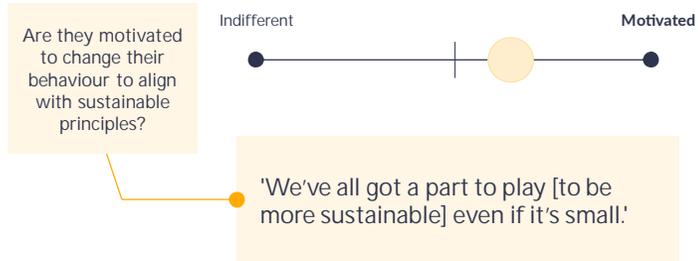
- Showcase the personal and present benefits of making sustainable lifestyle choices (over and above the long-term sustainability benefits).
- Showcase what personal benefits are at stake due to inertia — use loss aversion to frame the choice.
- Use prompts to nudge ambivalent people towards positive behavioural changes.
- Ensure that there is as little friction as possible for consumers to choose a more sustainable option e.g. strive for price parity, lower barriers to engagement.

**48%** also say that although they know they should care more about the environment through their purchasing habits, convenience takes priority.

# ●●● Amenable



Sustainability is... something I'm learning about and what it means, but I'm unsure what impact I could be having.  
I am motivated by... learning about issues I didn't know about before.



## Useful ways to engage this sustainability mindset

- Educate Amenable consumers on which lifestyle choices can have the greatest impact to **effort pay-off**.
- **Provide them with feedback which reinforces positive behaviours and disincentivises negative ones.**
- **Structure information to help them evaluate their choices.**
- **Make the positive impact of sustainable choices clear and tangible to them and appeal to different priorities e.g. sense of civic duty/community, feeling of fitting in with societal norms, decreased human suffering, long-term pay-off etc.**

**84%** of UK consumers say that being environmentally friendly is important to them, yet

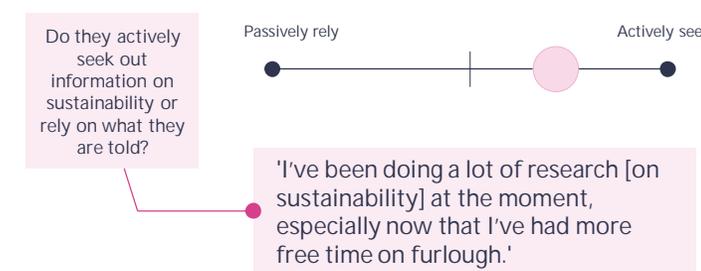
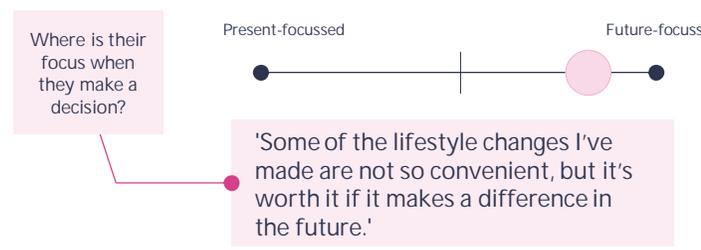
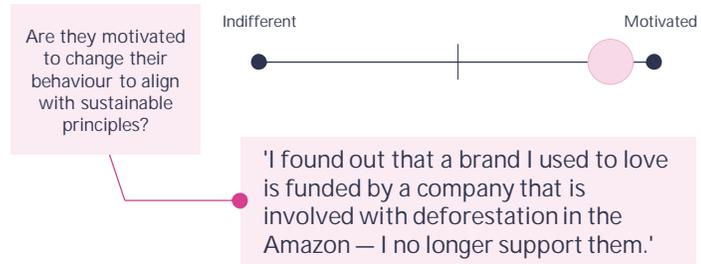
**68%** cannot name a single environmentally friendly brand .

# Advocate



Sustainability is... something I make a conscious effort to incorporate into different aspects of my lifestyle.

I am motivated by... having a positive impact on society and the planet.



- ### Useful ways to engage this sustainability mindset
- Provide them with all of the information they are seeking to support their decision-making.
  - Reinforce their behaviours by presenting them with the tangible impact of their actions.
  - Reward them for exerting their influence in their circles e.g. referral schemes based on time spent using a product or service.

**37%** of people in Great Britain believe that the climate is changing and human activity is partly responsible.

**51%** believe the climate is changing and human activity is mainly responsible.

# ●●● Design principles for shifting consumer behaviour to sustainable propositions

Through our research we identified interventions that can help shift behaviour (leveraging findings from frameworks such as COM-B and SHIFT). We have collated them into a set of design principles to guide firms in developing sustainable propositions and solutions

## Sustainable Service Design Principles

Make It Sustainable

This should go without saying, but your proposition should have a sustainable outcome e.g. reducing emissions, remove waste out, safeguarding workers. Don't just set and forget, but continue evolving.

Make It Real

Make the impact of the choice tangible and real, removing any confusion as to why your customer should choose the sustainable option.

Make It Personal

Highlight how the sustainability benefits carry forward your customer, and focus on the personal relevance on the choice.

Make It Accessible

Remove barriers to entry or friction points from the experience (such as cost) to ensure that more people can use your solution and scale its impact.

Make It Transparent

Be clear in what you're doing and the impact you're having. Share information openly and honestly so your customer can make the choice for themselves.

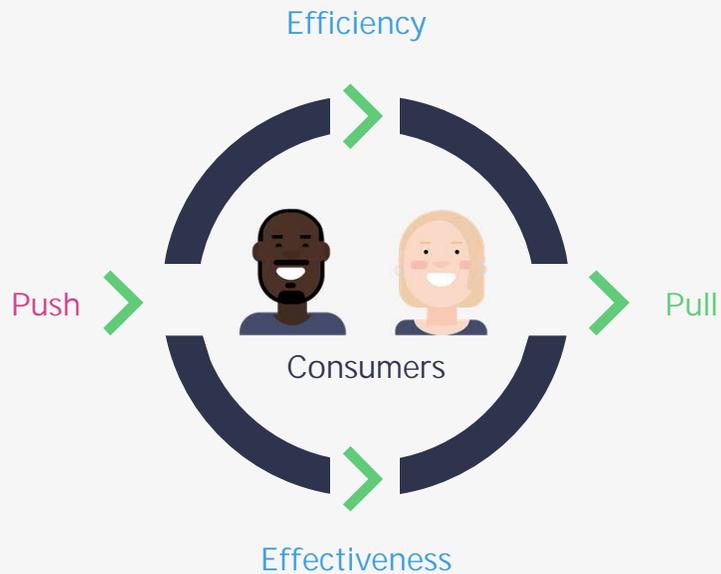
## Questions to ask yourself

- How does our proposition reduce emissions, promote social equality or protect the environment?
- How can we integrate Circular Economy Principles to reduce waste?
- How can we continually improve our proposition?
- How does our proposition communicate its value?
- How can we track and measure the impact we deliver?
- How does the sustainable outcome align to our customers values?
- How can we create a personal dialogue with the customer?
- Do we make them feel that we recognised their needs?
- How can we get the proposition to appeal to all our consumers?
- How can we create a frictionless experience / make it as easy to use as possible?
- Are we sharing our progress?
- How are we keeping ourselves honest about our commitments, progress and ambition?

# How can we intervene to promote sustainable behaviour?

We found similarities in the types of interventions that shift behaviour in individuals, which we have summarised into a simple framework to help in the design of sustainable services or communicating sustainable propositions

Ways to think about influencing behaviour

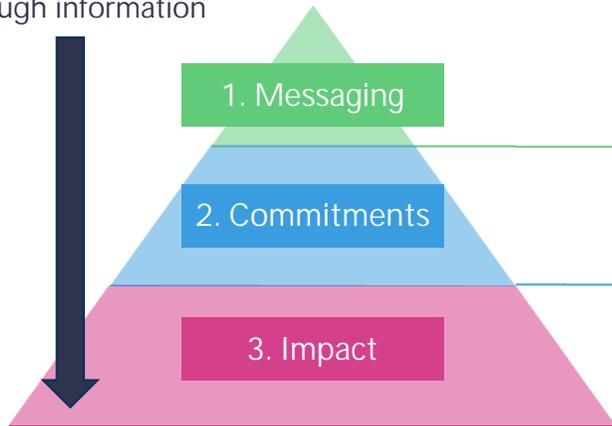


Category	Explanation	Technique Examples	In-market examples
Pull	How might we incentivise or reward sustainable behaviour & choices to pull consumers towards sustainable options?	<ul style="list-style-type: none"> <li>Use social influence to make sustainable choice more attractive.</li> <li>Reward sustainable behaviours to build habits e.g. loyalty points.</li> <li>Create an innovative and appealing proposition that attracts people.</li> <li>Use prompts to encourage users to engage in the desired behaviour .</li> </ul>	<ul style="list-style-type: none"> <li>Tesla has created a product and brand that is appealing to customers and pulls them away from other competitors. It has 90% satisfaction, and 80% of customers buy or lease a second Tesla.</li> <li>Smart meter prompts and energy saving nudges incentivise participants to save energy (and costs).</li> </ul>
Push	How might we edit out or punish consumers to push them out of unsustainable choices or habits?	<ul style="list-style-type: none"> <li>'Architect out' the unsustainable option, so that the sustainable choice becomes de-facto.</li> <li>Have an 'unsustainable tax' that makes it less cost-effective.</li> </ul>	<ul style="list-style-type: none"> <li>In certain regions of Germany where 'green' energy was set as the default option for residential buildings, 94% of individuals remained with the choice.</li> <li>Introduction of 5p plastic bag tax resulted in a 86% fall in single use plastic bags issued by supermarkets.</li> </ul>
Efficiency	How might we make it easier to use or access the sustainable option?	<ul style="list-style-type: none"> <li>Making information easier to find.</li> <li>Reducing level of data that consumers need to supply.</li> <li>Make it cheaper to buy.</li> <li>Make it easier to use than the competition.</li> </ul>	<ul style="list-style-type: none"> <li>The app Yuka makes it easy for consumers to quickly find and assess health data on food and cosmetics.</li> <li>Toyota Prius leverages gamification to show how efficiently you are driving compared to last time.</li> </ul>
Effectiveness	Maximising impact / value of the sustainable choice or the perception of the value.	<ul style="list-style-type: none"> <li>Make the sustainable alternative perform better against the criteria that the customer values.</li> <li>Show the impact / value in choosing sustainable choice or behaving sustainability.</li> </ul>	<ul style="list-style-type: none"> <li>Vegan mayo has been increasing in popularity over the last couple of years, and Hellman's vegan mayo alone accounted for 32% of NPD sales in 2019. It's combination of taste and sustainability credentials has won over consumers who previously wouldn't consider it.</li> </ul>

# How can we help consumers find the right information and make decisions?

We identified a framework that consumers move through to determine how sustainable a company really is and have created a hierarchical model which outlines what consumers are looking for and the best ways for companies to present it

How customers flow through information



We found that customers complained about...

- Having to search for the information on sustainability they need
- Marketing campaigns being a self-serving, non-committal exercise that are easy to back out from, or are ineffectual in the first place
- There being insufficient hard metrics or no external validation to back up the claims made

We saw that effective brands structured their sustainability story as such...

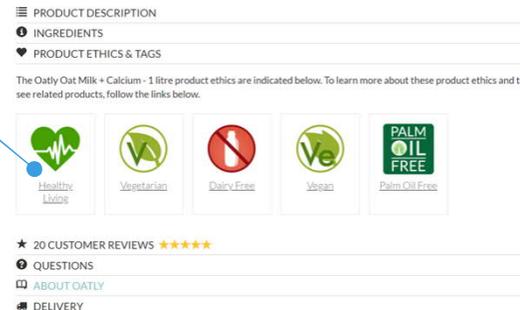
- Clear messaging on how they are being sustainable, highlighting the positive impact opposed to the negative
- Easy available information during purchase journey
- Detailed and transparent commitments on what they are doing to become more sustainable
- Visualised impact created and told stories to create emotional reactions
- Quantifiable impact of actions, provided accreditation and explanation of accreditation
- Leveraging 3<sup>rd</sup> party accreditation & explaining their worth

For information on a product's sustainability look at Ethical Superstore:

'View ethics and tags': provide symbols of ethical credentials for each product.



Highlight what the accredited symbol is denoting



Explain what each symbol means, why it is important and what the benefits are - backing up these claims with facts & figures.

Palm Oil Free

Palm oil is typically found in grocery, household cleaning and beauty products - it's probably in over 50% of these types of products in your home. The trouble with palm oil is that it is not a sustainable ingredient and contributes to deforestation, habitat degradation, climate change, animal cruelty and indigenous rights abuses. Approximately 50 million tons of palm oil is produced annually, and according to the World Wildlife Fund, an area equivalent to the size of 300 football fields of rainforest is cleared each hour to make room for palm oil production.

We know many of you like to avoid products that use palm oil in production, and in order to help you make those feel good choices we have identified all the products we sell which do not contain any palm oil. You will also find those that use sustainable palm oil here.

Vegan

Vegan products must be entirely free from animal involvement. The manufacture and/or development of a vegan product, and where applicable its ingredients, must not involve, or have involved, the use of any animal product, by-product or derivative. Also, the development and/or manufacture of a vegan product, and where applicable its ingredients, must not involve, or have involved, testing of any sort on animals conducted at the initiative of the manufacturer or on its behalf.

Ethical Superstore carries a wide range of vegan products, many of which carry the [Vegan Society's](#) trademark. You'll be surprised how many vegan alternatives there are, such as [tofu](#) or [which is a vegan alternative to eggs](#), [vegan mince](#), our hugely popular [Soma](#) [vegan beans and sausages](#), even a [vegan alternative to duck!](#) A surprising amount of everyday products contain animal derived ingredients which is why we stock ranges of [vegan sweets](#) and [vegan chocolate](#).

While we make every effort to ensure all our products are correctly tagged as vegan, mistakes can be made and we ask that you always double check the ingredients. If you think something has been incorrectly labelled as vegan, please don't hesitate to get in touch by clicking 'ask a question' on the product page.

## ●●● Useful frameworks for focusing on behaviour change

In our research, two particular frameworks stood out in understanding behaviour / habit formation and what factors impact behaviour change

### COM-B

The COM-B model of behaviour is widely used to understand what underpins certain behaviours and choices. It identifies three factors that need to be present for any behaviour to occur: Capability, Opportunity and Motivation. These factors interact over time so that behaviour can be seen as part of a dynamic system with positive and negative feedback loops.

- Capability is defined as: a person's psychological or physical capacity to change
- Motivation is defined as: all the internal mechanisms — both automatic and reflective — that either activate or inhibit behaviour
- Opportunity is defined as: contextual factors that enable behaviour.

Our research highlighted how capability aligned to the financial capacity to purchase sustainable options, motivation aligned to personal principles/priorities and opportunities were both impacted by how easy or hard firms made it to engage as well as their social sphere of influence.

Consistent barriers to sustainable behaviour included:

- Cost
- Difficulty in finding sustainable products
- Inconvenience in accessing sustainable products

### SHIFT

The SHIFT model proposes that consumers are more inclined to engage in pro-environmental behaviours when the message or context leverages the following psychological factors:

- Social influence: Consumers are often impacted by the behaviours and expectations of others. Focusing on this can help shift behaviours.
- Habit formation: Breaking negative habits (e.g. through penalties) and shaping positive habits (by repetition and incentives) is key.
- Individual self: Factors linked to the individual self (e.g. self-perception) can have a powerful influence on consumption.
- Feelings and cognition: Targeting emotions (both positive and negative) can influence in the moment, however its important to avoid intense negative emotions.
- Tangibility: Eco-friendly actions and outcomes can seem abstract, vague, and distant from the self. Focusing on making them tangible (real, present, distinct) increased likelihood of engagement.

The SHIFT model provides a framework of areas of intervention that designers can explore. E.g. How can the value proposition focus on the 'individual self', or how can the communication around a service make the outcome more 'tangible'. Many of our design implications align to these factors.

An aerial photograph showing a large array of solar panels in the foreground, surrounded by lush green trees. In the background, several modern skyscrapers rise against a cloudy sky. The entire image has a semi-transparent purple and blue overlay.

# Notes from the Field, Next Edition and References



# Notes from the Field

Reflections and learnings from our team in navigating this topic



Emmelle Wilson-Raymond



Tom Statters



Sergei Isakov

## Learnings around techniques of diary study during COVID-19

We began our research as the UK took its first steps out of national lockdown, and there was a general sense of hopefulness and excitement. However, we still needed to be conscious of our participants' safety and comfort during our research. We made sure that all of our asks could be completed from the comfort of the home, in case any participants were shielding or felt uncomfortable at the thought of making unnecessary trips out of the house.

As with previous editions of Human Signals, we found connecting via familiar tools like WhatsApp and email put participants at ease and allowed them to share their reflections in real-time in an easy and relaxed format. To avoid repetition and maintain good levels of engagement throughout, we framed our approach to be a blend of participant-led activities and reactions to stimuli we provided.

“ I enjoyed the study, I enjoyed being challenged about my own behaviour... I'd like to see the report when it's published to see what I've been part of. ”  
 Laura, 35, Liverpool

## Managing the ethical aspects of the research

Almost all participants were surprised by how much the activities made them think and reflect on their own behaviours and how sustainable they really are. This would then manifest in different ways — they would either express feelings of hopelessness and anxiety about the subject or feelings of empowerment and motivation to learn and do more and, oftentimes, they would express a mixture of the two.

One of our key considerations when carrying out this research was what we could do to minimise any potential harm or ill-feeling as a result of participants digging deeper into the subject.

*A YouGov poll found that 55% of people felt that climate change has impacted their mental well-being.*

We made sure to hold space for the participants to share their honest reflections and we thanked them for their honesty and efforts. Participants are not just a resource to be mined for insight – and we wanted the study to feel conversational and enjoyable, rather than extractive and/or transactional.

We also offered them the opportunity to debrief after the study, and provided them with our contact details if they ever wanted to discuss the research further.

## Being professional / managing different opinions

Climate change can be polarising and a political subject, and it was important for us to maintain a neutral position in the discussion so as not to encourage a social desirability bias from participants.

Some of the key techniques we used to reduce any biases were:

- Giving people space to say their piece, without judgement
- Using neutral rather than values-based language to ask questions and set tasks
- Playing words back verbatim — rather than putting our own interpretation on them and influencing the integrity of the research
- Carrying out regular self-checks on our personal biases, especially when participants had views that didn't align to our own

When asking follow-up questions, we never assumed the meaning of their statements, and were not afraid to 'play dumb' when asking them to explain and elaborate. We never wanted them to feel as though we were putting them on the spot to defend their position. Instead, we approached from a position of willingness to learn and understand their points of view.

# What next?

Human Signals will be back soon with a new edition focussed on Social Justice. If you want to share your opinion, get earlier editions or find out how you can apply this research, please let us know.



Peter Neufeld | Partner  
FSO Lead | Head of FS CX  
[pneufeld@uk.ey.com](mailto:pneufeld@uk.ey.com)  
[LinkedIn](#)



Sergei Isakov | Lead  
Business Design  
[sergei.isakov@ey-seren.com](mailto:sergei.isakov@ey-seren.com)  
[LinkedIn](#)



Emmelle Wilson-Raymond | Snr. Consultant  
Research & Insight  
[emmelle.wilson-raymond@ey-seren.com](mailto:emmelle.wilson-raymond@ey-seren.com)



Tom Statters | Consultant  
Research & Insight  
[tom.statters@ey-seren.com](mailto:tom.statters@ey-seren.com)  
[LinkedIn](#)



Francesco Cagnola | Consultant  
Service Design  
[francesco.cagnola@ey-seren.com](mailto:francesco.cagnola@ey-seren.com)  
[LinkedIn](#)

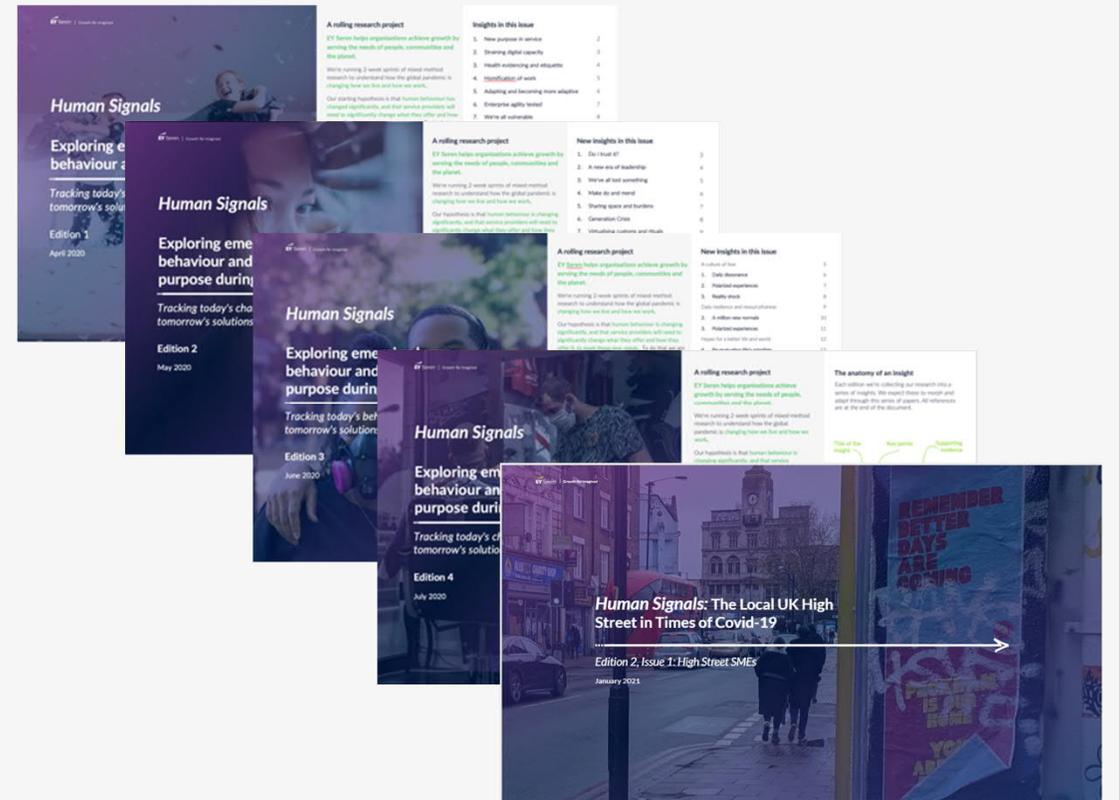
More ways to connect

 [Our website](#)

 [LinkedIn](#)

 [Instagram](#)

## Get in touch to receive copies of previous editions of Human Signals



# References & further reading

## Overview of our sustainability research approach

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- [If consumers hold the key to a greener future, how can energy companies unlock it?](#), Rob Doepel et al, 27 Jan 2021
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- [EY Future Consumer Now Index](#)
- [EY long-term value](#)
- EY Seren Energy Sustainability Realised Research

Watch out for the next issue of *Future Consumer Now*:

Wave 7 of *Future Consumer Now*, EY's global consumer study of consumer intentions across 20 countries, will be published in late June.

This issue will focus on consumer attitudes to sustainability and the implications they might have for consumer companies.