

Media, Marketing & Communications: Consumer Attitudes & Trends, 2023-2018

[SEC Newgate ESG Monitor 2023](#) (SEC Newgate) — Analyzes emerging consumer sentiment towards ESG performance and corporate environmental responsibility policies, with a global report (surveying 12,080 people) and ten country specific reports. The global report finds:

- Respondents are increasingly engaged with ESG issues, with awareness growing from 46% in 2022 to 53% in 2023, and interest in ESG growing from 56% to 67%.
- 77% of respondents agreed it was important for corporates to take action on ESG issues.
- 69% agreed companies can be profitable while also performing well on ESG.
- 68% agreed that companies should communicate the results of their ESG efforts more clearly for investors and consumers, but **just 35% indicated they were looking for information on companies' ESG performance.**
- Only 50% of employees believe their employer is genuinely trying to do the right thing when it comes to ESG.
- **43% of respondents believed that companies are generally behaving ethically and doing the right thing.**
- **47% of respondents have heard of greenwashing and 63% think it's a problem (once it is defined for them).**

[Ready to Prefill? Market Innovation to Unlock Growth in the Market](#) (City to Sea and Re) — Provides insight into current consumer perceptions, barriers, and motivations in relation to prefilled returnable packaging. Key findings include (Aug 2023):

- 69% of consumers indicated they are likely or very likely to try products in returnable packaging if they are available where they shop, but lack of availability is preventing trial.
- Over half of respondents (53%) said they were more likely to buy from a brand that offered products in prefilled returnable packaging, rising to 84% among those that had previously bought products in returnable packaging.
- **60% indicated that value for money was the most important criteria influencing their product choice.** But almost half are prepared to pay a deposit for a product they buy in returnable packaging.
- **More than 75% of those interested in trying prefilled returnable packaging said reducing waste is quite or very important to them.**

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Higher-income individuals are able to make more sustainable choices though not necessarily in ways that matter most, according to the latest data from 20 countries from Deloitte's **Global Sustainability Survey**. 59% of higher-income respondents say they always or often choose sustainable products compared with 44% of middle-income and 42% of lower-income respondents. **However, compared to lower-income individuals, fewer middle or high-income individuals were willing to make changes to high-emitting behaviors,** such as flying less (44% vs. 52%) or using green transportation (44% vs. 49%). 46% of higher-income respondents said

they had considered switching jobs to work for a more sustainable company vs. 20% of middle-income and 13% of lower-income respondents. But 63% of higher-income respondents believed their employers are “doing enough to address climate change,” while 66% of middle-income and 77% of lower-income did not. **Overall, fewer respondents of all income levels said they had changed personal behavior to address climate change (54%) than 18 months before (65%).** (Aug 2023)

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[Sustainability, Communications, & Climate Confusion](#) (FleishmanHillard) — **55% of UK consumers feel that sustainability is important, with 51% prepared to pay more for products with an environmental benefit, according to a survey of 2,000 adults.** The majority also want products that: can be recycled (69%), are designed in a way to produce less waste (65%), and use less or no plastic packaging (63%). However, **many are confused about other claims:** only 45% were confident on what ‘made from responsibly managed forests’ meant; 41% were confident about “Certified Carbon Neutral”; 35% about “Carbon Negative Product”; and 28% about a climate footprint calculation. **Consumers did indicate that they do take actions to understand, with 27% doing an online search, 25% talking to friends or family; 19% visiting a company website; and 18% visiting the product’s social media channels.** (July 2023)

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More than 60% of consumers are worried about CO2 emitted from aircraft and would pay more for greener air travel, according to a survey commissioned by engineering software company Ansys. 45% feel guilty about their air travel footprint and 39% plan to reduce their air travel footprint (half of these planning to do so through flying less). **32% thought the aviation industry was not doing enough to make flights carbon neutral and 32% reported being more likely to fly with airlines committed to reducing their air travel footprint.** 46% said they would travel in aircraft powered by sustainable aviation fuel, 38% by hydrogen, 36% by electric. But 42% of consumers said they would fly on sustainable aircraft only if cost is not a factor. (July 2023)

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74% of Americans support U.S. participation in international efforts to reduce the effects of climate change, according to a Pew Research Center survey of 10,329 U.S. adults. 67% prioritize alternative energy development over fossil fuels. 85% favor requiring oil and gas companies to seal methane leaks, and 61% favor power plants eliminating all carbon emissions by 2040. Only 40% favor phasing out production of gas-powered cars and trucks, 7% less than two years ago; and 46% favor new buildings running only on electricity (with no gas lines) while 51% oppose this. (July 2023)

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69% of Americans support the U.S. taking steps to become carbon neutral by 2050, according to a new survey by the Pew Research Center. Other interesting findings (April 2023):

- **69% of Americans think the U.S. should prioritize renewable energy, while 30% think the U.S. should prioritize expanding oil, coal, and natural gas;**

- 31% of Americans think the U.S. should completely phase out oil, coal, and natural gas;
- 66% of Americans think the federal government should subsidize wind and solar, while 43% think electric cars should be subsidized and 21% think coal mining should be;
- **67% think large businesses and corporations are doing too little to reduce climate change effects;**
- 54% of Americans think climate change is a major threat, though there is a partisan divide with 78% Democrats vs. 23% of Republicans agreeing with this;
- **Only 37% of Americans (59% Democrats and 13% Republicans) agree that addressing climate change should be a top priority;**
- **75% of Americans support U.S. participation in international efforts to reduce climate change effects.**

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[Consumers care about sustainability—and back it up with their wallets](#) (McKinsey & Co and NielsenIQ) — **Examines sales growth for products that claim to be environmentally and socially responsible.** (February 2023)

[The Shifting Politics of Doing Good in America](#) (Global Strategy Group (GSG)) — **This report examines the political landscape around recent attacks on companies engaging in ESG initiatives.** Key takeaways include (Feb 2023):

- **88% of Americans approve of companies that have a positive impact on their communities, and 77% agree that corporations have a responsibility to bring about social change on society's most important issues;**
- While some voters believe that many companies are too “woke,” only 8% of Americans think investigating how companies spend money on ESG issues should be a priority for Congress, and 83% trust companies more than politicians when deciding whether they agree with a company's stance on an issue;
- Recent anti-ESG rhetoric has not had much impact on Republicans' purchasing behavior or how they think about the role of companies in society. Only 36% of Republicans have boycotted a company because of a stance they took on an issue (less than the 40% of overall voters).

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[2022 Consumer Insights Report](#) (Fair Trade USA) — **Investigates the spread of conscious consumerism into the U.S. mainstream, with more consumers seeking out Fair Trade Certified products and seeing this as a way to have a positive impact on communities and the environment.** The report found that 65% of consumers recognize the Fair Trade Certified seal, 78% trust it, and 41% would be more likely to buy a product with it (up from 33% in 2017). Younger generations show stronger connection with the label, with 24% of Gen Z and 30% of Millennials actively looking for and understanding the importance of the seal, compared with 22% of Gen X, 4% of Baby Boomers, and 17% of Matures. (Feb 2023)

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[Pulse Check: It's Time to Recalibrate—Surprising Truths About Corporate Advocacy](#) (APCO)

— **This survey of the U.S. general public (sampling 2,005 adults) examines views on ESG and corporate advocacy and finds a significant “partisan divide.”** Key takeaways (Nov 2022):

- 57% of Republicans believe that a company should focus on their core business mission and stay out of current event issues and debates, compared to only 18% of Democrats;
- 40% of Republicans believe CEOs should refrain from commenting on current events and issues, compared to 9% of Democrats;
- **78% of respondents approve of companies taking action internally in response to current events while 61% approve of taking action externally.** Both Republicans and Democrats are more supportive of internal action (67% and 90% respectively) than external action (42% and 79%).
- **57% of the U.S. public are “not familiar at all” with the term ESG (regardless of party affiliation). Of those familiar, 89% of Democrats and 61% of Republicans have a favorable impression.**

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A new survey found that climate misinformation is prominent in six countries surveyed:

Australia, Brazil, India, Germany, the U.S., and the UK. Key findings include (Nov 2022):

- **Between 55% and 85% of the populations surveyed believe at least one of the climate change misinformation statements included in the questionnaire, with the highest share in India and the lowest in the UK;**
- Between 6% and 23% of the populations surveyed do not believe in climate change or are uncertain about whether climate change is happening. A further 22 to 38% believe that humans are only partly responsible for the change in climate;
- One quarter or more people surveyed believe that their country cannot afford to reach the target of net zero emissions by 2050;
- **News consumption is not an indicator of whether people are better informed on climate science.**

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[Purpose Up / Doubling Down in Tough Times](#) (Barkley and Jefferies) — **This new report,**

surveying more than 7,000 consumers and 159 companies, found that sustainability and ESG are increasingly important to consumers. Report highlights include (Oct 2022):

- 96% of consumers said buying from purpose-led brands is as important as it was a year ago, despite rising inflation;
- 72% say working for a company that aligns with their values is important;
- 64% of consumers say buying from companies that take action on environmental and social issues is how they show support for an issue they care about;
- And 94% of business leaders believe climate change will have an impact on their brand, with 59% saying it already has or will in the next five years.

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[Consumers Are the Key to Taking Green Mainstream](#) (Boston Consulting Group) — **A new**

report finds that while 80% of consumers say they are concerned about sustainability, only 1-

7% of consumers have paid a premium for sustainable purchases (depending on the category). Only 20% believed they could personally have an impact, while 70% felt wary of corporate sustainability claims and commitments. The findings are based on a survey of 19,000 consumers across the U.S., Japan, Germany, France, Italy, China, India, and Brazil, that examined 14 product and services categories. (Sept 2022)

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A median of 75% of respondents viewed global climate change as a major threat, according to new Pew Research that surveyed 24,525 adults in 19 countries in North America, Europe, and the Asia-Pacific Region. This was the largest of five surveyed threats (including the spread of false information online, cyberattacks, the condition of the global economy, and the spread of infectious disease). **In the U.S., only 54% of people responded that climate change is a major threat,** putting it in fifth place on the list. (Sept 2022)

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A new report by Populace explored the significant difference between what Americans say publicly and feel privately on a range of controversial topics, reflecting widespread “preference falsification” driven by a fear of offending others or “incurring retribution.” An important highlight: the report found that **only 14% of Americans want CEOs to take public stances on controversial social issues, though twice as many (28%) say they support that publicly.** There is no demographic where a majority, privately or publicly, wants this. (Aug 2022)

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Three years after the Business Roundtable’s (BRT) statement redefining the purpose of a corporation, **JUST Capital released two reports analyzing the performance of the 239 BRT members and how Americans view the performance of the nation’s largest companies.** (Aug 2022)

[Performance highlights](#) of BRT signatories compared to non-BRT peers include:

- **Produce 66% less direct and indirect GHG emissions** per dollar of revenue.
- **Use 2.4 times more renewable energy** as a proportion of total energy use.
- **Are 3.2 times more likely to disclose measurable diversity and inclusion targets,** 2.9 times to disclose conducting a pay equity analysis, and 3.4 more likely to disclose providing a subsidy for child care services.
- **Are twice as likely to have a paid parental leave policy.**
- **Are 1.7 times more likely to include ESG key performance indicators in executive compensation** or remuneration metrics.

[Highlights of Americans’ expectations and beliefs](#) include:

- **93% agree it’s important for companies to promote an economy that serves all Americans, but only 48% agree they are.**
- **37% feel companies are having a positive impact on the environment** and 49% believe they’re having a positive impact on society overall.

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A US survey conducted by **Consumer Reports** provides a **snapshot of Americans' perspectives and concerns regarding the transportation industry's impact on the environment** and their **willingness to make environmentally friendly transportation choices** such as battery electric vehicles (BEVs) and sustainable fuels. Key findings include (July 2022):

- Only **2% of Americans currently own a battery electric vehicle (BEV)**, though 3% have in the past.
- **Current EV owners (51%)** are more likely than past EV owners (36%) or those who have never owned an EV (26%) to **say reducing their impact on the environment is one of the most important factors influencing their vehicle purchase/lease decisions**.
- 36% indicated they would “definitely” or “seriously consider” buying or leasing an electric-only vehicle, while 28% would not consider it.
- The top three **barriers** to purchasing or leasing an electric-only vehicle are **charging logistics** (61%), **charge range** (55%), and **costs** (52%).
- **Cost-related factors are also the most desirable attributes of an EV** with about 3 in 10 Americans citing lower fueling costs, lower costs over a vehicle's lifetime, including maintenance.
- **46% of Americans were unaware of EV incentives**, with around half indicating they would be influenced by “tax rebates/discounts at the time of purchase or lease” (53%) and/or “discounts to install a home charger” (49%).
- 67% would likely use low carbon fuel in their personal vehicle if the cost per gallon was the same as the cost for traditional fuel.
- **Only 11% of those surveyed had heard about the use of sustainable aviation fuel (SAF) in airplanes** before taking the survey, though a third indicated they would be ‘very likely’ to choose a flight on a plane that uses low carbon fuel if other costs were the same.

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New research from the **Yale Program on Climate Change Communication** and **Data for Good** at **Meta** describes **climate change beliefs, attitudes, policy preferences, and behaviors among Facebook users** in 110 countries, territories, and geographic groups. Selected findings include (July 2022):

- Most respondents in 46 of the areas surveyed say they know at least a moderate amount about climate change, and when presented a brief explanation of climate change, **the vast majority of respondents indicated a belief that climate change is happening** - even the lowest percentage expressing belief came in at 67% of respondents (Laos and Haiti).
- **In 25 surveyed areas, respondents are more likely to think that businesses are most responsible for reducing the pollution that causes climate change**, led by Germany and Mexico (both 43%), with 36% of respondents in the U.S. believing so. **In 42 surveyed areas, respondents are more likely to think that the government is most responsible** for reducing the pollution that causes climate change.
- **In the U.S. 45% believe addressing climate change will have economic benefits, while 29% believe impacts may be negative.**

- **In the U.S. a majority (52%) support increasing renewables “much more”** and an additional 22% “somewhat more.” A majority (58%) supported reducing fossil fuels.

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Environmental technology company **Greenprint released its second [Business of Sustainability Index](#) tracking consumer sentiment on sustainability within the United States.** Key findings include (June 2022):

- 66% of Americans, including 80% of young Americans (ages 18-34), are willing to pay more for sustainable products versus less sustainable options, despite rising inflation.
- 78% don't know how to identify environmentally friendly companies.
- 60% are more likely to buy stock in a company that is environmentally friendly versus one that is not.
- 38% believe corporations when they make claims of environmental friendliness, down from 47% from 2021.
- 41% say US corporations overall are doing a poor job reducing their carbon footprint.

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More than half of car buyers say they want their next car to be an EV, according to research from **Ernst & Young**. The firm's annual Mobility Consumer Index survey, which polled 13,000 people in 18 countries, indicated 52% of respondents looking to buy a car want an EV, **an increase of 22 percentage points in two years**. Buyers in Italy (73%), China (69%) and South Korea (63%) showed the most interest, while EV enthusiasm was lower in Australia (38%) and the U.S. (29%). Researchers call it a “tipping point in the global car-buying market.” (May 2022)

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The 2022 edition of the annual Axios Harris Poll 100 indicates a slow or inconsistent response to political crises can damage consumer's trust in a company. Findings of the annual survey, which appraises the reputations of the 100 most visible brands in the country, suggest that companies are increasingly having to balance the expectations of their employees, consumers, and politicians. **When polled on whose views a company should prioritize, 31% of respondents said their customers, 28% said employees, and just 16% said shareholders.** Brands with clear, partisan political affiliations mostly saw their reputation rankings decline. (May 2022)

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Results from the Conference Board's survey of U.S. consumers indicate that the sustainability features that “sway” American consumers are changing. Insights to inform corporate sustainability strategy and communications include (May 2022):

- **Consumers care about how workers are treated.** Creating awareness about policies and actions that benefit employees is a worthwhile investment.
- **Target audiences may be better reached by using specific and descriptive labeling** for sustainability initiatives rather than labeling all ESG efforts under the term “sustainability.”

- **Focusing on younger, urban consumers** who are already convinced about sustainability may be a better investment than efforts to “convert naysayers.” These consumers are also most receptive to climate initiatives.
- **Revenues from sustainable products should not be the only measure of ROI;** Intangibles such as employee engagement and investor appeal also matter.
- While interest in sustainability varies widely across consumers with differences in political attitudes, residential settings, or age, **there is less difference when consumers are segmented by gender or income.**

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Travelers are increasingly looking for more sustainable ways to explore the world, according to an Expedia survey of 11,000 people from 11 countries. Among the findings: 90% of consumers look for sustainable options when traveling, two-thirds want more information about sustainability from lodging and transport services, and consumers are willing to spend an average of 38% more to make traveling more sustainable. (April 2022)

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Survey data indicates that Americans’ collective trust of tech companies continues to decline, according to the 2022 edition of Edelman’s annual Trust Barometer. **Only 54% of Americans surveyed said they trust technology companies,** down 19% from 2019 and compared to a global average of 74%. Responses also broke along political lines, with **almost 67% of democrats expressing trust compared with only 49% of republicans.** (April 2022)

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Out of all the ESG reports and stories distributed by 3BL Media in 2021, “environmental topics generated the most volume and audience interest,” with a 68% rise in audience engagement over 2020. The second most popular category, **philanthropy and cause initiatives,** declined 29% in engagement from 2020 when companies focused heavily on COVID-related activities. In third place was content related to corporate **diversity, equity, and inclusion,** which saw a 35% rise in engagement. (March 2022)

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69% of Americans are in favor of the U.S. prioritizing the development of renewable energy sources and taking action to become carbon-neutral by 2050, according to a new Pew Research Center poll of about 10,200 US adults. 67% say the U.S. should use a mix of fossil fuels and renewables, and 31% believe the U.S. should phase out fossil fuels completely. (March 2022)

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A majority of consumers believe companies should bear more of the costs associated with combating climate change than governments, taxpayers, consumers, and other countries, according to a new POLITICO Morning Consult Global Sustainability Poll of 1,000 consumers in 13 countries. Large majorities in every country think fossil fuel companies should be held accountable for their climate impact. (Feb 2022)

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87% of the American public supports the federal government requiring corporate disclosure on environmental impact data and human capital, according to a new JUST Capital, Ceres, SSRS, and Public Citizen survey. (Feb 2022)

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[The Young Consumer and a Path to Sustainability](#) (Credit Suisse Research Institute) — **Analyzes drivers of Gen Z and millennial consumer spending across a range of goods and services**, based on surveys of 10,000 consumers ages 16-40 across 10 countries. It concludes that **emerging economies** (especially Mexico, India, and China) **have a larger share of young consumers who are environmentally conscious, are willing to pay more for sustainable products and switch to such products, and accept that tighter regulations might be necessary**. The opposite appears true for consumers in the U.S., France, and Germany. **Key findings** (Feb 2022):

- 63% don't believe corporate climate claims.
- About 60% of those in India, Brazil, South Africa, Mexico, and the U.S. think corporate management's compensation should be tied to the sustainability of their company's products.
- Almost 80% intend to only buy sustainable products or buy as many as possible, and over 15% of those in China and India already only buy sustainable products.
- 63% expect to own an electric or hybrid electric car.
- 41% believe the fashion industry is unsustainable, yet only 20-40% intend to purchase less fast fashion, including more than half of those in China.
- 65-90% have a "high level of anxiety" related to sustainability issues.

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[Healthy & Sustainable Living: 2021 Highlights Report](#) (GlobeScan) — **Surveys over 30,000 consumers across 31 markets about their sustainability-related attitudes and behaviors, and identifies barriers to adopting a more sustainable lifestyle**. While environmental concerns are at an all-time high, a large gap exists between aspiration and action for sustainable living. CEF members **PepsiCo** and **Visa** were among GlobeScan's corporate partners. **Key findings** (Jan 2022):

- 63% say that climate change is "very serious" —the largest proportion recorded since GlobeScan began tracking in 1998
- Only 22% have made major changes to be more sustainable in the last year, and 70% say they're already "doing everything they can" to protect the environment
- 46% cite affordability as a barrier, and 28% say they're not sure how to live more sustainably

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[2022 Edelman Trust Barometer](#) (Edelman) — **Reports that business is the most trusted institution and even more is expected of business due to governments' "failure to lead"**

during the pandemic. Edelman CEO Richard Edelman says, “Societal leadership is now a core function of business.” **Key findings:**

- Nearly half of survey respondents see government (48%) and media (46%) as “divisive forces in society.”
- Respondents think business should do more to address climate change (52%), economic inequality (49%), and workforce reskilling (46%).
- The majority of stakeholders buy from or advocate for brands (58%), choose a place to work (60%), or invest (64%) based on their values and beliefs.
- “Distrust has become the default,” with 59% of respondents saying they tend to distrust until they see evidence that something is trustworthy.

[MORE »](#) (Jan 2022)

Out of 29,000 people surveyed across five countries, 83% want to be more sustainable but only 30% are “ready to act now,” according to Garnier’s annual “One Green Step” report. In 2021, 67% committed to reducing their plastic consumption, and 61% recycled more. (Jan 2022)

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[2022 Global Automotive Consumer Study](#) (Deloitte) — **Identifies consumer opinions toward issues impacting the automotive sector**, including technology development, EVs, purchase experience, and transportation modes. **Key trends among 26,000 consumer responses across 25 countries** (Jan 2022):

- Consumers still have a limited willingness to pay for advanced technologies
- Most consumers, including 69% of US consumers, still prefer an ICE powertrain for their next vehicle
- Interest in EVs is driven by lower running costs and a better driving experience
- Driving range and lack of available charging infrastructure are barriers to adoption
- Many still prefer in-person purchase experiences
- Personal vehicles are still preferred over shared mobility

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Out of over 19,000 people across 10 countries, consumers value innovations that have a lower carbon footprint (35%) and use less energy (40%), according to a new Whirlpool Corporation study. Consumers are “prepared to change their behavior to reduce their environmental impact,” with 63% saying they are reducing weekly laundry loads and 67% saying they’re reducing or reusing single-use plastics. (Jan 2022)

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[Climate Culture Index](#) (Rare) — **Measures the state of US consumer beliefs related to climate action**—from what individual Americans are thinking (e.g., their mindsets) about various high-impact climate actions to what they are doing about them. (2021)

[The Intersection of Business and Politics](#) (Brunswick Group) — **Warns about “The Talking Trap”**—the danger of corporate executives impulsively speaking out on social issues unrelated to their company’s core business. **Key findings** (Dec 2021):

- 63% of corporate executives think companies should speak out on social issues in American life, but 44% of 2020 voters said companies should only do so if the issue directly relates to the company's core business
- "Reflexive messages fall flat. ... If your organization decides to respond to an emerging issue, engage with humility, vulnerability, and enthusiasm on the issues and in ways that are most relevant to your organization."
- "Organizations need to be ready to back it up with an investment that is as tangible as it is earnest — donations of cash, donations of product, donations of your employees' paid time, and with your daily business practices."

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Key findings from a new [national poll](#) of 1,000 Americans by the Yale Program on Climate Change Communication, all of which are record highs since Yale's surveys began in 2008 or the questions were first asked (Nov 2021):

- Seven in 10 Americans are at least "somewhat worried" about global warming
- 55% think global warming is harming people in the U.S. "right now," and 50% think they themselves will be harmed by global warming
- 52% have personally experienced global warming's effects—the first time there has been a majority

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Nearly 70% of US consumers think "they can influence companies to do better by buying from them when they do," according to an [SB Brands for Good](#) and Ipsos survey of 5,000 adults. **85% are loyal to brands that help them have a better, more balanced life.** (Nov 2021)

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Out of 10,000 people in 10 countries, including 1,000 US respondents, 41% of respondents said that an environmentally friendly certification or seal of approval impacts their purchase choices, according to a new Essity survey. **40% said that a company's environmental practices affect their decision to work there.** (Nov 2021)

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Advocacy organization [Stop Funding Heat](#) and activist group [Real Facebook Oversight Board](#) released a new [report](#) concluding that climate misinformation on Facebook was viewed **1.4 million times daily over the past 8 months** – nearly 14 times the estimated [daily user traffic](#) to Facebook's climate science information hub. (Nov 2021)

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Key findings of JUST Capital's sixth annual "Americans' Views on Business Survey" (Nov 2021):

- 49% believe companies have a positive impact on society, down from 58% in 2018

- 63% believe CEOs of large companies are responsible for taking a stand on important societal issues, with income inequality, racial equity, and climate change ranked as the top three issues
- 84% say that companies “often hide behind public declarations of support for stakeholders but don’t walk the walk”
- 58% said capitalism “is not working for the average American”
- 36% believe companies are positively impacting the financial well-being of their lowest-paid workers

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Out of 27,000 global consumers, 83% are willing to pay more for a product if they’re certain it’s ethically sourced, and 88% prioritize buying from companies with ethical-sourcing strategies—a 10% increase since before the COVID-19 pandemic, according to a new OpenText survey. **64% of 18- to 24-year-olds** surveyed said they **would stop buying from a company if it were accused** of doing business with unethical suppliers. (Oct 2021)

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Only half of consumers (53%) say buying healthy, sustainable food is easy, with affordability (48%) and availability (36%) being the biggest obstacles, according to a new study of approximately 30,000 adults in 31 global markets. Their two **biggest concerns** about the food system are the **use of chemical fertilizers and pesticides (81%)** and **single-use plastic food packaging (78%)**. (Sept 2021)

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[The Complexity of Trust: PwC’s Trust in US Business Survey](#) (PwC) — Breaks down **what consumers, employees, and business leaders believe are the foundational elements of trust in business, the role of ESG in building trust, and the pandemic’s impact on trust**. Reports that **employees and customers trust US businesses more now** than before the pandemic. (Sept 2021)

45% of young people (ages 16-25) say their feelings about climate change have “negatively affected their daily life and functioning,” according to a new global survey of 10,000 in 10 countries by academics at the University of Bath, Stanford University, and others. **65% believe the government is failing them**, and 75% believe the “future is frightening.” (Sept 2021)

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72% of people are greatly concerned that climate change will harm them personally during their lifetime, and 80% are willing to make “a lot of/some” changes to how they work and live to help reduce the impact of climate change, according to a Pew Research Center survey of nearly 20,000 in 17 advanced countries in Asia, North America, and Europe. 78% think China’s handling of climate change is “very bad” or “bad,” compared with 61% for the U.S. (Sept 2021)

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[2021 Edelman Trust Barometer](#) (Edelman) — Reports that **a majority of its survey respondents believe business leaders (56%), government leaders (57%), and journalists (59%) are**

“purposely trying to mislead people by saying things they know are false.” Also reports business is the only institution respondents believe is competent and ethical. Asserts that **protecting information quality is the biggest opportunity for businesses to earn trust.** (Sept 2021)

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61% of people in large global economies—including the U.S., the U.K., China, India, Brazil, Japan, and Germany—say they would evaluate a prospective employer based on its position toward social issues or its employees' freedom to express political beliefs, according to the Edelman Trust Barometer. (Sept 2021)

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65% of American workers believe companies are “promoting an economy that serves all Americans” and building an economy that allows everyone to “succeed through hard work and creativity” and “lead a life of meaning and dignity,” up from 45% in 2019, according to a JUST Capital poll. (Aug 2021)

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[The Purpose Action Gap: The Business Imperative of ESG](#) (Barkley, Jefferies) — Analyzes shifts in consumer and brand values around the role and importance of ESG, based on 3 studies of consumers and C-suite executives. **95% of consumers believe “ESG is as important or more important than 12 months ago”** and are more willing to act when brands make sustainability affordable and accessible. **98% of companies believe “acting on ESG-related issues is more important or much more important than it was 12 months ago,”** though 20% are “very” ready to speak with investors on ESG-related topics. (Aug 2021)

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Nearly ⅓ of millennial shoppers tend to avoid buying products with palm oil, while nearly half avoid products with unsustainable palm oil, according to research commissioned by Nestlé. (Aug 2021)

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Americans say they'd take action around global warming, but few do, according to a survey of 1,037 U.S. adults by Yale University and George Mason University climate opinion researchers. **Nearly 30% said they're "definitely" or "probably" willing to join a campaign to get elected officials to take action on global warming, but 1% currently participate in such an effort.** (Aug 2021)

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56% of Americans favor faster delivery over shopping sustainably, according to a Retail Brew/Harris Poll survey of 2,000 adults. **54% (⅓ of millennials and Gen Zers, 55% of Gen Xers, 42% of baby boomers) said it's important for retailers to be sustainable, while 46% said it's**

not important. 46% said higher prices are the main roadblock to buying sustainable goods. (Aug 2021)

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Radically Better Food: 4 Imperatives for Regenerative Brands ([BBMG](#), [GlobeScan](#)) — **Breaks down trends in consumer preferences around sustainable food brands** based on their survey of 1,000 U.S. consumers, focus group of 100 food-focused consumers, and interviews with industry experts and brand leaders. **Offers 4 imperatives for brands to build a regenerative brand** and examples of food brands taking on regenerative systems. (July 2021)

A majority of Americans see investing in clean energy industries, particularly for the purpose of manufacturing products like steel and cement, as a way to build an economic foundation for community prosperity, according to a nationwide poll commissioned by Breakthrough Energy. Americans also strongly support various approaches to boosting clean energy technologies, including investing billions in direct R&D, demonstration, procurement, and tax credits. (July 2021)

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Gen Zers and millennials are more likely to engage with climate change social media content and be anxious about the future afterward, according to a Pew Research Center survey of nearly 14,000 people. A Deloitte poll of nearly 30,000 Gen Z and millennials in 45 countries found 43% and 44%, respectively, fear the environment has “passed the point of no return.” (July 2021)

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7 out of 10 Americans know of the scientific consensus that people are largely the cause of climate change and that the world isn’t on course to reach the Paris Agreement temperature-reduction targets, according to an Ipsos poll. (July 2021)

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71% of people, particularly those in developing economies, think businesses using scarce natural resources should pay additional taxes, even if doing so could raise the prices of goods and services, according to an Ipsos survey for the World Economic Forum of nearly 20,000 adults across 28 countries. 85% want the “information on the use of scarce natural resources” available on product labels. (July 2021)

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Individual investors are finding it difficult to trust corporate disclosures, according to a recent survey conducted by Opinium Research and commissioned by Workiva. **64% find it challenging to judge whether a company is doing the right thing,** and 50% have a hard time trusting corporate promotions of environmental and societal initiatives. **43% prefer ESG information in**

data and numbers rather than qualitative descriptions and assessments. (May 2021)

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The majority of Americans, especially Gen Z and Millennials, support an array of measures to address climate change but oppose phasing out of fossil fuels entirely, according to a new study by Pew Research Center. Key findings (May 2021):

- **64% believe efforts to reduce the effects of climate change should be prioritized**, even if it means fewer resources for addressing other important problems (67% of Gen Z and 71% of Millennials)
- **69% view large businesses as doing too little to address climate change**, followed by ordinary Americans (66%) and the energy industry (62%)
- **71% believe the U.S. should prioritize the development of alternative energy sources**, such as wind and solar, over the expansion of oil, coal, and natural gas production
- 64% feel the U.S. should use a mix of energy sources, including oil, coal, natural gas, and renewables; **only 33% support phasing out fossil fuels entirely**
- **51% oppose phasing out the production of new gasoline cars and trucks by 2035**

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Public image and trust in science has improved to its highest recorded level in 4 years, according to [3M's State of Science Index](#). (May 2021)

- 91% of respondents trust science
- 85% agree there are negative consequences to society if science is not valued
- 89% of people feel science brings hope and makes the future brighter
- **92% support collaboration between public and private sectors to advance science**
- **51% expect corporations to work with governments to advocate for regulations and policies solving global challenges**, including preparing for the next pandemic (55%), mitigating the effects of climate change (46%), and removing barriers to quality STEM education for underrepresented groups (40%)

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Americans believe CEOs of large companies should help to influence lawmakers on social and economic issues, according to a survey by JUSTCapital. **70% support CEOs influencing corporate tax policy, infrastructure, and blocking hacking attempts from foreign entities, 65% on racial equality, and 59% on voting rights.** (May 2021)

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Global consumer interest and demand for sustainable goods has surged over the last 5 years, according to a study commissioned by WWF. **Searches for sustainable goods rose 71% over the previous 5 years in high-income and emerging economies. Twitter posts related to biodiversity and nature loss rose 65% (from 30M to 50M) in the last 4 years, and global news coverage of environmental protests increased by 103% in 2019.** (May 2021)

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[Trust Barometer Spring Update: A World in Trauma Roughly](#). 77% of respondents said they **trust their employer** and **62% trust businesses**, compared to **NGOs (58%)**, **government (56%)**, and **media (51%)**. Nearly **80% of employees expect their companies to act on vaccine hesitancy, climate change, automation, misinformation, and racism**. (May 2021)

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Americans are drawn to companies with stronger political positions, according to a survey by Axios and the Harris Poll gauging the reputation of the most visible brands in the United States. (May 2021)

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Sustainable packaging is a priority for consumers in North America, South America, and Europe, according to a survey by Boston Consulting Group. **67% consider recyclable packaging important**, and **54% consider sustainable packaging** when selecting products. **83% of consumers under 44 years of age reported a willingness to pay more for sustainable packaging**, compared to 70% of all consumers. (May 2021)

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Most Americans believe companies play an essential role in advancing social justice and plan to hold them accountable to public commitments, according to Porter Novelli's 2021 Business & Social Justice Study. **Key findings** (May 2021):

- **58% of employees hold their employer to higher social justice standards** than other companies, and **43% are reconsidering their current job** because their company isn't doing enough to advance social justice
- **45% have researched what companies have done to make progress** against social justice commitments
- **60% are optimistic that real change will occur** as companies begin to address social justice issues and **62% believe companies can help normalize social justice conversations** through their marketing and communications

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Consumers in the U.S., U.K, Canada, France, and Spain are eager to “go green” but don't know where to start, according to a survey by Oracle (April 2021):

- 45% of respondents said fighting climate change is personally important, and 54% want to reduce their carbon footprint
- 80% of Millennials and 73% of Gen Z consumers are willing to pay more for clean energy; compared to 36% of Baby Boomers
- 39% have never heard the word “decarbonization,” and 67% have no or only a vague idea where their CO2 emissions come from

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“Not knowing how” is the biggest barrier for people to act sustainably at home, according to a Procter & Gamble study in Canada. 71% of people want to be more sustainably conscious at

home, and nearly 76% of parents are inspired by their children to do so, but fewer than 40% make environmentally conscious choices at home as often as they'd like. (April 2021)

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There's overwhelming public support for governments to take further actions to address climate change in both developing and industrialized countries, according to an international survey by Facebook Data for Good and the Yale Project on Climate Change Communication. 65% of US respondents say the government should do more. Over half of respondents in nearly every country and territory "strongly support" their government's participation in the Paris Agreement. (April 2021)

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Two-thirds of U.K. adults are wary of business communications relating to environmental and social purpose because they are concerned brands are not yet "walking the talk," according to a study commissioned by the Good Agency. Two-thirds of the 4,700 respondents thought corporate communications showcasing brand purpose "all look the same or very similar" and contained "cliché" expressions and confusing jargon around topics relating to ethics, community work, climate, and nature. (April 2021)

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The Covid-19 pandemic has resulted in marked increases in consumer passion for environmental issues, according to a recent Mastercard study of consumers in 24 countries. **62% of consumers indicate companies should behave in more sustainable and eco-friendly ways**, while **58% say they are more conscious about how their actions can impact the environment**, with Gen Z and Millennials (65%) leading this trend. (April 2021)

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160 million households worldwide watched at least one film or show related to sustainability, climate, or the planet on Netflix in 2020, according to Netflix. (April 2021)

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eBay searches for sustainable homewares like "eco furniture" and "sustainable furniture" saw a growth of 123% and 171% in 2020 compared to 2019, according to the online marketplace. (February 2021)

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The majority of the global population (64%) view climate change as an emergency, according to the largest ever public opinion survey on climate change (1.2 million respondents in 50 countries, covering 56% of the global population), by the UNEP's [2020 Mission 1.5 campaign](#).

The 4 most popular climate policy areas (January 2021):

- Conservation of forests and land (54% public support)
- Solar, wind and renewable power (53%)
- Climate-friendly farming techniques (52%)
- Investing more in green businesses and jobs (50%)

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78% of Americans wish more brands used paper packaging instead of plastic packaging, and 68% are more likely to purchase from companies who do, according to a recent survey by Ranpak and the Harris Poll. The survey also found that **72% of Americans are more likely to purchase again from brands that ship sustainably**. (January 2021)

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“[2021 Edelman Trust Barometer](#)” (Edelman) an annual assessment of **global public trust in institutions**, finds that **business is the most trusted institution** — compared to governments, NGOs, and media — and is **the only institution seen as both ethical and competent**. (January 2021)

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“[Retail Carbon Footprints: Measuring Impacts from Real Estate and Technology](#)” (MIT and Prologis) finds that **carbon emissions from online shopping are 36% lower on average than those produced by in-store trips**. The report also found that **a full standard delivery van can replace more than 100 individual car trips to a store**, with fleet electrification increasing this advantage further. (January 2021)

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“[Social Impact Stats Compendium 2020](#)” (For Momentum, July 2020) aggregates a broad range of **cause marketing, purpose, CSR, and social impact statistics** from past research.

“[2020 Zeno Strength of Purpose Study](#)” (Zeno Group, July 2020) analyzes survey responses from 8,000 individuals across 8 markets to better understand **consumer attitudes towards purposeful brands**. The report finds that consumers who think a brand has a strong purpose are **4 times more likely** to purchase from the company, **6 times more likely** to protect the company in the event of a misstep or public criticism, **4.5 times more likely** to champion the company and recommend it to friends and family, and **4.1 times more likely** to trust the company.

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Nearly 80% of people in the U.S. and UK would be willing to make lifestyle changes, similar to those made during the pandemic, to stop climate change, according to a Futerra and OnePulse [survey](#). The **top-3 lifestyle changes** people are willing to make are **“wasting less,” “avoiding plastic,” and “switching to green energy.”** (June 2020)

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[“2020 Global Buying Green Report”](#) (Trivium Packaging and Boston Consulting Group, April 2020) analyzes survey responses from more than 15,000 U.S., Europe, and South America individuals to better understand consumer attitudes toward sustainable packaging. The report finds that **74% of consumers are willing to pay more for sustainable packaging**, with nearly **25% willing to pay 10% or more**.

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[“Brand Pressure Index”](#) (High Lantern Group, Jan 2020) ranks the **top social issues that impacted corporate brands in 2019** based on an analysis of 6.2 million tweets from leading activists, influencers, and political figures. The top-10 corporate issues included the following:

1. Climate change (up 77% from 2018)
2. Plant- and lab-based foods (up 274% from 2018)
3. Aviation safety (up 689% from 2018)
4. Living wage (down 3% from 2018)
5. Data security (down 12% from 2018)
6. Union concerns (down 11% from 2018)
7. Pesticides (up 26% from 2018)
8. Antitrust (up 42% from 2018)
9. Trade barriers (up 14% from 2018)
10. Consumer privacy and regulation (down 20% from 2018)

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[“2019 Gen Z Purpose Study”](#) (Porter Novelli and Cone Communications, November 2019) finds that **90% of Gen Z believe companies must take action on social and environmental issues** and **75% will do research** to see if a **company is being honest when it takes a stand on issues**. The report also finds that **“environment”** is the **top priority issue Gen Z wants companies to address**, followed by poverty and hunger and human rights.

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[“Waking the Sleeping Giant”](#) (Weinreb Group, June 2019) surveys 1,000 Americans to better understand consumers’ changing perceptions of single-use plastics, plastic packaging, and plastic waste. Key findings included the following:

- 80% of Americans surveyed have heard “at least a little” about single-use plastic bans.
- More than half (59%) of Americans surveyed have heard the most about “climate change” from news, social media, family and friends, while nearly the same amount of respondents (57%) have heard the most about “plastics in the ocean” from these same sources.
- Most respondents (27%) feel that plastic waste is the one issue they can impact the most.
- A majority of respondents (58%) say that they have more favorable views of brands that limit plastic use in packaging.

“From Me to We: The Rise of the Purpose-led Brand” (Accenture Strategy, 2018) analyzes survey responses from nearly 30,000 consumers globally to better understand what they expect from brands and companies. Key findings included the following:

- 62% of consumers globally want companies to take a stand on the social, cultural, environmental and political issues close to their hearts.
- 63% are buying goods and services from companies that reflect their personal values and beliefs.
- 62% of consumers say their purchasing consideration is driven by a company’s ethical values and authenticity.
- 74% crave greater transparency into how companies source their products, ensure safe working conditions, and their stance on important issues.
- 66% believe their actions can influence a company’s stance on issues of public concern.
- 47% have stopped doing business with a company as a result of its actions.

“2018 Edelman Earned Brand” (Edelman, 2018) finds that nearly two-thirds (64%) of consumers around the world will buy or boycott a brand based on its position on a social or political issue—up 13% from last year. Other key findings included the following:

- 53% of surveyed consumers believe that brands can do more to solve social ills than the government.
- 54% believe it is easier for people to get brands to address social problems than to get government to act.
- Consumers are just as likely to express purchase intent after seeing a values-led communication (43%) as they are after seeing a product-focused message (44%).
- Values-based messaging (32%) is more effective than product-focused communications (26%) in driving advocacy.
- 60% believe that brands should make it easier to see what their values and positions on important issues are when they are about to make a purchase.
- 56% of people believe that marketers spend too much time looking for ways to force them to pay attention to their messages and not enough time thinking of ways to make them want to pay attention.

“2018 Cone/Porter Novelli Purpose Study” (Cone and Porter Novelli) provides insight into the expectations and behaviors of Americans towards purpose-driven companies compared to traditional brands. Key findings included the following:

- 78% of Americans believe companies must do more than just make money; they must positively impact society as well.
- 77% feel a stronger emotional connection to purpose-driven companies over traditional companies.
- 66% would switch from a product they typically buy, to a new product from a purpose-driven company.