



# SUSTAINABILITY SENTIMENT TRACKER 2024/5

SUSTAINABILITY UNDER THREAT:  
**FIVE LESSONS** FOR BUSINESS TODAY

 PUBLIC**FIRST**

# INTRODUCTION

As the green transition marches on, once-distant climate pledges from both governments and businesses are fast approaching. Change is getting faster and more noticeable - not just in power generation but in the 'real world' of consumer-facing technologies and services like transport and heating.

These changes to everyday life are taking place against a political shift. The election of Donald Trump, on a pro-fossil fuel, anti-climate platform, throws much of the Biden climate agenda up in the air. Meanwhile, the UK parliament is increasingly divided on climate-related issues, and this is already starting to jeopardise efforts to reach net zero and meet the UK's statutory targets.

While voters remain concerned about the threat of climate change, the cost of living, migration, access to housing, healthcare and education have all, at various points, superseded the climate as a day-to-day concern in the last year. Persistent inflation since the pandemic has made consumers hyper-sensitive to price and therefore less willing to fork out for some goods that they previously would have been happy to pay for.

It's in this context that many have begun to rethink what sustainability means today. In the past twelve months, some companies have started to question the role of sustainability in the changing landscape: Chief Sustainability Officers have been removed from some executive committees, ESG research houses have lost staff, and brands have de-prioritised sustainability initiatives. Whether or not this is warranted, an important question remains: what do consumers actually think about sustainability today, and how does this thinking drive their preferences?

This is the reason behind the release of Public First's 2024 Sustainability Sentiment Tracker. This research, carried out for the fourth year in a row, tells us what consumers in the UK and the US think about sustainability and business, and how their thinking has changed in recent years. Ultimately, it aims to furnish businesses with new insights for navigating the rapidly changing world of climate politics today.



# WHAT IS THE SUSTAINABILITY SENTIMENT TRACKER?

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In July 2021, driven by a desire to enable businesses and governments to determine the importance of sustainability issues in the real world, Public First launched the *Sustainability Sentiment Tracker*. The Tracker provides answers to a series of questions about what consumers in the UK and the US think when it comes to sustainability and business. We have run the tracker each year since then, asking repeat questions to gather longitudinal data, as well as new questions to reflect the changing political context.

This time, we undertook two nationally representative polls of 2,016 adults in the US and 2,010 adults in the UK across August and September 2024 - asking consumers a series of questions to assess their political, economic and sustainability attitudes. This year, for the first time we also conducted a price-sensitivity experiment to reveal consumers' sustainability purchasing preferences.

*This paper is a short summary of a wide ranging piece of quantitative research in both the US and UK. The full tables can be found [here](#), but if you would like to speak in more depth about the findings, or discuss ideas for future research, please feel free to contact [energyandenvironment@publicfirst.co.uk](mailto:energyandenvironment@publicfirst.co.uk)*

*The polling was conducted by Sunita Pfitzner and Michela Arena.*





# LESSON ONE

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**DON'T CONFUSE  
CYNICISM FOR  
DISINTEREST**

LESSON 1: DON'T CONFUSE CYNICISM FOR DISINTEREST

Consumers are cynical about business. That's hardly new. Only 6% of Americans and 4% of Brits trust large corporations completely, and over a third in both countries don't trust them at all.

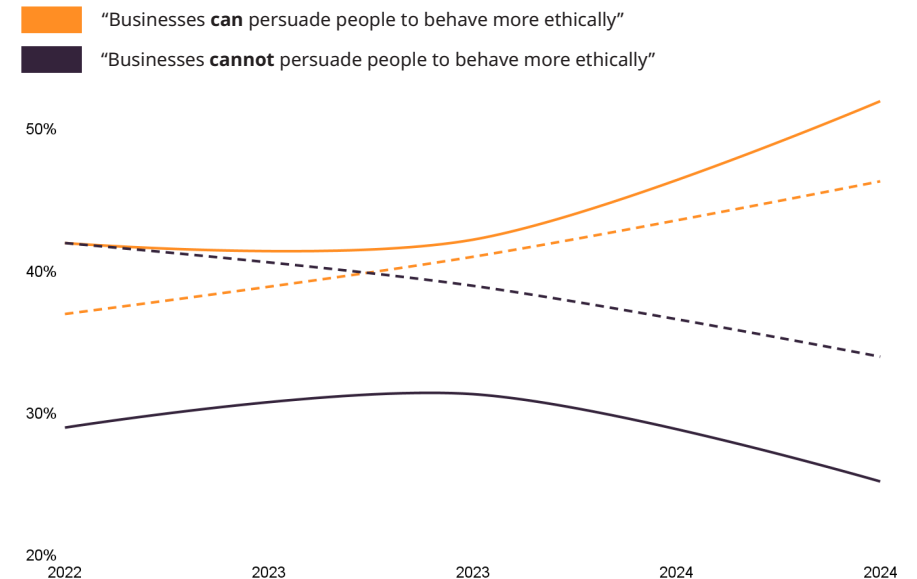
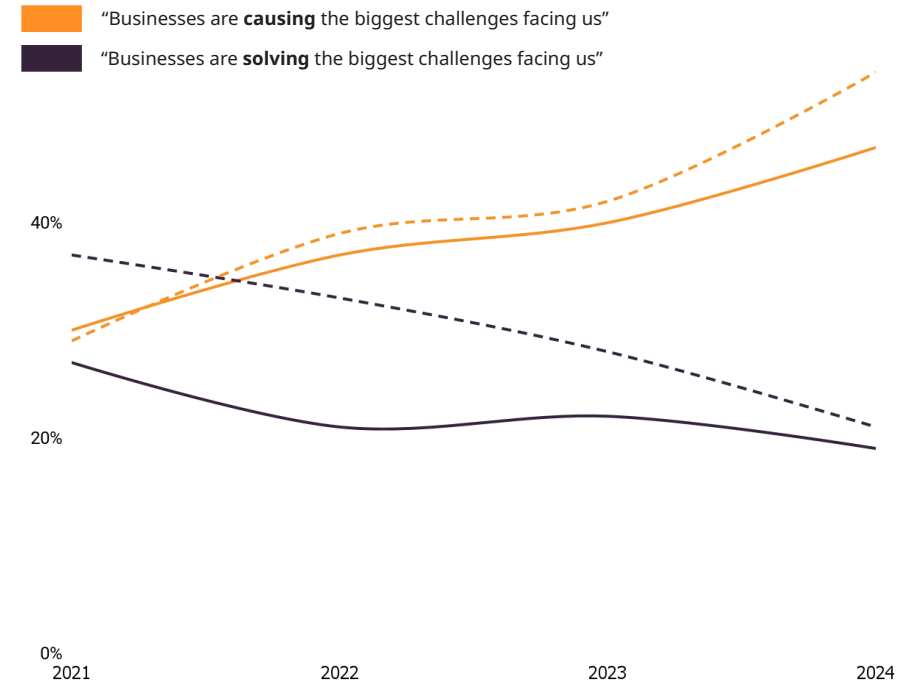
But consumer trust in businesses isn't just low: it's falling. There has been a shift in consumer perceptions of business over the past four years; now, **more people say that businesses are causing the world's biggest problems rather than solving them.**

54% of Americans and 47% of Brits now think businesses are causing the biggest challenges facing us, up from just 29% and 30% respectively in 2021. Today, only a fifth of the public say businesses are solving the biggest challenges facing us. This is a stark change.

But, crucially, a growing level of distrust in business shouldn't be mistaken for the idea that people don't care about businesses' behaviour, particularly on the climate. Sustainable practices are still important to consumers when deciding which companies to shop with. **74% of British adults say that businesses should commit to reducing their impact on the environment;** 71% say that businesses that cause a lot of pollution should be required to invest a proportional amount in environmental protection; and two-thirds say that businesses have a responsibility to their consumers to be honest about their environmental impact.

Consumers still care what businesses are doing to the environment and they increasingly recognise the influence and opportunity that businesses have to improve things. Today the majority of UK adults believe businesses can persuade people to behave more ethically. In the US, only 34% believe businesses do not have the power to convince people to behave more ethically, down from 41% in 2022.

**Brands should not confuse cynicism with disinterest.** Despite feeling that large corporations are at least partially responsible for causing climate change, consumers still think that businesses have the power to solve it, and will be crucial in the energy transition. Secondly, consumers still think businesses have a role to play in pushing them to act sustainably and ethically themselves. They see the influence brands can have over the public, and this is where they think businesses have a responsibility to do better.



Solid Line = UK data      Dashed Line = US data



# LESSON TWO

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**PAY ATTENTION TO  
& COMMUNICATE  
QUALITY**

Public First ran an experiment to find out which sustainable features consumers are most willing to pay for. Respondents were shown descriptions of T-shirts with various features (vegan, second-hand, locally made, carbon-neutral, eco-friendly, handmade, recycled, and made in the UK) at different price points and asked to judge their affordability. Using the Van Westendorp Price Sensitivity Meter - a common technique used to determine consumer price preferences - we identified acceptable price ranges for each feature to determine which attributes consumers value most.

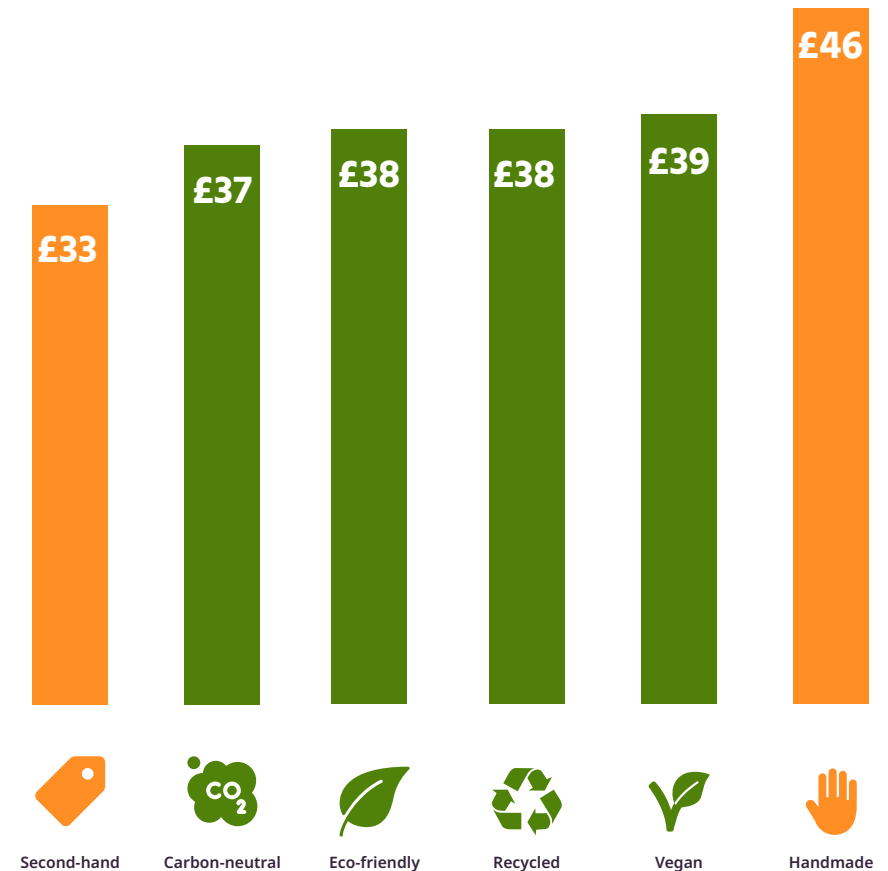
**What did we find?** The price sensitivity experiment showed that consumers were willing to pay substantially more for a 'handmade' product than for other types of T-shirt. This was measured by the price at which 50% of respondents considered the product to be 'too expensive'. The table shows how this 50% price threshold varied depending on the attributes that we tested.

The attributes highlighted in green are associated primarily with the environment and sustainability. By comparison, second-hand and hand-made have connotations for consumers beyond sustainability.

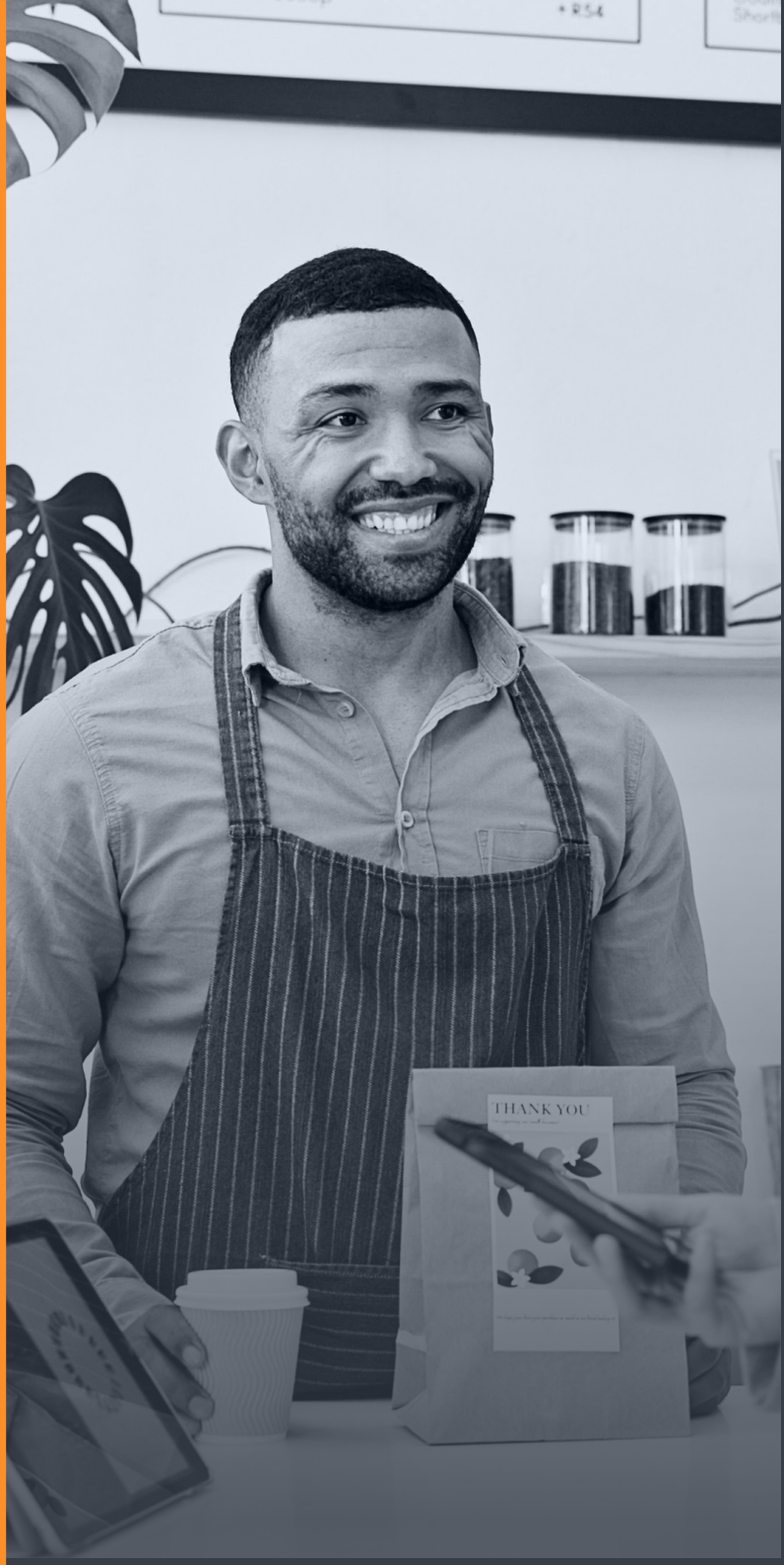
The green attributes had limited impact either way on consumers' willingness to pay; they did not reduce or increase the perception that a T-shirt was too expensive. The features that pointed towards the (either inferior or superior) quality of the product - 'handmade' and 'second-hand' - had a significant impact. Handmade had a £46 price threshold, whereas second-hand had a £33 price threshold.

**What does this tell us?** 'Handmade' implies sustainability but it also communicates other attributes like quality and care, which consumers are willing to pay more for. This is important. When consumers have less disposable income, communicating product quality goes a long way. Handmade Products are seen as sustainable but not only that - they are also seen to be of a higher quality. When thinking about marketing products, sustainability is therefore important, but it's not the main pull factor for consumers: finding a way to integrate messaging about sustainability with quality will be key to persuading the customer to spend more.

50% Price Threshold (£)



Consumers were willing to pay substantially more for a 'handmade' product



# LESSON THREE

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**DON'T EXPECT  
CONSUMERS TO  
PAY (MUCH) MORE**



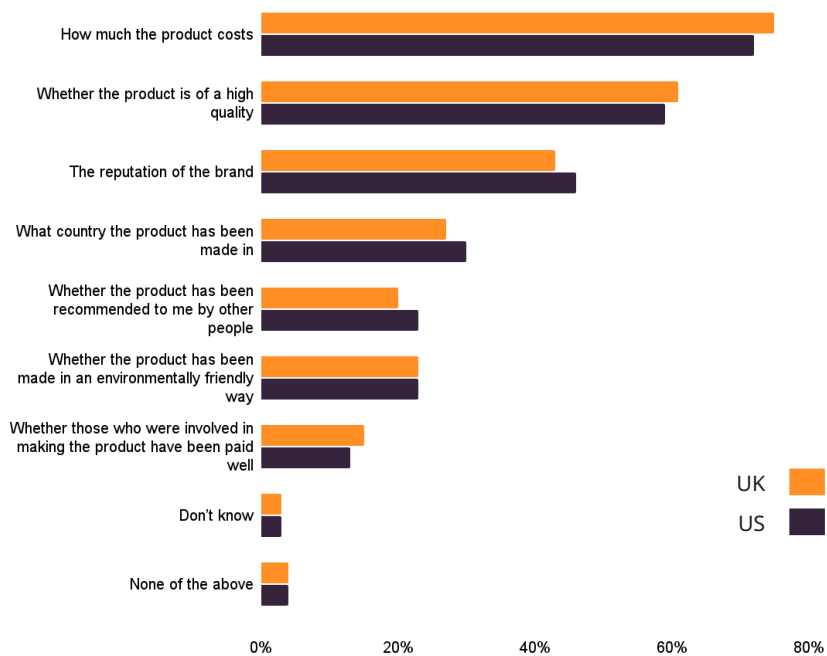
Though some consumers can be pushed to pay more, the environment is by no means their main consideration when shopping. Only one in four people say they consider whether products have been made in an environmentally friendly way when buying new products. By far the most important feature is cost.

Approximately three-quarters of consumers in both the UK and US consider cost when buying products. In line with the findings from our experiment, the quality of the product is next most important at roughly three-fifths of adults in both the UK and US.

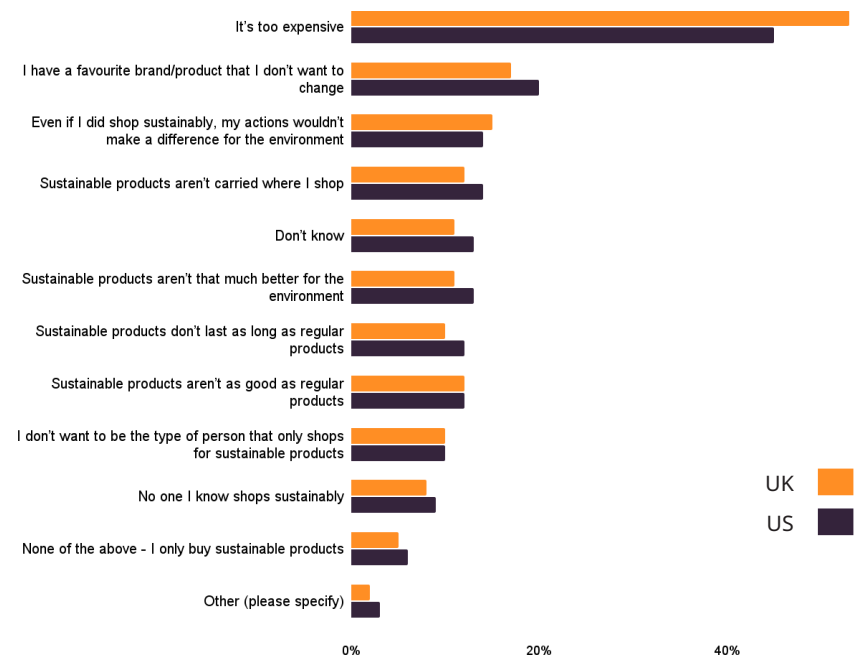
Indeed, when asked directly, consumers cite cost as *the main* barrier to shopping more sustainability.

Cost is 2.5 times more likely to be a barrier to UK consumers shopping more sustainably than the next highest barrier, brand loyalty. This may change with a rosier economy, but right now consumers' appetite to pay more for sustainable goods is limited by worries about the cost of those goods.

**When you buy new products, which of the following do you tend to consider about the products, if any? Please select all that apply**

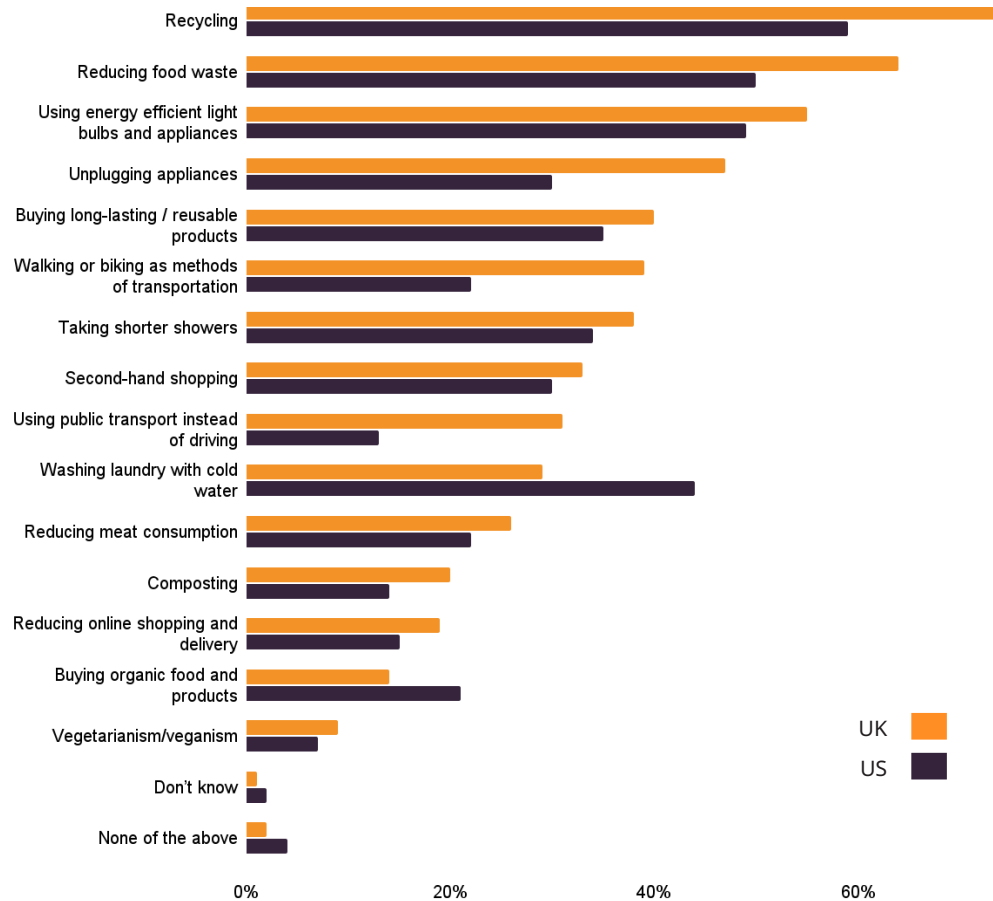


**Which of the following do you consider to be the main reasons why you don't shop more sustainably? Please select all that apply.**

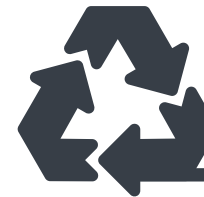


Still, it's worth bearing in mind that consumers do *want to* act sustainably, and already engage in sustainable behaviours on a day-to-day basis. Three quarters of Brits recycle every day, and two-thirds actively reduce their food waste. This suggests that if brands make it easier for consumers to act sustainably, for example through offering them sustainable options within an acceptable price range, consumers will take those opportunities.

*'Which of the following practices have you adopted in your daily life if any? Please select all that apply.'*



64%



74%

Three quarters of Brits recycle every day, and two-thirds actively reduce their food waste

# LESSON FOUR

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**BE CONSCIOUS OF  
THE AGE DIVIDE**



**Although cost is the biggest barrier to sustainable behaviour for consumers, it's not the whole story.**

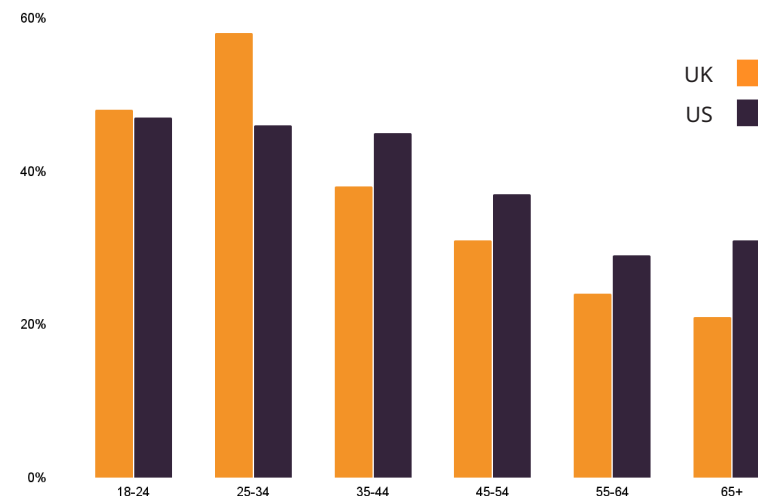
Looking back at our price sensitivity experiment, we found that within the public there are significant preferential differences. Put simply, young people will pay more - much more - than older generations for all types of products. And this is a consistent trend, i.e. it rises gradually, through age groups from 18 to 65+, as the chart on the next page shows.

What we learn from this is that younger people *expect to pay a higher premium overall*, before being confronted by a product, whereas older consumers tend to be more price sensitive. As an average across all the attributes we tested, the 50% price threshold for 18-34 year olds is £70, compared to £33 for 55 year olds or above.

These preferences may partially reflect younger generations' increased concern about climate change compared to older voters. Younger people declare themselves more willing to spend to make sure the products they buy are from companies that protect the environment. Over half of 18-35 year old Brits say they do this compared to less than a quarter of those over 55. This trend is less acute in the US market although it still exists.

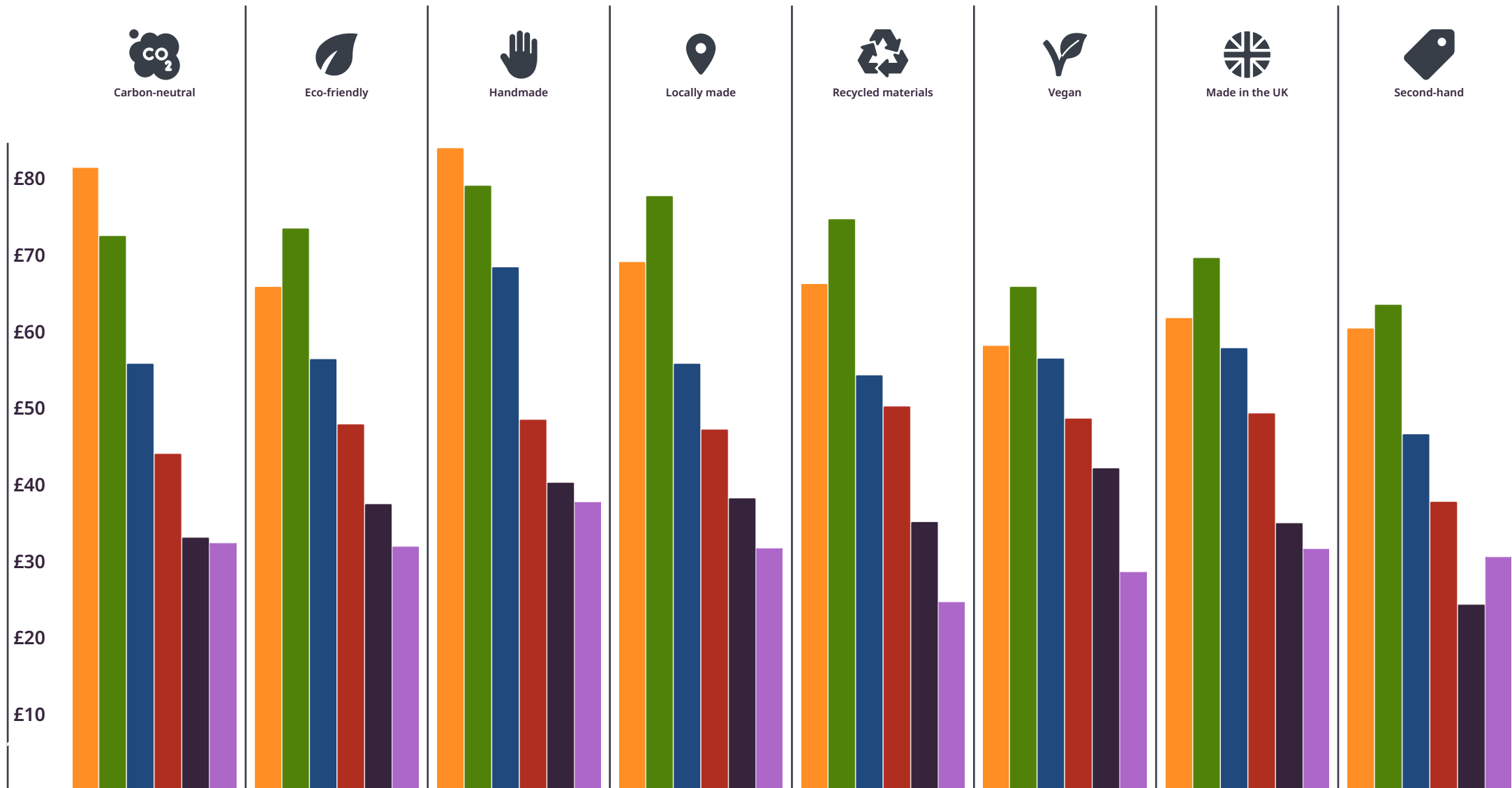
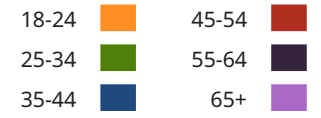
But differences in attitudes to the climate don't explain everything. The fact that every product attribute exhibited the same price trend indicates that part of the difference between old and young can be put down to their spending habits. The average consumer today is simply less thrifty than their parents. The lesson here is that businesses should know how old their typical consumer is and adjust accordingly. Age is one of the key characteristics that will determine how their consumers will value their products - and whether they'll see it as a bargain or a rip-off.

*"I spend more money to buy products from companies that protect the environment" (% agree)*



As an average across all the attributes we tested, the 50% price threshold for 18-34 year olds is **£70**, compared to **£33** for 55 year olds or above

Price Thresholds at 50% Probability of Being Too Expensive  
(by T-Shirt Type and Age Group)





# LESSON FIVE

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**IGNORE THE NOISE,  
CONSUMERS CARE  
ABOUT THE CLIMATE**

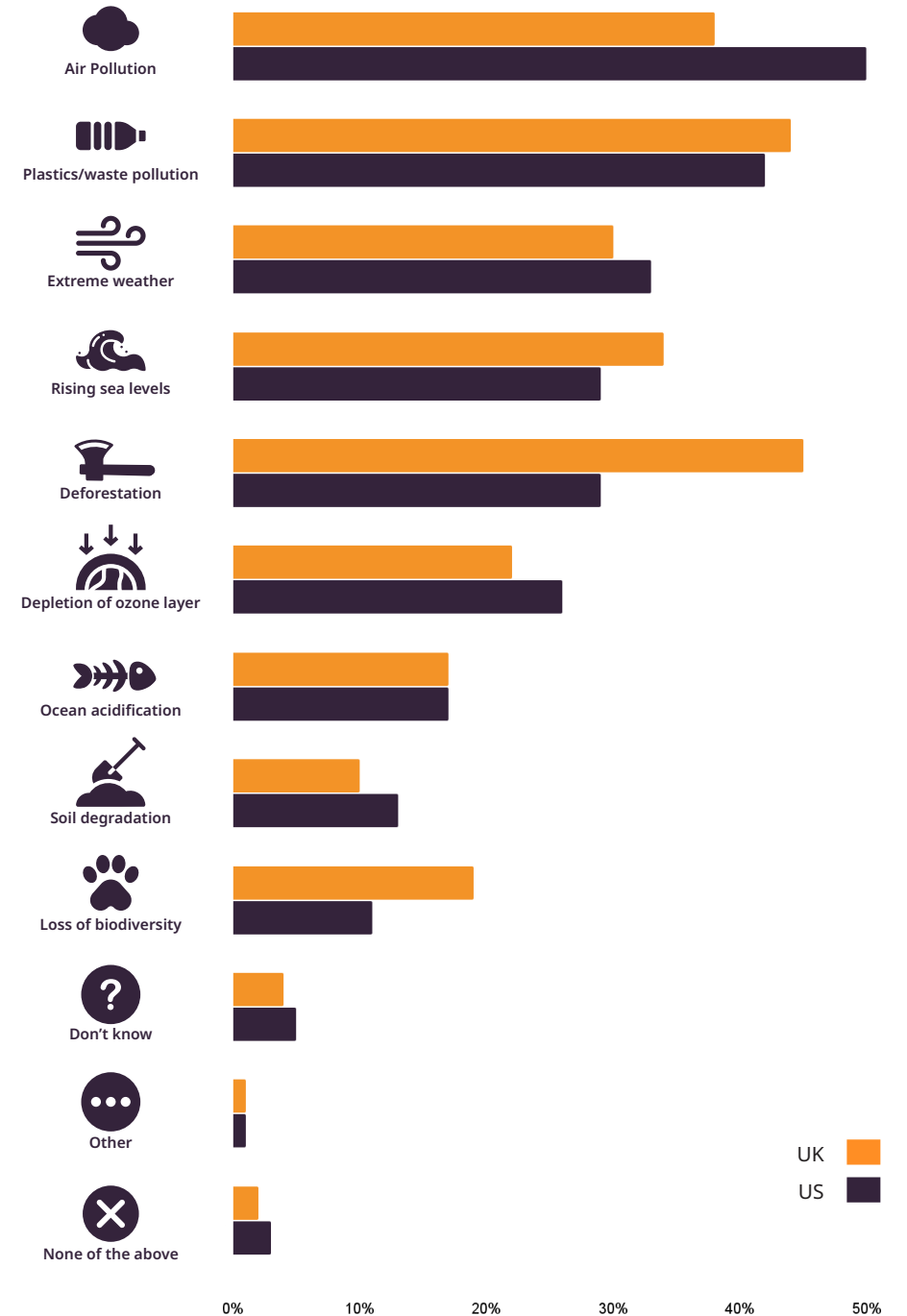
Much has been written about the fracture of the climate consensus over the past twelve months. In spite of the media headlines, businesses should keep in mind that the public's concern about the climate is steadfast, and tackling issues related to climate change is still important to consumers in the UK and US.

Whilst the climate is not up there with the more immediate concerns on the economy or healthcare for example, most people still see environmental issues as critical. This is especially true for younger consumers. The public see air and waste pollution, extreme weather and deforestation as urgent problems and only 3% of people said they did not believe any environmental issues to be urgent. Businesses should take note of these concerns when considering the role of sustainability in their operations going forward.

**Ultimately, the idea that we have entered an era where sustainability is no longer important is not backed up by the evidence.** Of course, sustainability needs to be balanced alongside other concerns that are primarily economic, but our fourth year of research in this area suggests businesses should remain committed to their efforts to support the green transition if they want to maintain - and win back - the confidence, trust and support of their consumers.

Less than 3% of people did not believe any environmental issues to be urgent

*'Which of the following environmental issues are most urgent, if any?' Please select up to three of the following*





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