



FEATURE

Who is setting the pace for personal sustainability?

From Deloitte's new Sustainable Actions Index comes a portrait of the people bringing sustainability into the mainstream.

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DELOITTE CENTER FOR INTEGRATED RESEARCH

CLIMATE CHANGE AND other ecological crises are about people. Our families, friends, neighbors, and colleagues will feel the effects. Many already are. People will be at the heart of solving these crises, too. As the costs and impacts of climate change become clearer, so too does the case for systems-level transformations spanning energy, mobility, food, industry, and more.¹ However, changes are only possible through collective action, built through cumulative shifts in attitudes and behaviors.

Because our choices are profoundly shaped by their context—by what our friends, family, colleagues, and communities do—the impact of an individual action can extend beyond the immediate effect, subtly influencing the behaviors of those around us. In fact, research on social movements and change suggests that a relatively small number of dedicated individuals can catalyze much wider and more rapid shifts in the broader environment.²

In the aggregate, such social contagion effects can have dramatic impacts on attitudes and behaviors, as seen on issues such as smoking and marriage equality.³ That's why personal efforts toward living a more sustainable life matter. It's less about the individual emissions avoided by walking rather than driving and more about the example the act sets for others.

So how do we build societal support for a low-carbon transformation?

We've created the Deloitte Sustainable Actions Index to help answer that question. Our goal is to understand what inspires individual and collective action on sustainability-oriented behaviors. This analysis can be applied to understand how close (or not) we might be to societal tipping points in behaviors and identify the levers companies and governments can use to both respond to, and encourage, the broader adoption of pro-climate norms. It is part of an ongoing effort to look at individual sustainability efforts in new ways,

centered around how companies, governments, and civil society can catalyze the rapid adoption of more sustainable practices by people. This is the first in what will be a series of studies exploring different applications of these ideas.

Constructing the Sustainable Actions Index

To better understand the individual and collective roles that people play in addressing climate change and sustainability, we asked respondents to Deloitte's Global State of the Consumer Tracker⁴ about how sustainability factored into three dimensions of their lives.

Because people are multifaceted, there are inherent tensions and tradeoffs in the lives of even the most sustainability-minded among us. That's why the survey was designed to gain insight into how sustainability is shaping respondents' actions in a variety of ways: in their personal choices, their civic participation, and in their workplace. The approach allows us to see how different demographic characteristics and beliefs manifest differentially in behaviors across people's lives. Younger people tend to be more engaged with sustainability across the board, for example, but they are especially active in the political sphere. We may dutifully recycle at home but take dozens of flights for business travel. We may urge our employer to do away with single-use plastics but support political candidates who oppose policies to address climate change.

Understanding these tensions and tradeoffs could enable leaders to better manage risks and identify ways to catalyze bolder, faster action. As a diverse set of stakeholders increasingly demands climate action, leaders can understand where, how, and from whom "people pressure" to do more on climate change and sustainability could manifest and intensify. And it can allow them to craft strategies and appeals to help accelerate action and

potentially shift behavior in ways that are tailored to how particular groups are enacting sustainability in different areas of their lives.

We addressed the three main spheres—home, workplace, and community—in a series of questions around personal choices, workplace concerns, and citizen actions, as described below.

- **Personal choices**, covering matters that are more directly under individual control as part of daily habits and purchasing decisions. These questions asked about the sustainability choices people are making on a day-to-day basis. Do they recycle or compost? Have they taken measures to reduce energy usage or get their energy from renewable sources? Have they walked or cycled rather than using a personal car? Have they considered, or bought, an electric vehicle? Do they try to buy more locally, avoid or consume less meat, or choose more sustainable products?

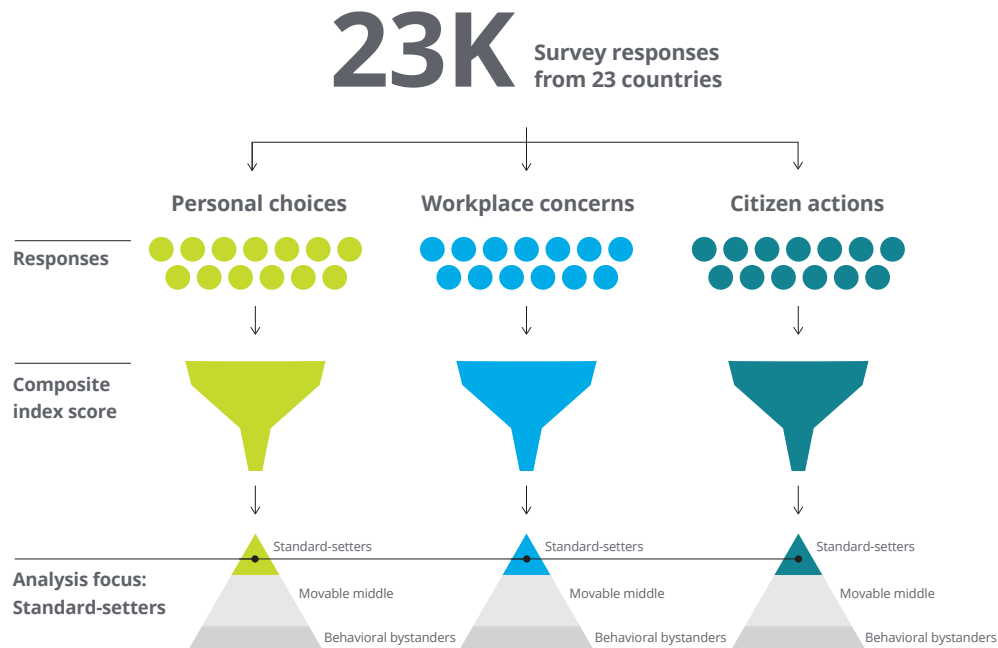
- **Workplace concerns** related to people’s engagement with sustainability at their jobs. We asked questions about people’s expectations of their employer’s sustainability actions, how a potential employer’s position on sustainability would factor into their decision to accept a job, and if people would consider changing jobs to work for a more sustainable company.

- **Citizen actions**, about a person’s likelihood of voting for a candidate who supports action against climate change; their support of regulations aimed at climate protection; their participation in climate protests or demonstrations; and if they have talked to public officials or their friends and family about climate change and the environment.

We asked these and additional questions of 23,000 respondents in 23 countries in September 2021. Responses were concentrated in North America, Europe, and East and South Asia.

FIGURE 1

How the Sustainable Actions Index was constructed



Source: Deloitte analysis.

To construct the Sustainable Actions Index, we then synthesized responses to questions corresponding to each of these three pillars and divided by the number of items (varied by respondent depending on nonresponses to specific items) and multiplied, resulting in a unique score on each dimension of the index. Respondents were then divided into three groups based on their index scores' deviation from the mean: *behavioral bystanders* (low), the *moveable middle* (medium), and *sustainability standard-setters* (high), respectively.

This analysis focuses on the latter group because it arguably serves as the best barometer for impactful

behaviors and allows us to understand more meaningful change and commitment. Research on social movements and change suggests that a relatively small number of dedicated individuals can catalyze much wider and more rapid shifts in the broader environment.⁵

Across geographies, a “typical” sustainability standard-setter, among the respondents participating in the survey, identifies as female; is 25–44 years old; is a high-income earner; has felt worried or anxious about climate change recently; has at least one child at home; and experienced at least one climate event over the last six months.

FIGURE 2

Profile of a sustainability standard-setter



Note: Deloitte analysis.

Digging deeper into the attributes of this group reveals important variations across index dimensions. There were five noteworthy demographic and attitudinal factors that especially correlated to people’s sustainability behaviors, namely: belief in climate change; direct experience of climate events; level of optimism about the prospects of global climate action; the presence of children at home; and age.

A sense of climate emergency tends to shape sustainable behaviors

Not surprisingly, those who strongly believe climate change is an emergency also tend to be the ones working most actively to address it across all aspects of their lives. But even modest shifts in the strength of one’s beliefs are associated with a significant drop-off in sustainability actions in areas of personal choices and workplace concerns. Twenty-four percent of respondents who strongly believe climate change is an emergency were standard-setters for personal choices, but that falls to just 9% among those who only “somewhat believe” climate change is an emergency.

However, belief in a climate emergency doesn’t seem to matter when it comes to motivating citizen actions. Even those somewhat doubtful that climate change constitutes an emergency are almost as likely to be highly active in political and civic activities as those who strongly believe climate change is an emergency.⁶

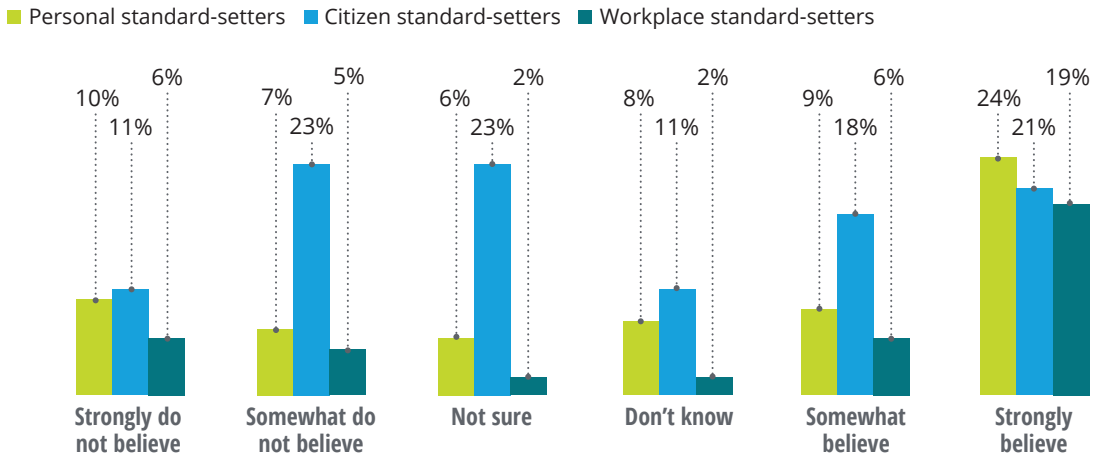
Seventy-two percent of total respondents believe climate change is an emergency.

This could suggest that climate change is a polarizing and motivating issue for people across the spectrum, but it might also indicate the degree to which actions to address climate change can enjoy widespread support—even among those who are more sanguine about global warming. Among all respondents, two-thirds of respondents wanted government to take more steps to address climate change and more than half said they supported new regulations, even if it cost them personally. An additional 54% of those surveyed said they would be more likely to vote for a candidate that supported climate action.⁷



FIGURE 3

Belief that climate change is an emergency among sustainability standard-setters



Source: Deloitte analysis.

Experiencing climate change can spark action

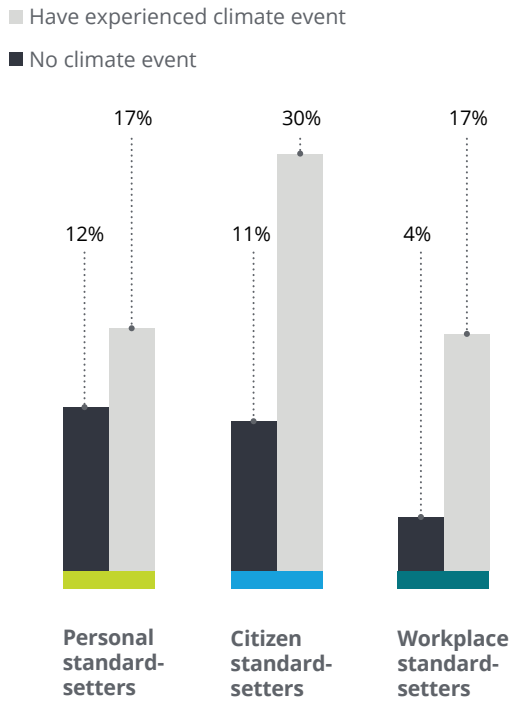
Across every index domain, those who reported recently experiencing a climate-related event—extreme heat, wildfire, drought, etc.—were more likely to be standard-setters. While this data cannot determine causality,⁸ the visceral experience of living through the effects of a changing climate appears to spur people to act (or at least consider acting) in their personal choices, in the public sphere, and in their workplaces. A growing body of academic research supports this idea,⁹ although in some countries, there are stark partisan divides.¹⁰ It is also possible that this is a

relatively recent dynamic, as media coverage grows increasingly explicit about linking extreme weather to climate change and as the scientific community improves its ability to attribute particular events to global warming.¹¹

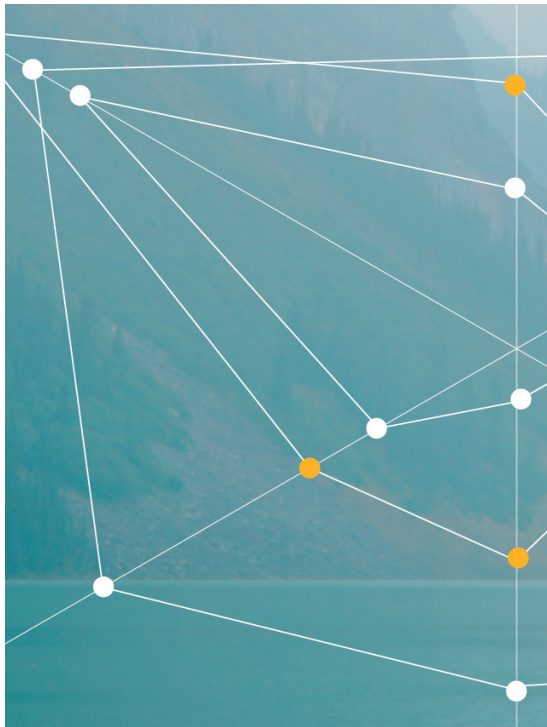
Regardless, as more people across the world directly experience severe weather and climate events in the coming years,¹² they may be spurred to become sustainability standard-setters in multiple aspects of their lives. Within local geographies, climate-related disasters could prompt employee, customer, and constituent demands for more actions to mitigate and adapt to climate change.

FIGURE 4

Reported climate event experiences correlate with increased actions



Source: Deloitte analysis.



Standard-setters are optimistic about the world’s climate prospects

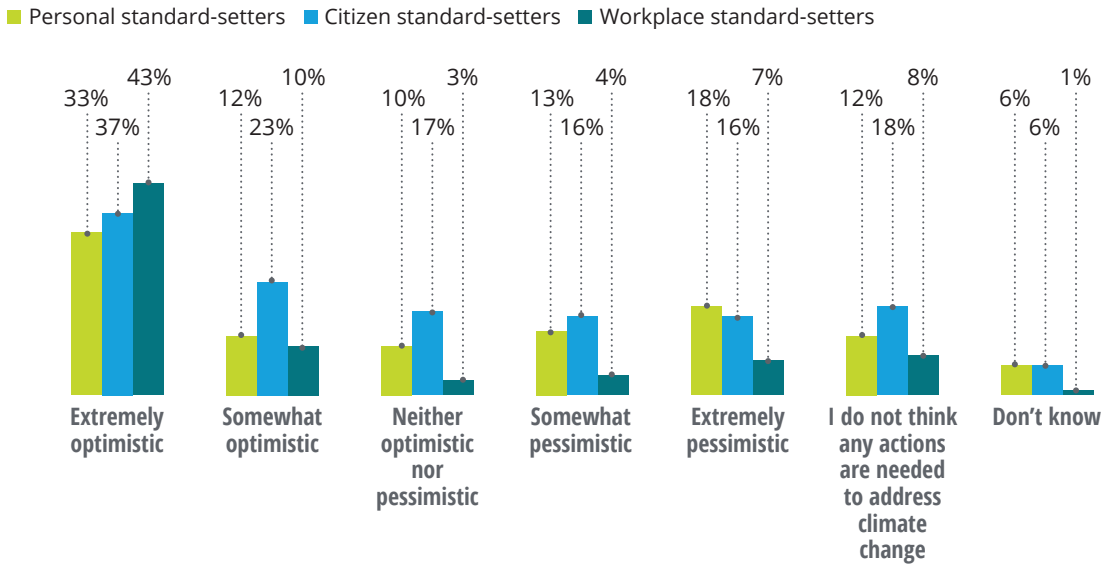
Survey respondents who are extremely optimistic that the world will take sufficient steps to address climate change were also those who more often behaved in sustainable ways. The difference is particularly pronounced in the workplace concerns domain: Of those who are extremely optimistic about the prospects for change, 43% are sustainability standard-setters; among those who are “somewhat optimistic,” just 10% fell into the standard-setter group.

Many have written about the dangers of “doomism” or talking about climate change as a lost cause because it can erode the drive to action.¹³ Our research bears that out and goes one step further: Deep optimism—not just avoiding climate fatalism—is often a key ingredient for meaningful action across multiple domains.

It also suggests that people can be moved to action if they believe it’s feasible to effectively act in solving climate change. For business leaders and policymakers, this is an opportunity to catalyze widespread behavioral change by building a narrative of hope, emphasizing that addressing climate change is within our wherewithal, that we know what needs to be done, and that we have most of the tools we need to do it—all positions consistent with the scientific and technological consensus.¹⁴

FIGURE 5

I am _____ that the world will take sufficient steps to avoid the worst impacts of climate change.



Source: Deloitte analysis.

A stake in the future translates to sustainability action

Even if the world moves to rapidly reduce emissions, the worst effects of climate change still lie in our future.¹⁵ Having a tangible, visceral stake in that future—evinced by children at home—often translates to a greater likelihood of being highly engaged on sustainability issues across all three pillars of the index. The desire to set an example for one’s children might also be at work; some research indicates that parents act in more climate-conscious ways when children are watching.¹⁶

Some observers contend that avoiding having children is a climate-conscious choice because it

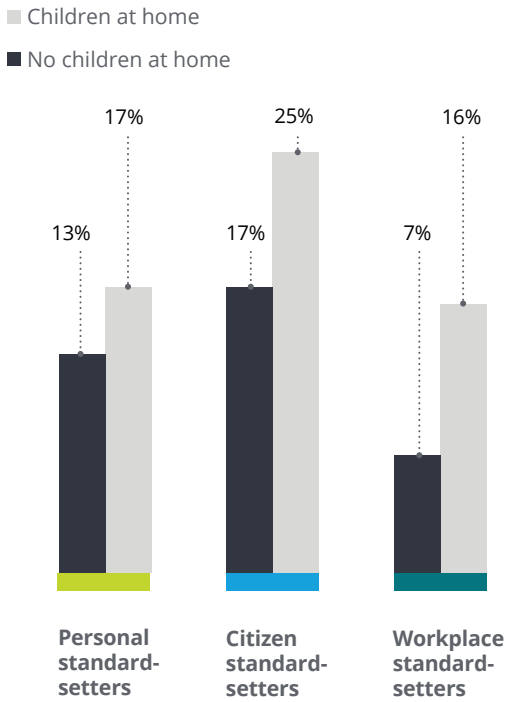
avoids the carbon footprint of another human¹⁷ or because it prevents one’s progeny from growing up in an increasingly climate-damaged world.¹⁸ This survey data offers a rejoinder to those arguments: Having children appears to spur respondents to

Sixty-three percent of total respondents with children at home felt worried or anxious about climate change, compared to 55% among those without children.

engage more deeply and widely with sustainability, making the kinds of changes that are needed to avoid the worst climate change–induced impacts facing us.

FIGURE 6

Children at home and their impact on respondents' sustainability actions



Source: Deloitte analysis.

Waxing and waning sustainability actions with age

The index highlights clear differences in how different generations incorporate sustainability into their lives. Younger respondents are significantly more likely to be highly engaged in political and civic actions compared to older groups. But the youngest cohort sees far fewer respondents who are deeply active in sustainability at either their workplaces or, perhaps surprisingly, in their personal choices.

This could reflect, in part, the constraints of their circumstances. Some of the more impactful sustainability personal choices—such as sourcing renewable electricity for the home—may not be available or viable. Likewise, those under 25 years old are likely to be early in their career and may not see a channel to influence sustainability in their workplace environment. This finding reveals an opportunity for business leaders to harness this cohort's overall support for more sustainable practices. It's also a chance to nurture long-term brand loyalty from consumers by offering more sustainable products even to the youngest cohort, as this research suggests sustainable consumption choices grow increasingly prevalent and important with age.

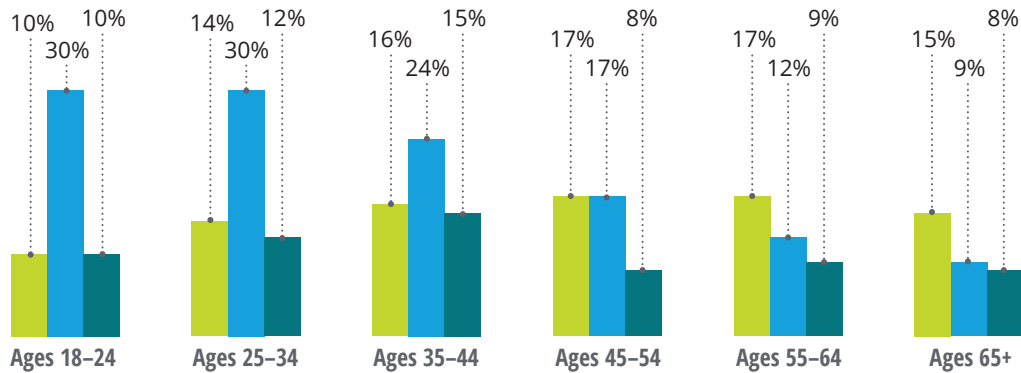
Those who are in the early or middle parts of their careers (25–44 years old) are also the most active in their workplaces; they are only slightly less engaged in citizen action and tend to be sustainability standard-setters in the realm of personal choices. This suggests an evolution with age, with sustainability considerations expanding to impact more dimensions of people's lives, starting from an initial focus on political and civic actions to over time encompass workplace and household behaviors.

Among older cohorts, the survey saw a high prevalence of standards-setters around personal choices, but that doesn't extend to the workplace or political life. The relative dearth of workplace standard-setters among those older than 44 is potentially worrisome given that those are likely to be many of the people in leadership or managerial positions and those who could be best positioned to shape their organizations' sustainability agendas.¹⁹

FIGURE 7

Prevalence of sustainability standard-setters across respondents' age groups and behavior dimensions

■ Personal standard-setters ■ Citizen standard-setters ■ Workplace standard-setters



Source: Deloitte analysis.

From behavior change to system change

Addressing climate change demands systems-level transformations spanning energy, mobility, food, industry, and more.²⁰ But that doesn't mean individual attitudes and behaviors don't have a role to play. Shifting societal norms and actions can feed into the efforts of companies and governments, ideally creating positive feedback loops that can lead to tipping points when adoption rapidly accelerates. More demand for climate-friendly products, for example, can prompt increases in the quantity produced and their quality, and drive down prices through economies of scale—in turn fueling more demand.

It's precisely this type of virtuous cycle that can create a new cultural norm. The index offers considerations for leaders across domains who seek to encourage sustainable behaviors.

Prepare for change: Understand when, where, and along which dimensions a tipping point in behavior could be reached, leading to rapid change.

Assess whether your organization is ready for a shift in popular attitudes and actions. What risks might such shifts pose across each of the three index dimensions (consumption, politics, and work)?

Nurture a narrative of change: Optimism can fuel action. Build a vision for your customers, constituents, and workers that shows the potential of a more sustainable future and a plausible path to get there. Don't sugarcoat the challenges or be afraid to admit fears or constraints (large or small), but emphasize a way forward rooted in action—"the antidote to despair."²¹

Encourage change: Act in the areas where your organization can accelerate behavioral change among the constituents you speak to. If you are a retailer or produce consumer goods, how can you make the sustainable option also the go-to option, one that doesn't sacrifice performance or price? Change the way you communicate with consumers through marketing and advertising to make sustainable choices more appealing. If you are in government, how can you translate growing support for climate action into actual policy? If you

are an employer, how can you integrate climate and sustainability considerations into every part of the business in ways that meet workers' expectations and help you attract and retain the best talent? What are the broader implications of these shifts for your operating model and key metrics?

As the impacts of climate change and other ecological crises become clearer, so does the case for change. The world is mobilizing, belatedly, to

address the climate crisis. Governments across the globe are deploying an array of policy and regulatory tools as they attempt to slash emissions. Companies are setting net-zero targets, with broad implications for supply chains and business models. A large and growing group of sustainability-minded citizens can help make these efforts easier and more impactful, so it behooves businesses and governments to enable individuals to become sustainability standard-setters.

Endnotes

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6. Note that this question does not ask about whether climate change is happening or what is causing it.
7. Deloitte Global State of the Consumer Tracker, Wave 23, September 2021.
8. It is possible the explanation runs the other way, i.e., those who are most active on sustainability issues across these domains are also most likely to interpret recent weather events through the lens of climate change.
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21. Often attributed to singer Joan Baez, a version of this sentiment is also expressed by climate scientist Katharine Hayhoe; *CNN*, "Climate scientist: 'The antidote to despair is action,'" video, September 24, 2021.

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