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Cultures, Countries & Your Sustainability Story

Rethinking what "sustainability" means in your communications around the world.

Fall 2023

Every individual

looks at the world — and your brand — differently. Yet every unique perspective is shaped by culture and country.

Your company's words can be translated from one language to another.

But do you know whether your sustainability story will resonate in different locations?

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Shelton Group's annual Eco Pulse® study went global in 2023.

We surveyed people in 12 countries to better understand how they conceptualize an **eco-friendly person** — and what that means for companies' sustainability communications.

Methodology

This online survey was fielded February 9 – March 7, 2023, surveying a total of 5,497 respondents in:

Americas:

U.S. (n=1,005), Canada (n=412), Brazil (n=412)

Europe:

United Kingdom (n=408), Spain (n=410), Germany (n=404), Poland (n=408)

Middle East/Africa:

UAE (n=403), Nigeria (n=400)

APAC:

China (n=411), India (n=410), Australia (n=414)

In the overall analysis, the U.S. data was down-weighted to equalize the population distributions. The overall margin of error is +/- 1.3%; within a single country, the margin of error is +/- 4.9%.

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What makes someone an eco-friendly person?

Percentage of respondents who chose each action

United States (US)

63% Recycles their trash

54% Reuses items when possible

50% Brings their own bag(s) when shopping

Canada (CA)

73% Recycles their trash

69% Brings their own bag(s) when shopping

68% Reuses items when possible

Brazil (BR)

76% Recycles their trash

70% Reuses items when possible

67% Brings own bag(s) when shopping

Spain (ES)

84% Recycles their trash

72% Reuses items when possible

66% Brings own bag(s) when shopping

United Kingdom (UK)

73% Recycles their trash

63% Reuses items when possible

50% Brings own bag(s) when shopping

Germany (DE)

71% Recycles their trash

65% Brings own bag(s) when shopping

63% Reuses items when possible

Poland (PL)

63% Brings their own bag(s) when shopping

54% Recycles their trash

53% Purchases eco-friendly products

United Arad Emirates (UAE)

59% Recycles their trash

55% Buys eco-friendly products

51% Uses reusable containers for water

Nigeria (NG)

56% Buys eco-friendly products

54% Recycles their trash

48% Reuses items when possible

India (IN)

69% Buys eco-friendly products

62% Recycles their trash

59% Reuses items when possible

China (CN)

48% Buys eco-friendly products

45% Chooses eco-friendly transportation

44% Brings own bag(s) when shopping

Australia (AU)

75% Recycles their trash

68% Reuses items when possible

68% Brings own bag(s) when shopping

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What accounts for the differences in defining eco-friendly behavior?

Hofstede's Cultural Dimensions Theory
is a widely recognized framework for intercultural understanding in business and academic settings. By demonstrating how a society's culture and values influence its members' behaviors, it offers one way to parse out our data.

Hofstede's 6 Cultural Dimensions

Power Distance Index

Individualism vs. Collectivism

Masculinity vs. Femininity

Uncertainty Avoidance Index

Long-Term Orientation vs. Short-Term Normative Orientation

Indulgence vs. Restraint

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Researchers have demonstrated

that Power Distance Index and Individualism vs. Collectivism are associated with a country's sustainability performance and trajectory toward sustainable development.

Our data demonstrates a connection between these two dimensions and consumer sustainability attitudes, too.

Power Distance Index (PDI)
&
Individualism vs. Collectivism (IDV)

So, what do these two dimensions mean?

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Individualism vs. Collectivism

Is someone's self-image defined in terms of "I" or "we"? What is the scope of someone's responsibility toward other people?

Individualist societies encourage people to look after themselves and their immediate family. Collectivist societies, on the other hand, encourage people to belong to "in groups" that take care of them in exchange for loyalty.

We mapped the 12 countries we surveyed along the 2 key cultural dimensions using the Hofstede Insights Country Comparison Tool.

https://www.hofstede-insights.com/country-comparison-tool.

Individualist

US
AU
UK
CA
DE
PL
ES
IN
BR
UAE
NG
CN

Collectivist

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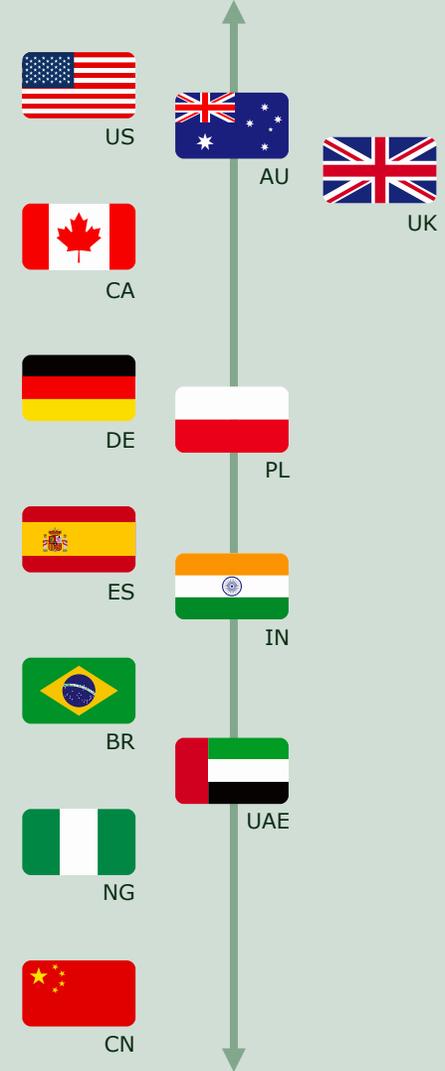
Power Distance Index

How is power distributed among individuals?
To what degree do people expect, accept or question authority?

Countries with High Power Distance are typically more hierarchical. Less powerful individuals in the country tend to expect that power is distributed unequally and accept that they are disconnected from existing power structures. Countries with Low Power Distance tend to question authority and attempt to distribute power more equally. Overall, people feel like there are channels for influencing the status quo or helping create change.

Low Power Distance ←————————————————————————————→ High Power Distance

UK   US   CA   ES   PL   UAE   IN   CN
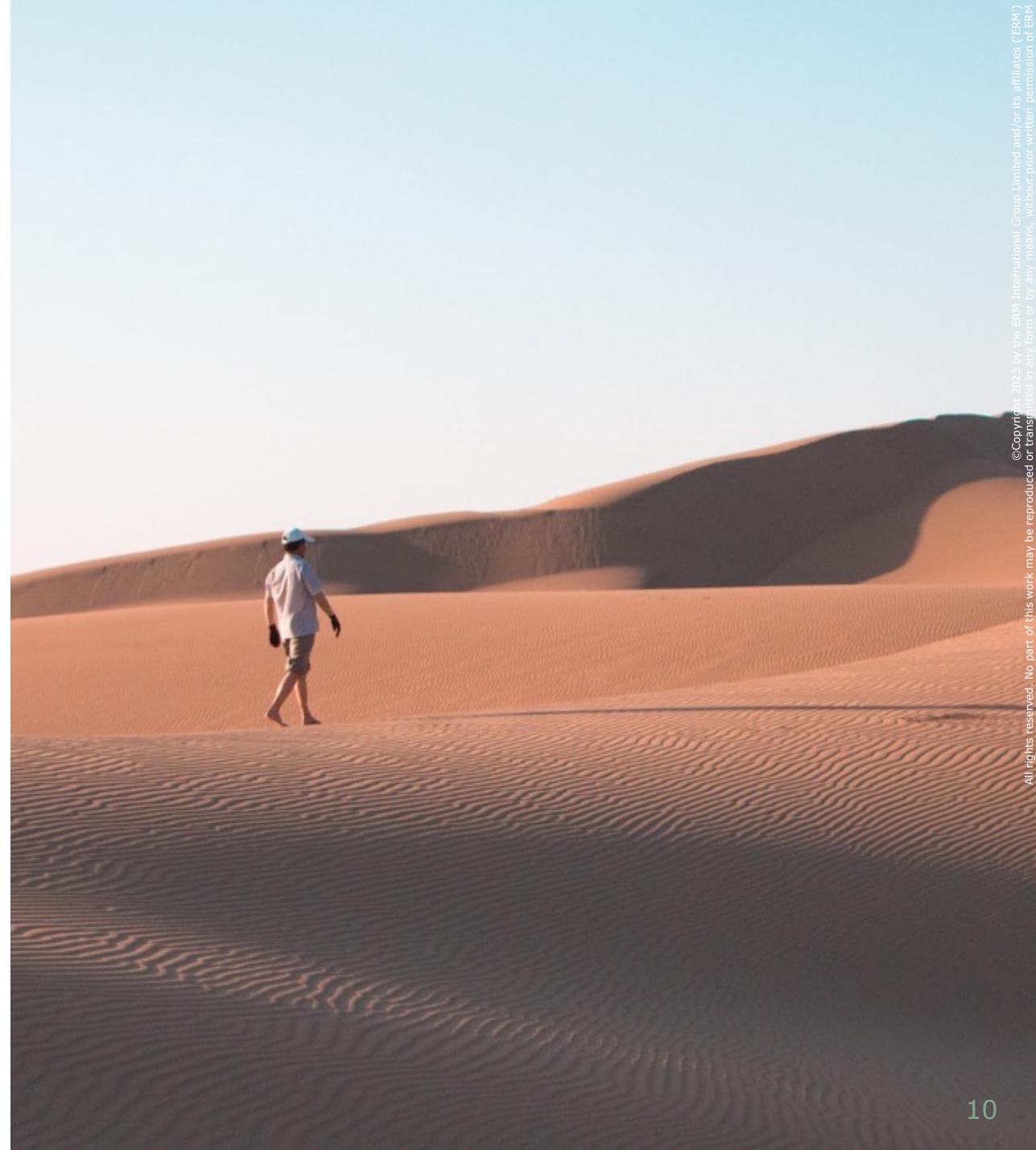DE   AU   BR   NG

The countries we surveyed fall into two basic groups.

Individualism is almost always correlated with Low Power Distance, and Collectivism is almost always correlated with High Power Distance:
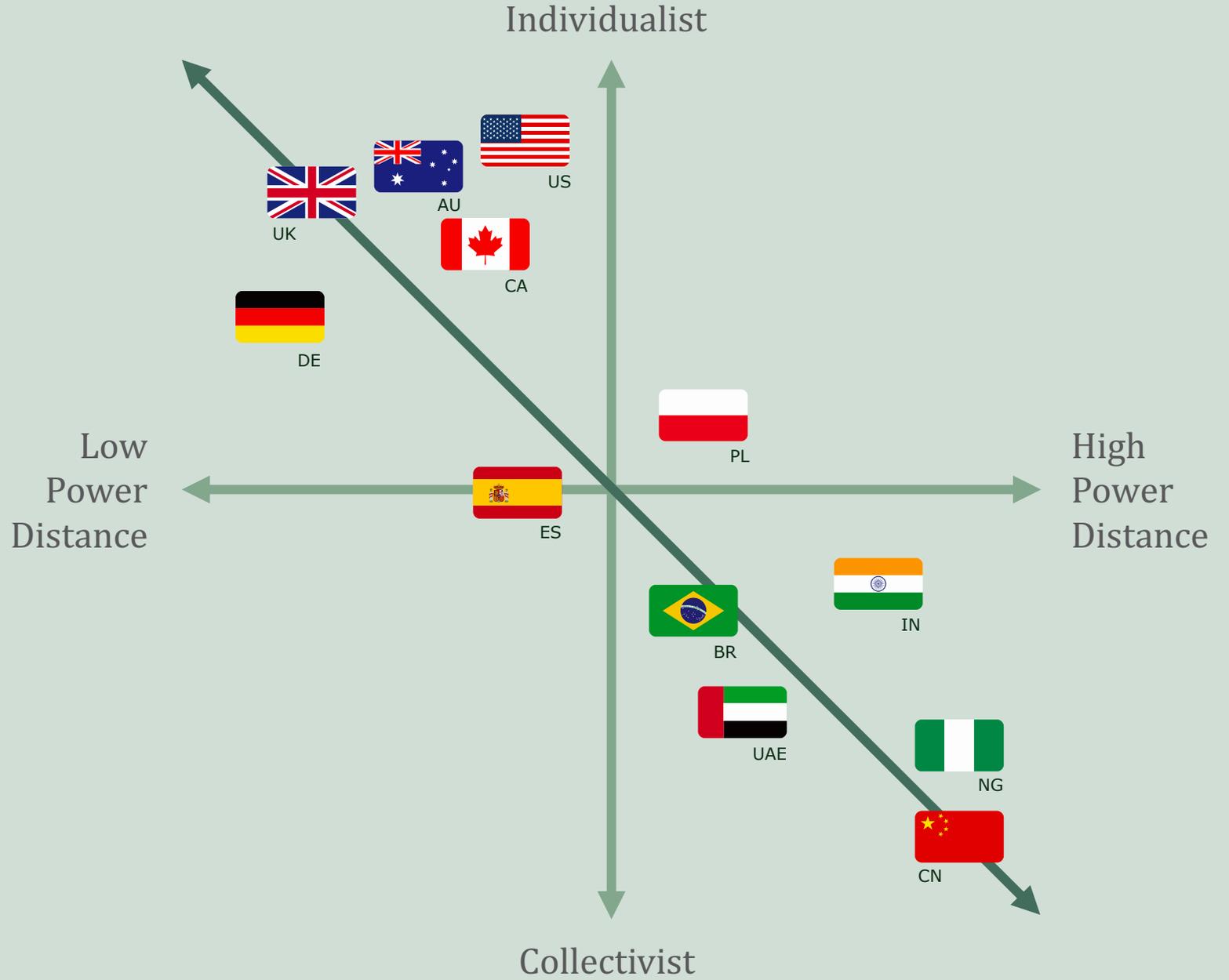
Our data

demonstrates that these two cultural dimensions can be predictive of how people in countries around the world think about sustainability.

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In countries that are more **individualist**, we found …

People are more concerned about inflation than about key environmental or social issues.

- 7 out of 12 countries we surveyed are individualist — and those 7 out of 12 countries are also most concerned with inflation.

Recycling is seen as the most eco-friendly trait.

- 8 out of 12 countries mentioned recycling as the top trait that describes an eco-friendly person. 6 out of those 8 countries are individualist.
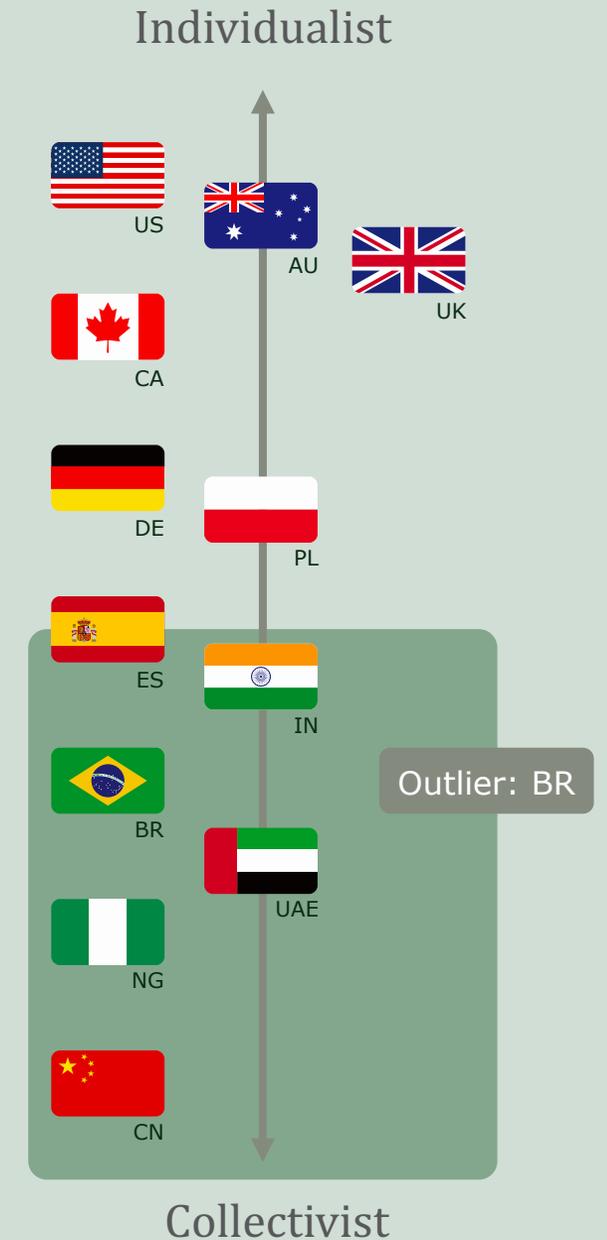
Individualist

US
AU
UK
CA
DE
PL
ES
IN
BR
UAE
NG
CN

Outlier: PL

Collectivist

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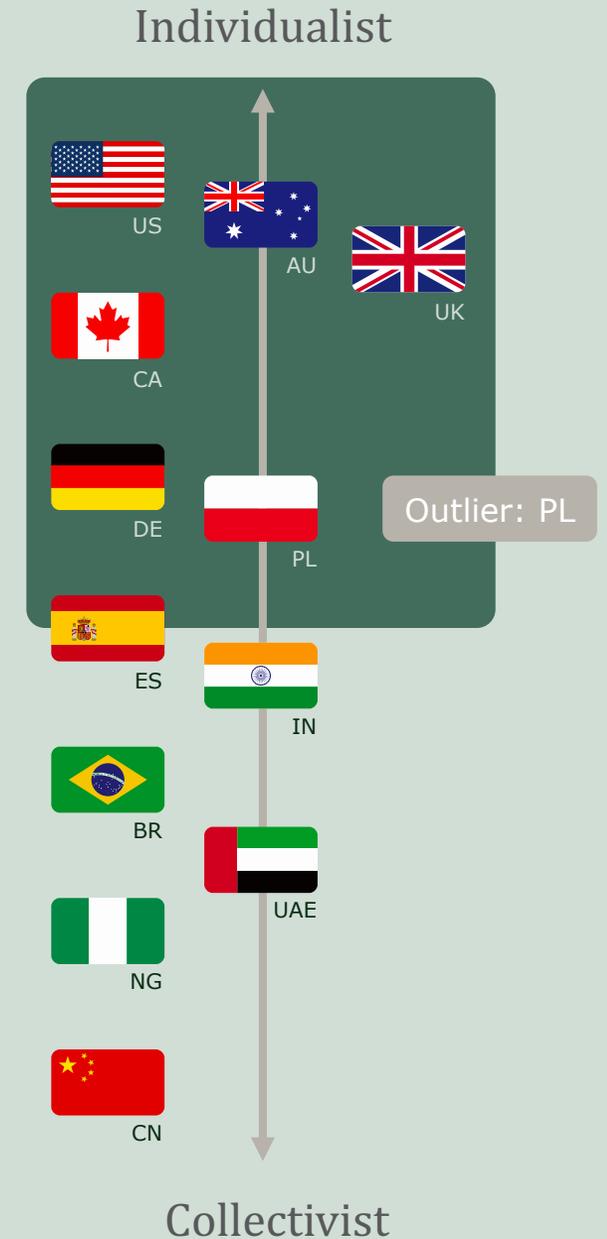
In countries that are more **collectivist**, we found …

People are more concerned with visible environmental damage (including air and water pollution) and food and water shortages.

- 5 out of 12 countries surveyed were <u>most</u> concerned with pollution and food shortages; all 5 of those countries are collectivists.

Purchasing eco-friendly products is perceived as a top trait of an eco-friendly person.

- 5 out of 12 countries surveyed mentioned purchasing eco-friendly products as a top 3 eco-friendly description.

- 4 out of 5 of those countries are characterized as collectivist.

Individualist

US

AU

UK

CA

DE

PL

ES

IN

BR

Outlier: BR

UAE

NG

CN

Collectivist

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In countries with a **Low Power Index,** we found …

Similar to individualistic countries, people are more concerned about inflation when thinking about the future of the planet.

- 7 out of 12 countries surveyed were most concerned with inflation.
- 5 out of 7 of those countries have Low Power Distance.

Recycling is seen as the top behavior for an eco-friendly person.

- 8 out of 12 countries mentioned recycling; 5 out of those 8 countries are characterized by Low Power Distance.
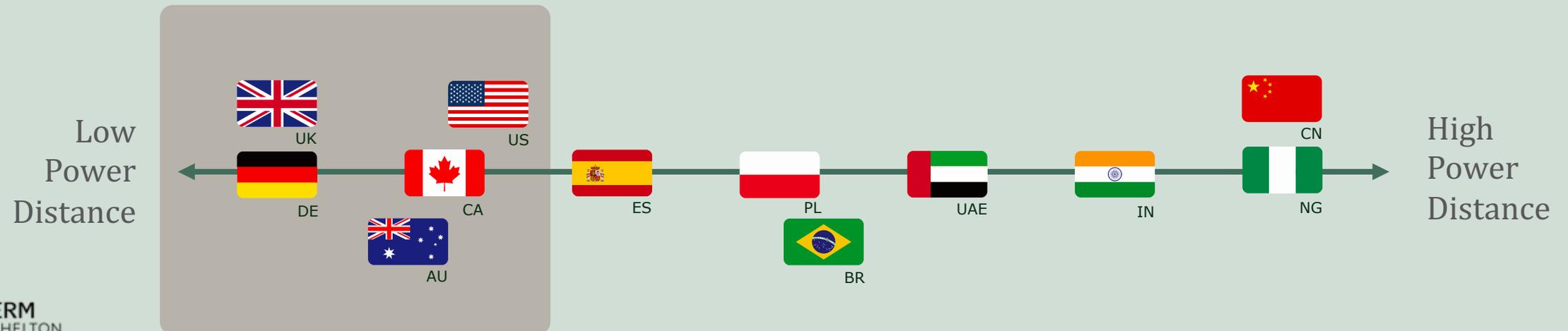
In countries with a **High Power Index,** we found ...

People do not mention recycling as the most eco-friendly description.

- 4 out of 12 countries did not mention recycling as the most eco-friendly description; all 4 of those countries are characterized by High Power Distance.

Outlier: BR, ES, UAE

Purchasing eco-friendly products is perceived as a top behavior for an eco-friendly person.

- 5 out of 12 countries mentioned purchasing eco-friendly products as a top 3 eco-friendly description; all 5 of those countries have High Power Distance.

Outlier: BR, ES

Low Power Distance ← → High Power Distance

UK US DE CA AU ES PL BR UAE IN CN NG

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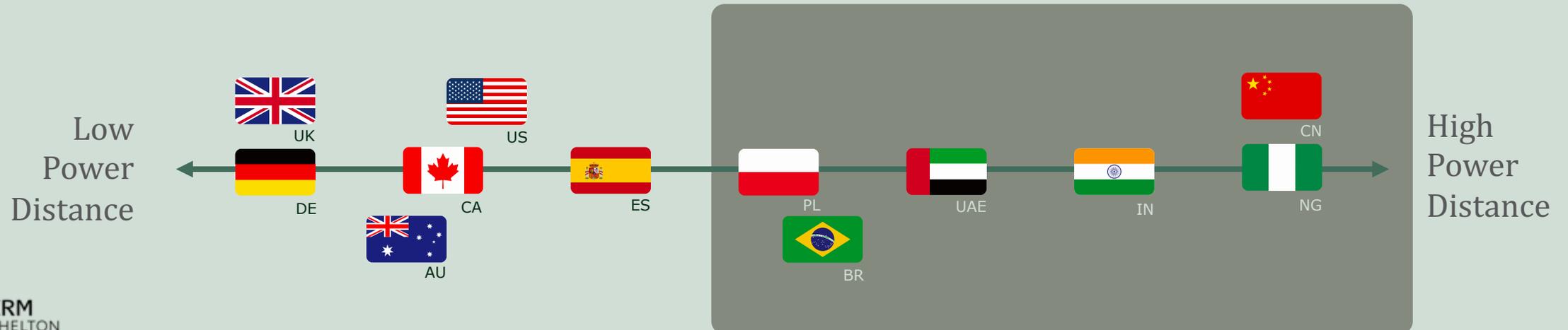
Applying the data:

Recycling and reuse in your sustainability story.

Globally, most agree that recycling is the **bare minimum** we can do for the environment.

CN	China	95%
IN	India	94%
PL	Poland	92%
BR	Brazil	92%
ES	Spain	89%
DE	Germany	88%
AU	Australia	88%
UK	United Kingdom	87%
CA	Canada	86%
UAE	United Arab Emirates	85%
US	United States	84%
NG	Nigeria	83%

Source: Eco Pulse®, 2023 (Global)

How much do you agree or disagree with the following statement? N = 5,497

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But **recycling** rises to the top for defining "eco-friendly" in most Individualist, Low Power Distance countries for a reason:

Recycling/reusing is an individual behavior — and a long-ingrained way to take control over one's personal impact.

Individualist

Low Power Distance

High Power Distance

Collectivist, High Power Distance

Collectivist

UK · AU · US · CA · DE · ES · BR

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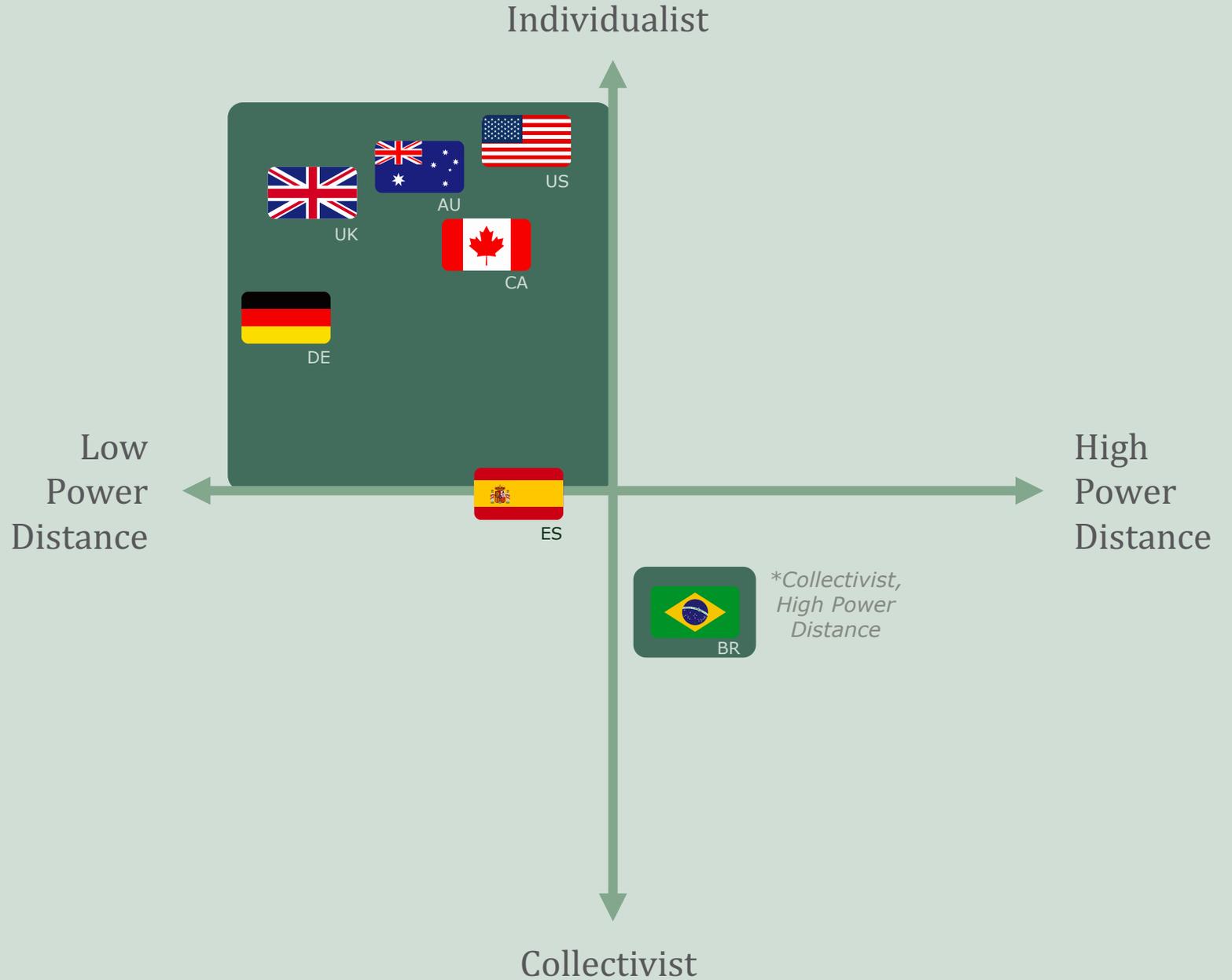
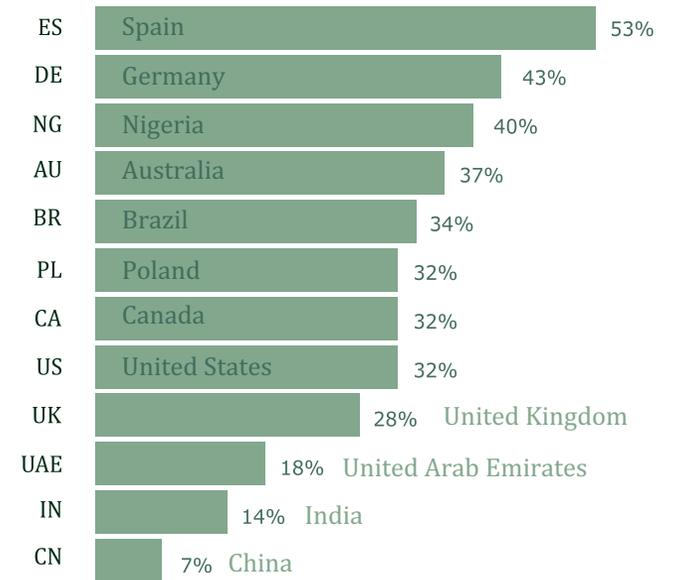Overall, however, more people in Individualist/Low Power Distance countries **lack confidence** that the recycling system works. They doubt that what they toss in the recycling bin actually gets recycled.

ES	Spain	53%
DE	Germany	43%
NG	Nigeria	40%
AU	Australia	37%
BR	Brazil	34%
PL	Poland	32%
CA	Canada	32%
US	United States	32%
UK		28% United Kingdom
UAE		18% United Arab Emirates
IN		14% India
CN		7% China

Percent not at all/not very concerned

Source: Eco Pulse®, 2023 (Global)

How confident are you that the things you toss in a recycling bin actually get recycled? N = 5,497

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18

Storytelling applications

1. Target messages for Individualist/Low Power Distance countries.

Recycling is a proof point in every location, but in these countries, it's a central aspect of your story.

AU   BR   CA   DE   ES   UK   US

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Storytelling applications

2. Counteract skepticism with transparency.

Consumers want to recycle, but they're not confident about the impact they're having — does what they put in the bin actually become a new product? Address their concerns. Explain how your company/brand designs for easy recyclability, plus how you're helping improve collection, sorting, and recycling processes. Use case studies or examples to illustrate this process.

AU	BR	CA	DE	ES	UK	US

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Storytelling applications

3. Educate on the recycling process.

Invite consumers to be part of an improved recycling system with you. Provide a simple and clear explanation of the recycling process from collection to end product. Use visuals, infographics, or videos to make it easier for consumers to understand how their recycling efforts contribute to eco-friendliness. Help consumers take back the power to make a difference through their personal actions.

| AU | BR | CA | DE | ES | UK | US |

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Storytelling applications

4. Tout recycling success stories.

Unite corporate and individual efforts into success stories of recycling initiatives that have had a tangible positive impact. Highlighting real-world examples can inspire confidence in consumers. This also demonstrates how you're helping individuals be the heroes of their own sustainability stories once more.

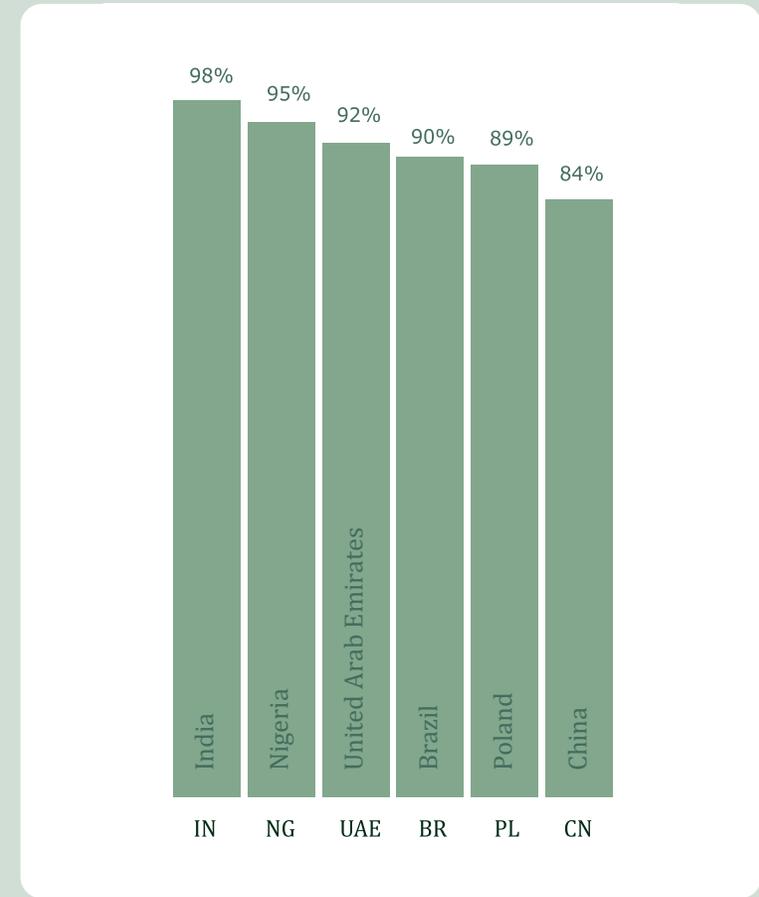| AU | BR | CA | DE | ES | UK | US |

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Applying the data:

Purchase eco-friendly products.

The vast majority of people in Collectivist/High Power Distance countries feel moderately to strongly personally responsible to **change their daily choices** to positively impact the environment.

98% India IN

95% Nigeria NG

92% United Arab Emirates UAE

90% Brazil BR

89% Poland PL

84% China CN

Source: Eco Pulse®, 2023 (Global)

How personally responsible do you feel to change your daily habits and purchase practices to positively impact the environment? N = 5,497

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Consumers in these countries say **purchasing eco-friendly products** is key to being an eco-friendly person.

This behavior requires personal motivation but, unlike recycling, does not require participation in a system established by those in power. It can be a satisfying behavior for people who feel personally responsible yet disconnected from formal structures.

Individualist

Low Power Distance

High Power Distance

Collectivist

PL

BR

IN

UAE

NG

CN

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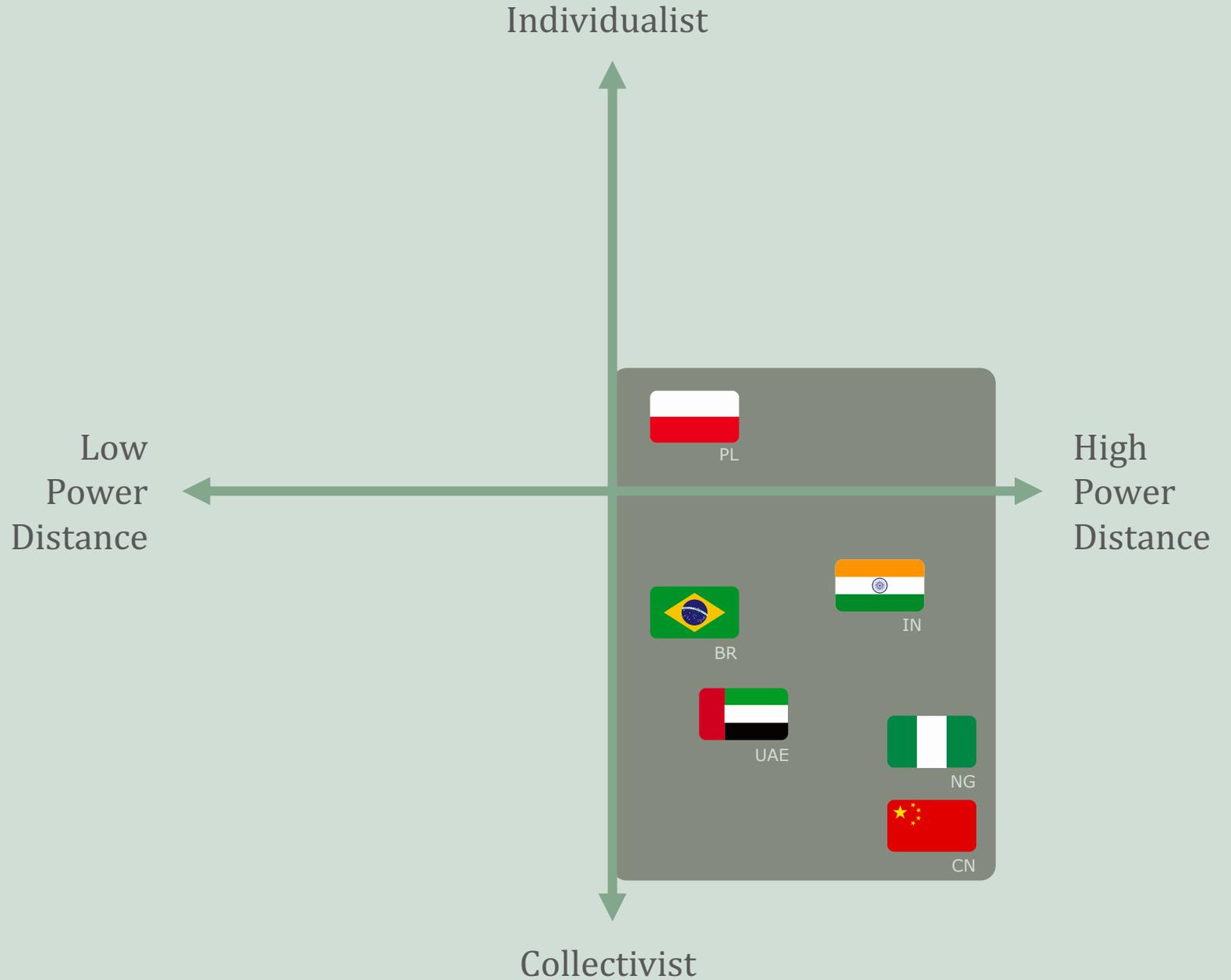
It also plays a significant role in how individuals shape their public identity. Most people in these countries want to be seen as someone who buys eco-friendly products.
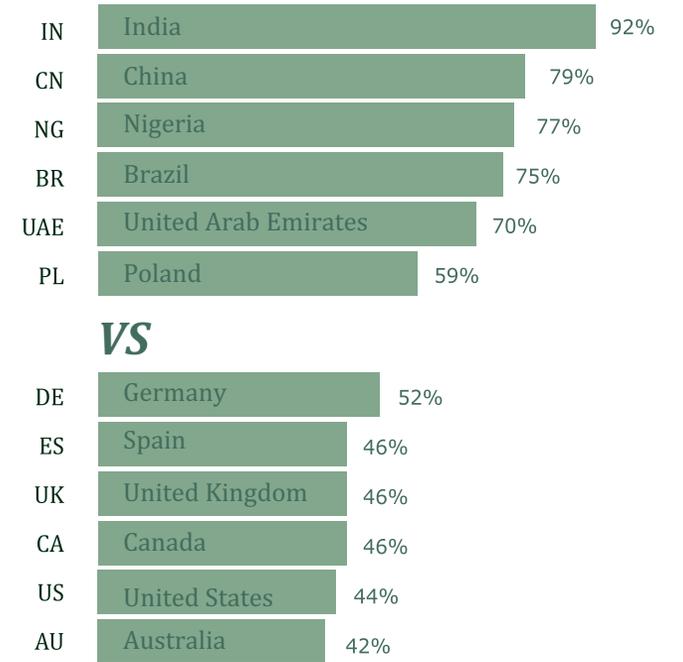
IN	India	92%
CN	China	79%
NG	Nigeria	77%
BR	Brazil	75%
UAE	United Arab Emirates	70%
PL	Poland	59%

VS

DE	Germany	52%
ES	Spain	46%
UK	United Kingdom	46%
CA	Canada	46%
US	United States	44%
AU	Australia	42%

Somewhat agree/strongly agree

Source: Eco Pulse®, 2023 (Global)

How much do you agree or disagree with the following statement:

Buying/using eco-friendly products is an important part of my personal image. N = 5,497

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Storytelling applications

1. Lead with the sustainable lifestyle.

Use your brand image to help shape your consumers' own image. Demonstrate how your brand and your products empower consumers to be eco-friendly — and be seen as eco-friendly.

BR   CN   IN   NG   PL   UAE

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Storytelling applications

2. Highlight eco-friendly product benefits.

Showcase a wide range of eco-friendly products in various categories and platforms. Ensure that the sustainable features and benefits of your products can be easily identified and verified by consumers. These are the proof points to how you empower consumers to be seen as eco-friendly.

| BR | CN | IN | NG | PL | UAE |

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Storytelling applications

3. Provide quality and performance assurance.

Assure consumers that your eco-friendly products do not compromise on quality or performance. Share customer testimonials and reviews that attest to the effectiveness of your products.
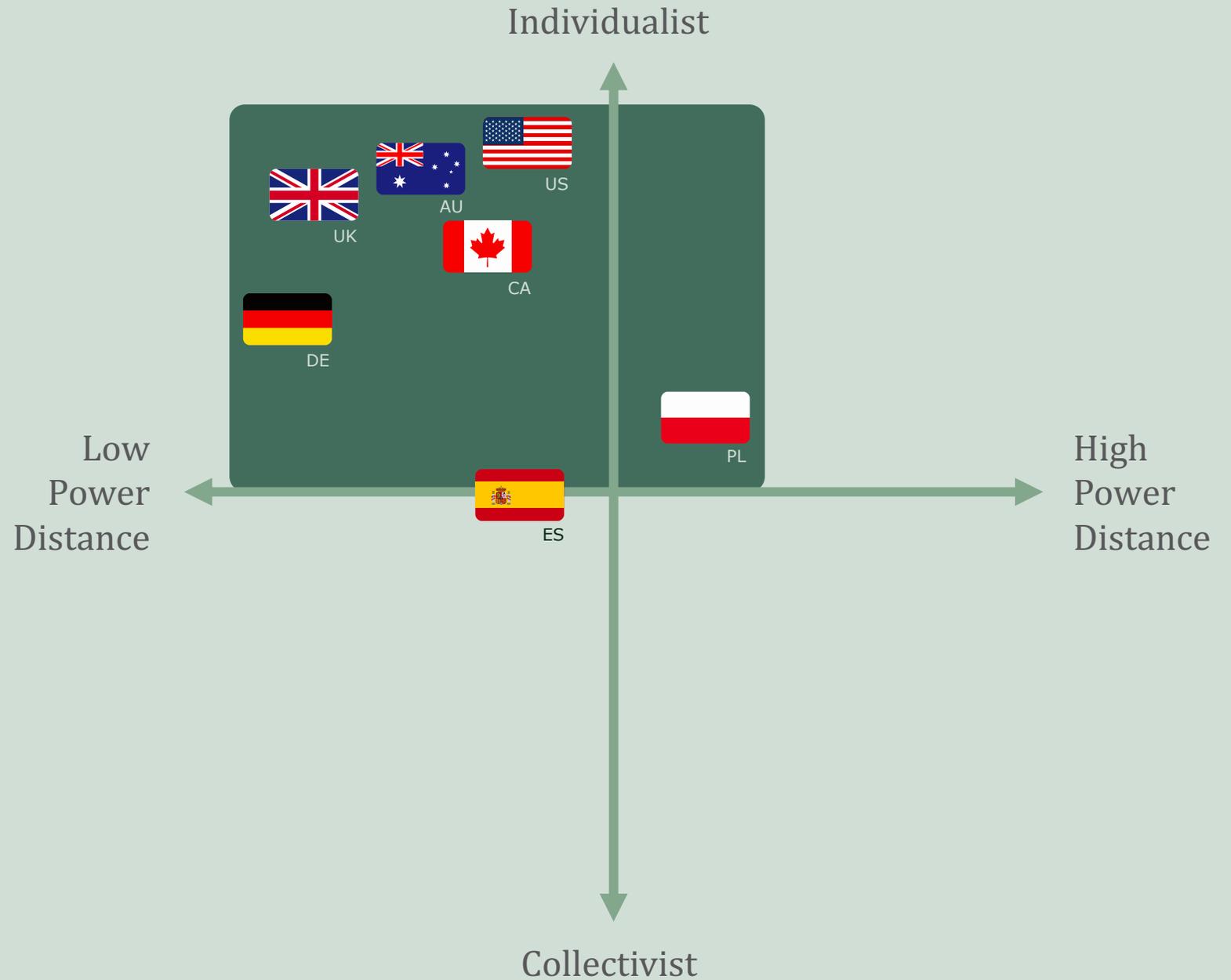
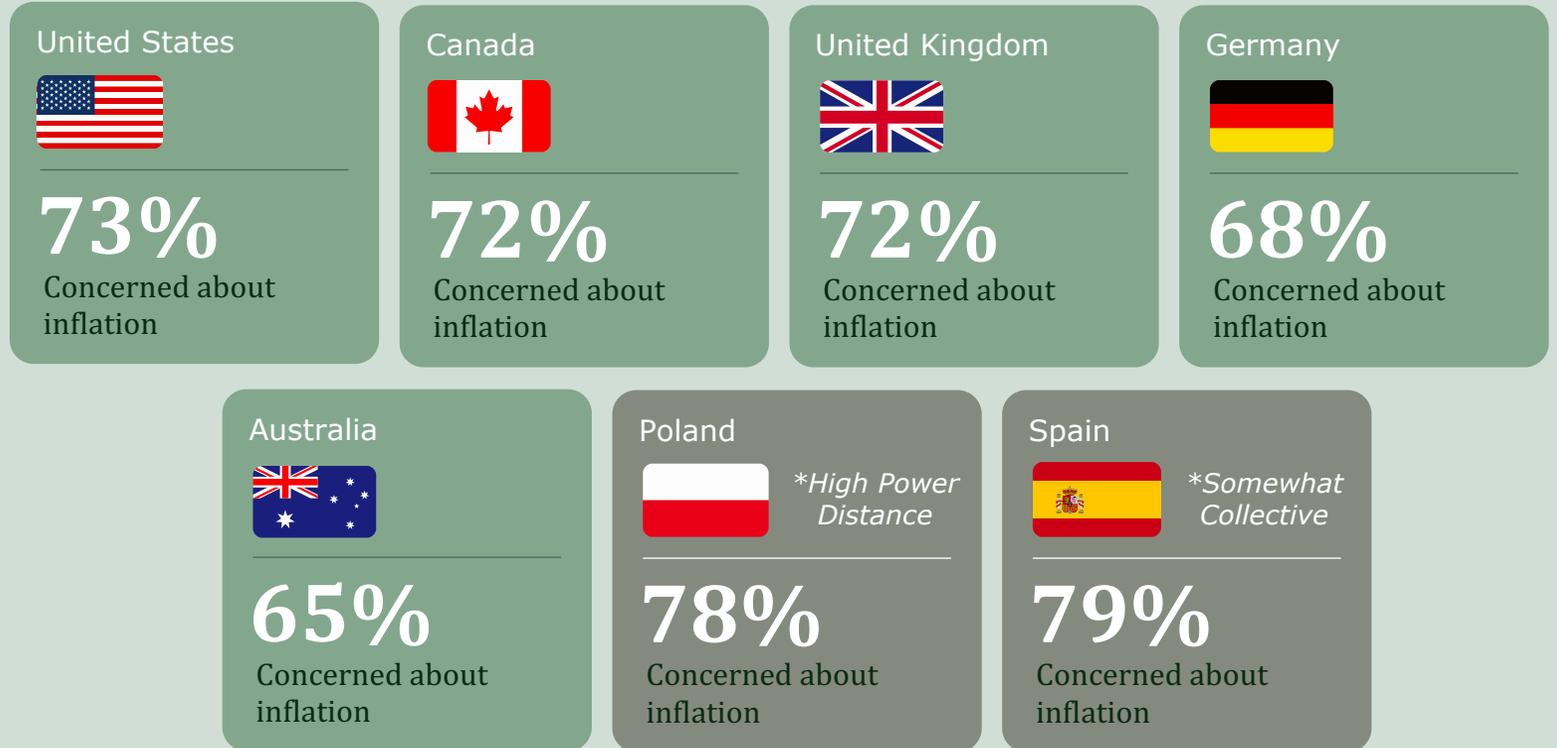| BR | CN | IN | NG | PL | UAE |

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Applying the data:

Inflation … This might seem like the odd topic out, but you may be surprised.

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When asked to think about the future of our planet, every individualist country is most concerned about inflation.

Individualist

US
AU
UK
CA
DE
PL

Low Power Distance — High Power Distance

ES

Collectivist

ERM SHELTON

Inflation is the top concern about the future of our planet — and likely, the future of the individual.

United States	Canada	United Kingdom	Germany
🇺🇸	🇨🇦	🇬🇧	🇩🇪
73%	**72%**	**72%**	**68%**
Concerned about inflation	Concerned about inflation	Concerned about inflation	Concerned about inflation

Australia	Poland	Spain
🇦🇺	🇵🇱 *High Power Distance*	🇪🇸 *Somewhat Collective*
65%	**78%**	**79%**
Concerned about inflation	Concerned about inflation	Concerned about inflation

*Somewhat/very concerned*

Source: Eco Pulse®, 2023 (Global)

When you think about the future of our planet, how concerned are you about each of these issues? N = 5,497

These countries didn't choose product purchases as the identifying characteristic of an eco-friendly person. But they're concerned about economics ... and what are they spending money on?

☀ Most people say they are searching for more energy-efficient, natural, eco-friendly products.
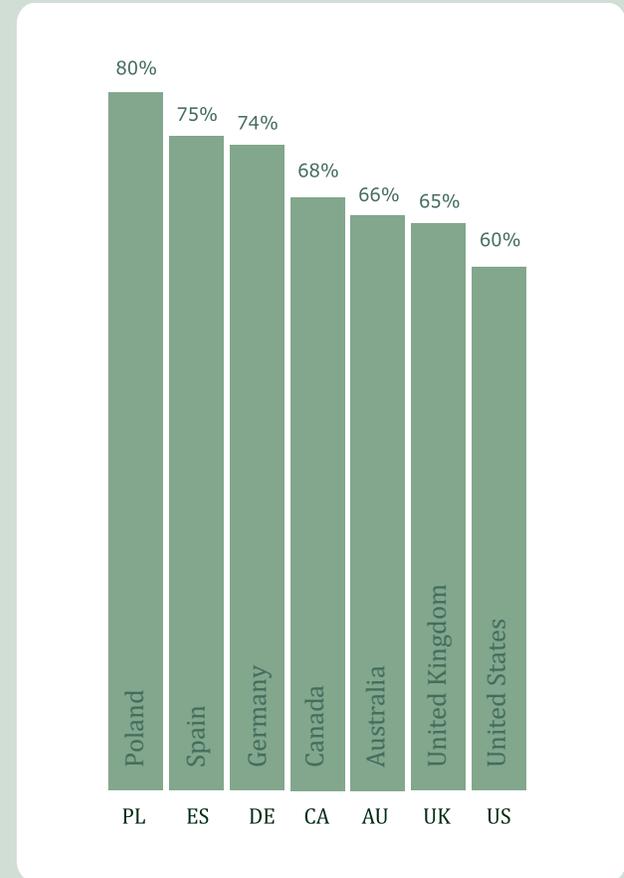
*PL: High Power Distance
*ES: Somewhat Collectivist

Source: Eco Pulse®, 2023 (Global)

Are you searching for greener (more energy-efficient, natural, eco-friendly, etc.) products these days? N = 5,497

Storytelling applications

1. Use economic messages to connect in Individualist/Low Power Distance countries.

Market your brand in countries where financial stability is a priority by illustrating how your eco-friendly products can provide financial benefits and increased resilience to economic change.

AU   CA   DE   PL   ES   UK   US

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Storytelling applications

2. Highlight immediate economic benefits.

Focus on the immediate benefits of eco-friendly products that can help consumers mitigate the impact of inflation. For instance, energy-efficient appliances can lead to lower utility bills.

AU CA DE PL ES UK US

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Storytelling applications

3. Provide lifetime cost analysis.

Provide consumers with information on the total cost of ownership for eco-friendly products compared to conventional alternatives. Show how investing upfront can lead to long-term savings. Explain how these products can help consumers save money through energy efficiency, durability or reduced maintenance costs. For example, talk about long-term savings from energy efficiency, or how solar panels can help mitigate utility rate increases in the future.

AU   CA   DE   PL   ES   UK   US

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Storytelling applications

4. Local sourcing as job creation.

Highlight any efforts your company makes to source materials locally or produce eco-friendly products within the country, which can contribute to job creation and economic growth.

AU   CA   DE   PL   ES   UK   US

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Applying the data:

Visible environmental damage.

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While Individualist/Low Power Distance countries are most concerned with inflation, almost every Collectivist country is most concerned with some form of visible environmental damage. The one exception is food shortages, which can be a direct, personal result of environmental damage.

Individualist

Low Power Distance

High Power Distance

Collectivist
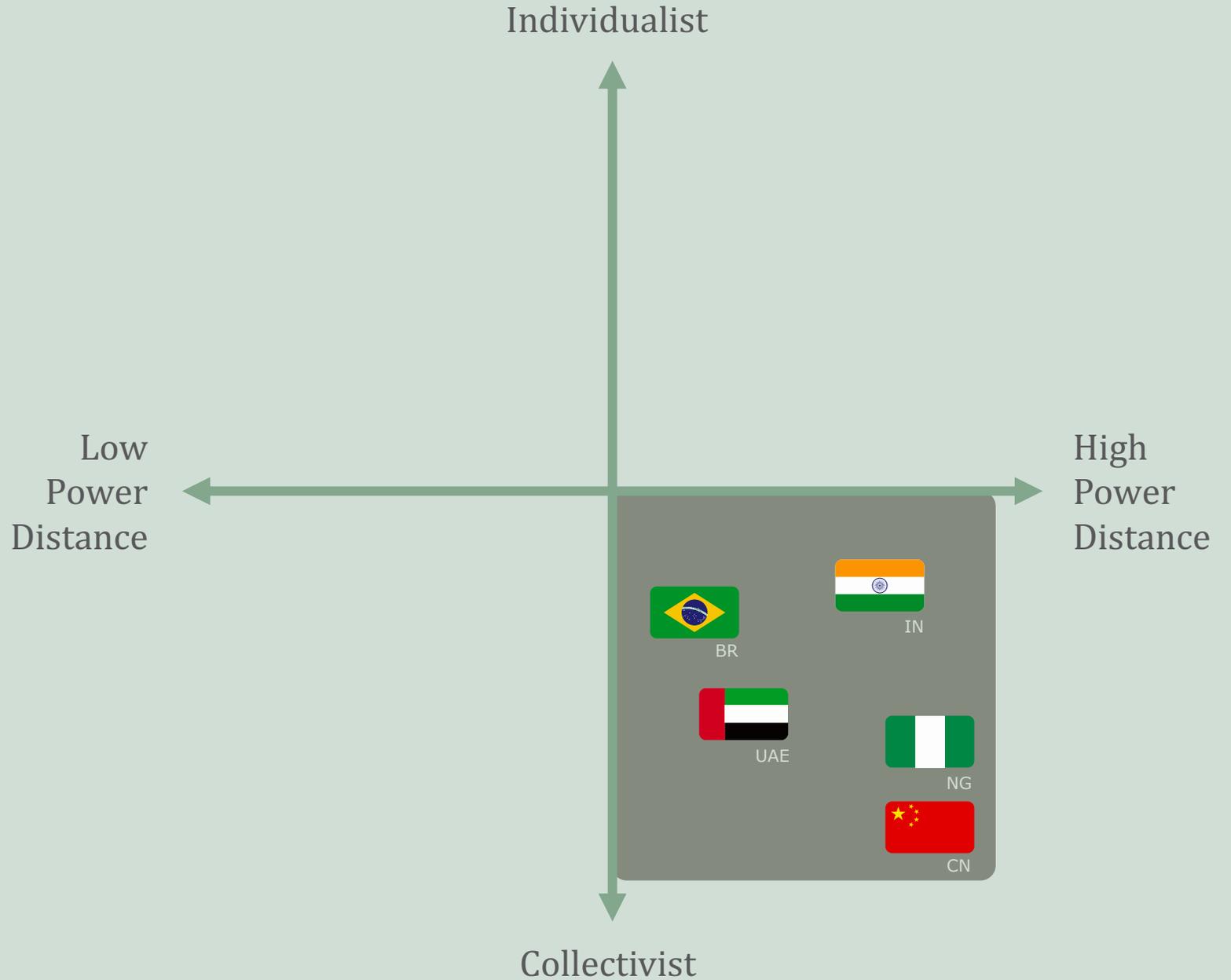
The concerns in each country are highly visible and could have direct consequences on people's lives.

Brazil
- **79%** - Water Pollution
- **79%** - Deforestation
- **77%** - Air Pollution
- **77%** - Water Shortages

China
- **56%** - Air Pollution
- **55%** - Water Pollution
- **54%** - Water Shortages

India
- **90%** - Air Pollution
- **88%** - Water Pollution
- **86%** - Water Shortages
- **86%** - Plastic Waste

Nigeria
- **86%** - Food Shortages
- **86%** - Inflation
- **85%** - Air Pollution

United Arab Emirates
- **65%** - Water Pollution
- **62%** - Water Shortages
- **62%** - Climate Change
- **62%** - Plastic Waste

Somewhat/very concerned

Source: Eco Pulse®, 2023 (Global)

When you think about the future of our planet, how concerned are you about each of these issues? N = 5,497

Many of these countries' concerns are directly related to climate change, whether as contributors (like deforestation) or as effects (like water shortages).

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People in Collectivist/High Power Distance countries believe strongly not only that climate change is occurring, but also that it is primarily caused by human activity.

97% of consumers across these five countries acknowledge at least one effect of climate change.

Which, if any, of the following are effects of greenhouse gas (GHG) emissions on climate change? n = 2,036
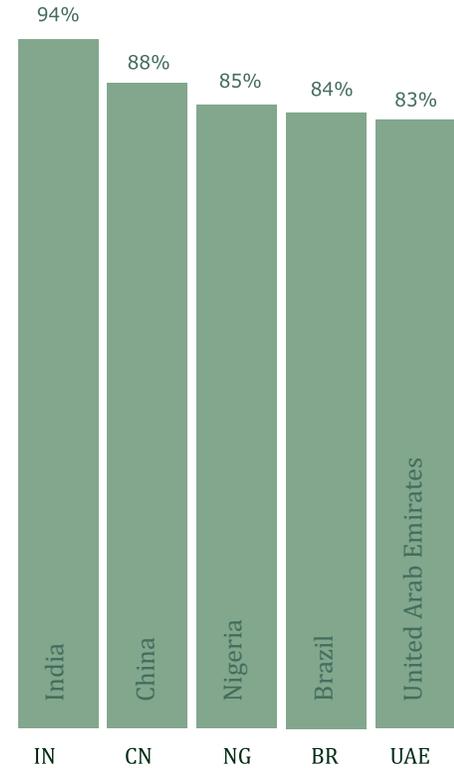
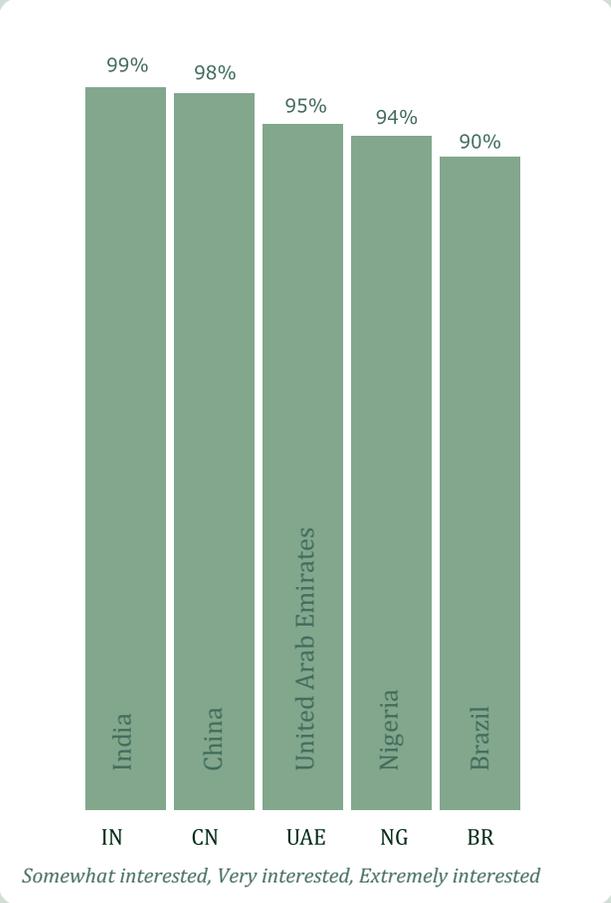|				
94%	88%	85%	84%	83%
India	China	Nigeria	Brazil	United Arab Emirates
IN	CN	NG	BR	UAE

Somewhat agree/strongly agree

Source: Eco Pulse®, 2023 (Global)

How much do you agree or disagree with the following statement:

Global warming, or climate change, is occurring, and it is primarily caused by human activity. N = 5,497

Which is no doubt why **almost everyone** in these countries is interested in hearing from companies about their **greenhouse gas emissions (GHG) efforts.**


India	China	United Arab Emirates	Nigeria	Brazil
99%	98%	95%	94%	90%
IN	CN	UAE	NG	BR

Somewhat interested, Very interested, Extremely interested

Source: Eco Pulse®, 2023 (Global)

Many companies are spending significant amounts of money to reduce their greenhouse gas (GHG) emissions in order to fight climate change. How interested are you in hearing from companies about their efforts to reduce greenhouse gas emissions? N = 5,497

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A significant majority say their opinion of a company would **improve** if that company were a known **leader in reducing its GHG emissions.**

Positive Impact

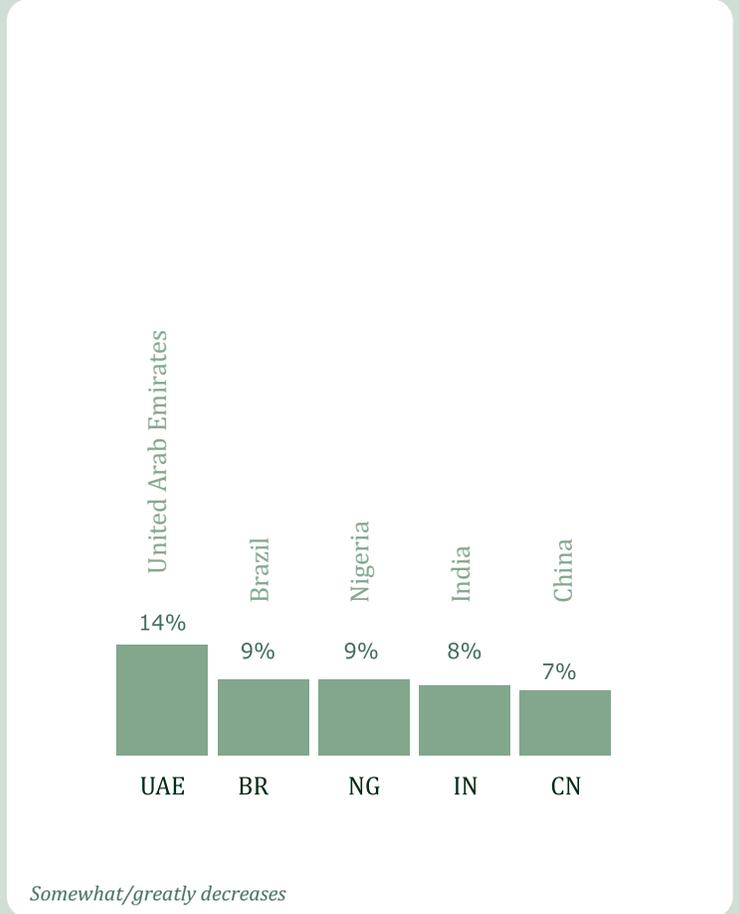|	IN	BR	NG	CN	UAE
	85%	81%	81%	81%	75%
	India	Brazil	Nigeria	China	United Arab Emirates
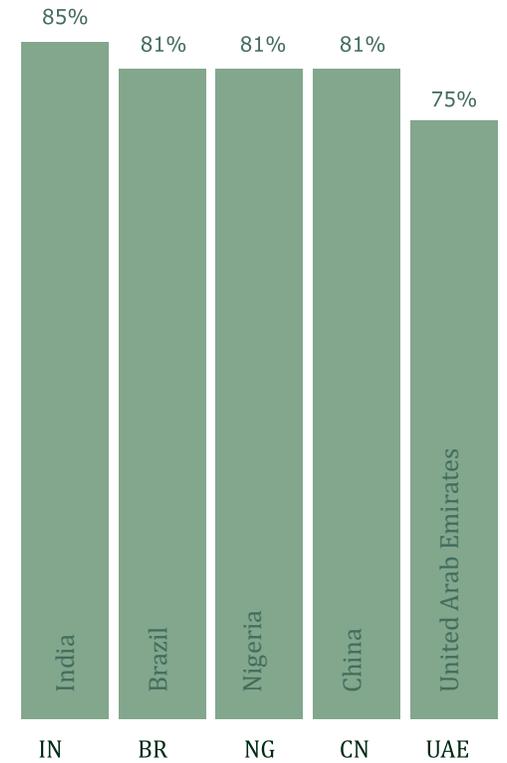
Somewhat/greatly improves

Source: Eco Pulse®, 2023 (Global)

How does knowing a company is a leader in reducing its greenhouse gas (GHG) emissions impact your opinion of that company? N = 5,497

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And very few opinions are negatively impacted due to knowing a company is a leader in reducing its greenhouse gas emissions.

So there's almost **no downside to communicating companies' initiatives to reduce GHG emissions.**

United Arab Emirates — 14% — UAE
Brazil — 9% — BR
Nigeria — 9% — NG
India — 8% — IN
China — 7% — CN

Somewhat/greatly decreases

Source: Eco Pulse®, 2023 (Global)

How does knowing a company is a leader in reducing its greenhouse gas (GHG) emissions impact your opinion of that company? N = 5,497

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Environmental damage. Climate change. There's one more piece to the puzzle: **Engagement.**

Consumers in many Collectivist and High Power Distance countries mention "volunteering" and "giving to environmental causes" as significant eco-friendly traits.

Nigeria	India	China
44%	**41%**	**40%**

Source: Eco Pulse®, 2023 (Global)

Now think of that same person who you consider to be eco-friendly. Which, if any, of the following describes the person that makes you consider them eco-friendly? N = 5,497

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Storytelling applications

1. Start with tangible benefits.

Highlight the immediate and tangible benefits of using eco-friendly products. Can you make authentic claims related to cleaner air, cleaner water, healthier landscapes or more secure food and water supplies? Connect these benefits directly to consumers' daily lives.

| BR | CN | IN | NG | UAE |

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Storytelling applications

2. Go for visual impact.

Emphasize the impact of eco-friendly products visually — show more than tell how they help reduce environmental damage. Use visuals, graphics, and before-and-after imagery to illustrate how your products can make a difference.

| BR | CN | IN | NG | UAE |

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Storytelling applications

3. Talk about your carbon footprint and GHG emissions.

Marketers, communicators and sustainability professionals must take the time to boil complexity down to stories that connect. Be sure to tie this to both your operational climate impact and your product climate impact.

BR   CN   IN   NG   UAE

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Storytelling applications

4. Partner with environmental organizations.

Collaborate with local environmental organizations or initiatives to demonstrate your brand's commitment to addressing environmental damage and climate change in the region. Many collectivist countries believe volunteering or giving to environmental causes is a top eco-friendly behavior.

| BR | CN | IN | NG | UAE |

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Your story

should take different forms to fit your audiences' values and cultures. Now you know how to start parsing out different lead messages that resonate in different locations.

But how do you act on this knowledge?

You connect with ERM and Shelton Group.

We're here to help you <u>do</u> what's right for your business and the world. And we'll help you <u>tell</u> the story in a way that meets your audiences where they're at, in terms of country, culture and values.

Contact us today:
info@sheltongrp.com
865.524.8385

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