

Our global consumer research on C&S provides a comprehensive view on consumer-centric sustainability



8 Countries



USA



China



Japan



Germany



India



France



Italy



Brazil



14 Categories

CPG

- Beverages
- Snacks
- Skincare
- Home care

Retail

- Grocery retail
- Dining

Leisure Travel

Apparel

TMT: Streaming services

Electronic devices (PC/tablets)

Building materials

Luxury products

Utilities: Electricity

Automotive/Mobility: Cars

Topics Covered



What do consumers think about sustainability – concern, action, willingness to pay?



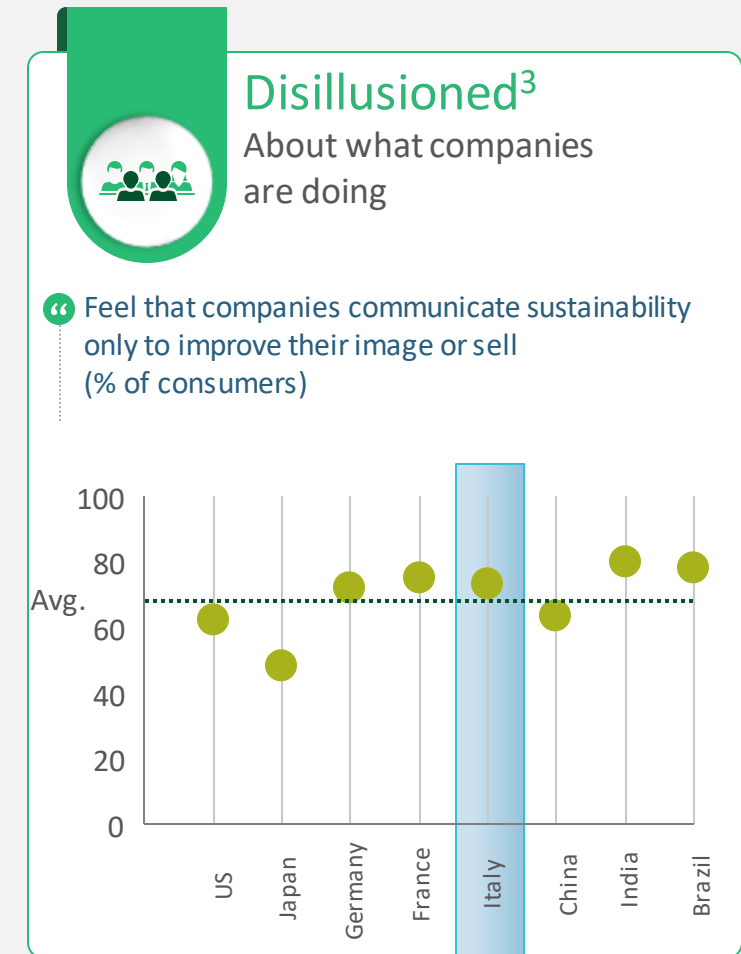
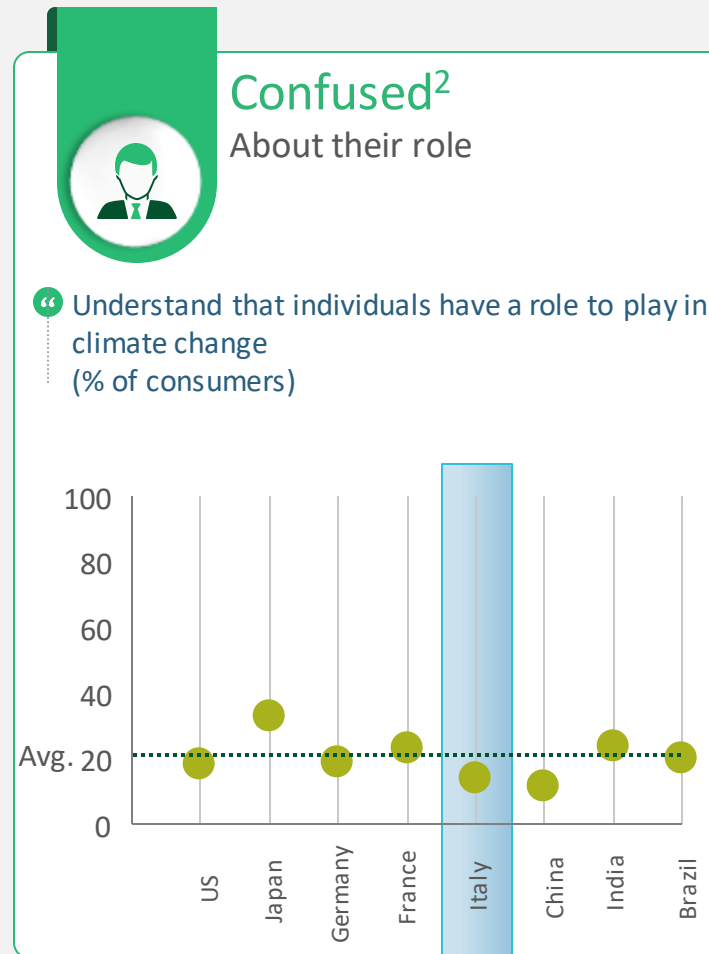
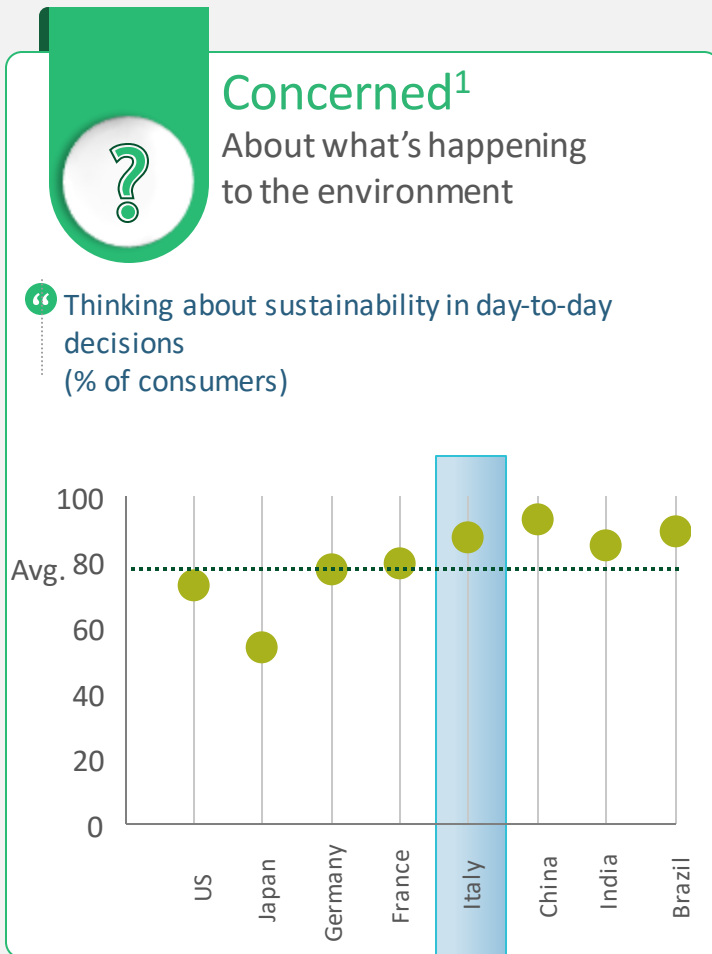
What are the key barriers towards greater adoption?



What will it take to drive action – what language, influencers, prices?



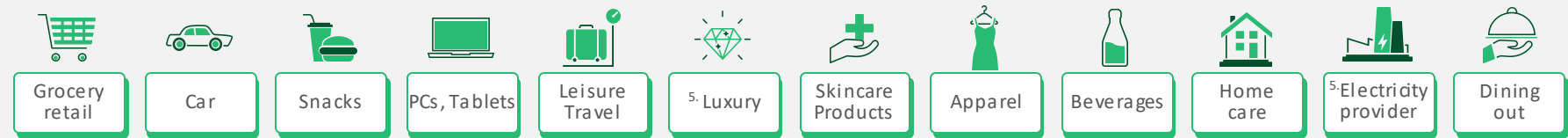
Consumers in Italy are concerned about the environment, but also disillusioned



Source: BCG climate and sustainability consumer survey, June 2022.

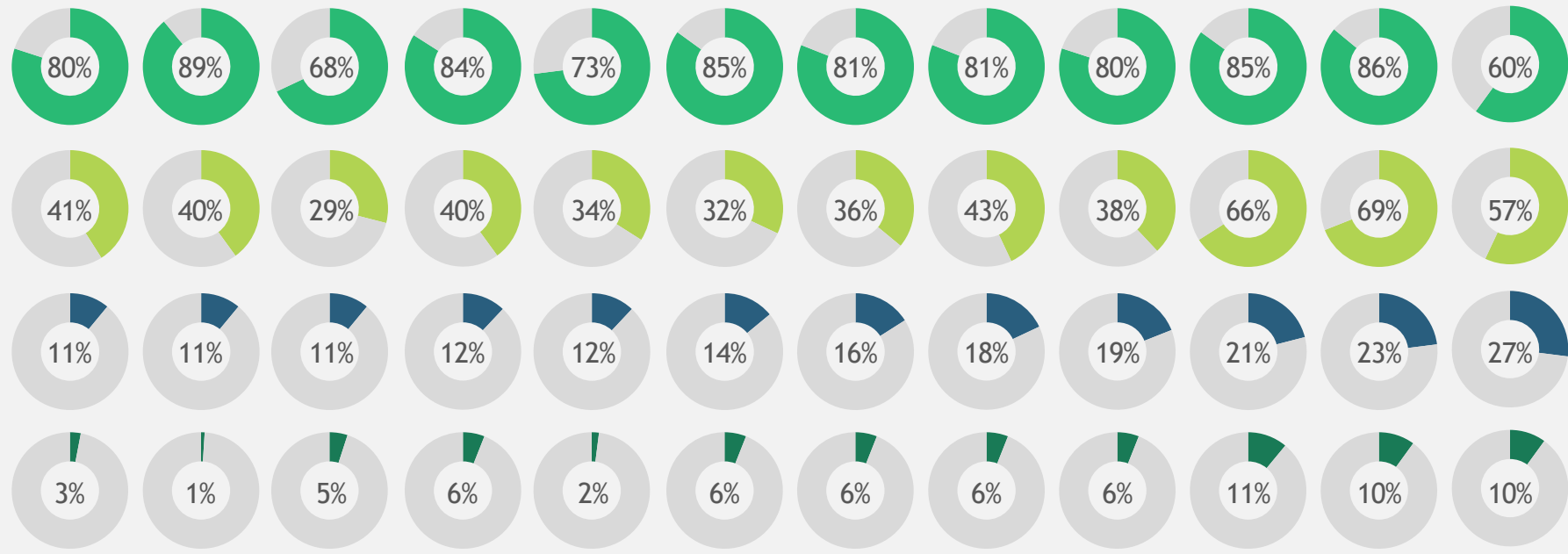
Note: ¹Question: B4.2 How likely are you to be thinking about sustainability when you make day-to-day decisions? (% of respondents showing concern at least on 5 out of 10 times when buying or using products & services); Market representative sample size (n=11,836) ²Question: E1.1 Which of the following players are most responsible for climate change?; ³Question: E1.6 How much do you agree/disagree with the following regarding sustainability? n=19,024; weighted market representative sample of countries USA, Japan, Germany, France, Italy, China, India and Brazil.

Categories are at different stages of maturity on sustainable action by consumers



Less Evolved

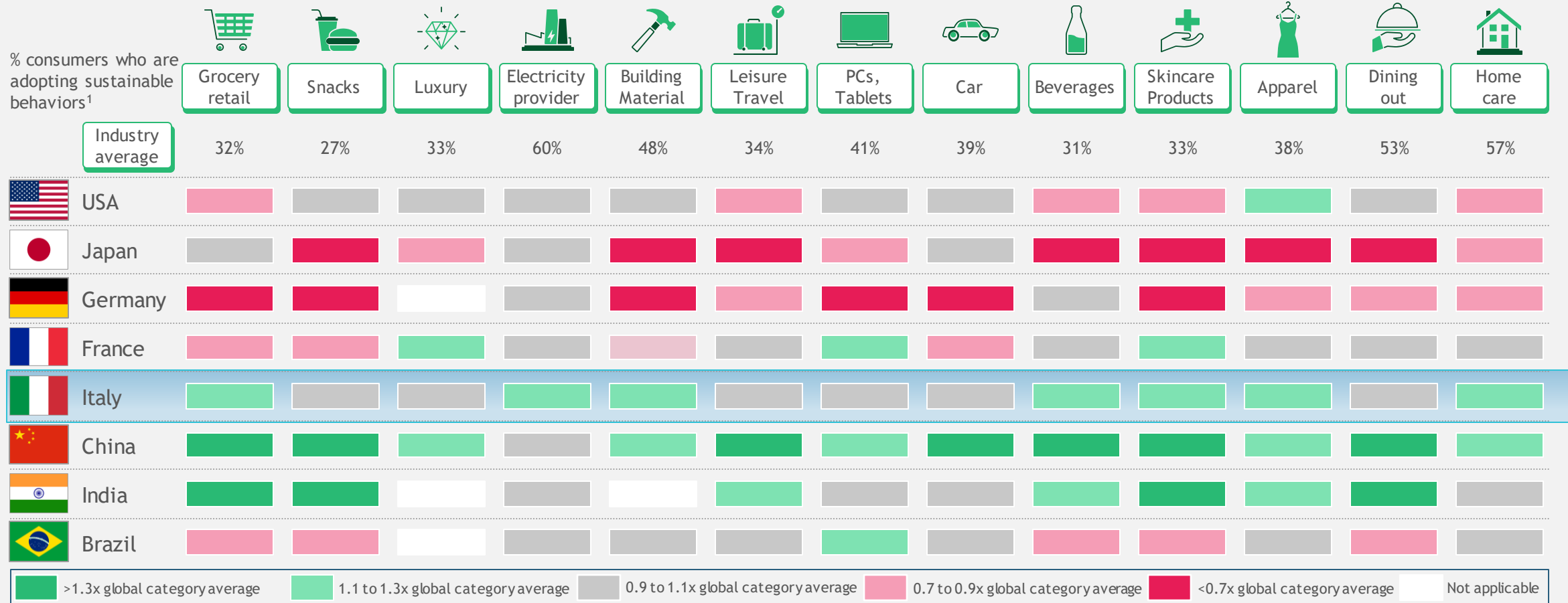
More Evolved



Source: BCG climate and sustainability consumer survey, June 2022

Note: Weighted market representative random sample only, n=11,836; countries include USA, Japan, Germany, France, Italy, China, India and Brazil. Numbers represent simple averages of % of respondents per country. ¹Question: B4.2 How likely are you to be thinking about sustainability when you make day-to-day decisions? ²Question: B5.2 How frequently do you engage in these sustainable behaviours? ³Question: B5.2 How frequently do you engage in "purchase-related" sustainable behaviours? ⁴Question: B1.12a Would you expect the price of product with sustainable characteristic to be more expensive than regular products?; % acting consumers who have purchased sustainable products or service ³ and believe it had a higher price premium versus regular product or service. ⁵India, China and Brazil excluded from electricity provider acting stage as not applicable, Luxury excluded from Germany, India and Brazil. ⁶Building material excluded from India due to low sample size.

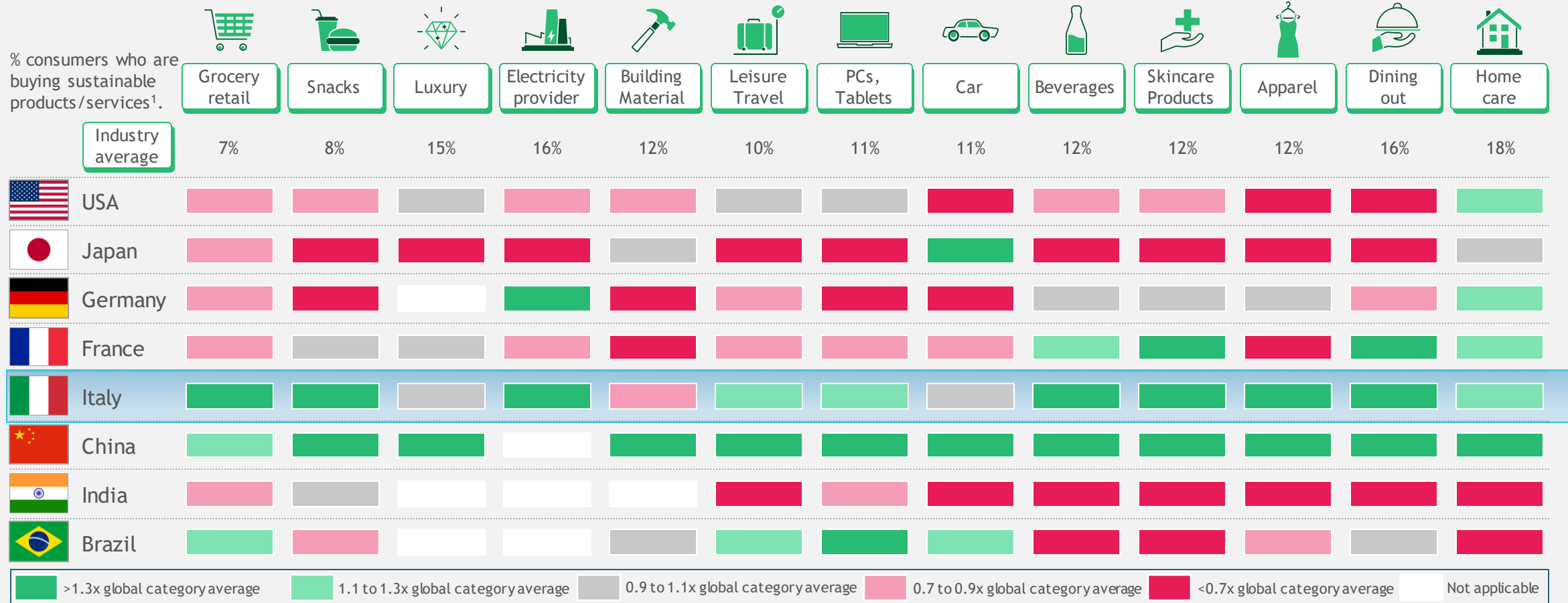
Higher adoption to sustainability among consumers from Italy compared to other high-income markets



Source: BCG climate and sustainability consumer survey, June 2022.

Note: Weighted market representative random sample only n=11,836; countries include USA, Japan, Germany, France, Italy, China, India and Brazil. Question: B5.1 Which of these behaviours have you followed when purchasing or using [category]. B5.2 How frequently do you engage in these sustainable behaviours?, Note: Luxury excluded from Germany, India, Brazil due to low sample size. Building material excluded from India due to low sample size. Simple average of market % taken to arrive at category level percentages.

..And consumers from Italy are also ahead on 'acting' (buying sustainable products/ services) from other markets except China



Source: BCG climate and sustainability consumer survey, June 2022.

Note: Weighted market representative random sample only n=11,836; countries include USA, Japan, Germany, France, Italy, China, India and Brazil. Question: B5.1 Which of these behaviours have you followed when purchasing or using [category]. B5.2 How frequently do you engage in these sustainable behaviours?, Note: Luxury excluded from Germany, India, Brazil due to low sample size. Building material excluded from India due to low sample size. Simple average of market % taken to arrive at category level percentages.

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