



Sustainable Lifestyle Report 2021

Sustainable Lifestyle Receptive Survey2021 ◀ SLS2021 ▶

Global Business Center, Dentsu Inc. / Dentsu Institute

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The “Now” and “Hereafter” of Sustainable Lifestyles

In 2010, Dentsu Inc. and Dentsu Institute conducted an awareness survey regarding sustainable lifestyles in 14 countries. More than a decade later, we have less than ten years before 2030, the year stipulate to achieve the 17 Sustainable Development Goals. In 2021, we conducted a second survey of awareness regarding sustainable lifestyles in 16 countries, in order to discover the “now” and “hereafter” of awareness among people.

The world has been transformed in this ten years. With advances in digitalization and technology, we can use social media and other tools to enjoy enriched global networks. Yet at the same time, people around the globe are faced with large-scale natural disasters and the threat of COVID-19. In this survey, we used some of the same questions from the 2010 survey, while updating others to reflect changes from the past decade. We also made some changes to our target countries.

This report presents a portion of the results, based on the 12 countries where our survey was completed in July 2021. The results of the remaining 4 countries, where the survey was conducted in October, will be announced in 2022.

The survey questions were wide-ranging, including awareness and actions towards the global environment and society, and awareness, lifestyles, and consumption behavior regarding sustainability and the future. The reason for this range was because we have a broad-based concept of what “sustainable lifestyles” means. In other words, “lifestyles” does not merely refer to things like consumption or daily habits, but whether, in the various decisions and choices we make each day, we are aware of passing on our current environmental, social, and economic prosperity to future generations: we wanted to clarify people’s awareness and values.

This report has two chapters. Chapter 1 focuses on people’s awareness and actions regarding society and the environment, while Chapter 2 takes an overview of people’s awareness and actions regarding consumption. We clarify each country’s characteristics and common trends, and consider what these mean for the future.

SLS2021 Team

Global Business Center, Dentsu Inc. / Dentsu Institute

Chapter 1.

Awareness and Actions Regarding Society and the Environment

If we don't engage in mitigating the effects of climate change, we won't be able to sustain our lifestyles or society.

72.7%

Society can be changed through the cumulative actions of each individual.

74.4%

Total (n=4800)

Social issues of concern

Social issues of concern vary by country. In Germany and the UK, both European countries, “Ocean plastic waste” was the issue of most concern. The EU has been a pioneer in this area, announcing a plastics strategy in 2018 and adopting regulations to limit single-use plastics in 2019. Due to this limitation, a number of different companies, such as the food-service industry, have been forced to reduce plastic waste. As a result, awareness of plastic waste has penetrated to the extent that it is sensed in people’s daily lives.

However, the ASEAN nations are more concerned about economic issues such as “Poverty and hunger,” and “Unemployment rate,” and social infrastructure issues such as “Education” and “Healthcare/public health”.

Characteristics of each country

- “Natural disasters” are rated highest in Japan, with “Falling birthrate and aging population” rated second.
- “Ocean plastic waste” is rated highest in Germany, the UK, and Singapore.
- In the US, the highest ranks were “Poverty and hunger,” “Racism,” and “Healthcare system and facilities.”
- In China, India, and Vietnam, the top places were “Air pollution,” “Water pollution and shortages.”
- In Indonesia, the Philippines, and Malaysia, “Public health” and “Poverty and hunger” were of the greatest concern.
- In Thailand, the top issues were “Poverty and hunger,” “Air pollution,” and “Unemployment rate.”

In addition, perhaps reflecting the fact that there have been a number of unprecedented natural disasters in recent years, “Natural disasters” ranked high in Japan, Germany, and Vietnam.

It appears that there is awareness of social issues in daily life of each individual. Looking at how the country and companies act, and information obtained from media, also play major roles in raising this awareness.

Figure 1. Social issues of interest

Country	Issue	Percentage
Japan (n=500)	1 Natural disasters	57.2%
	2 Falling birthrate and aging population	45.6%
	3 Air pollution	41.6%
Germany (n=500)	1 Ocean plastic waste	58.8%
	2 Natural disasters	52.8%
	3 Poverty and hunger	52.2%
UK (n=500)	1 Ocean plastic waste	52.8%
	2 Forest conservation	42.4%
	3 Poverty and hunger	42.2%
US (n=500)	1 Poverty and hunger	47.4%
	2 Racism	45.8%
	3 Healthcare system and facilities	45.0%
China (n=500)	1 Air pollution	69.6%
	2 Water pollution and shortages	64.4%
	3 Educational issues	55.4%
India (n=500)	1 Air pollution	70.0%
	2 Water pollution and shortages	60.8%
	3 Public health	59.0%
Indonesia (n=300)	1 Educational issues	65.3%
	2 Public health	60.7%
	3 Poverty and hunger	57.7%
Malaysia (n=300)	1 Educational issues	55.3%
	2 Public health	53.0%
	3 Poverty and hunger	51.3%
Philippines (n=300)	1 Poverty and hunger	77.0%
	2 Public health	72.0%
	3 Healthcare system and facilities	67.0%
Singapore (n=300)	1 Poverty and hunger	42.3%
	1 Ocean plastic waste	42.3%
	3 Reduction of CO ₂ emissions	41.3%
Thailand (n=300)	1 Poverty and hunger	64.7%
	2 Air pollution	62.0%
	3 Unemployment rate	61.3%
Vietnam (n=300)	1 Air pollution	78.3%
	2 Water pollution and shortages	73.7%
	3 Natural disasters	66.0%

Involvement in social activities

The ratio of people who considered themselves “leaders” in social activities*1 such as making donations and collecting signatures was not that high in any country, but we determined that there were a lot of “members” and “followers” instead. In Vietnam and Indonesia, 80% of the respondents recognized themselves as “Leaders,” “Members,” and “Supporters,” those with high involvement in social activities. The two countries were followed by the Philippines, India, and Malaysia, with about 70% each.

However, in economically advanced nations*2, such as Singapore, the UK, Germany, and Japan, those with high involvement in social activities were less than 50%, with just 28.0% in Japan, the lowest result of all.

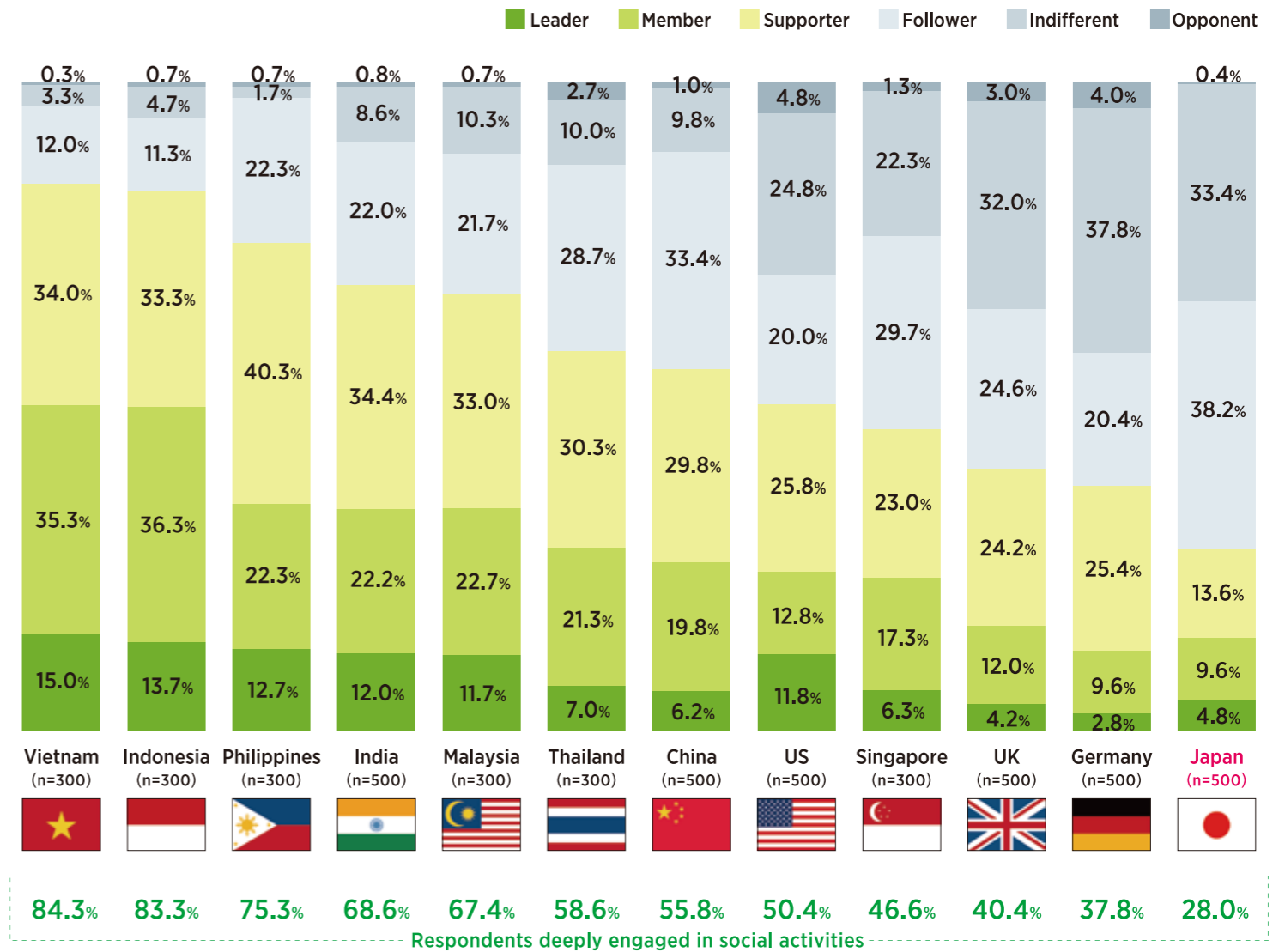
Characteristics of each country

- In Vietnam and Indonesia, about 80% were those with high involvement in social activities.
- In Japan, Germany, the UK, and Singapore, fewer than half had high involvement in social activities.

*1. This survey defines “social activities” as “activities engaged in by individuals with the goal of correcting climate change issues and social imbalances.” Respondents could select the closest to themselves from the six choices of “Leader” (plans social activities such as events and drives for donations, or signatures), “Member” (event participant), “Supporter” (does not participate in events but does spread information to those around), “Follower” (proactively seek information), “Indifferent” (has no interest in information), and “Opposed” (opposes social activities).

*2. The definition of “economically advanced nation” is based on the Economically Advanced Nations announced by the International Monetary Fund (IMF) in 2017. For this survey, it means Japan, Germany, the UK, the US, and Singapore.

Figure 2. Engagement in Social Activities



Why people have an interest in social issues

The triggers to become interested in social issues are more commonly “Social media posts” than “News and articles” in ASEAN, but in other countries, it was in reverse order. In ASEAN, the younger generation occupies a larger extent of the total population (see the demographics comparison on p.28), and younger people use social media more. Through social media, it is easy and common for the users to find out what their friends and influencers are doing, and is also easy to publicize their own lifestyles and opinions. Receiving and posting information on social media has a major influence on the awareness of youth not just in ASEAN but around the world, and has the potential to shape future images of society and the economy, which means we must continue to pay close attention to it.

Characteristics of each country

- In ASEAN, “Social media posts” rate higher than “News and articles.”
- In Singapore and Vietnam, “Volunteering” ranks high.
- In Japan and the UK, “Documentaries and non-fiction” ranks high.
- In Indonesia and Malaysia, “Videos shared by people making a social contribution” is the spur.

Figure 3. Why people have an interest in social issues

Country	Rank	Category	Percentage
Japan (n=500)	1	News and articles	56.0%
	2	Documentaries	33.0%
	3	Talking to friends and family	32.2%
Germany (n=500)	1	Talking to friends and family	45.4%
	2	News and articles	39.4%
	3	Movies, TV shows, or books	38.6%
UK (n=500)	1	News and articles	46.2%
	2	Talking to friends and family	45.0%
	3	Documentaries	40.8%
US (n=500)	1	Talking to friends and family	47.6%
	2	Movies, TV shows, or books	42.6%
	3	News and articles	41.2%
China (n=500)	1	News and articles	54.8%
	2	Movies, TV shows, or books	51.8%
	3	Experiencing a natural disaster	48.6%
India (n=500)	1	News and articles	57.2%
	2	Talking to friends and family	56.4%
	3	Social media posts	56.0%
Indonesia (n=300)	1	Social media posts	62.7%
	2	Movies, TV shows, or books	57.3%
	3	Videos shared by people making a social contribution	54.0%
Malaysia (n=300)	1	Social media posts	60.7%
	2	Movies, TV shows, or books	54.7%
	3	Videos shared by people making a social contribution	53.0%
Philippines (n=300)	1	Social media posts	72.3%
	2	News and articles	60.0%
	3	Movies, TV shows, or books	59.3%
Singapore (n=300)	1	Talking to friends and family	45.0%
	2	Social media posts	42.0%
	3	Volunteering	38.3%
Thailand (n=300)	1	Social media posts	60.3%
	2	News and articles	47.0%
	3	Talking to friends and family	44.0%
Vietnam (n=300)	1	Volunteering	69.0%
	2	Experience tours	54.0%
	3	Social media posts	49.7%

Eco friendly lifestyle behavior 1

Eco friendly lifestyle behavior also shows differences between countries. For example, in China, 72.6% “Bringing home leftover food at restaurants,” the highest among all 12 countries. This is thought to be the effects of the Anti-Food Waste Law passed in 2021. This law, created to reduce food loss, imposes a fine of up to 10,000 yuan (approx. 170,000 yen) on restaurants if a customer orders too much, and permits restaurants to collect a garbage disposal fee from customers who leave large amounts of food on their plates.

In the Philippines, with the highest rate of personal shopping bag usage among the 12 countries, there are regulations regarding plastics in more than 500 local authorities. In second-ranked Japan, charges for shopping bags started in 2020, increasing the rate of people using their own eco bags. In addition, in the Philippines, Indonesia, and Japan, countries with high sales of refillable products, a lot of refillable laundry products can be found in shops. However, in the UK and China, there are few refillable

products available, so fewer people buy them.

Characteristics of each country

There is a high rate of people bringing leftover food home in China, but a low rate of people buying refillable products.

There is a high rate of using your own eco bags and buying refillable products in Japan, but a low rate of taking leftover food home.

All four have high rates in the Philippines.

There is a low rate of personal shopping bag usage in the US.

Figure 4. Carrying water bottles

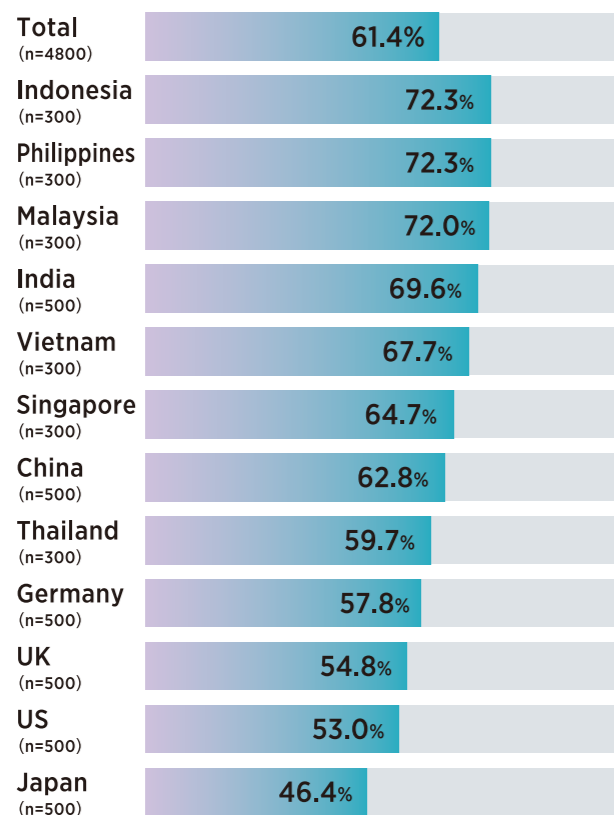


Figure 5. Bringing home leftover food at restaurants

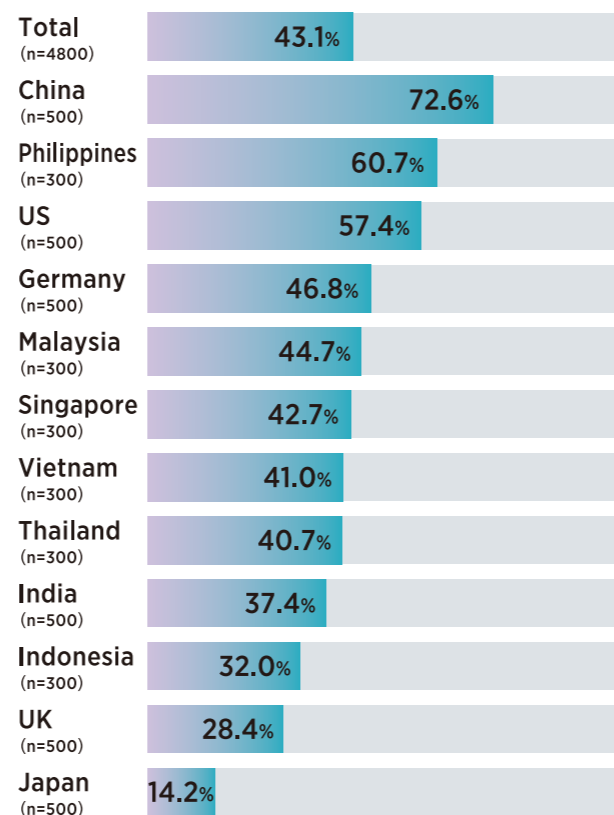


Figure 6. Using Eco bags

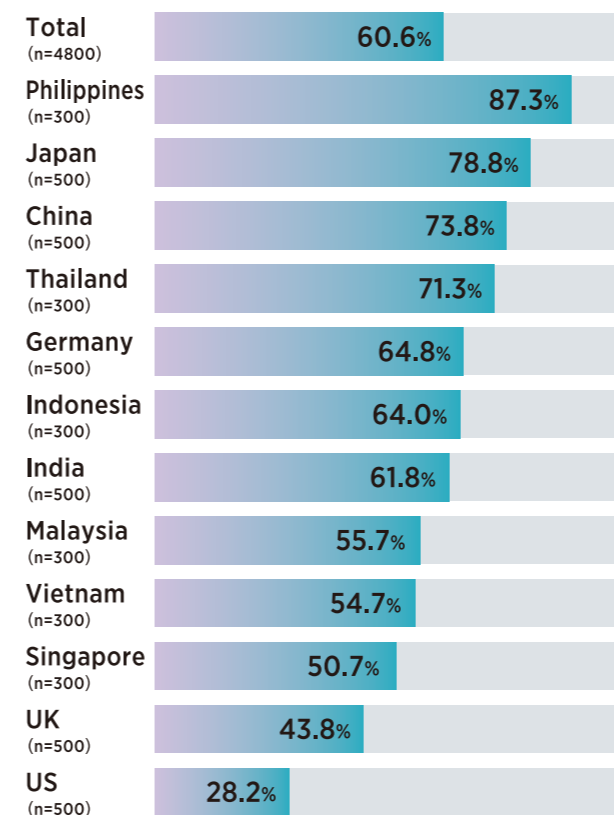
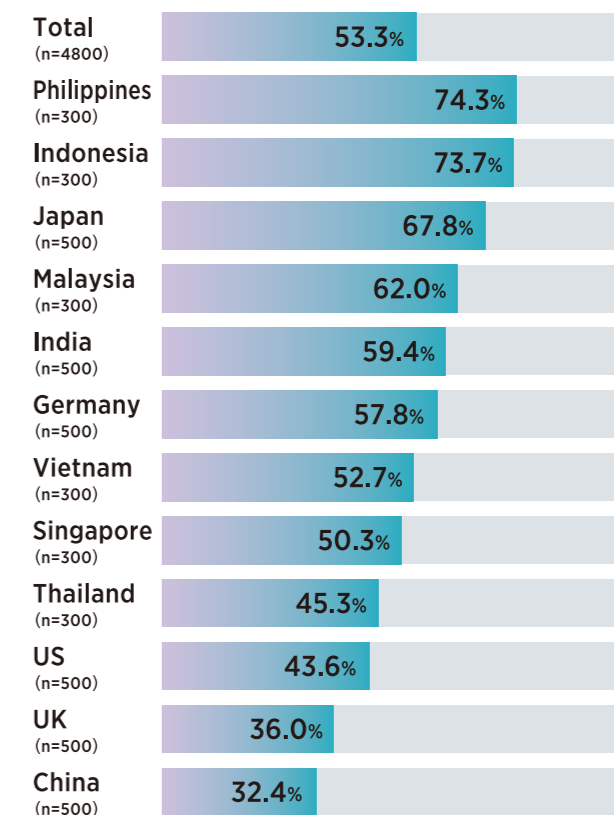


Figure 7. Buying refillable products



Eco friendly lifestyle behavior 2

More than half of the respondents in Vietnam were engaged in the two items connected with discarding unwanted items, “Taking unused clothing and toys to store collection boxes” and “Donating unneeded goods or books or dropping them off at second-hand stores.” In addition, in the UK, which had a high rate of respondents saying they donated items, there are numerous charity shops in each city, and a firmly-rooted culture of donating unwanted items.

This survey also asked about actions related to laundry. The ratio of people responding “Gathering laundry to wash together rather than doing it everyday” was over half in all countries other than Singapore and Japan, showing that this is practiced in many countries. In addition, more than half the people in Vietnam and Germany agreed with “Using natural detergents.”

Characteristics of each country

- There is a strong culture of recycling or donating unwanted items in the UK.
- Both store collection boxes and selling/donating second-hand items are common in Vietnam.
- A lot of people in Germany do their laundry in bulk and use environmentally friendly detergents.

Figure 8. Taking unused clothing and toys to store collection boxes

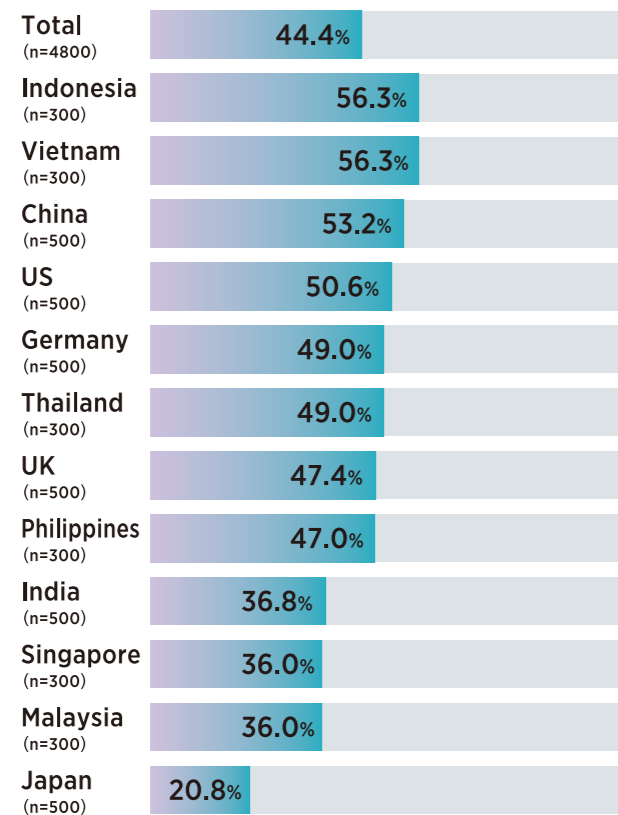


Figure 9. Donating unneeded goods or books or dropping them off at second-hand stores

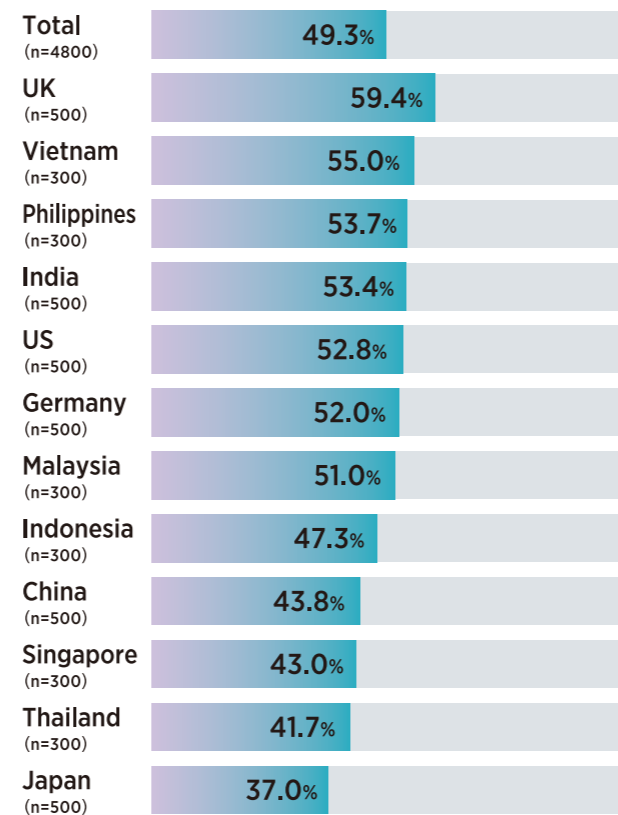


Figure 10. Gathering laundry to wash together rather than doing it everyday

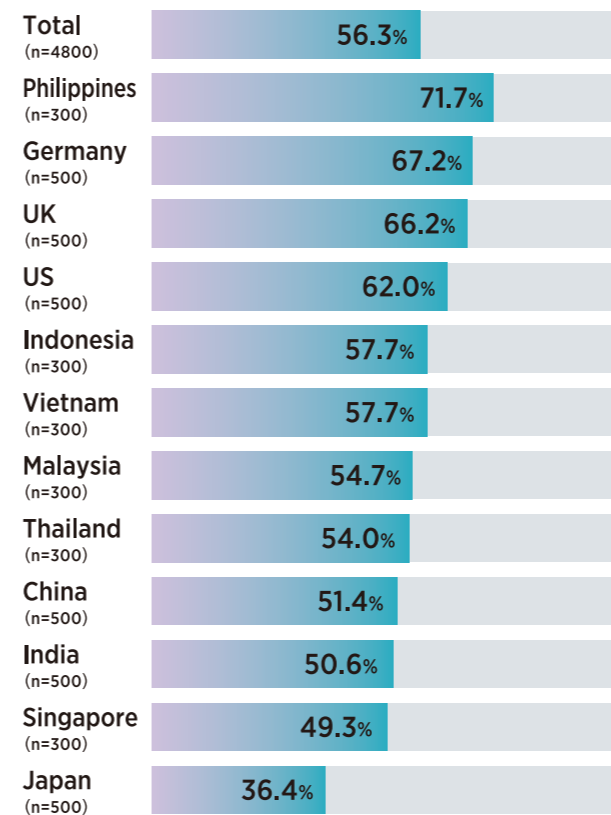
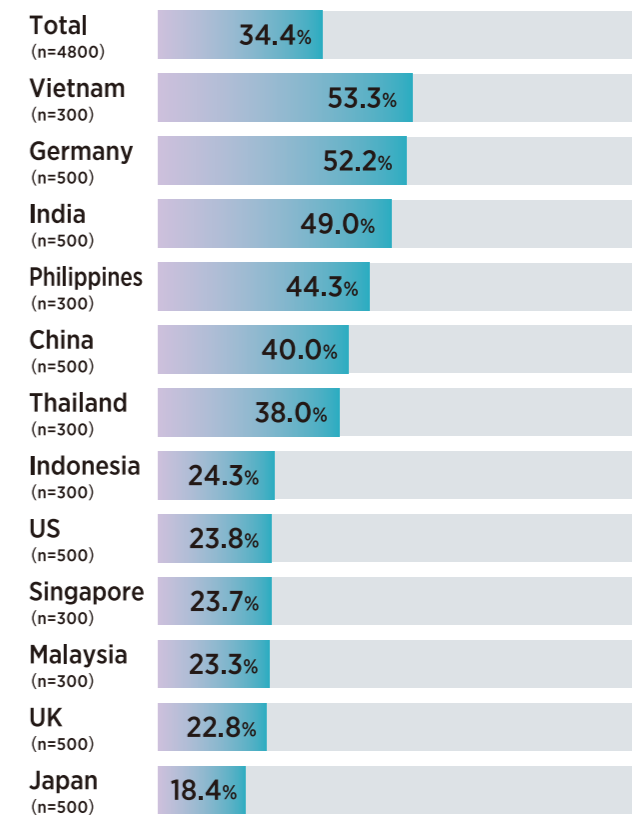


Figure 11. Using natural detergents



Awareness of terms

There are a number of terms used in relation to sustainability, and the awareness (“I know the meaning of this term” + “I know this term though I don’t know the meaning”) in each country also varies. For example, of the following five terms, awareness of “SDGs” was highest in Japan and Indonesia, with more than 70% of people responding that they knew the term or even the meaning. The SDGs are so well known in Japan that they are even mentioned in school textbooks, and in addition to the government and local authorities, industry is also increasingly getting involved. Indonesia, being a maritime country located on the equator, means that geographically, it is susceptible to climate change. Therefore, specific activities towards achieving the SDGs are being strengthened by the National Development Planning Agency in particular.

On the other hand, awareness of the term “SDGs” is less than 50% in the US, the UK, Singapore, the Philippines, and India. Instead, “Zero emission” was known by more than 70%, where as only 36.6% of the respondents in Japan knew.

Looking just at the theme of carbon, including “Carbon neutrality,” “Decarbonization,” and “Zero

emission,” the most common term varies in each country, so there appears to be a need to consider which term would be most effective to use.

Characteristics of each country

- Only “SDGs” is recognized by more than 70% of people in Japan and Indonesia.
- Only “Zero emission” is recognized by more than 70% of people in the US and Singapore.
- “Carbon neutrality” and “Zero emission” are recognized by more than 70% of people in the UK.
- Only “Circular economy” is recognized by more than 70% of people in Malaysia.
- More than 70% of people in Germany, China, India, Thailand, Vietnam, and the Philippines know multiple terms.

Figure 12. Awareness of terms (“I know the meaning of this term” + “I know this term though I don’t know the meaning”)

	Total (n=4800)	Japan (n=500)	Germany (n=500)	UK (n=500)	US (n=500)	China (n=500)	India (n=500)	Indonesia (n=300)	Malaysia (n=300)	Philippines (n=300)	Singapore (n=300)	Thailand (n=300)	Vietnam (n=300)
Carbon neutrality	69.5%	57.0%	84.4%	76.0%	56.8%	82.4%	76.4%	56.3%	60.7%	67.7%	68.0%	65.3%	71.7%
Decarbonization	62.3%	63.8%	29.6%	57.4%	54.8%	67.4%	77.4%	50.7%	65.0%	70.0%	67.0%	83.7%	75.7%
Zero emission	74.3%	36.6%	78.6%	84.2%	73.8%	91.0%	82.6%	68.7%	59.3%	78.7%	87.0%	81.3%	69.3%
Circular economy	62.7%	29.6%	73.8%	41.0%	40.2%	90.8%	73.2%	59.3%	71.7%	71.3%	50.7%	86.7%	83.0%
SDGs	49.5%	70.4%	58.8%	12.2%	12.4%	94.2%	39.2%	75.0%	27.3%	34.3%	26.0%	73.7%	77.7%

The images of the word “Sustainability”

What the word “Sustainability” relate to, has varied by country. In economically advanced nations, people think of the global environment, whereas in ASEAN, it is seen as meaning related to industrial growth concepts, such as “Development” or “Technological advancement,” or other aspects of individual happiness or sustainability as a society, including “Harmony” or “Well-being.” In

economically developing nations, which have large youth populations, sustainability has a strong image of being a set of “Development” and “Growth.”

Looking at changes in Japan from 2010 to 2021, “Global environment” remained in top, but there have been major changes in the other ranks. In 2010, vague terms like “Connectivity / Relationships” and “Endurance” were ranked high, but in 2021, more specific terms like “Recycling society / Circular economy,” “Social impact,” and “Diversity” were rated high, showing that those terms are now recognized as an ongoing issue.

Figure 13. Words associated with “sustainability”

Country	Rank	Word	Percentage
Japan (n=500)	1	Global environment	51.8%
	2	Recycling society / Circular economy	29.2%
	3	Social impact	26.6%
Germany (n=500)	1	Recycling society / Circular economy	62.8%
	2	Global environment	58.8%
	3	Responsibility / Obligation	44.6%
UK (n=500)	1	Global environment	55.6%
	2	Recycling society / Circular economy	50.8%
	3	Responsibility / Obligation	36.0%
US (n=500)	1	Global environment	37.4%
	2	Recycling society / Circular economy	36.0%
	3	Sense of balance	32.6%
China (n=500)	1	Global environment	65.4%
	2	Recycling society / Circular economy	64.4%
	3	Technological advancement	49.4%
India (n=500)	1	Global environment	50.8%
	2	Sense of balance	41.8%
	3	Recycling society / Circular economy	40.4%
Indonesia (n=300)	1	Growth	55.7%
	1	Technological advancement	55.7%
	3	Innovation	49.7%
Malaysia (n=300)	1	Wellbeing	46.7%
	2	Harmony	41.0%
	3	Global environment	40.3%
Philippines (n=300)	1	Growth	51.7%
	2	Efficiency	49.3%
	3	Development	49.0%
Singapore (n=300)	1	Global environment	62.7%
	2	Recycling society / Circular economy	51.3%
	3	Social impact	42.7%
Thailand (n=300)	1	Wellbeing	52.7%
	2	Development	51.0%
	3	Global environment	49.3%
Vietnam (n=300)	1	Development	46.7%
	2	Endurance	45.3%
	3	Security	40.3%

Figure 14. Words associated with “sustainability” (Japan)

Year	Rank	Word	Percentage
2010 (n=1,000)	1	Global environment	31.7%
	2	Connection / Relationships	22.5%
	3	Responsibility / Obligation	20.0%
	4	Children / Next generation	16.9%
	5	Endurance	15.6%
2021 (n=500)	1	Global environment	51.8%
	2	Recycling society / Circular economy	29.2%
	3	Social impact	26.6%
	4	Technological advancement	25.4%
	5	Diversity	24.2%

Characteristics of each country

- In Germany, “Circular economy” was top, above “Global environment.”
- In the UK and Germany, “Responsibility / Obligation” was in the top three.
- In the US and India, “Sense of balance” was in the top three.
- In Malaysia and Thailand, “Wellbeing” was ranked top.

The images of "the year 2030"

2030 is the year stipulated by the United Nations as the year to achieve the Sustainable Development Goals (SDGs). However, with the exception of the "Recycling society/Circular economy" ranked 3rd in the UK, in no countries have terms related to sustainability reached the top three. In all target countries, the high rankings of "Technological advancement" and "Digital" show little change from the 2010 survey.

Looking at the results for Japan, the top in 2010 was "Anxiety" and the second place was "Collapse," both pessimistic words. In 2021, "Anxiety" rated third, but in fourth place came "Biotechnology/Genomics" and fifth place was "Diversity," showing that while there is still a vague worry about the future, specific images of "the year 2030" are starting to crystalize.

Figure 15. Words associated with "the year 2030"

Country	Rank	Word	Percentage
Japan (n=500)	1	Technological advancement	49.0%
	2	Digital	39.0%
	3	Anxiety	34.6%
Germany (n=500)	1	Technological advancement	52.2%
	2	Digital	45.2%
	3	Transformation	41.8%
UK (n=500)	1	Technological advancement	42.6%
	2	Digital	29.2%
	3	Recycling society / Circular economy	25.2%
US (n=500)	1	Technological advancement	46.8%
	2	Progressing	30.8%
	3	Growth	30.0%
China (n=500)	1	Technological advancement	71.0%
	2	Digital	61.4%
	3	Global	57.4%
India (n=500)	1	Technological advancement	70.4%
	2	Digital	60.8%
	3	Development	58.6%
Indonesia (n=300)	1	Technological advancement	84.3%
	2	Digital	74.3%
	3	Progressing	65.7%
Malaysia (n=300)	1	Technological advancement	72.3%
	2	Digital	63.3%
	3	Transformation	61.0%
Philippines (n=300)	1	Technological advancement	76.3%
	2	Development	68.0%
	3	Growth	60.7%
Singapore (n=300)	1	Digital	60.3%
	1	Technological advancement	60.0%
	3	Transformation	45.7%
Thailand (n=300)	1	Technological advancement	64.0%
	2	Development	60.7%
	3	Digital	48.3%
Vietnam (n=300)	1	Technological advancement	82.3%
	2	Development	70.0%
	3	Progressing	63.3%

Figure 16. Words associated with "the year 2030" (Japan)

Year	Rank	Word	Percentage
2010 (n=1,000)	1	Anxiety	41.5%
	2	Collapse	22.1%
	3	Technological advancement	20.8%
	4	Digital	19.4%
	5	Far	17.5%
2021 (n=500)	1	Technological advancement	49.0%
	2	Digital	39.0%
	3	Anxiety	34.6%
	4	Biotechnology / Genomics	31.0%
	5	Diversity	30.6%

Characteristics of each country

- "Recycling society / Circular economy" was in the top three in the UK only.
- "Technological advancement" and "Digital" were highly ranked in many countries.
- "Anxiety" was in the top three only in Japan.
- Images of the year 2030 are starting to become clear, such as "Biotechnology / Genomics" and "Diversity."

Japanese youth are concerned about racism

Looking at the social issues of concern in Japan by age, among youth ages 18 to 29, “Racism” was top. On the other hand, “Economic stagnation,” the top concern of those aged 40 or older, was of less concern among those between 18 and 29.

The impact of social media is thought to be behind this. While the vast majority of people in Japan say that “News and articles” is where they develop interest in social issues, “Social media posts” ranked higher than “News and articles” among those aged 18-29. This shows that for the youth, social media plays a key role as a platform to spur awareness of social issues.

For example, movements that start overseas, such as Black Lives Matter or Stop Asian Hate, can be learned about in real time through social media. Since the younger generation engages with social media for much longer times, they are able to engage more quickly and more often with these sorts of global values. Thus, issues on racial or gender discrimination, or the political correctness of words and expressions, were not commonly shared in Japan until a few years ago, but the awareness seems to have become rapidly higher among the youth in particular.

Figure 17. Social issues of interest (Japan)

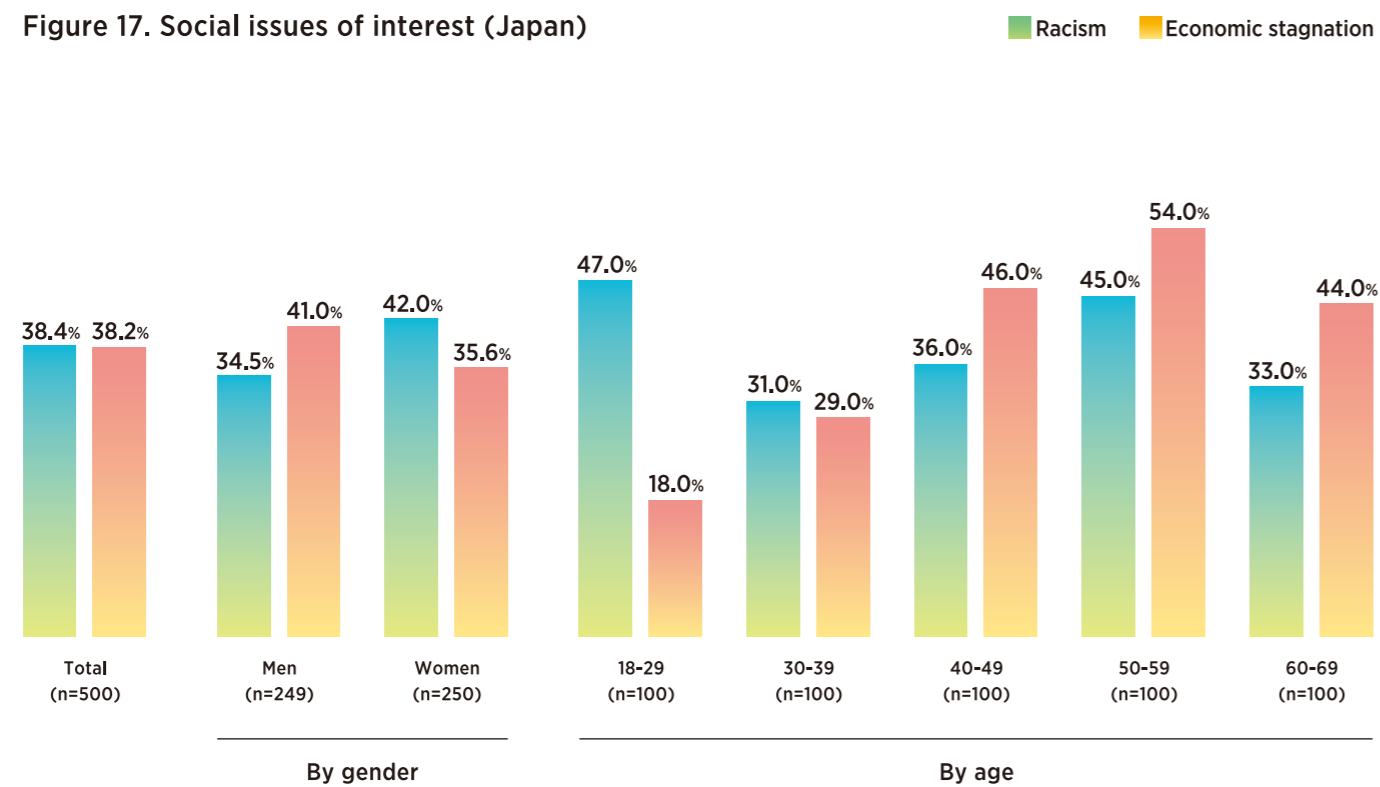
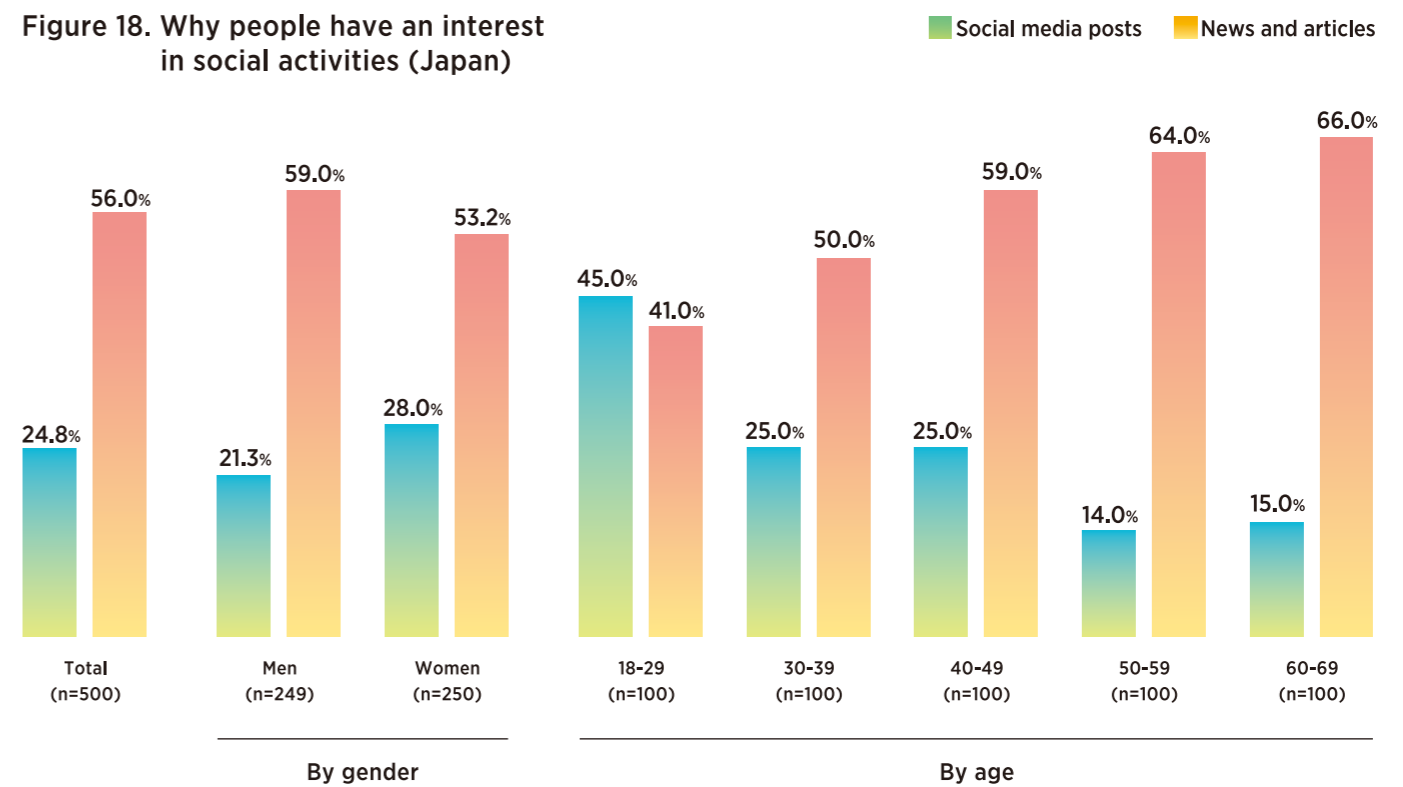


Figure 18. Why people have an interest in social activities (Japan)



Chapter 2.

Awareness and Actions Regarding Consumption

I choose environmentally friendly products for my daily necessities even if they are more expensive.

62.2%

I switch to brands that reduce the impact of climate change or tackle other social issues.

47.9%

Total (n=4800)

Environmental consumption and social involvement

The term “sustainable lifestyles” does not refer to a single lifestyle, but is flexible, being different in each country, generation, and person. As one attempt, we have focused on two elements: “Price tolerance for environmentally friendly products (do you choose environmentally friendly products for daily necessities even if they are more expensive, or choose goods that are cheaper?)” and “Involvement in social activities (Leaders, Members, Supporters, Followers, Uninterested, Opposed)” as seen on p. 6, assigning types to people from each country in the quadrant chart.

In Vietnam, Indonesia, and the Philippines, more than 60% of people had both high levels of price tolerance for environmentally friendly products and involvement in social activities. On the other hand, the economically advanced nations of Japan, Germany, the UK, the US, and Singapore showed low levels in both, with the numbers of those not interested in either of them between 30% and 40%.

We look forward to seeing what sort of sustainable lifestyles will be constructed by people in countries where there is a large population of younger generation, high expectations for economic growth, and where people easily feel they have the capacity to change society.

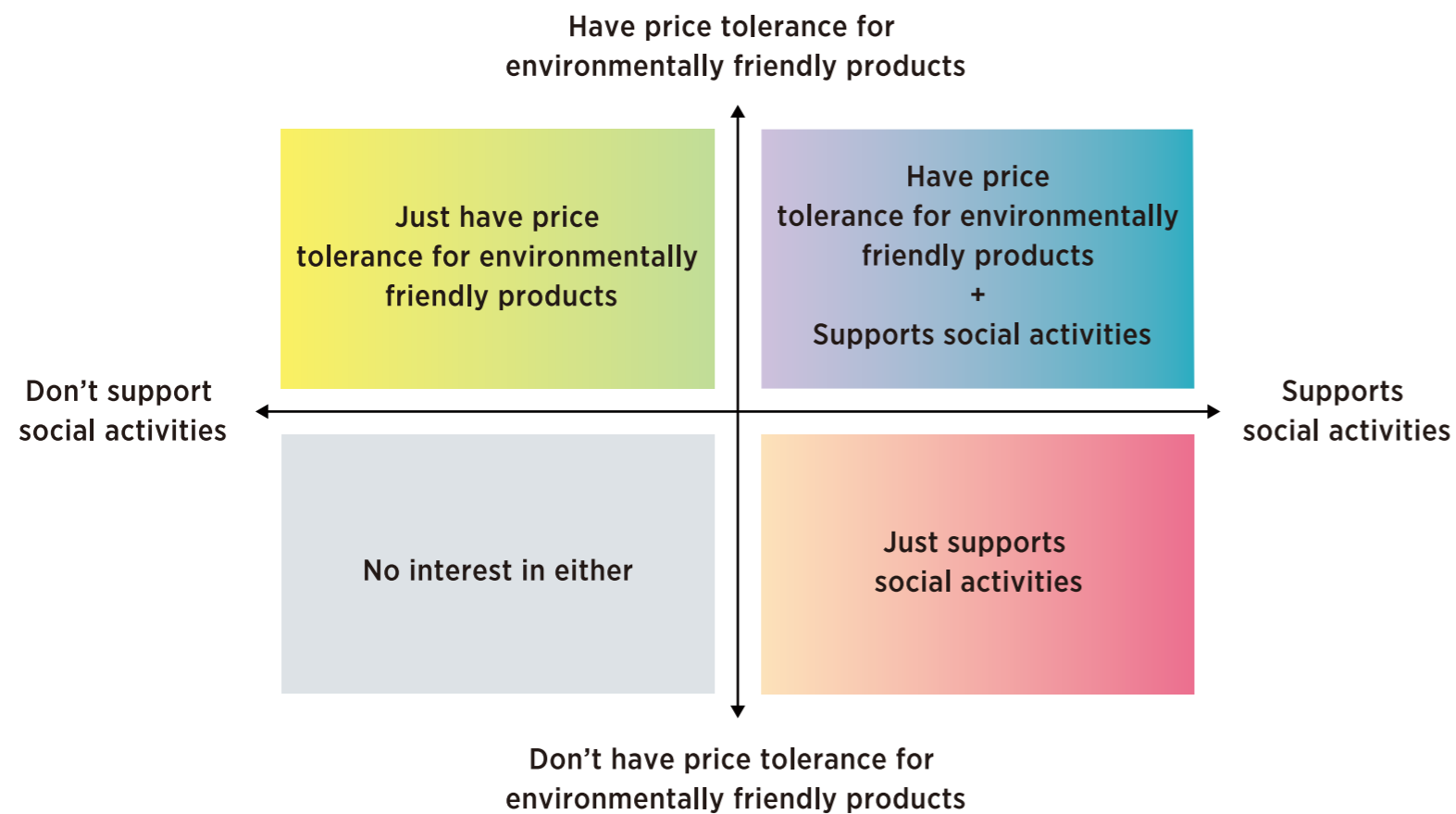
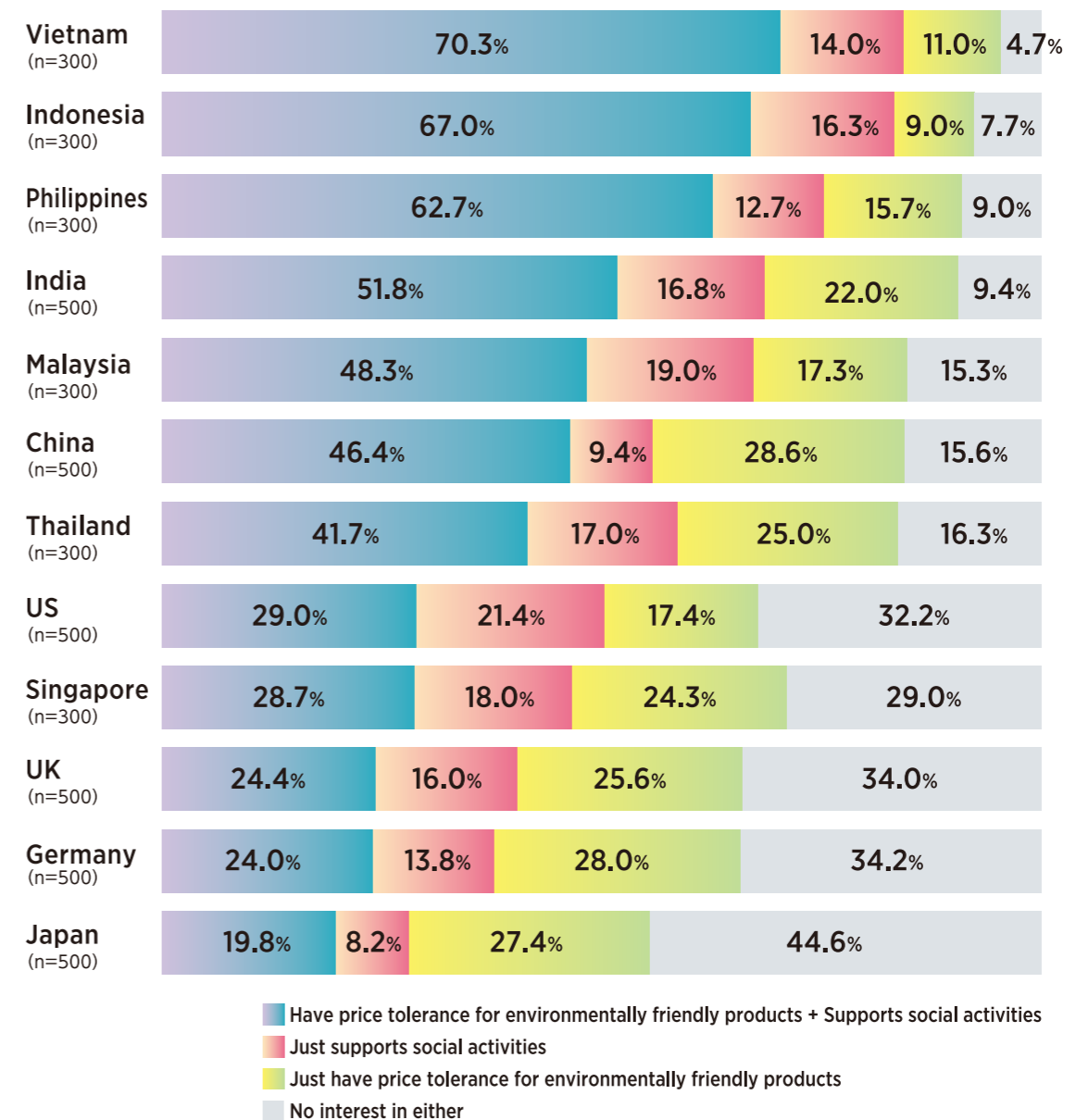


Figure 19. Environmental consumption and social involvement



Do consumers spend money with public welfare in mind or spend money for own interests and benefits?

When asked what they prioritized in consumption, people in the economically advanced nations of Japan, Germany, the UK, the US, and Singapore all placed "Own interests and benefits" over "Public welfare." In these countries, there was a high ratio of people responding that cost burdens such as environment taxes were unacceptable, and more than half replied that "I have my hands full preserving my current livelihood." with no leeway to consider the lives of the next generation. However, in Vietnam, Indonesia, and China, where greater economic growth is expected, more than 60% responded that they were doing what they could for the next generation. Positive prospects related to economic aspects may be affecting feelings towards the next generation. Note that Japan, which has had a long economic stagnation, showed an increase in the number of people who prioritized their "Own interests and benefits" in consumption compared to 2010.

Figure 20. Can you bear the cost of things such as an environmental tax?

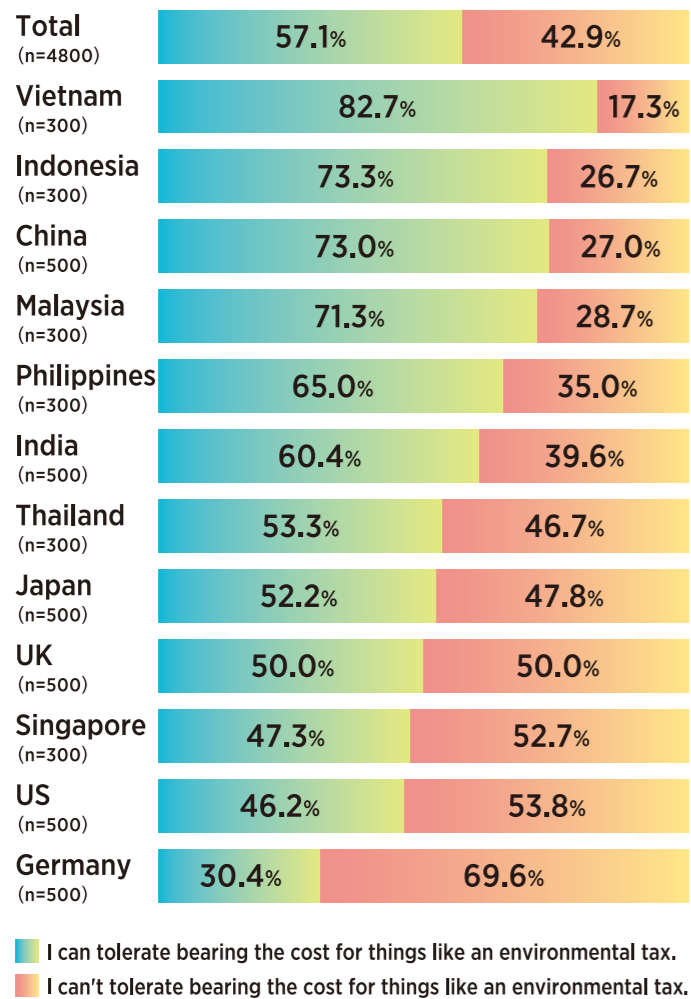


Figure 21. Are your hands full keeping your current livelihood, or are you doing what you can for the next generation?

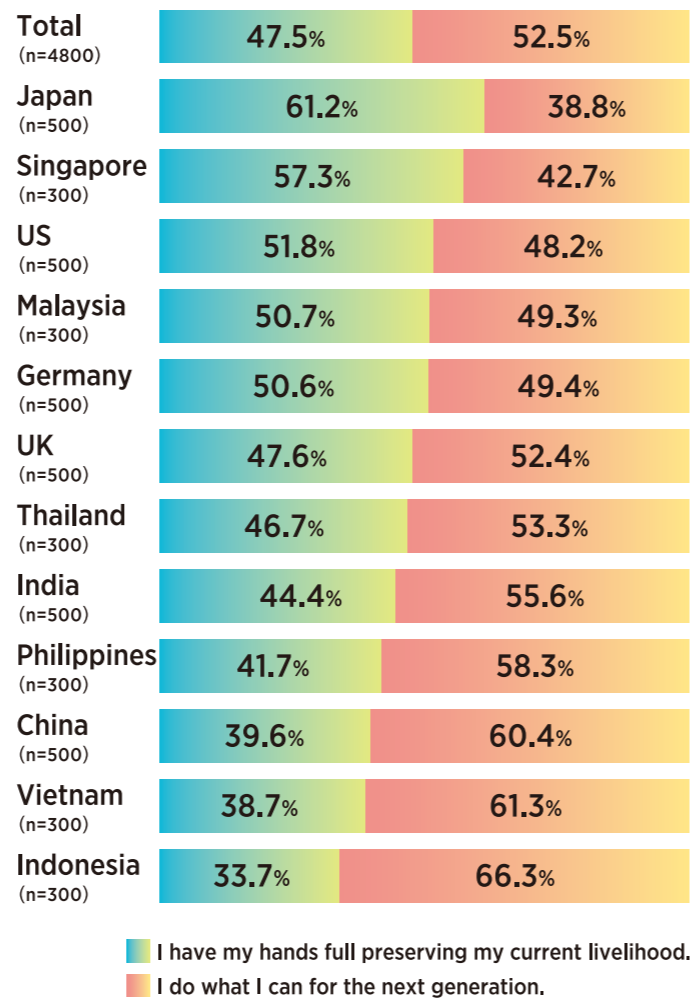
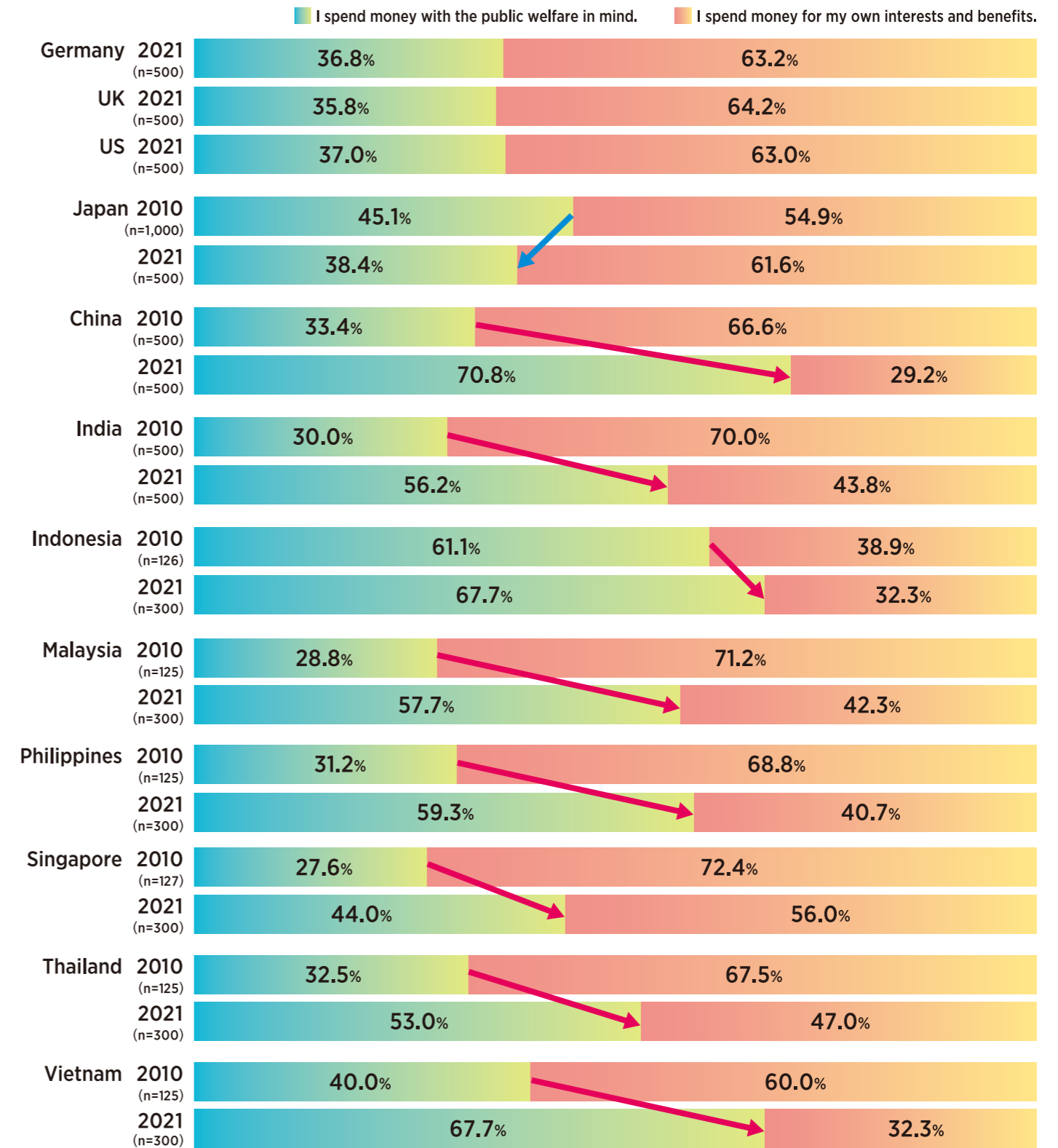


Figure 22. Consumption for "own interests and benefits" or "public welfare"



Consumption trends starting to penetrate among the under-45s

When asked about their experiences in using the products and services shown below, there was a low ratio of 20% to 30% among those who had used them over all 12 countries. However, looking only at those between 18 and 44, some products and services were consumed or used more commonly.

In terms of food and diet, a little under half the people between 18 and 44 had bought “Plant-based meat substitutes” in Vietnam and the UK. More than 40% of Germans have used “Composter.” In

addition, “Subscriptions for organic food or food products” were high in the Asian region.

From the perspective of the sharing economy, the three items of “Monthly rented household electronics/furniture/clothing,” “Rental spaces charged monthly” and “Car sharing” were ranked highly in Vietnam, India, the US, and Malaysia. In particular, the ratio of those who said they have used car sharing was 74.0% in Malaysia and 55.0% in Vietnam, more than half.

Figure 23. What your family owns or uses any of the following items or wants to use any of these in the future

	Plant-based meat substitutes	Composter	Subscriptions for organic food or food products	
Food and diet	Total	32.7%	Total	29.9%
	Vietnam	48.0%	Germany	43.3%
	UK	45.9%	Thailand	39.0%
	India	38.7%	Malaysia	33.7%
	Indonesia	33.3%	India	30.5%
	Thailand	32.0%	Vietnam	27.3%
Sharing economy	Total	25.8%	Total	24.9%
	Vietnam	45.7%	Vietnam	39.7%
	India	41.4%	India	37.6%
	US	35.8%	US	35.4%
	Malaysia	31.7%	Malaysia	29.3%
	Thailand	28.0%	Germany	28.7%
			Car sharing	
			Total	34.1%
			Malaysia	73.0%
			Vietnam	55.0%
			India	47.3%
			US	44.5%
			Philippines	29.6%

* Data in the table is the scores of “We’ve owned it” + “We own or use it” for those ages 18-44 in each country. ** Those 10 or more points higher than the average score of 12 countries (n=4800) are highlighted.

Degree of tolerance to bear the cost for products with reduced environmental impact (total of 12 countries)

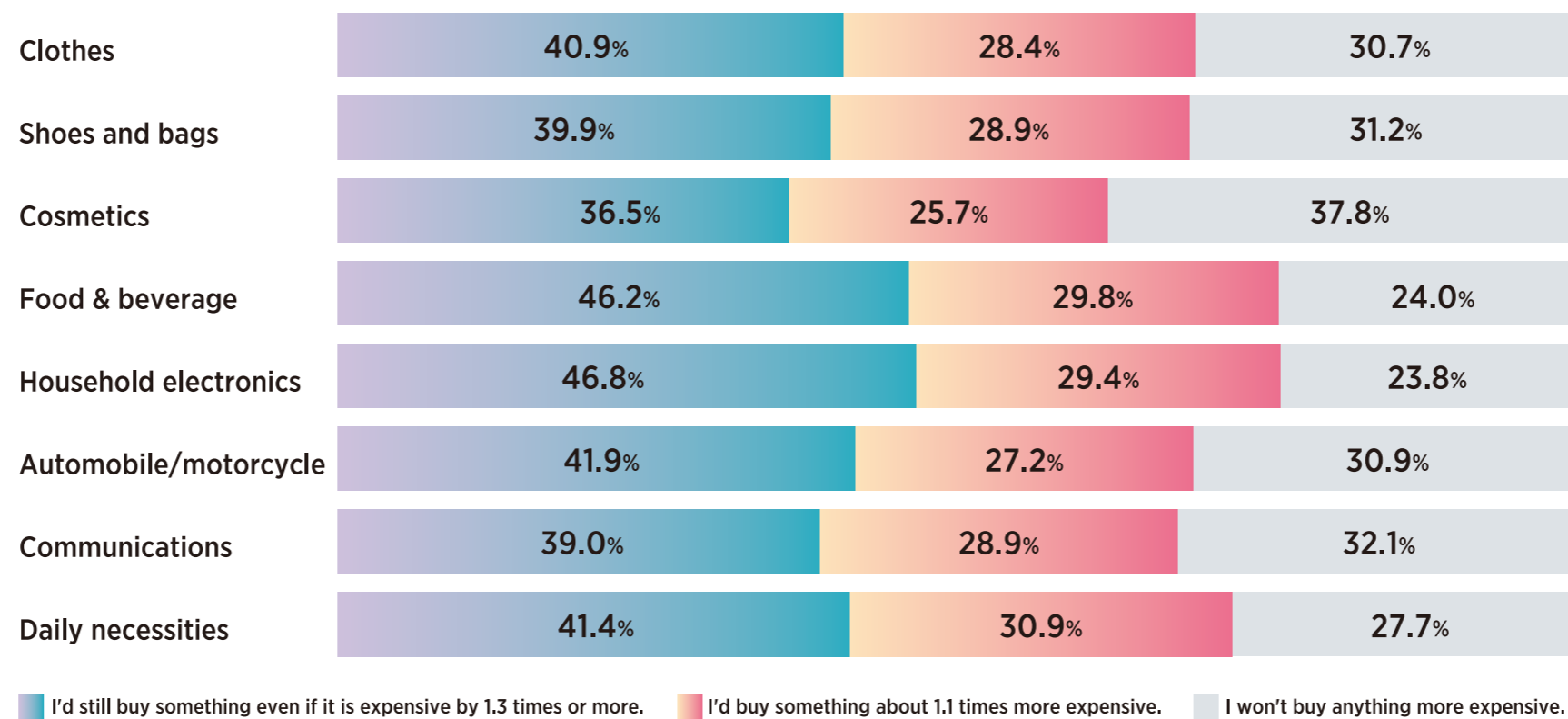
Hearings were held in eight product categories in response to the question “A product has been developed that reduces its environmental load by 50%, is high quality and looks good, and can be used longer than the existing product. But it costs over twice as much. Comparing this product to one you normally use, what price would induce you to purchase this new product? Answer for each of the following eight categories.”

Looking at the total of all respondents in all 12 countries, about 30% responded with “I would pay about 1.1 times” and about 40% with “I would even pay 1.3 times or more.” At the same time, around

30% responded with “I would not buy it if it was more expensive.” There were no major differences between categories.

It is not known whether their responses reflect their actual actions. However, the fact that about 70% responded that they could accept increased prices if it was for the environment is worthy of note. There is a basis for people accepting higher prices if they accept the reason for it, so companies actively developing a diverse range of environmentally-friendly alternatives could be the trigger for expanding and diversifying sustainable lifestyles.

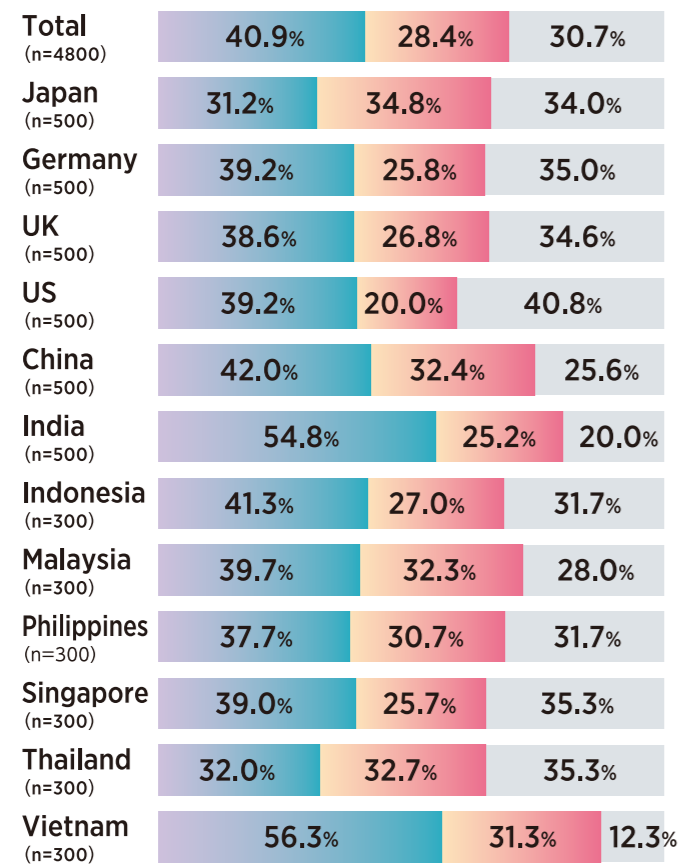
Figure 24. Degree of tolerance to bear the cost for products with reduced environmental impact



* “I'd still buy something even if it is expensive by 1.3 times or more” is the total of “I'd buy something twice as expensive,” “I'd buy something about 1.5 times more expensive,” and “I'd buy something about 1.3 times more expensive.”

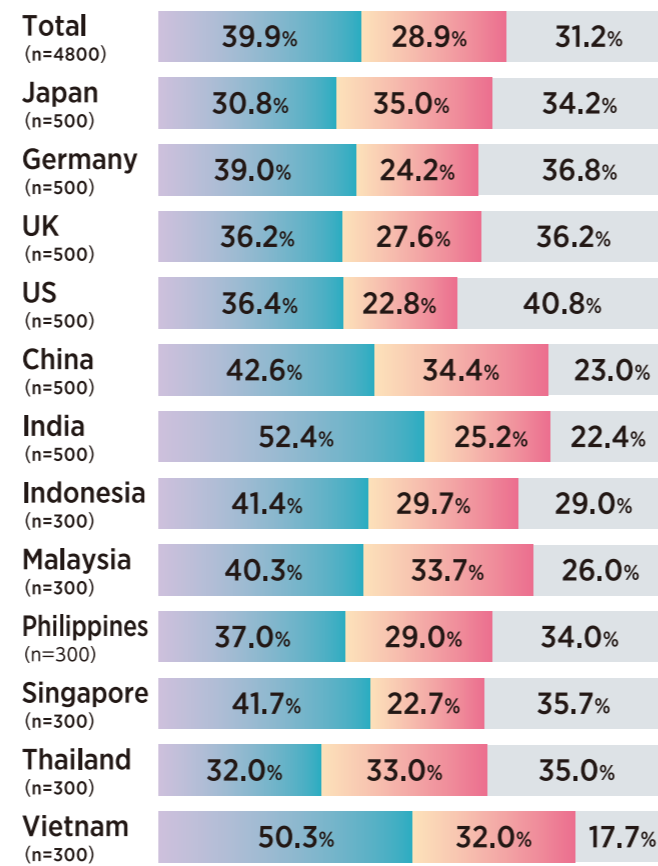
Degree of tolerance to bear the cost for products with reduced environmental impact (by category and country) 1

Figure 25. Clothes



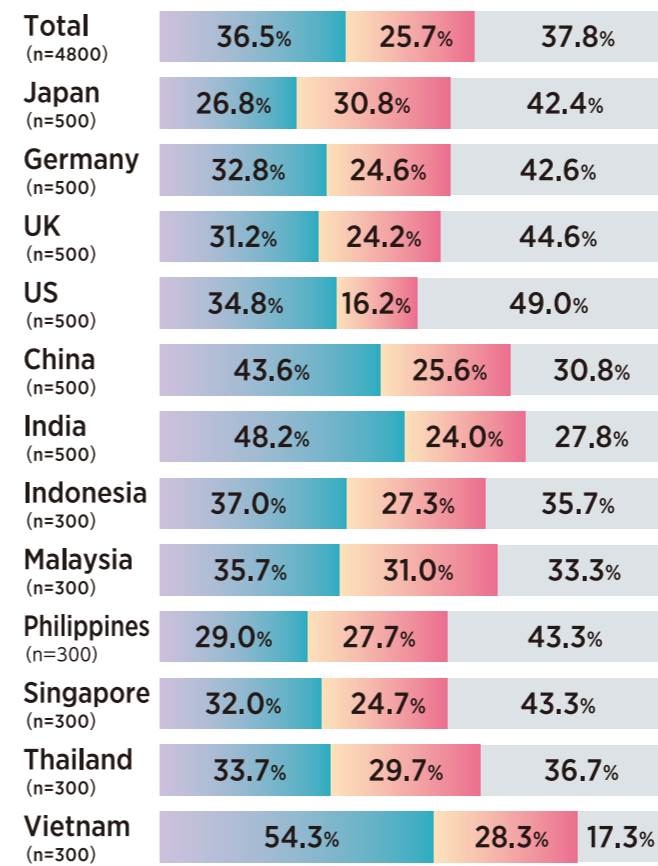
■ I'd still buy something even if it is expensive by 1.3 times or more.
■ I'd buy something about 1.1 times more expensive.
■ I won't buy anything more expensive.

Figure 26. Shoes and bags



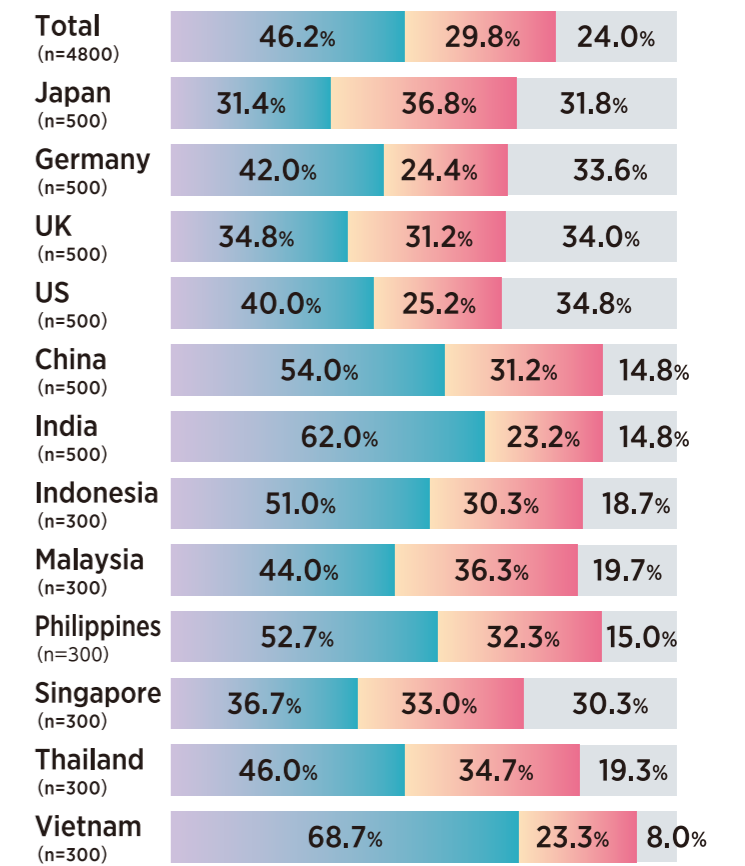
■ I'd still buy something even if it is expensive by 1.3 times or more.
■ I'd buy something about 1.1 times more expensive.
■ I won't buy anything more expensive.

Figure 27. Cosmetics



■ I'd still buy something even if it is expensive by 1.3 times or more.
■ I'd buy something about 1.1 times more expensive.
■ I won't buy anything more expensive.

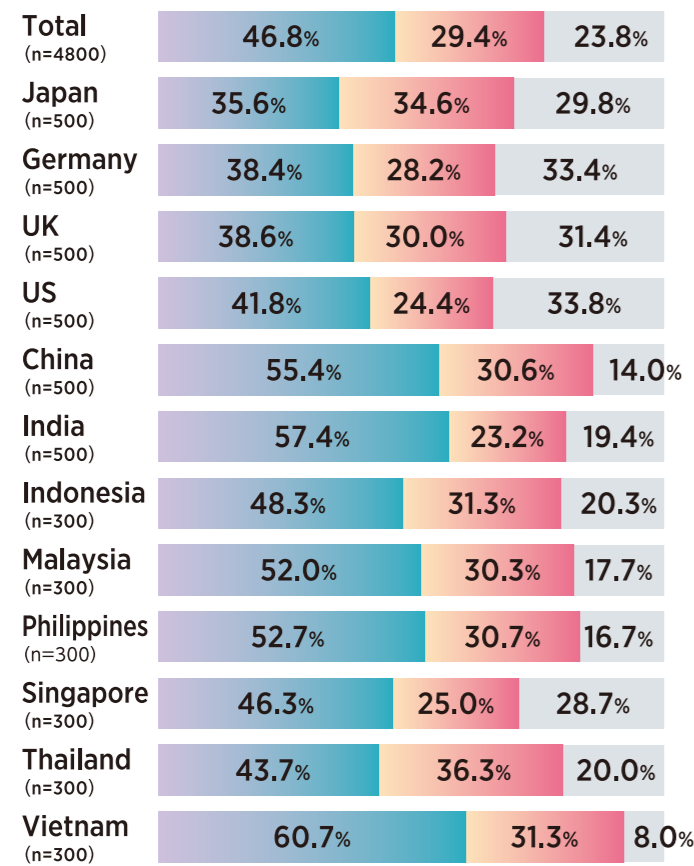
Figure 28. Food & beverage



■ I'd still buy something even if it is expensive by 1.3 times or more.
■ I'd buy something about 1.1 times more expensive.
■ I won't buy anything more expensive.

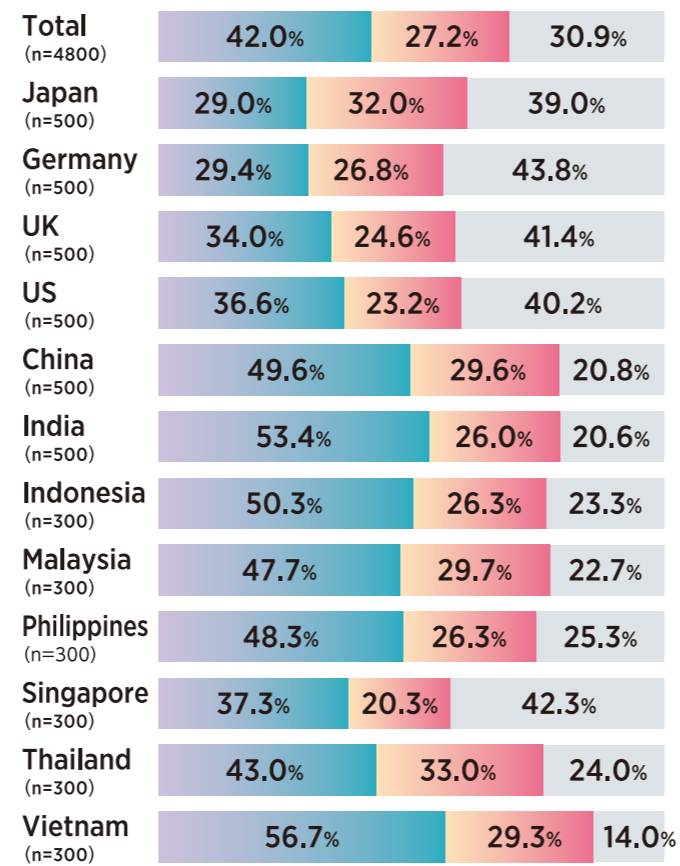
Degree of tolerance to bear the cost for products with reduced environmental impact (by category and country) 2

Figure 29. Household electronics (refrigerator, vacuum cleaner, and so-on.)



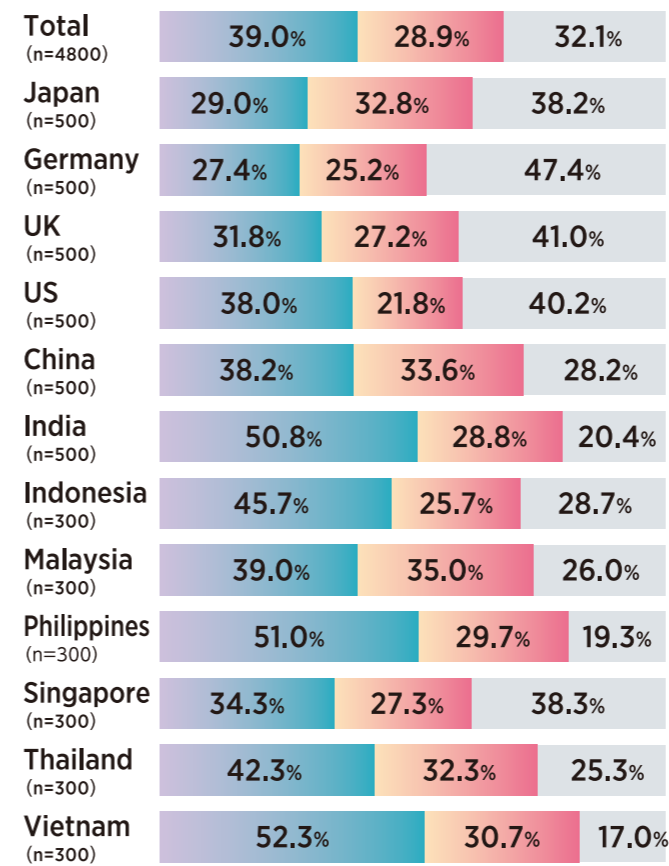
■ I'd still buy something even if it is expensive by 1.3 times or more.
■ I'd buy something about 1.1 times more expensive.
■ I won't buy anything more expensive.

Figure 30. Automobile / motorcycle



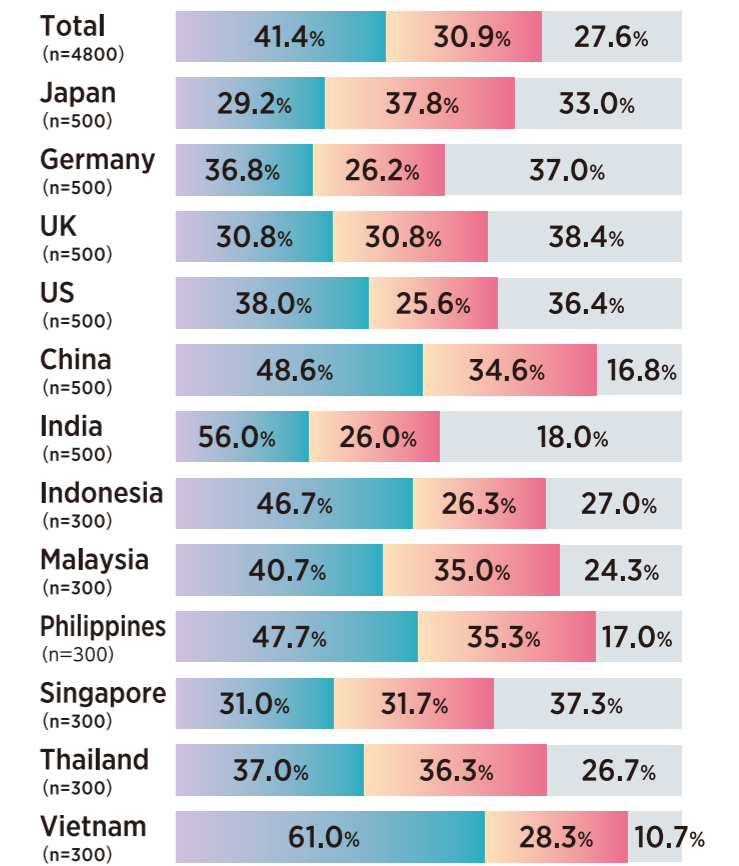
■ I'd still buy something even if it is expensive by 1.3 times or more.
■ I'd buy something about 1.1 times more expensive.
■ I won't buy anything more expensive.

Figure 31. Communications (internet access services and so-on.)



■ I'd still buy something even if it is expensive by 1.3 times or more.
■ I'd buy something about 1.1 times more expensive.
■ I won't buy anything more expensive.

Figure 32. Daily necessities (soap, toothpaste, and so-on.)



■ I'd still buy something even if it is expensive by 1.3 times or more.
■ I'd buy something about 1.1 times more expensive.
■ I won't buy anything more expensive.

Tolerable prices are rising among Westerners under 45 and Japanese under 30

As we have seen previously, in economically advanced nations, people were unenthusiastic about cost burdens such as environment taxes, and more than half replied that they were already stretched just maintaining their current lives, with no leeway to consider the lives of the next generation. However, looking only at those aged 18 to 44, the ratio of those responding that they could accept prices higher than current for products with low environment impacts becomes higher in Germany, the UK, and the US. For example, in the Food & Drink category, the ratio of those responding “I’d still buy something even if it is expensive by 1.3 times or more” for products

with low environmental impact was 11.9, 4.8, and 9.6 points higher, respectively, compared to each country’s total. In Japan, narrowing the field to those aged 18 to 29 shows a difference with the overall responses. In particular, in the categories of Communication, Clothing, and Food & Drink, the ratio of those responding “I’d still buy something even if it is expensive by 1.3 times or more” for products with low environmental impact was 14.0, 11.8, and 7.6 points higher, respectively, compared to each total.

Figure 33. Degree of tolerance to bear the cost for products with reduced environmental impact (Food & beverage)

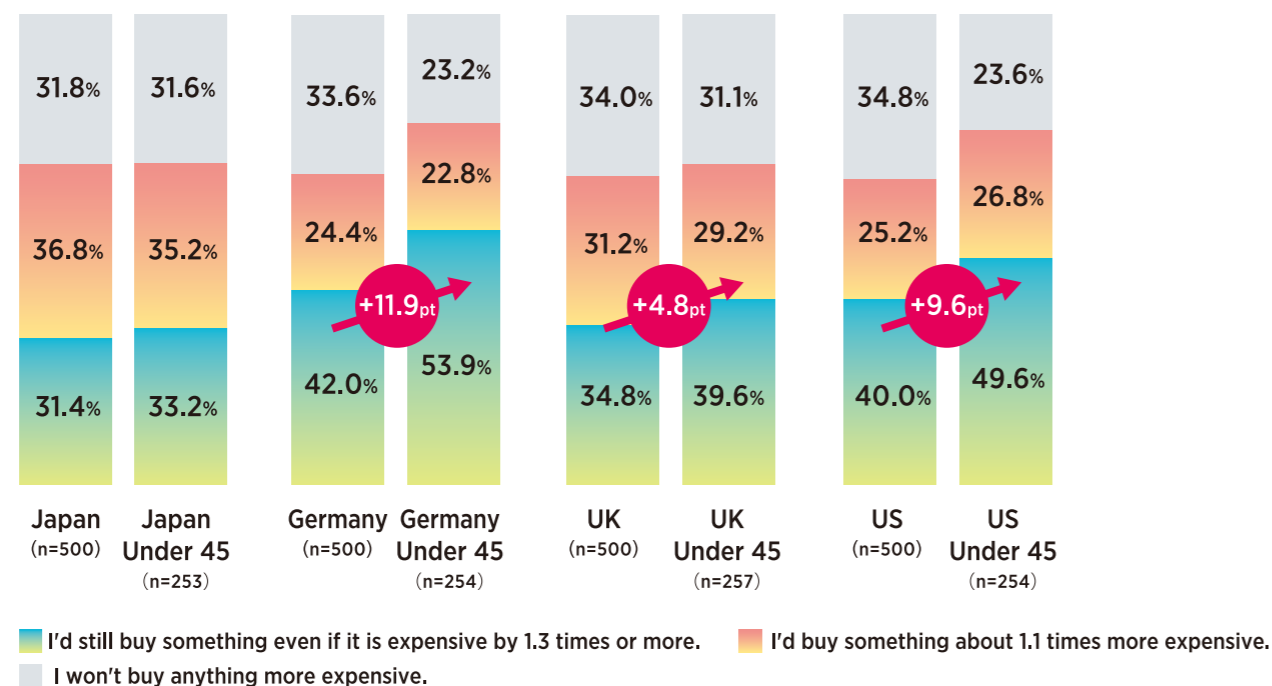
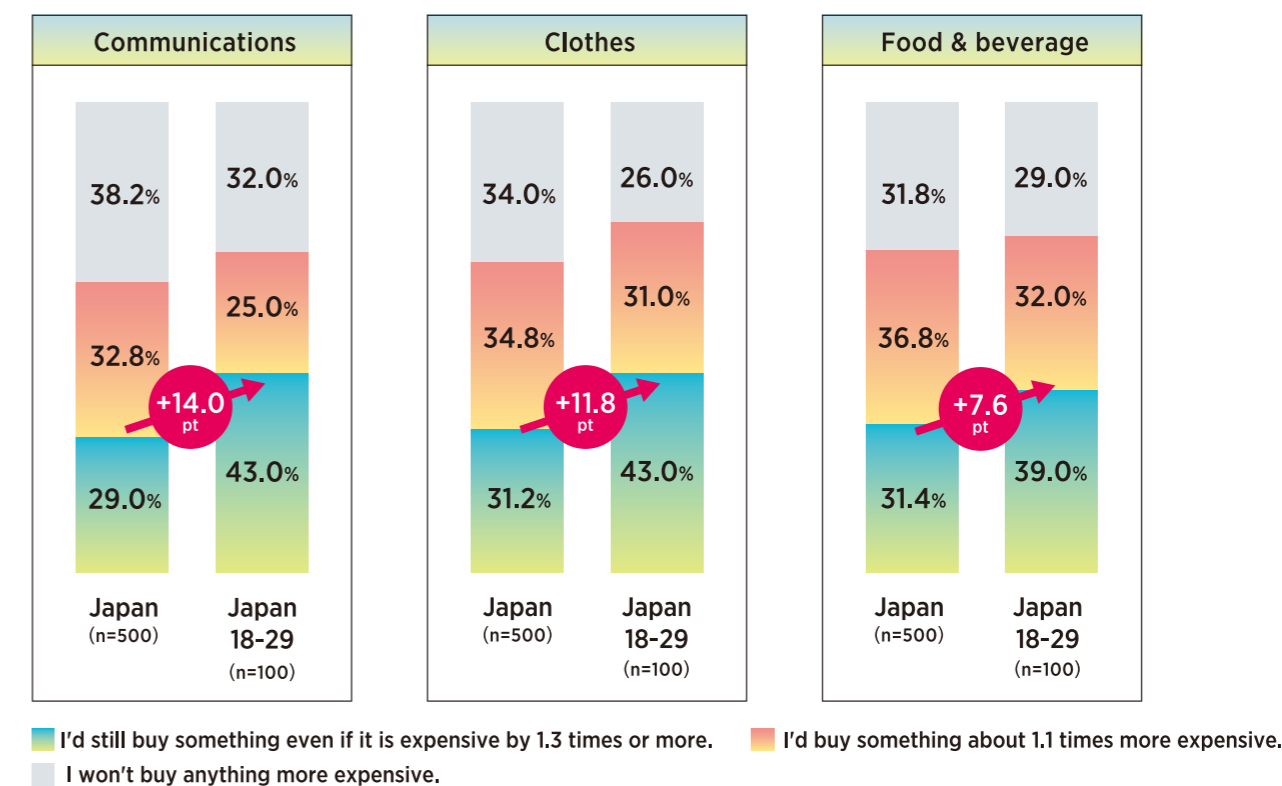


Figure 34. Degree of tolerance to bear the cost for products with reduced environmental impact (Japan)



In Closing

Towards the Next Decade and Century

From the results of this survey of 12 countries, it was seen that each country's approach to sustainable lifestyles differs, and the younger generation in each country has the potential to become the driver for sustainable lifestyles. What this suggests is that companies actively providing alternatives that consider society and the environment could be the trigger for expanding and diversifying sustainable lifestyles.

In addition, a comparison of each country provides a number of hints about what to learn from them. Germany and the UK consider sustainability a "Responsibility/Obligation" while Indonesia sees it as something for the "Children/Next Generation." China and the Philippines are using regulations and measures to practice lifestyle activities that result in contributing to reducing food waste and plastic waste. The Philippines, Indonesia, and Japan have commonly-used sustainable consumption options through wide ranges of refillable products. Germany and Vietnam have environmentally-friendly detergents as the standard. The UK has a deep-rooted culture of charity. Vietnam and Indonesia are active in social activities.

The image of lifestyles obtained through this survey are only a few examples. We look

forward to seeing how sustainable lifestyles spread in these different countries.

Japan was not exactly high among these 12 countries in terms of sustainability awareness, but there are signs that the younger generation, aged 18 to 29, who are attuned to global information and trends through social media are leading the change to sustainable lifestyles. The global trend that shape companies and society, such as selective consumption and social activities, are propagating in Japan as well.

Achieving sustainable lifestyles cannot easily be done through individual efforts. A number of different organizations, including companies, international organizations, national governments, NPOs, and research institutions, must work together. We need to think together about what we can do over the next decade, the next century, for the unseen future generations. Several hints have been obtained from this survey in addition to the data presented here. Please feel free to contact us if you are interested.













SLS2021 Team

Global Business Center, Dentsu Inc. / Dentsu Institute

▶ Summary of survey results

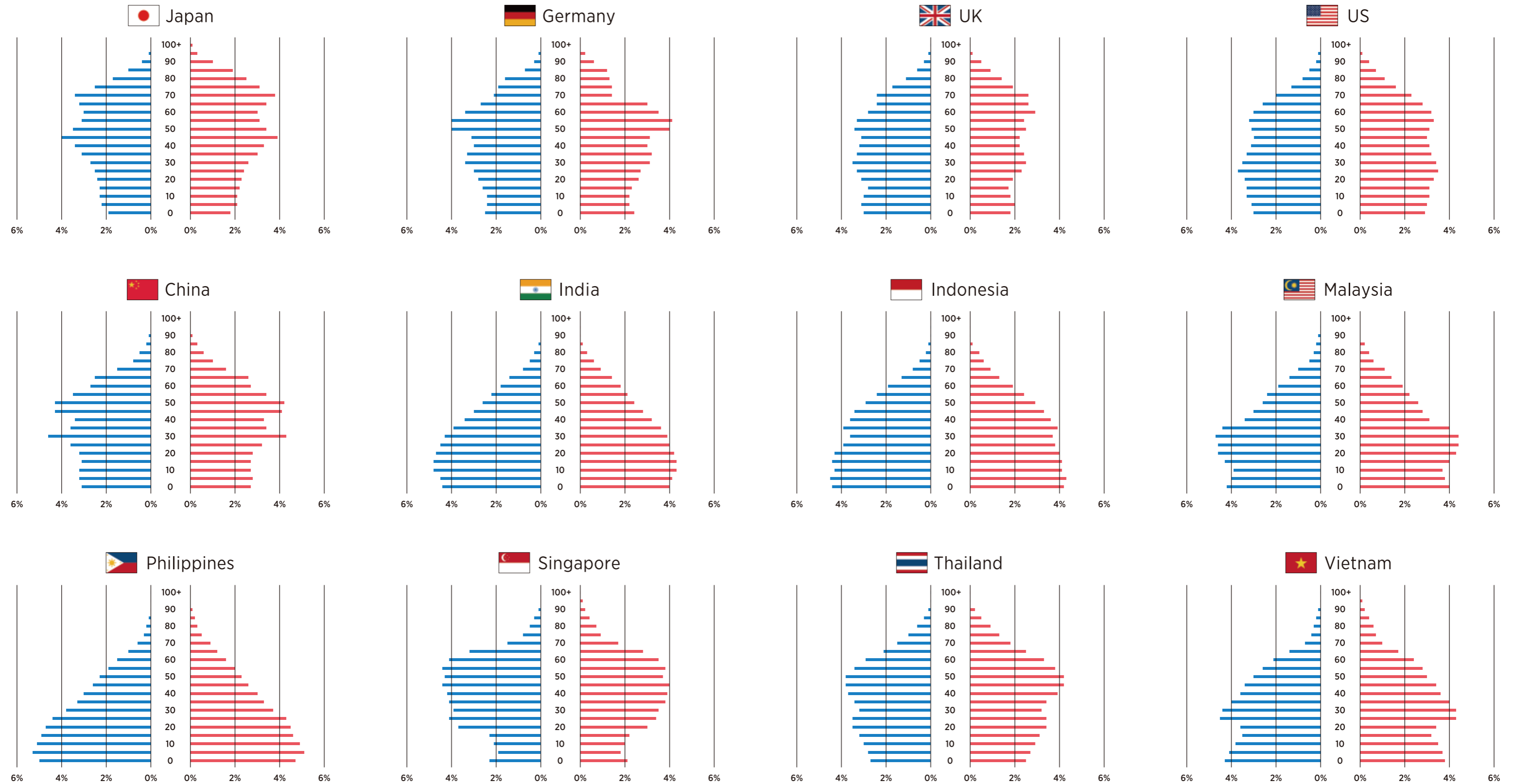
	Japan	Germany, United Kingdom	United States	China, India	ASEAN <small>*Excluding Singapore</small>
Images of “Sustainability”	Global Environment, Recycling Society / Circular economy Social Impact	Global Environment, Recycling Society / Circular economy Responsibility / Obligation	Global Environment, Recycling Society / Circular economy Sense of Balance	Global Environment Recycling Society / Circular economy	Development, Growth Well-being
Social issues of concern	Natural disasters Falling birthrate and aging population Air pollution	Ocean plastic waste Forest conservation, Natural disasters Poverty and hunger	Poverty and hunger Racism Healthcare system and facilities	Air pollution Water pollution / Water shortages Educational issues, Public health	Educational issues, Poverty and hunger Public health, Healthcare system and facilities, Air pollution
People with high involvement in social activities	About 30%	About 40%	About 50%	About 60 - 70%	About 60 - 80%
Triggers to become interested in social issues	News and articles	News and articles	News and articles Social media posts	From the news	Social media posts
Degree of tolerance in bearing cost for environment tax	About 50%	About 30 - 50%	About 50%	About 60 - 70%	About 70 - 80% (About 50% in Thailand only)
Awareness and Actions Regarding Consumption	for my own interests and benefits	for my own interests and benefits	for my own interests and benefits	with the public welfare in mind	with the public welfare in mind
Summary	<ul style="list-style-type: none"> • Passive in taking information • Opposed to economic burden 	<ul style="list-style-type: none"> • Has awareness of being eco-conscious to the extent of seeing buying, using, and throwing away as a duty • Opposed to economic burden 	<ul style="list-style-type: none"> • Social systems that value human rights and economic gaps outweigh the environment • Opposed to economic burden 	<ul style="list-style-type: none"> • Aims to achieve both industrial development and environmental protection • Accepts economic burdens as well 	<ul style="list-style-type: none"> • High engagement in social activities • Active use of social media • Accepts economic burdens as well

▶ World Events (2011 to 2021)

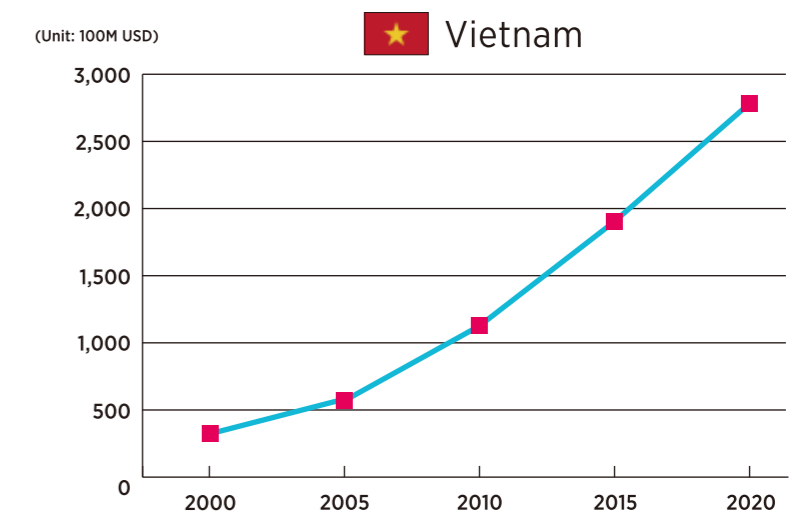
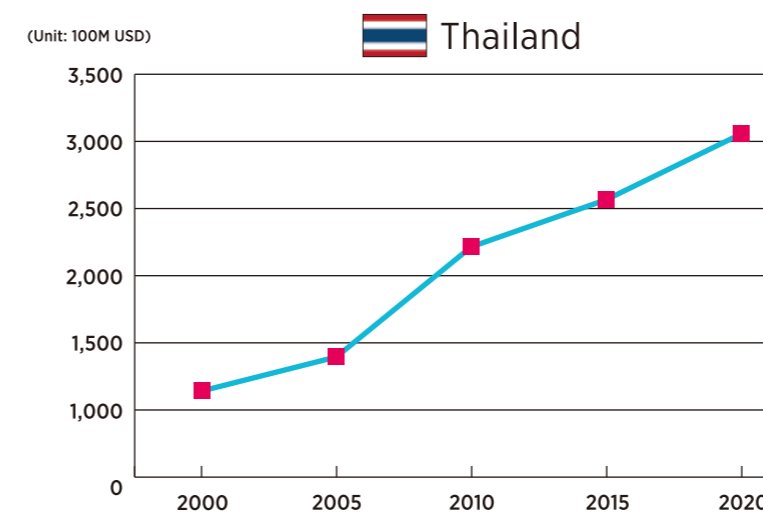
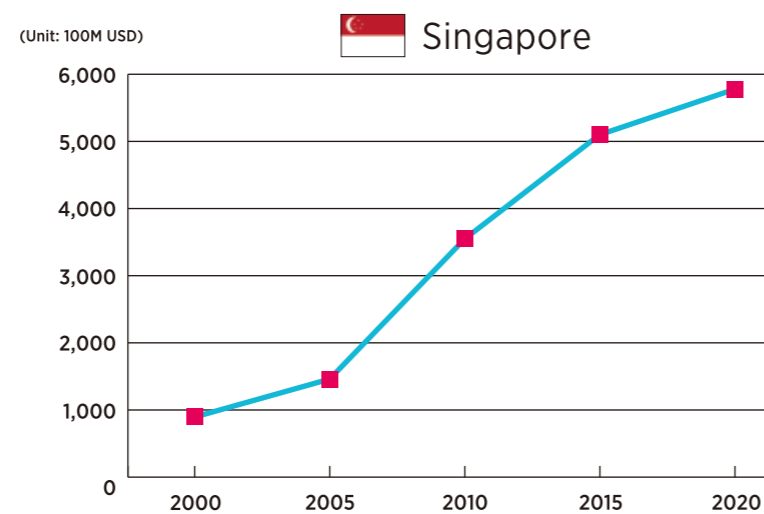
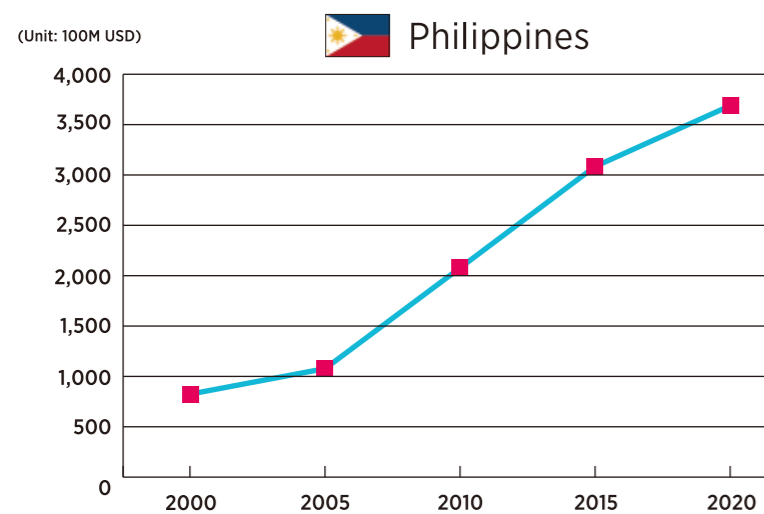
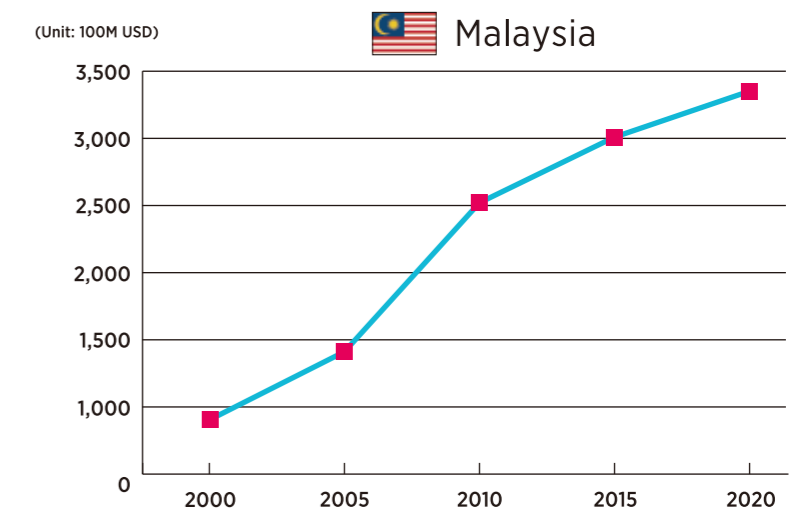
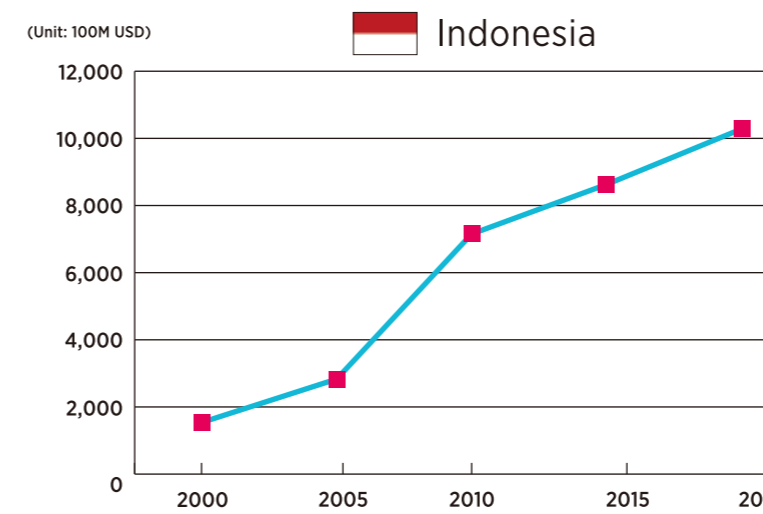
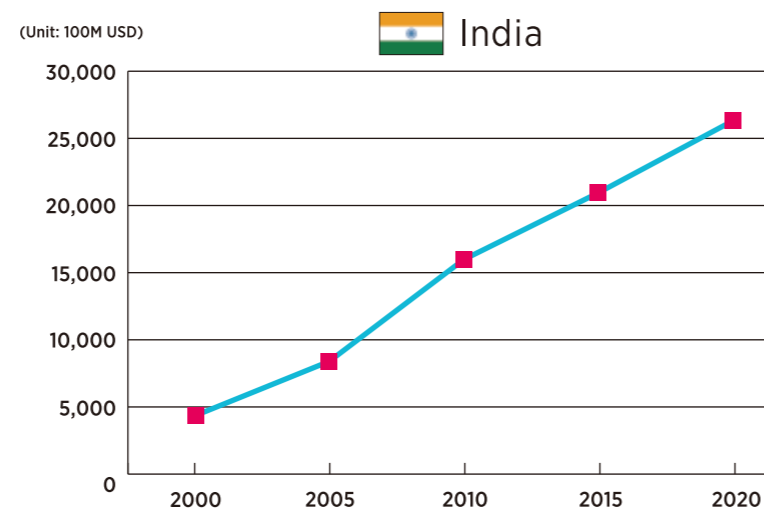
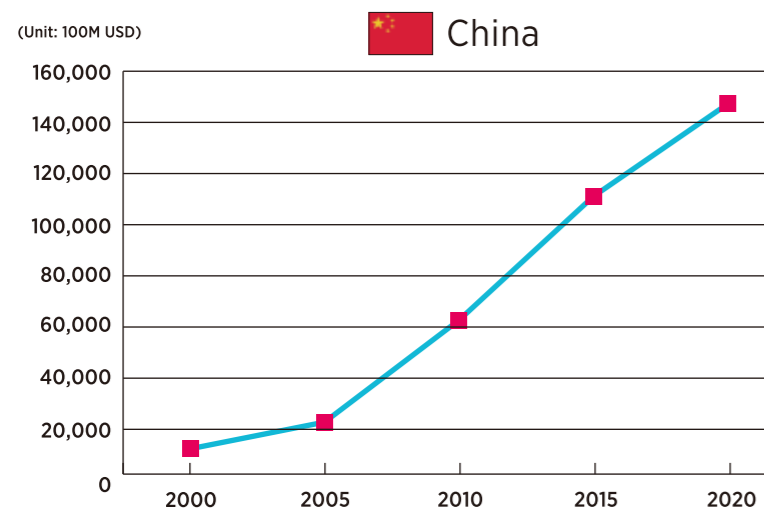
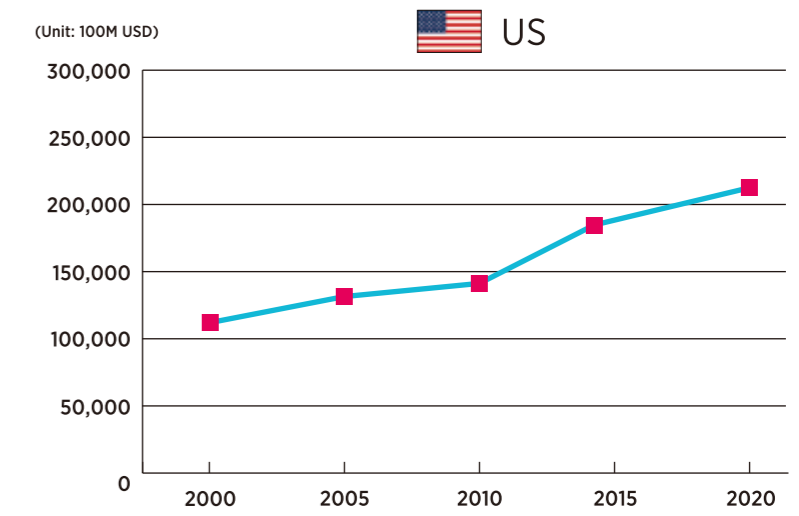
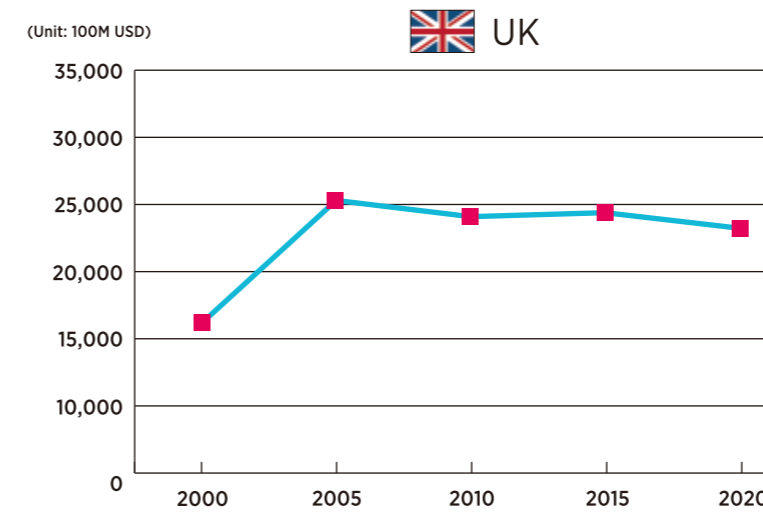
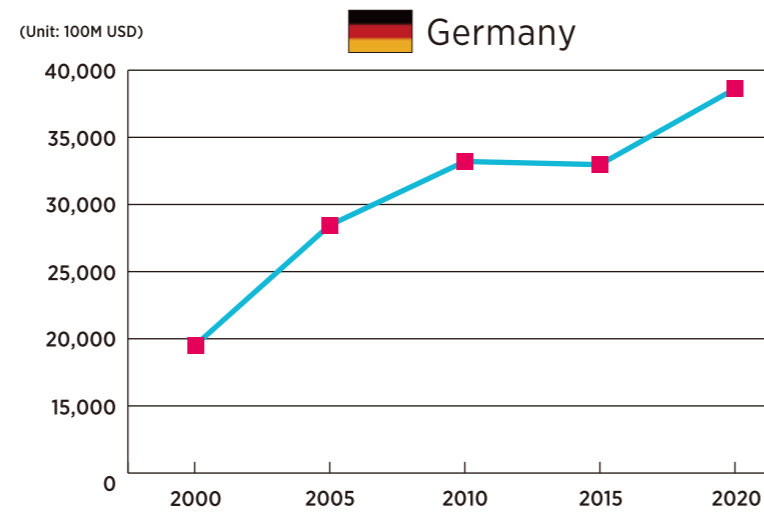
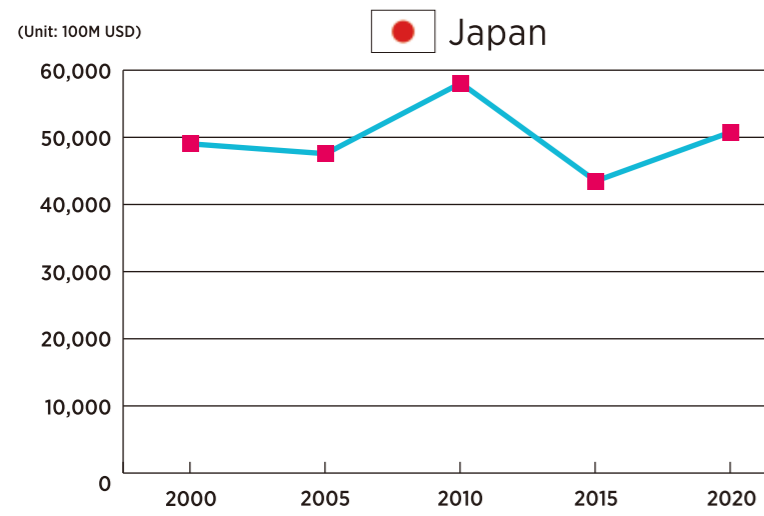
	World	The Paris Agreement (2015), COVID-19 (2020-21)
	Japan	Great East Japan Earthquake (2011), Kumamoto Earthquake (2016), West Japan Torrential Rains (2018), increase in Consumption Tax to 10% (2019)
	Germany	Decision to move away from nuclear power (2011), floods in western Germany (2021)
	UK	National referendum on leaving the European Union (2016), Brexit (2020)
	US	Occupy Wall Street protests about reducing gaps (2011), BLM demonstrations (2020), return to the Paris Agreement (2021)
	China	Ambient air quality standards (GB3095-2012) implemented, PM2.5 average concentration first published (2013), Beijing Torrential Rains (2021)
	India	Sikkim Earthquake (2011), Ministry of the Environment announces atmospheric pollution worsening (2016), Kerala Floods (2018)
	Indonesia	Sumatra Earthquake (2012), Sulawesi Earthquake (2018), Sumatra and Kalimantan forest fires (2019)
	Malaysia	Major flooding in five northern states (2014)
	Philippines	Super Typhoon Yolanda (2013), major earthquakes over M. 6.5 (2013, 2017, 2018, 2021)
	Singapore	Goods and Services Tax to be increased to 9% by 2025 (2021)
	Thailand	Floods (2011, 2021), anti-government demonstrations in Bangkok (2020)
	Vietnam	Motorcycles to be banned from Hanoi due to worsening atmospheric pollution in the city (2017)

Demographics comparison of the 12 target countries

Men Women



Changes in GDP of the 12 target countries



**Survey
overview**

Sustainable Lifestyles Receptive Survey 2021

Survey method : Internet survey

Survey body : Dentsu Inc., Dentsu Institute

[Survey carried out in July 2021]

Sample number : 4,800 samples

■ People aged 18-69 in Japan, Germany, the UK, the US, China, and India

■ People aged 18-44 in Indonesia, Malaysia, the Philippines, Singapore, Thailand, and Vietnam

[Survey carried out in October 2021]

Sample number : 2,000 samples

■ People aged 18-69 in Sweden, Brazil, Australia, and South Korea

Sustainable Lifestyles Receptive Survey 2010

Survey method : Internet survey

Survey body : Dentsu Inc., Dentsu Institute

[Survey carried out in March 2010]

Sample number : 1,000 samples

■ People aged 18-69 in Japan

[Survey carried out between September and November 2010]

Sample number : 4,000 samples

■ People aged 18-69 in Sweden

■ People aged 18-44 in Brazil, Russia, China, India, Indonesia, Malaysia, the Philippines, Singapore, Thailand, Vietnam, South Korea, Taiwan

Sustainable Lifestyle Report 2021

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Issued November 2021

Person in charge

[Global Business Center, Dentsu Inc.]

Rie Tanaka, Kana Nakamura, Yuri Takahashi

[Dentsu Institute]

Seiko Yamazaki, Sayuri Nakagawa, Taro Magome

Inquiries

Dentsu Team SDGs Email : team-sdgs@dentsu.co.jp

<https://www.dentsu-sdgs.com/>

Dentsu Institute Email : d-ii@dentsu.co.jp

<https://institute.dentsu.com/>

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