

2023

Sustainable Lifestyle Report

People are starting to accept resource constraints
to balance the economy and sustainability

Quality
of
Society

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[Survey Outline](#) · [Inquiries](#)

●●● Spreading Sustainable Lifestyles

The third Sustainable Lifestyle Survey (SLS2023) was conducted in six countries (Japan, China, France, Germany, Indonesia, and Thailand)—two from each of ASEAN, and Europe and east Asia—and follows the first survey covering 14 countries and the second covering 17. Compared to the previous two surveys, the number of countries was narrowed down, but the number of samples per country was increased to provide a more detailed look at differences by generation. In addition, some questions from *Dentsu Consumer Navigator: Sustainability 2023*, a survey conducted and published by the Dentsu Group Inc. in June 2023, were adopted, and items that are comparable to those in the U.S. are included in this report as reference figures.

While at the time of the last survey in 2021 healthcare systems and public health still remained a concern due to COVID-19, social issues related to human rights attracted attention, such as the Black Lives Matter movement in the US, and the renewed Modern Slavery Act in the UK. Subsequently, the Russia-Ukraine War, global inflation, abnormal weather, and water shortages hit center-stage, and in the corporate world, companies were increasingly reporting on Sustainability. As if to reflect these changes, the latest survey highlights that Sustainability is not just something that warrants awareness or actions by people and organisations—it is something that reaches to the very core of our everyday existence as a concern affecting everyone.

Citizens are becoming more aware of the need to take action on their own to solve environmental, social, and economic problems that directly affect their lives, rather than simply leaving them to the government or corporations. However, due to the need for people to balance the cost of living with the economic reality, it is not always possible to account for environmental and social issues.

It is noteworthy that new lifestyles based on realizing Sustainability are on the increase, which are driven by financial and resource constraints, rather than viewing it as a temporary fad or out of a sense of contributing for the sake of future generations. In particular, despite some variation between countries, actions such as the use of renewable energy, reduced use of plastics, reduced food waste, and consumption of synthetic meat and alternative transport means are gradually entering the mainstream of daily life, which shows that the options for a sustainable lifestyle are steadily gaining acceptance.

Through this report we hope to share some of the more pertinent implications for sustainable lifestyles, which were drawn from the changes in attitudes and behaviours expressed by the respondents to the survey.

Chapter 1

Interest in Sustainability

Affected by climate change

Food and water security 84.2%

Cost of living 84.0%

Average of 6 countries
(Japan, China, France, Germany, Indonesia, Thailand) (n=6,000)

The impending impact of Climate Change on our lives

On average across the six countries, the majority or above of respondents in all areas felt they were affected by climate change, with “Food and water security” and “Cost of living” topping the list. There is growing awareness in all countries that climate change is no longer just a wake-up call—it has real consequences for livelihoods.

The chief items mainly concern the economy, and the impact of climate change appears to be perceived as an economic impact rather than a direct health concern.

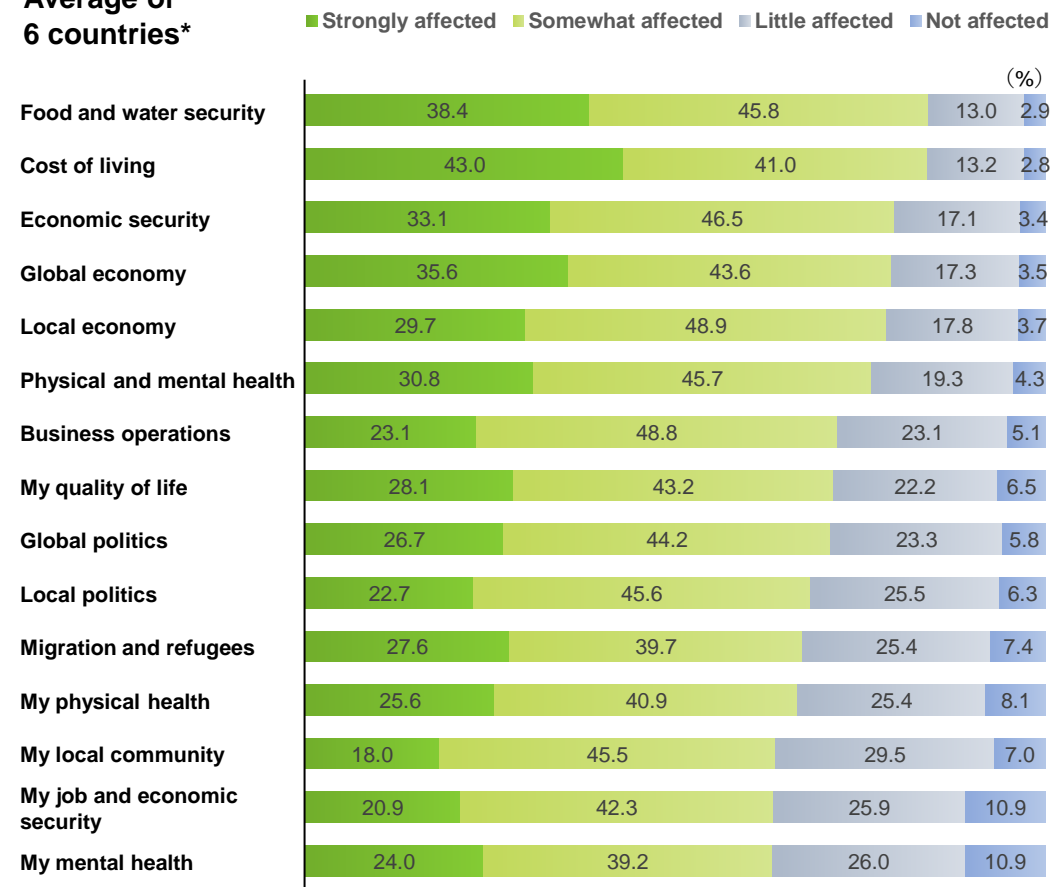
Incidentally, when we checked for differences in responses to “My mental health is affected by climate change” by generation in each country, 65.1% of French Gen. Z (French average +9.4 ppt) and 73.5% of German Gen. Z (German average +10.3 ppt) expressed climate anxiety.

Characteristics of the six countries

- “Food and water security” and “Cost of living” are most affected by climate change.
- The majority of respondents answered that all the areas presented are “Affected by climate change”.
- Economic items are prominent among the chief areas affected by climate change.

Areas where impacts of Climate Change were perceived to occur

Average of 6 countries*



* The percentages above were averaged from the answers given by 1,000 respondents in each of the six countries polled.

Social issues of concern vary by country

In China, Indonesia and Thailand, “Air pollution” has attracted the most concern. “Air pollution” is seen as a chronic issue in China, and the occurrence of massive amounts of yellow dust in April 2023 may also have influenced the results of this survey.







In France, “Food waste” attracted a high level of interest. It is the number one concern in France and the number two concern in Germany. In France, the food waste countermeasures law (known as the Garot Law) was enacted in 2016, ahead of the rest of the world. In addition, apps to prevent food loss are becoming popular in France and Germany, especially among young people, and awareness of the need to reduce food loss seems to be ingrained in their daily lives.

In Japan and Germany, “Conflicts and war” ranked high, perhaps reflecting the ongoing Russian invasion of Ukraine since February 2022. The interest in social issues is not only a reflection of what each individual feels in their daily life but is also to a large extent generated by media coverage.

Country-Specific Characteristics

- In Japan, “Natural disasters” ranked first and “Electricity and energy issues” second.
- In France and Germany, “Food waste,” “Ocean plastic waste,” and “Animal welfare” ranked highest.
- In Indonesia and Thailand, “Air Pollution,” “Public Health,” and “Poverty and hunger” are the top concerns that are linked to insecurity in day-to-day life.
- “Water pollution and shortages” is of high concern in China, France, and Indonesia.

Social issues of concern by country

Country	Rank	Issue	Percentage
 Japan (2023)	1	Natural disasters	47.9%
	2	Electricity and energy issues	45.2%
	3	Falling birthrate and aging population	40.2%
	4	Conflicts and war	39.7%
	5	Food waste*	39.1%
 France (2023)	1	Food waste*	61.9%
	2	Water pollution and shortages	59.5%
	3	Air pollution	58.5%
	4	Ocean plastic waste	58.3%
	5	Animal welfare*	56.6%
 Indonesia (2023)	1	Air pollution	64.5%
	2	Public health	59.2%
	3	Water pollution and shortages	59.0%
	4	Poverty and hunger	57.0%
	5	Ocean plastic waste	54.3%
 China (2023)	1	Air pollution	60.9%
	2	Water pollution and shortages	54.4%
	3	Educational issues	52.7%
	4	Natural disasters	50.7%
	5	Reduction of CO ₂ emissions	47.8%
 Germany (2023)	1	Ocean plastic waste	61.2%
	2	Food waste*	57.4%
	3	Conflicts and war	55.3%
	4	Animal welfare*	54.5%
	5	Forest conservation	52.9%
 Thailand (2023)	1	Air pollution	70.6%
	2	Poverty and hunger	57.8%
	3	Natural disasters	56.2%
	4	Economic stagnation	54.0%
	5	Public health	51.4%

* 1,000 respondents in each of the six countries polled.

* The top 5 items in each country were extracted.

* “Food waste” and “Animal welfare” are items only included in the 2023 survey.

Social issues of concern 2021/2023 (6 countries)

Country	Year	Sample Size (n)	Issue	Percentage
Japan	2021	500	1 Natural disasters	57.2%
	2023	1,000	1 Natural disasters	47.9%
Japan	2021	500	2 Falling birthrate and aging population	45.6%
	2023	1,000	2 Electricity and energy issues	45.2%
Japan	2021	500	3 Air pollution	41.6%
	2023	1,000	3 Falling birthrate and aging population	40.2%
Japan	2021	500	4 Ocean plastic waste	39.8%
	2023	1,000	4 Conflicts and war	39.7%
Japan	2021	500	5 Racism	38.4%
	2023	1,000	5 Food waste*	39.1%
France	2021	500	1 Ocean plastic waste	58.8%
	2023	1,000	1 Food waste*	61.9%
France	2021	500	2 Air pollution	56.8%
	2023	1,000	2 Water pollution and shortages	59.5%
France	2021	500	3 Conflicts and war	54.4%
	2023	1,000	3 Air pollution	58.5%
France	2021	500	4 Public health	53.8%
	2023	1,000	4 Ocean plastic waste	58.3%
France	2021	500	5 Forest conservation	52.8%
	2023	1,000	5 Animal welfare*	56.6%
China	2021	500	1 Natural disasters	69.6%
	2023	1,000	1 Air pollution	60.9%
China	2021	500	2 Electricity and energy issues	64.4%
	2023	1,000	2 Water pollution and shortages	54.4%
China	2021	500	3 Falling birthrate and aging population	55.4%
	2023	1,000	3 Educational issues	52.7%
China	2021	500	4 Conflicts and war	55.0%
	2023	1,000	4 Natural disasters	50.7%
China	2021	500	5 Food waste*	54.0%
	2023	1,000	5 Reduction of CO ₂ emissions	47.8%
Germany	2021	500	1 Ocean plastic waste	58.8%
	2023	1,000	1 Ocean plastic waste	61.2%
Germany	2021	500	2 Natural disasters	52.8%
	2023	1,000	2 Food waste*	57.4%
Germany	2021	500	3 Poverty and hunger	52.2%
	2023	1,000	3 Conflicts and war	55.3%
Germany	2021	500	4 Forest conservation	50.0%
	2023	1,000	4 Animal welfare*	54.5%
Germany	2021	500	5 Racism	45.0%
	2023	1,000	5 Forest conservation	52.9%
Indonesia	2021	300	1 Educational issues	65.3%
	2023	1,000	1 Air pollution	64.5%
Indonesia	2021	300	2 Public health	60.7%
	2023	1,000	2 Public health	59.2%
Indonesia	2021	300	3 Poverty and hunger	57.7%
	2023	1,000	3 Water pollution and shortages	59.0%
Indonesia	2021	300	4 Unemployment rate	55.0%
	2023	1,000	4 Poverty and hunger	57.0%
Indonesia	2021	300	5 Healthcare system and facilities	51.7%
	2023	1,000	5 Ocean plastic waste	54.3%
Thailand	2021	300	1 Poverty and hunger	64.7%
	2023	1,000	1 Air pollution	70.6%
Thailand	2021	300	2 Air pollution	62.0%
	2023	1,000	2 Poverty and hunger	57.8%
Thailand	2021	300	3 Unemployment rate	61.3%
	2023	1,000	3 Natural disasters	56.2%
Thailand	2021	300	4 Educational issues	58.7%
	2023	1,000	4 Economic stagnation	54.0%
Thailand	2021	300	5 Public health	58.7%
	2023	1,000	5 Public health	51.4%

* The top five items in Japan were extracted and compared with the previous survey (2021).
 * "Food waste" and "Animal welfare" are items only for 2023.
 * For the 2021 data of Indonesia and Thailand, interviews were conducted with 18-44 year olds.

Japan's growing interest in "Electricity and Energy Issues"

Comparing 2021 and 2023, "Natural disasters," which was ranked first in 2021, remains at the top, while "Falling birthrate and aging population," which ranked second in 2021, dropped to third and is recognized as a chronic issue.

One of the biggest changes was in "Electricity and energy issues," which ranked seventh in 2021, climbing 7.2 ppt to second place in 2023. In another question, 85.8% of Japanese respondents answered that they "Feel their utility bills have gone up," indicating increased concern over electricity prices for many people.

In 2021, "Racism" was ranked fifth, perhaps reflecting the focus on Black Lives Matter. Another big change was "Conflicts and war", which ranked ninth in 2021 and climbed to fourth in 2023, presumably due to Russia's invasion of Ukraine. From this, it could be assumed that international affairs of concern at the time of the survey influence survey results.

In seventh place is "Food self-sufficiency", up 6.2 ppt from 2021. Japan's food self-sufficiency rate is among the lowest in the world at 38% on a calorie basis and 63% on a production value basis (Ministry of Agriculture, Forestry and Fisheries; 2023). Further, "Food waste," polled for the first time in the 2023 survey, ranked fifth. Sitting in 14th place for largest amount of food waste in the world in 2021 (UN Environment Programme; 2021) and with rising concern over food sustainability, efforts to address food waste are ongoing. A law promoting reduced food loss went into effect in 2019. There are a growing number of options for reducing food waste in daily life, such as direct delivery services from production centers where customers can purchase non-standard vegetables and regular delivery services for unused, processed fish.

● Social issues of concern (Japan, yearly comparison)

Japan (2021) (n=500)			Japan (2023) (n=1,000)			Change compared with 2021 (percentage point)
1	Natural disasters	57.2%	1	Natural disasters	47.9%	-9.3
2	Falling birthrate and aging population	45.6%	2	Electricity and energy issues	45.2%	7.2
3	Air pollution	41.6%	3	Falling birthrate and aging population	40.2%	-5.4
4	Ocean plastic waste	39.8%	4	Conflicts and war	39.7%	4.7
5	Racism	38.4%	5	Food waste*	39.1%	—
6	Economic stagnation	38.2%	6	Economic stagnation	35.4%	-2.8
7	Electricity and energy issues	38.0%	7	Ocean plastic waste	34.4%	-5.4
8	Healthcare system and facilities	35.6%	7	Food self-sufficiency rate	34.4%	6.2
9	Conflicts and war	35.0%	9	Air pollution	34.0%	-7.6
10	Reduction of CO ₂ emissions	34.8%	10	Water pollution and shortages	31.6%	-0.4

* The top 10 items in Japan were extracted and compared with the previous survey (2021).

* "Food waste" and "Animal welfare" are items only included in the 2023 survey.

Awareness of “Biodiversity” is over 60% in all six countries

There are numerous Sustainability-related terms, and the level of awareness and understanding varies by country. For example, in Japan, awareness of “SDGs” is the highest of the four terms on the right, with 90% of respondents indicating recognition of it and 60% understanding its meaning.

On the other hand, in Germany and France, recognition of the same term is below 20%, so it is necessary to consider which term is more effective for communication in each country.

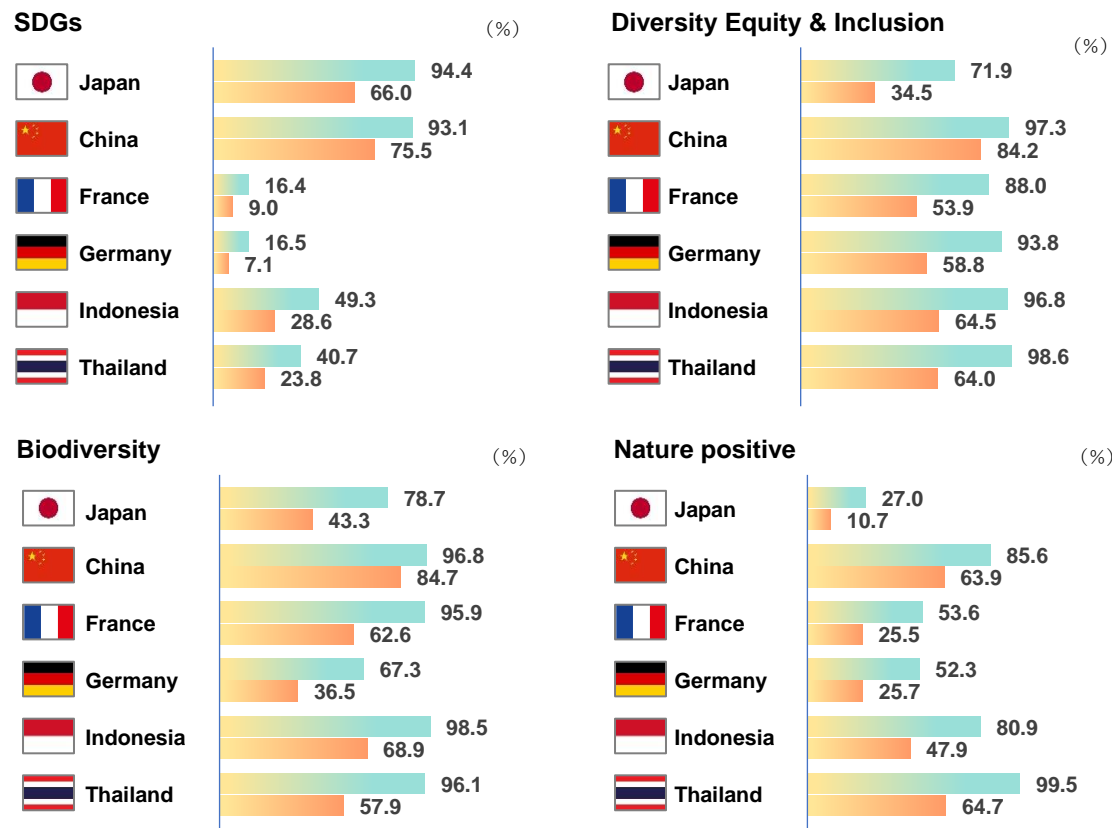
A difference was also found between France and Germany for the term “Biodiversity.” In France, its recognition rate was 90%, while only 70% in Germany. However, even in France, “Nature positive” was recognized by 50% of respondents but understood by only 20%, indicating that even though the terms are used in the same domain, the degree of penetration differs greatly.

Country-Specific Characteristics

- In Japan and China, awareness of “SDGs” is 90%.
- In Japan, “Diversity, Equity and Inclusion” is recognized by 70% but is understood by only 30%.
- In China, many of the terms are recognized by 90% of respondents and understood by over 70%.
- In Thailand, all of the terms except SDGs are recognized by 90% of respondents, and understanding of “nature positive” is the highest among the six countries.

Awareness and understanding of terminology

■ Recognition I know the meaning of this term and am concerned about the topic.
■ Understanding I know the meaning of this term though am not concerned with the topic.



* n in each country is 1,000

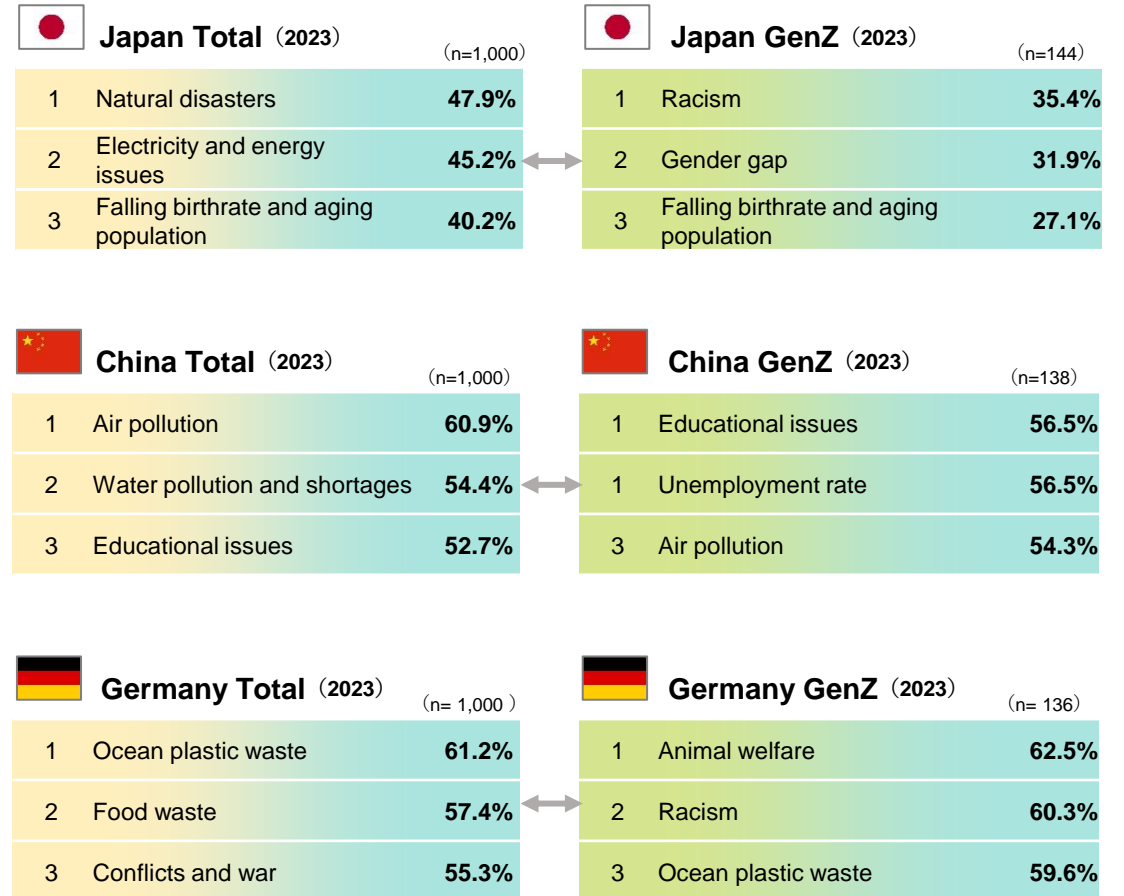
Generation Z is more concerned about human rights

Generation Z (18-26 years old) seems to be more interested in human-to-human issues and social-structural issues, as well as the natural environment. “Racism” continued to be the number one concern of GenZ in Japan, ranking first in the 2021 survey. “Gender gap” was the number two concern of GenZ, a result presumed to be related to Japan’s world ranking of 125th place as revealed in the 2023 Gender Gap Index.

Tied in first place in terms of interest among China's GenZ are “Educational issues” and “Unemployment rate.” Education issues have been in the spotlight in China in recent years in light of policies enacted to reduce homework and out of school tutorials against the backdrop of the radicalization of the ‘exam wars.’ In terms of “Unemployment rate,” the youth unemployment rate for 16-24 year olds reached 21.3% in June 2023, a record high for China.

The number one concern of GenZ in Germany is “Animal welfare.” Germany is known for its tough stance on animal rights, and has animal protection laws with provisions covering animal abuse and killing. In addition, the fact that Germany ranks second in the world in terms of the number of immigrants (in 2020) may have influenced the second concern of Gen Z: “Racism.”

● Social issues of concern (Overall vs. Generation Z)



* Extract the top 3 items in each country.

“Reducing waste” is Sustainability close to home

How do people perceive the word “Sustainability”? In the first and second surveys, we asked about the word itself, and the results varied from country to country, with no obvious differences. In the third survey, we presented it in writing and asked the respondents what scope was felt to be included in *Sustainability*. The top answers were “Ordinary citizens reducing waste” and “Businesses reducing waste,” which were common across the six countries.

It is noteworthy that waste-related measures tops the list in all countries, despite the other wide-ranging options presented, including “Maintaining peace,” “Educational equality,” “Employment and economic stability,” “Social issues in developing countries,” “Corporate social responsibility,” and “Donations and social contribution activities.”

Although no direct comparisons could be drawn due to differences in the options, the top choice in the U.S.* was also “Reduce consumption and waste” (62.8%), suggesting a strong association between Sustainability and “Reducing waste” across all countries.

Country-Specific Characteristics

- In Japan, China, France, and Germany, the top priority is “Businesses reducing waste.”
- In all five countries except China, the top priority is “Ordinary citizens reducing waste.”
- In Indonesia, Thailand and China, the top responses are: “Ordinary citizens thinking about environmental and social issues, and changing their consumption habits and lifestyles” and “Countries and governments fulfilling their environmental and social responsibilities.”

● Impression of Sustainability (TOP3)

Country (2023)	Rank	Item	Percentage
Japan (2023) (n=1,000)	1	Ordinary citizens reducing waste	39.2%
	2	Businesses reducing waste	35.3%
	3	Changing systems so that humanity can continue to survive on earth	32.0%
China (2023) (n=1,000)	1	Businesses reducing waste	36.0%
	2	Ordinary citizens thinking about environmental and social issues, and changing their consumption habits and lifestyles	33.1%
	3	Countries and governments fulfilling their environmental and social responsibilities	32.3%
France (2023) (n=1,000)	1	Businesses reducing waste	45.0%
	2	Ordinary citizens reducing waste	42.3%
	3	Ordinary citizens reducing consumption	34.7%
Germany (2023) (n=1,000)	1	Ordinary citizens reducing waste	45.7%
	2	Businesses reducing waste	45.6%
	3	Ordinary citizens reducing consumption	32.2%
Indonesia (2023) (n=1,000)	1	Ordinary citizens thinking about environmental and social issues, and changing their consumption habits and lifestyles	37.5%
	2	Countries and governments fulfilling their environmental and social responsibilities	35.5%
	3	Ordinary citizens reducing waste	34.7%
Thailand (2023) (n=1,000)	1	Ordinary citizens thinking about environmental and social issues, and changing their consumption habits and lifestyles	37.2%
	2	Ordinary citizens reducing waste	33.0%
	3	Countries and governments fulfilling their environmental and social responsibilities	32.0%

* Extract the top 3 items in each country.

* Dentsu Consumer Navigator : Sustainability 2023, a survey conducted and published by the Dentsu Group for the USA and Canada in June 2023

Japan “stayed the same” — The frequency of thinking about Sustainability —

An average of 69.5% of respondents in the six countries answered “Think about Sustainability more often” (the sum of Significantly increased + Somewhat increased) over the past three years, and 70.1% in the U.S.* answered “Have increased” the number of times they think about it. In Japan, 58.8% responded “Stayed the same,” making it the only country where there was no change. In fact, Sustainability-conscious behaviour and specific activities to reduce waste in Japan are not as common as in other countries, and there may be fewer opportunities to think about it.

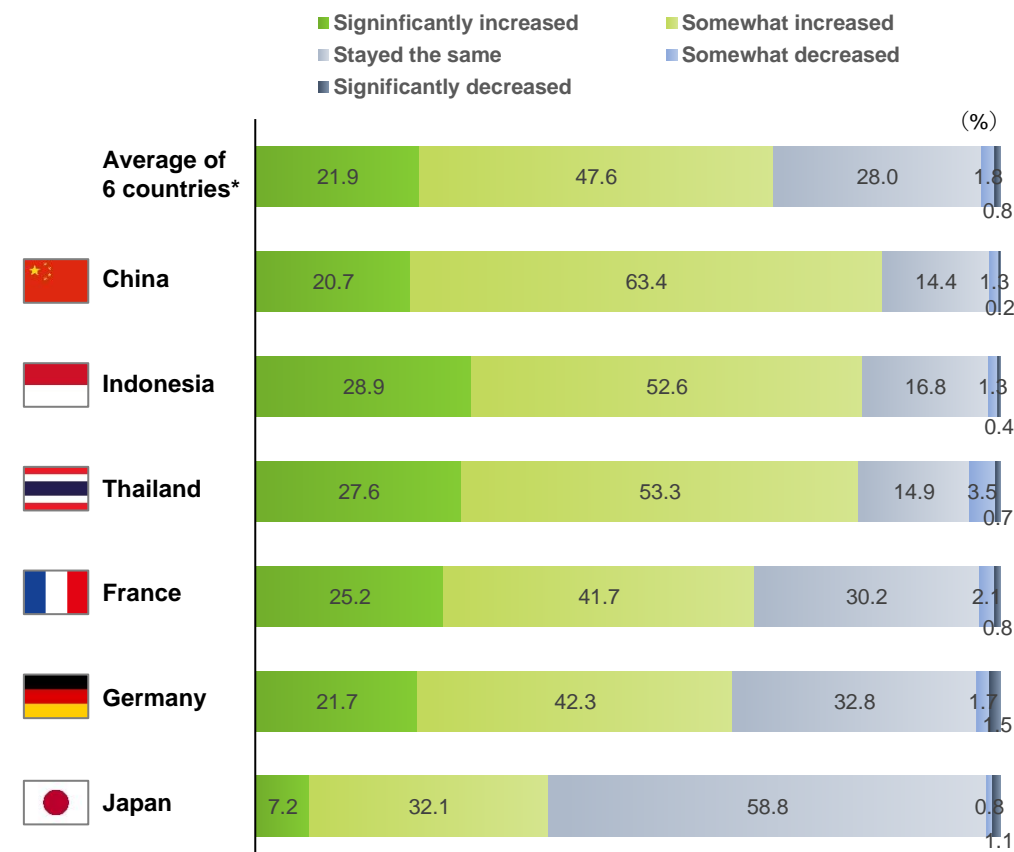
【Relevant Scores for Japan in 2023 (n = 1000)】

- “I don't know what Sustainability is” 13.3% (1-2% in the other 5 countries)
- “Buy products sold by weight or simple packaging to reduce waste” 49.9% (lowest among 6 countries)
- “Do not buy or throw away plastic products” 10.1% (lowest in 6 countries)
- “Frequently use renewable energy electricity” 9.0% (lowest in 6 countries)
- “Frequently repair/restore and use for a long time” 37.6% (lowest in 6 countries)
- “Choose environmentally friendly daily necessities even if they are more expensive” 32.7% (lowest in 6 countries)

Country-Specific Characteristics

- About 80% of respondents in China, Indonesia, 70% of respondents in France and 60% in Germany selected “Think about it more often.”
- Only in Japan did about 60% of respondents select “Stayed the same” while 40% selected “Think about it more often.”

● Frequency of thinking about Sustainability (Last three years)



* The percentages above were averaged from the answers given by 1,000 respondents in each of the six countries polled.

* Dentsu Consumer Navigator: Sustainability 2023, a survey conducted and published by the Dentsu Group for the USA and Canada in June 2023

France and Germany have a majority who are interested in “Animal Welfare”

Animal welfare is defined by the World Organisation of Animal Health (WOAH) as “the physical and mental state of animals in relation to their living and dying conditions,” and it applies to a wide range of areas, including the livestock industry, pets, animal experimentation, and wildlife conservation.

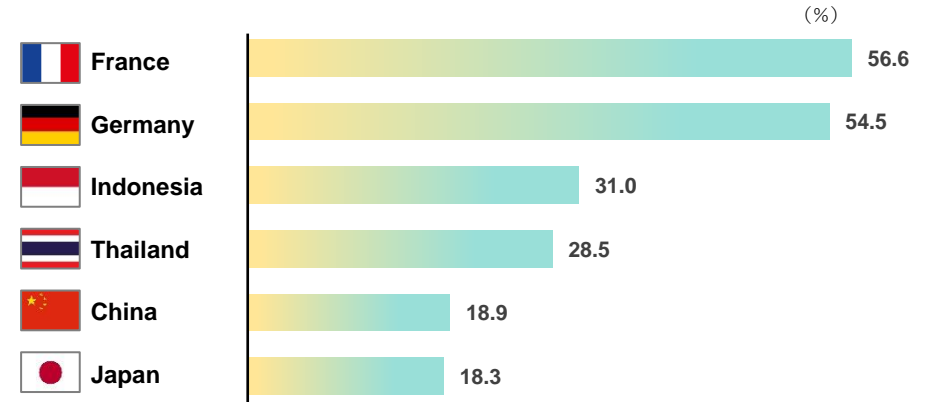
The majority of people in France and Germany are interested in animal welfare, and there are many laws and regulations regarding animal welfare and animal protection. Corporate animal welfare efforts, particularly in Europe, are attracting worldwide attention.

Foreign food manufacturers and hotels have switched to animal welfare-conscious food ingredients, and the response has extended to the supply chain. Corporate animal welfare efforts will continue to accelerate around the world.

On the other hand, Japan seems to lag behind the rest of the world in awareness of and response to animal welfare and animal rights, with the lowest level of awareness of the six countries that animal welfare and dignity should be protected with stricter regulations.

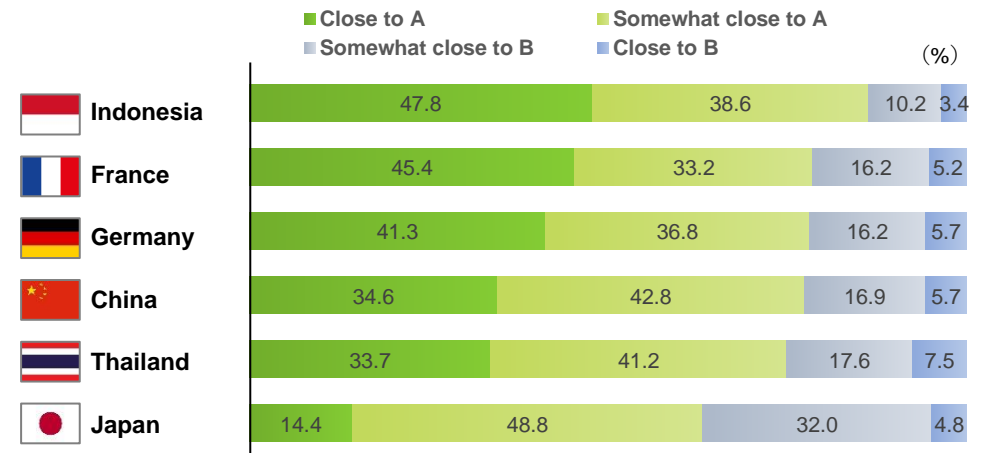
● Social Issues of Concern

“Animal welfare”



● Stricter regulations on animal welfare and dignity (yes/no)

A: It is important to protect animal rights and welfare even if this means tightening regulations
 B: Protecting animal rights and welfare is not important enough to justify tightening regulations



* n for each country is 1,000

Accepting restrictions on use, but reluctance to accept the financial burden

In order to achieve a Sustainable society, we sometimes have to accept restrictions on the use and purchase of products and financial burdens. When asked about their acceptance of restrictions and burdens, the most accepted was “Restriction on the use of plastics,” which was ranked first in five countries (excluding China) with an average of 86.5% across the six countries. It is clear that the promotion of Sustainability is strongly linked to “Restriction on the use of plastics.” In addition, 90% of respondents in China, Thailand and Indonesia said they would accept “Restrictions on buying clothing with a significant environmental impact.”

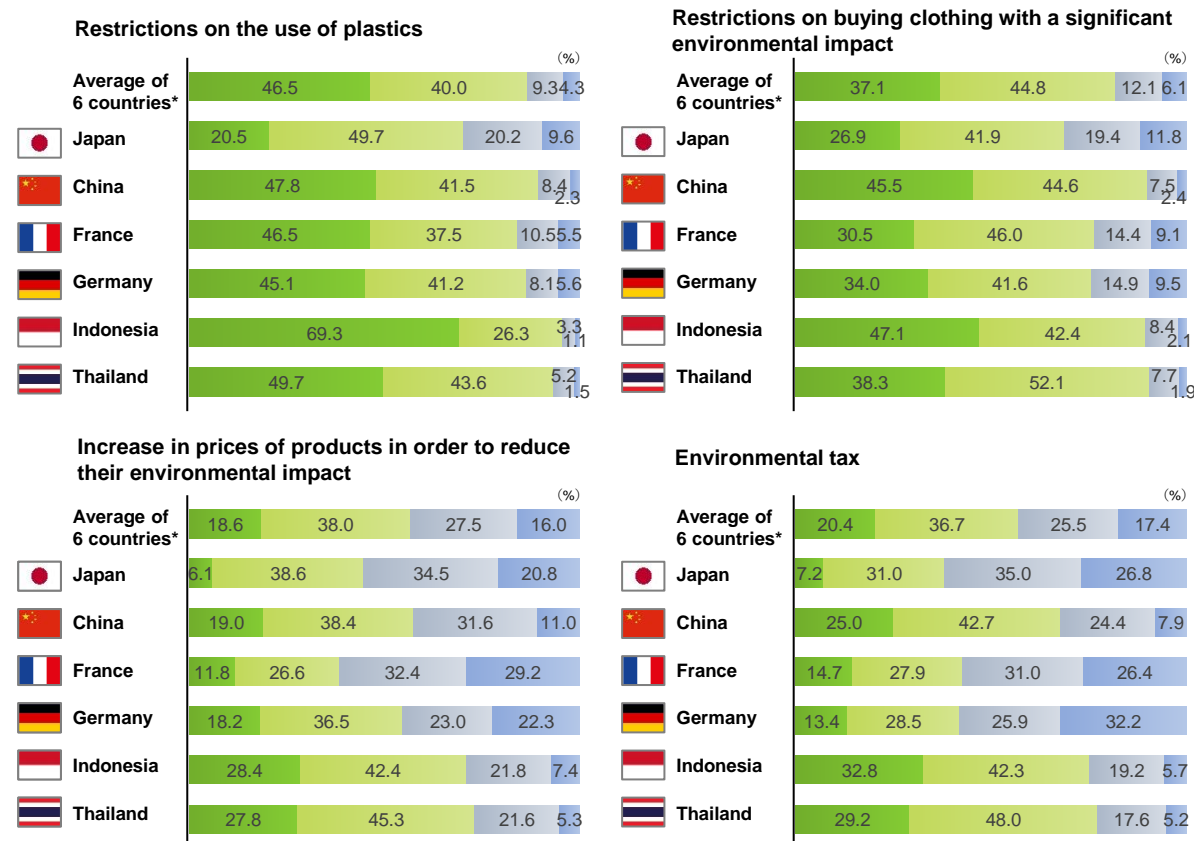
On the other hand, the most common negative responses were to “Increase in prices of products in order to reduce their environmental impact” (six-country average 43.5%) and “Environmental taxes” (42.9%). The majority of respondents in Japan and France said they would not accept product price increases to reduce their environmental impact, while the majority of respondents in Japan, France and Germany said they would not accept an environmental tax.

Country-Specific Characteristics

- Thailand, Indonesia and China have generally a higher acceptance of various restrictions.
- Japan's acceptance of various restrictions is generally lower than in other countries.
- France is the most resistant to raising product prices, with 60% not accepting it.

To what extent is this acceptable for the realization of a Sustainable society?

- I am actively willing to accept this for the sake of a sustainable society
- I am somewhat willing to accept this for the sake of a sustainable society
- I am reluctant to accept this, even for the sake of a sustainable society
- I am utterly unwilling to accept this, even for the sake of a sustainable society



* The percentages above were averaged from the answers given by 1,000 respondents in each of the six countries polled.

What are the qualities people need to have?

What are the qualities we need to have in order to realize a sustainable society? In order to find clues to this, we asked people in the six countries if they thought they had a total of the 11 following items: accurate information backed by science (1 item), skills such as imagination and action (5 items), compassion for others and nature (2 items), and attitude towards a sustainable society (3 items).

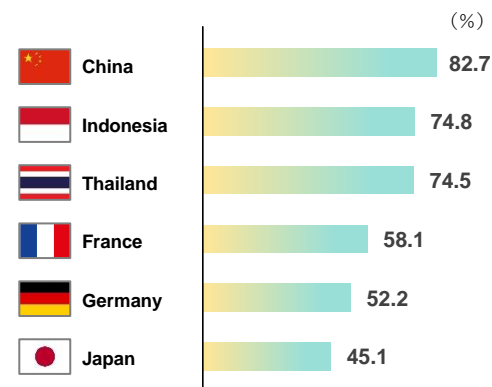
Noteworthy are “Time to think about Sustainability day to day,” “A concern for countries that are likely to be directly affected by climate change,” “The ability to engage in constructive discussions with people who have different views or positions” and “Accurate information backed by science.” More than 70% of respondents in China, Thailand and Indonesia said they have the above items, while only half to 60% of respondents in Japan, Germany, and France said they have.

Country-Specific Characteristics

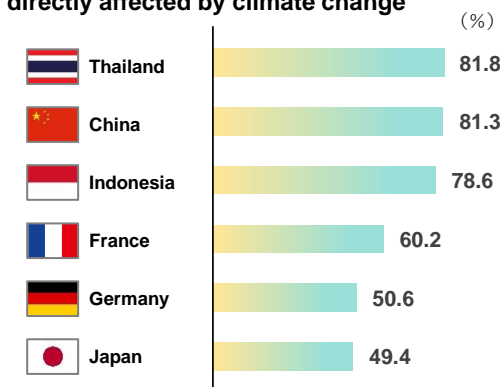
- In China, 80% of the respondents selected “Time to think about Sustainability day to day,” “The ability to engage in constructive discussions with people who have different views or positions” and “Accurate information backed by science.”
- In Thailand and China, 80% of respondents selected “A concern for countries that are likely to be directly affected by climate change.”
- In Japan, less than half of respondents said they have “Time to think about Sustainability day to day.”
- In Germany, less than half of respondents selected “Accurate information based on scientific evidence.”

What they think the people of their country have in common

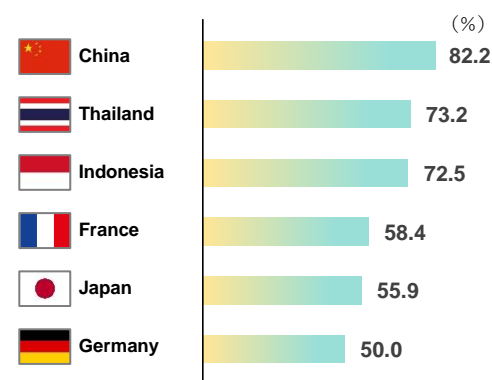
Time to think about Sustainability day to day



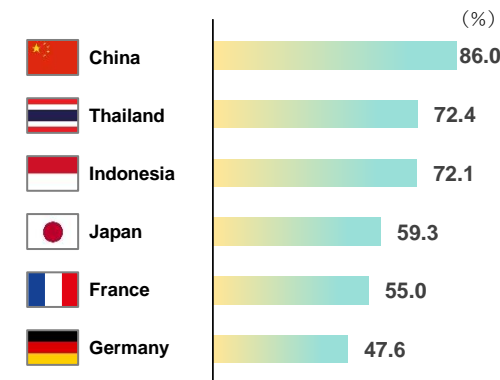
A concern for countries that are likely to be directly affected by climate change



The ability to engage in constructive discussions with people who have different views or positions



Accurate information backed by science



* Sum of “I think there is enough” + “I think there is a little”
* n for each country is 1,000

Chapter 2

Sustainability-related Behaviour and Consumption

There is a better selection of environmentally and socially responsible products

I check how a product was made and sourced as part of my purchase decision

74.4%

60.7%

Average of 6 countries
(Japan, China, France, Germany, Indonesia, Thailand) (n=6,000)

Eco-friendly bag use is increasing, and refillable product use is rising in Japan, Indonesia and Thailand

In all six countries, more than 60% of respondents answered that they “Often” use eco-friendly bags, indicating that eco-friendly bags have become a common sight in daily life in all countries.

Japan, Indonesia and Thailand are the top three countries for “Buying refillable products.” Many daily necessities on store shelves are refillable products in these countries, while in France and China, the percentage of frequent buyers is relatively low, reflecting the fact that refillable products themselves are rarely sold.

In France, which ranks first for “Taking clothing, toys, packaging, etc. to collection boxes at shops,” special collection boxes for clothes and other items are placed on footpaths and public roads, and after collection, the items are sorted for recycling, resale, donation, etc.

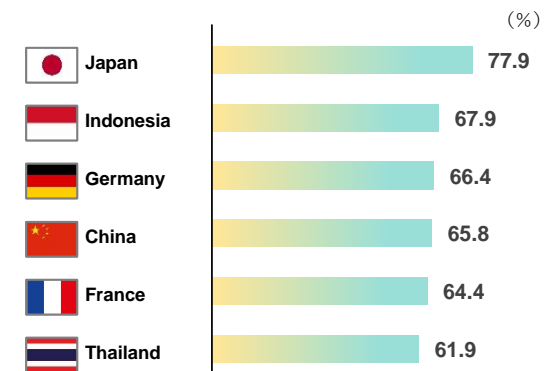
In Germany, the use of websites for buying and selling second-hand goods locally appears to be very active, with around 50% of respondents “Donating unneeded goods or books or dropping them off at second-hand stores.”

Country-Specific Characteristics

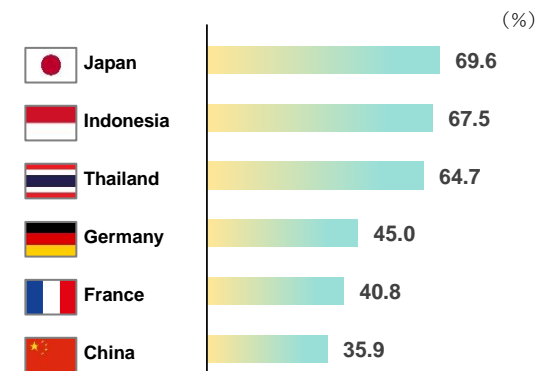
- In Japan, about 70% use eco-friendly bags and buy refillable products.
- In France, around 40% are “Taking clothing, toys, packaging, etc. to collection boxes at shops.”
- In Germany, around 50% are “Donating unneeded goods or books or dropping them off at second-hand stores.”

Environmentally friendly lifestyle behaviour

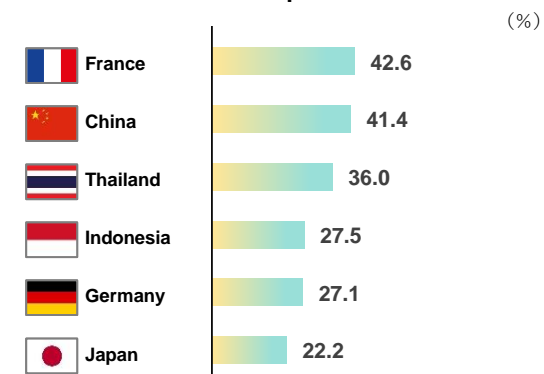
Using eco-friendly bags



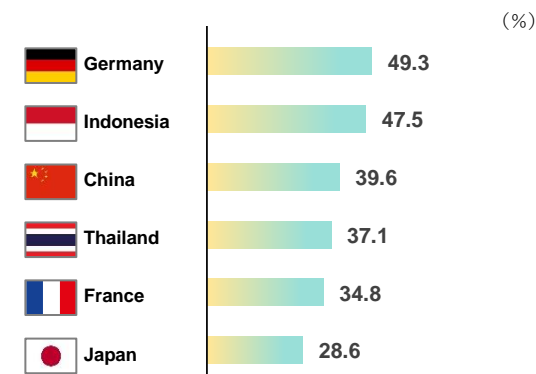
Buying refillable products



Taking clothing, toys, packaging, etc. to collection boxes at shops



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



* Only “Often” is selected out of “Often,” “Sometimes” and “Never”

* n in each country is 1,000

In some countries, the majority of people carry their own bottles and take home their leftovers

In China, “Bringing home your leftovers after visiting a restaurant” was the highest among the six countries at 66.9%, influenced by the Anti-Food Waste Law, a law enacted in 2021 that prohibits large amounts of leftover food.

Ranked first in eating plant-based meat substitutes, Indonesia has the largest Muslim population in the world. Mainly due to religious considerations, some fast food restaurants and cafes offer plant-based menus.

More than 40% of respondents answered “Carrying water bottles” as a behaviour. Cafes where you can use your own bottle and apps that provide information on the location of water supply spots have been developed for use in various cities and are becoming a part of daily life.

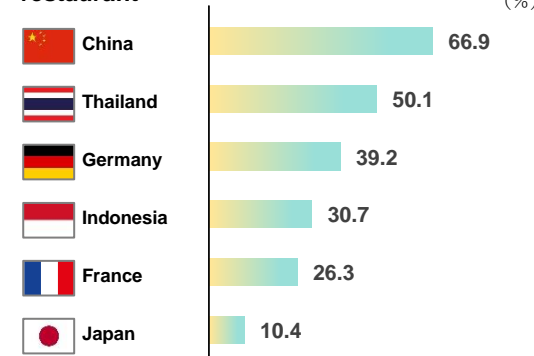
In Indonesia, which ranks first in “Making use of compost,” the city of Surabaya has successfully reduced the amount of garbage generated by promoting composting of food scraps as a countermeasure to the social issue of excessive waste disposal. Similar systems are being developed in other cities.

Country-Specific Characteristics

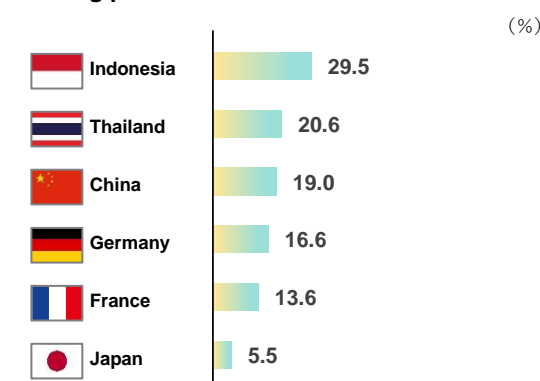
- In China, “Bringing home your leftovers after visiting a restaurant” was practiced by about 70% of respondents.
- In Indonesia, “Making use of compost” was practiced by about 50% of respondents.
- In Japan, “Eating plant-based meat substitutes” and “Making use of compost” was only practiced by about 5.8% of respondents.

Environmentally friendly lifestyle behaviour

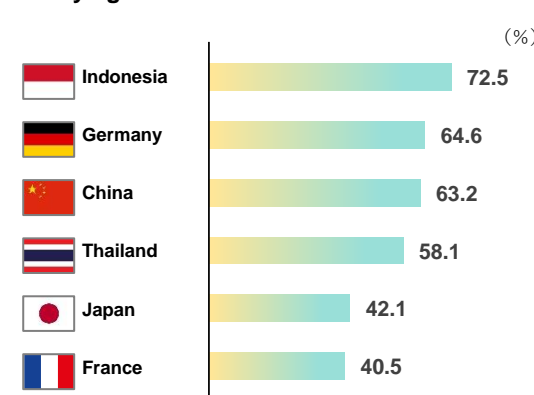
Bringing home your leftovers after visiting a restaurant (%)



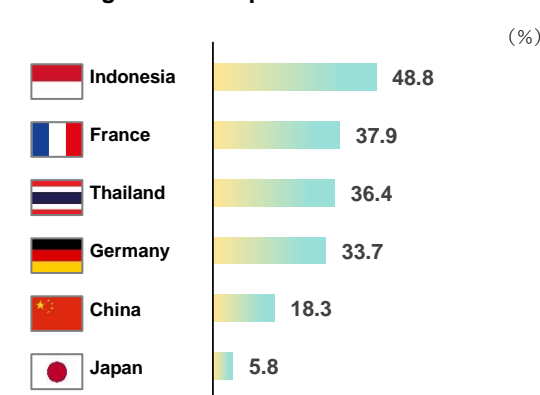
Eating plant-based meat substitutes (%)



Carrying water bottles (%)



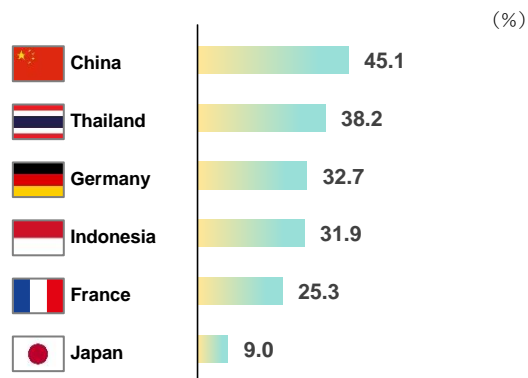
Making use of compost (%)



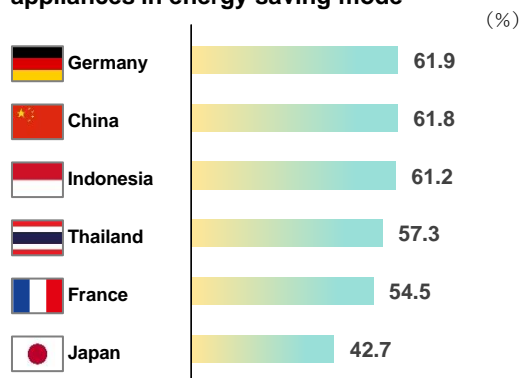
* Only “Often” is selected out of “Often,” “Sometimes” and “Never”
* n in each country is 1,000

Other environmentally friendly lifestyle behaviours

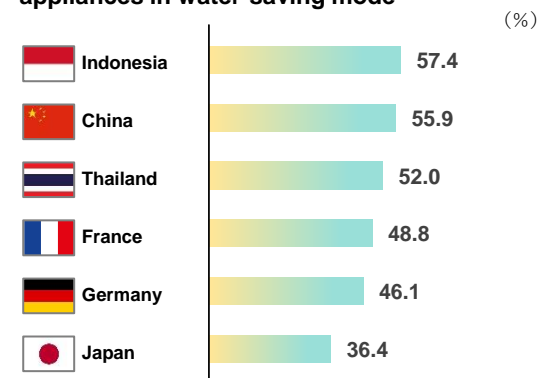
Using renewable energy



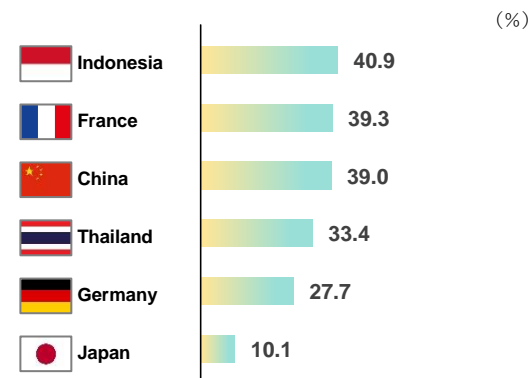
Using energy-saving appliances or running appliances in energy-saving mode



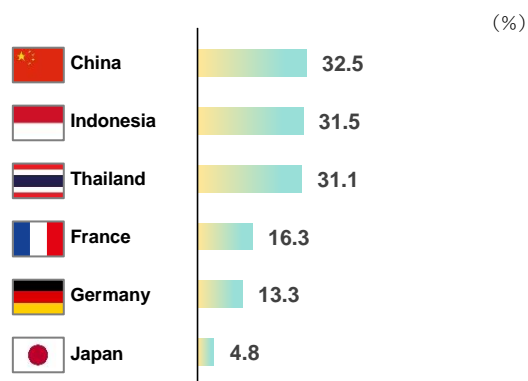
Using water-saving appliances or running appliances in water-saving mode



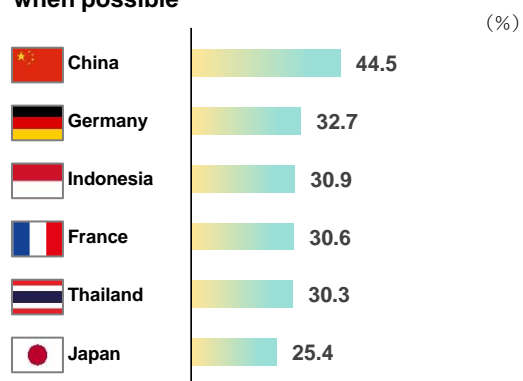
Not buying or not throwing away plastic goods



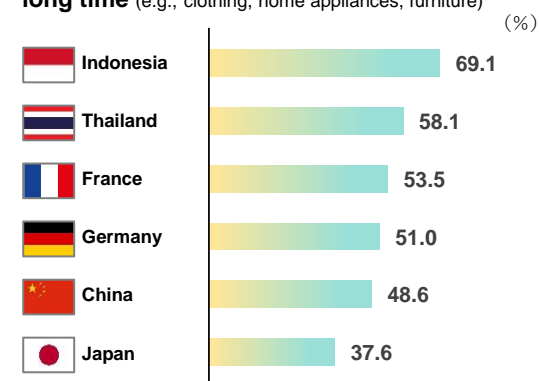
Carsharing/ridesharing



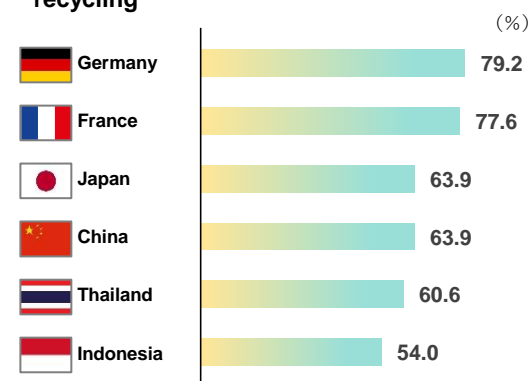
Using a bicycle rather than the car when possible



Repairing/mending goods and using them for a long time (e.g., clothing, home appliances, furniture)



Reducing waste by sorting rubbish and recycling



* Only "Often" is selected out of "Often," "Sometimes" and "Never"

* n in each country is 1,000

People in Japan, France, and Germany are reluctant to volunteer or be involved in environmental and social activities

The percentage of respondents in the six countries who feel "volunteering makes me happy" is 63.2%, but in Japan, the majority of respondents felt that "volunteering feels like a burden."

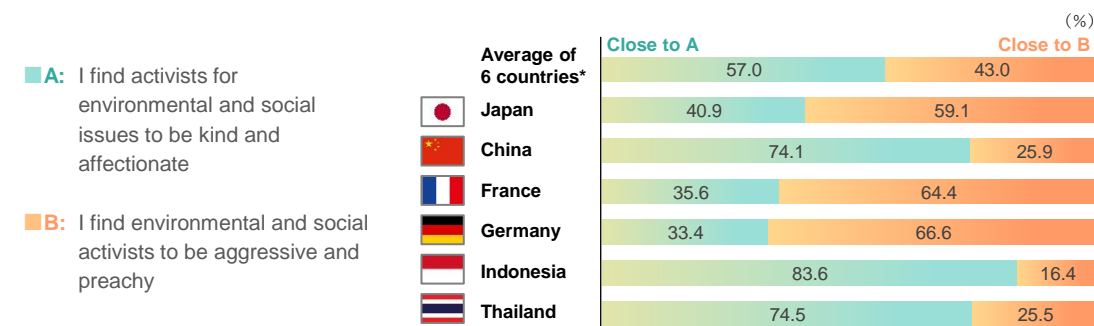
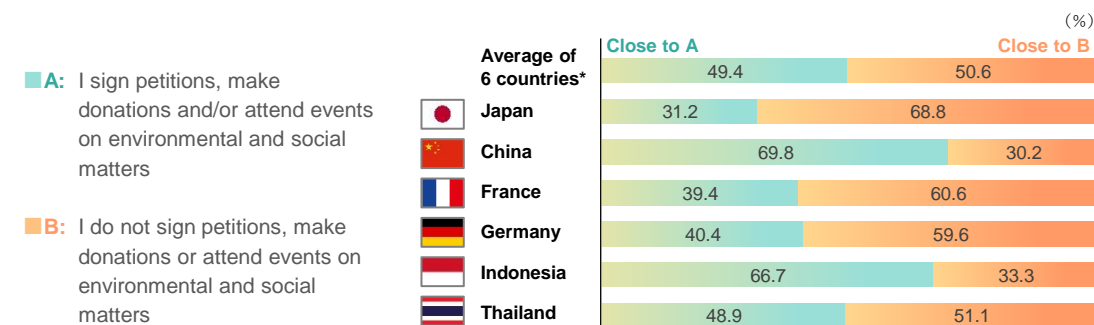
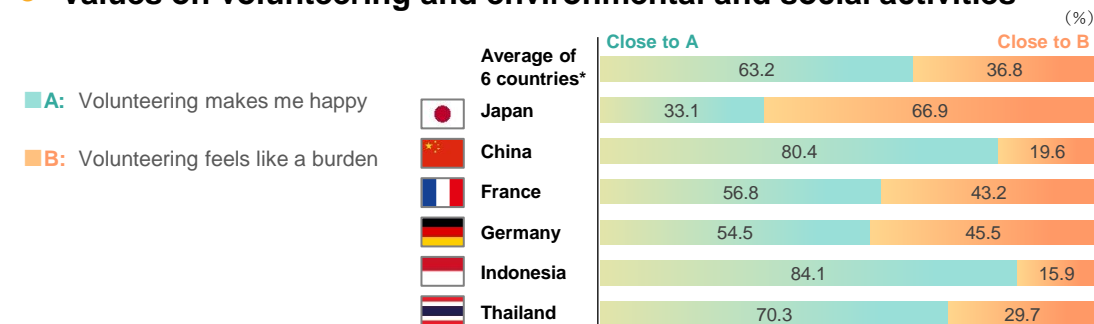
In Japan, about 70% of respondents said they would not "sign petitions, make donations and/or attend events on environmental and social matters" while 60% of respondents in Germany and France also said they would not participate in activities for the environment or society.

Regarding the impression of environmental and social issue activists, people in Indonesia, Thailand, and China felt they are "kind and affectionate," while Germany, France and Japan thought that they are "aggressive and preachy."

Country-Specific Characteristics

- In Japan, many people feel burdened by volunteering and do not participate in environmental and social activities.
- In China, Indonesia and Thailand, environmental and social activism is viewed positively.
- In Japan, France and Germany, environmental and social-issue activists are perceived as aggressive and preachy.

Values on volunteering and environmental and social activities



* The percentages above were averaged from the answers given by 1,000 respondents in each of the six countries polled.

Rising prices are causing living insecurity

On average, 73.8% of respondents in the six countries said, “I am worried about the future cost of living,” indicating that many people are concerned about their future finances.

In Japan, Germany and France, 80% of respondents thought “Even if the cost of living increases, my income will not.”

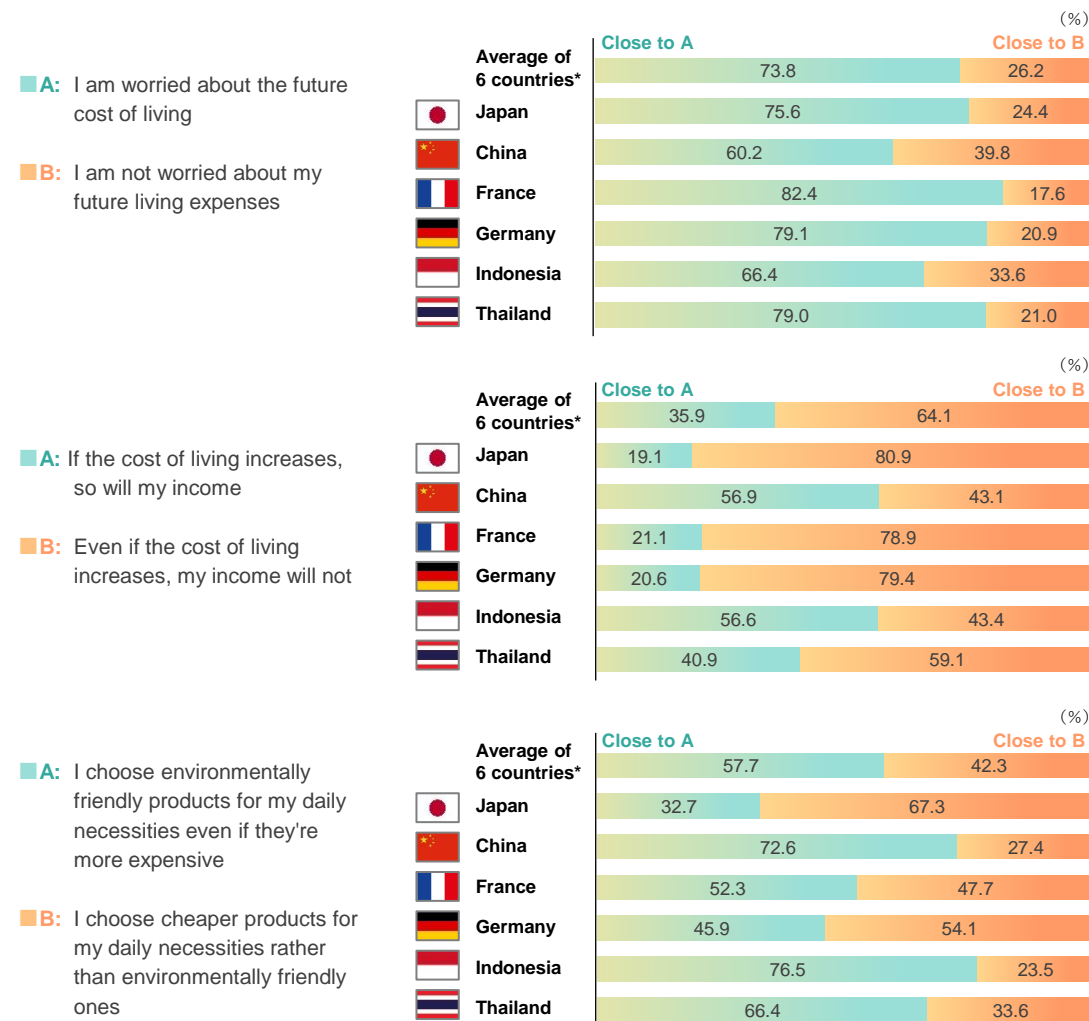
The majority of respondents in Japan and Germany said, “I choose cheaper products for my daily necessities rather than environmentally friendly ones,” and nearly half of the respondents in France said the same, indicating that inflation is having an impact.

With prices soaring worldwide, it seems that environmental considerations also require choices that balance costs.

Country-Specific Characteristics

- Nearly 70% in Japan choose low prices over global environmental concerns.
- People in Japan, Germany and France who believe that their incomes will not increase even if the cost of living increases choose low-priced items over environmentally friendly ones.

The relationship between cost of living and daily necessities



* The percentages above were averaged from the answers given by 1,000 respondents in each of the six countries polled.

Awareness of price increases, and their impact on purchases

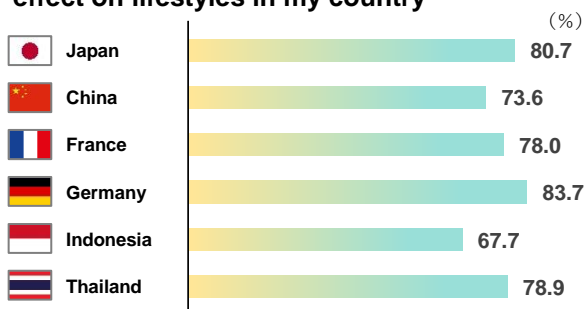
In 2023, 70-80% of respondents in all six countries feel that "Conflicts or wars in other countries are having an effect on lifestyles in my country" as well as climate change, and "The price of food has gone up" and the "volumes/amounts have decreased" are also felt by many people regardless of country. Efforts to reduce consumption and buy lower priced or used goods are beginning to be seen.

Country-Specific Characteristics

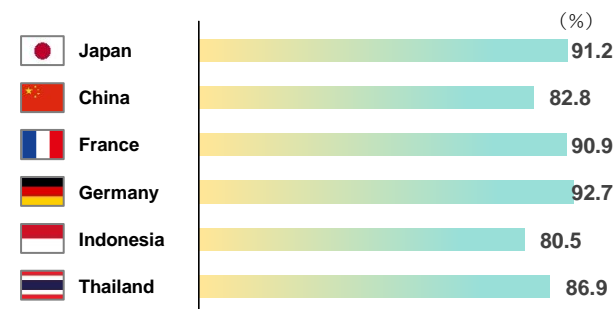
- People in Japan strongly react to "The price of food has gone up" and "volumes/amounts have decreased," and about 60% of respondents have "started using lower quality products and services."
- France, Germany and Thailand also had a majority of respondents who have "started using lower quality products and service" and "check to see if used products are available."

Awareness

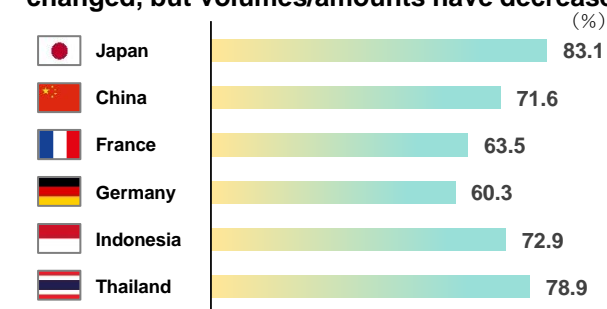
Conflicts or wars in other countries are having an effect on lifestyles in my country



The price of food has gone up

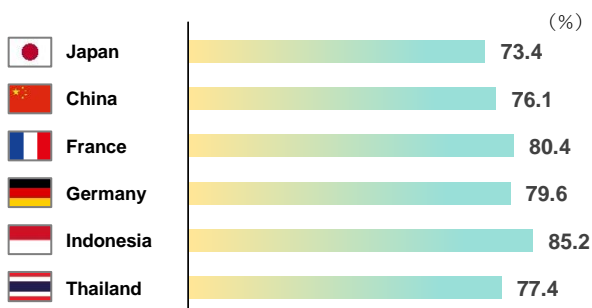


The price of daily essentials and food has not changed, but volumes/amounts have decreased

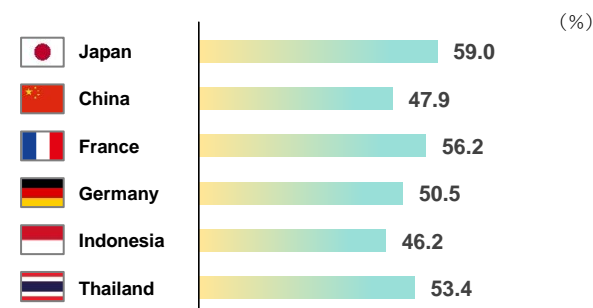


Behavior

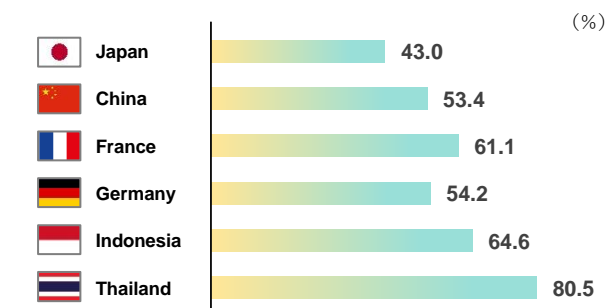
I am making an effort to reduce consumption by not buying products or buying them less frequently



I have started using lower-quality products and services



When shopping, instead of buying new products, I first check to see if used products are available



* n in each country is 1,000

Sustainable options are increasing and becoming more affordable

When we asked people in each category to give their impressions on whether sustainable options were offered at the time of purchase, as well as prices, the top choice in all categories was “There aren’t sufficient sustainable options available in this category.” From this, we can deduce that sustainable options are beginning to appear.

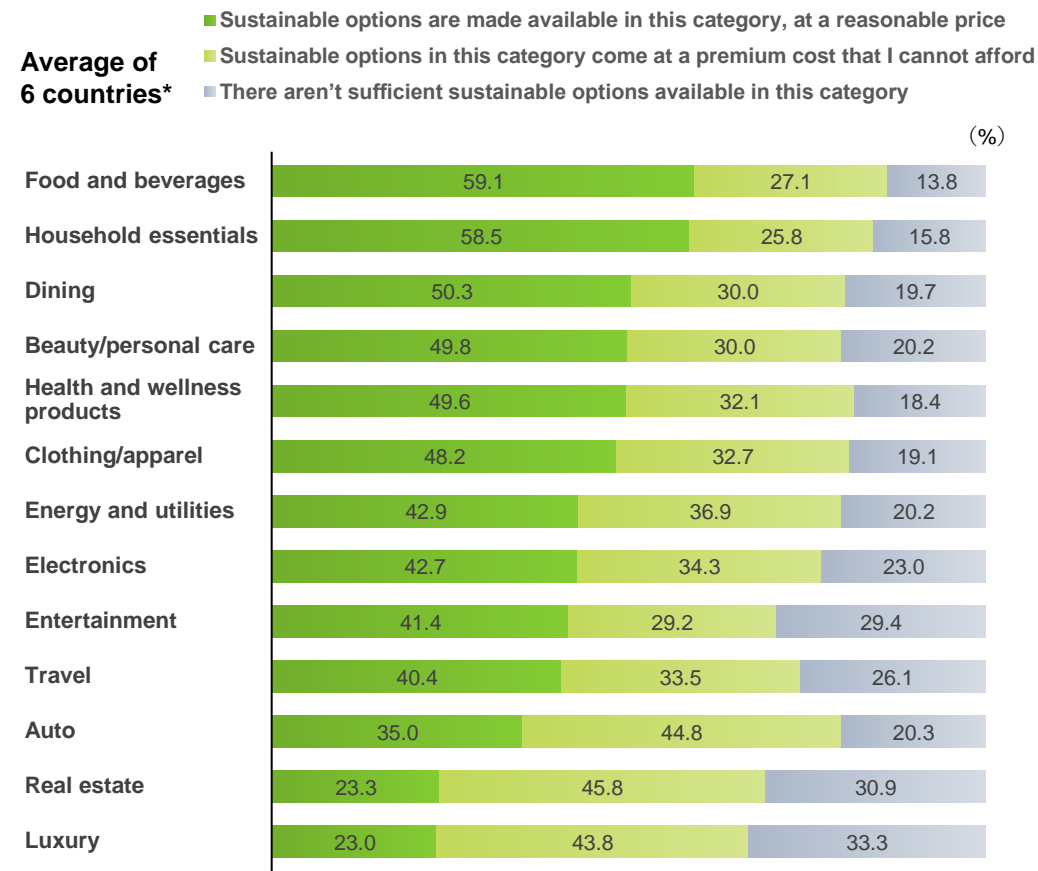
The numbers of people answering “Sustainable options in this category come at a premium cost that I cannot afford” was found to increase with higher-priced products such as automobiles and real estate, which are purchased less frequently and are often expensive. Since there are fewer purchasing opportunities, it may be difficult to imagine a fair price.

On the other hand, for items that are frequently purchased, such as food and beverages, daily consumer goods, eating out, beauty/personal care, health/wellness products and fashion, about 50% of respondents answered “Sustainable options are made in this category, at a reasonable price,” indicating that there are more opportunities to think about and practice sustainable purchasing when shopping.

Country-Specific Characteristics

- Approximately 60% of people feel that “Sustainable options are made available” for food, beverages and daily consumer goods.
- Approximately 50% of respondents feel that there are options for eating out, beauty, health, and fashion “at a reasonable price.”
- When it comes to luxury, real estate, and automobiles, the most common answer is “Sustainable options in this category come at a premium cost that I cannot afford.”

Impressions of “Sustainable Choices and Prices” (13 categories)



* The percentages above were averaged from the answers given by 1,000 respondents in each of the six countries polled.

Daily necessities: Sustainability considerations as a reason for accepting higher prices

When asked about the reasons for purchasing premium-priced products in high-frequency categories, such as daily necessities, factors related to sustainability were among the top five reasons for purchasing premium products in all countries, although priorities varied from country to country. In Germany in particular, the top two reasons for purchases corresponded to Sustainability.

On the other hand, in Japan, China, Indonesia and Thailand, the number one reason for purchasing premium-priced products is high quality, and it appears that high prices are accepted on the condition that quality is not sacrificed and Sustainability is also taken into account.



Country-Specific Characteristics

- In Japan, France, Germany and Thailand, the reason for premium purchases is “I can refill the container.”
- In France, Germany, Indonesia and Thailand, the reason for purchasing premium products is that “It is clearly a sustainable product.”
- In China, Indonesia and Thailand, having a system that “The container can be collected /reused” is the reason for premium purchases.
- In Germany, “The amount of plastic in the packaging/container is reduced” is also a reason for premium purchases.

Top five reasons for buying items that are 1.3 times more expensive than usual

Country (2023)	(n=)	Reason	Percentage
Japan (2023)	(n=1,000)	1 The product is high quality/grade	29.3%
		2 It is healthy or good for the skin	26.2%
		3 The brand/business is trustworthy	26.0%
		4 It is a domestic product	25.7%
		5 I can refill the container	25.3%
China (2023)	(n=1,000)	1 The product is high quality/grade	41.7%
		2 The product is made using naturally sourced ingredients	40.2%
		3 It is healthy or good for the skin	35.5%
		4 The brand/business is trustworthy	31.8%
		5 The container can be collected/reused	26.9%
France (2023)	(n=1,000)	1 I can refill the container	28.3%
		2 The product is high quality/grade	26.6%
		3 The product is made using naturally sourced ingredients	24.5%
		4 It is clearly a sustainable product	22.7%
		5 I would not buy the product at a higher price	21.2%
Germany (2023)	(n=1,000)	1 It is clearly a sustainable product	31.6%
		2 I can refill the container	28.6%
		3 The product is high quality/grade	27.9%
		4 The amount of plastic in the packaging/container is reduced	26.3%
		5 It is a domestic product	23.4%
Indonesia (2023)	(n= 1,000)	1 The product is high quality/grade	53.9%
		2 The brand/business is trustworthy	37.6%
		3 It is clearly a sustainable product	37.5%
		4 The product is made using naturally sourced ingredients	37.3%
		5 The container can be collected/reused	28.8%
Thailand (2023)	(n= 1,000)	1 The product is high quality/grade	41.1%
		2 The container can be collected/reused	36.9%
		3 It is clearly a sustainable product	36.8%
		4 It is healthy or good for the skin	32.2%
		5 I can refill the container	31.0%

* Extract the top 5 items in each country.

* Orange text indicates items that are strongly related to Sustainability.

Electrical appliances: The reasons for accepting higher price ranges are durability and energy savings

For durable consumer goods, such as electrical appliances, there has long been a focus on balancing premium quality and environmental friendliness, and in all six countries, “The product is durable and has a long useful life” and “It is energy saving with low running costs” were cited as the top reasons for purchasing high-priced goods, along with “The overall performance is good” and “It is safety-focused.” People in France, Germany, Thailand and Indonesia selected “The technological development is environmentally friendly” and in Indonesia “The product design makes it easy to repair/replace parts/recycle,” indicating expectations for technological innovations and mechanisms that go one step beyond energy conservation.



Country-Specific Characteristics

- “The product is durable” and “It is energy-saving with low running costs” are the top reasons in all the six countries.
- In France, Germany, Indonesia and Thailand, “The technological development is environmentally friendly” was selected.
- In Indonesia, “The product design makes it easy to repair/replace parts/recycle” was the reason for premium purchases.
- In Japan, France and Germany, “I would not buy the product at a higher price” was also within the top-5 reasons regarding purchases.

Top five reasons for buying items that are 1.3 times more expensive than usual

Country	Year	Reason	Percentage
Japan (2023)	(n=1,000)	1 The product is durable and has a long useful life	34.3%
		2 I would not buy the product at a higher price	24.7%
		3 It is safety-focused	24.6%
		4 The overall performance is good	24.5%
		5 It is energy-saving with low running costs	23.8%
China (2023)	(n=1,000)	1 The product is durable and has a long useful life	41.1%
		2 It is energy-saving with low running costs	39.9%
		3 It is safety-focused	33.9%
		4 The overall performance is good	30.9%
		5 The after-sales service is good	26.5%
France (2023)	(n=1,000)	1 I would not buy the product at a higher price	26.4%
		2 The product is durable and has a long useful life	22.4%
		3 It is energy-saving with low running costs	21.4%
		4 The overall performance is good	19.5%
		5 The technological development is environmentally friendly	16.1%
Germany (2023)	(n=1,000)	1 The product is durable and has a long useful life	32.5%
		2 It is energy-saving with low running costs	30.8%
		3 The overall performance is good	26.5%
		4 The technological development is environmentally friendly	24.3%
		5 I would not buy the product at a higher price	21.2%
Indonesia (2023)	(n=1,000)	1 The product is durable and has a long useful life	43.0%
		2 It is energy-saving with low running costs	40.0%
		3 The overall performance is good	33.8%
		4 The technological development is environmentally friendly	30.7%
		5 The product design makes it easy to repair/replace parts/recycle	29.8%
Thailand (2023)	(n=1,000)	1 The overall performance is good	39.2%
		2 The product is durable and has a long useful life	34.2%
		3 It is energy-saving with low running costs	31.8%
		4 The technological development is environmentally friendly	31.5%
		5 It is safety-focused	31.1%

* Extract the top 5 items in each country.

* Orange text indicates items that are strongly related to Sustainability.

Automobiles/Beauty & Personal care/Food & Beverages: Sustainability is linked with higher prices

- Reasons for choosing something that is 1.3 times more expensive than usual (top 15 items based on the average* of the six countries)



Auto

1	It is energy saving with low running costs	30.3%
2	It is safety focused	27.8%
3	The product is durable and has a long useful life	27.8%
4	The overall performance is good	25.6%
5	The technological development is environmentally friendly	23.5%
6	The brand/business is reliable	20.3%
7	The after-sales service is good	18.8%
8	The product design makes it easy to repair/replace parts/recycle	18.1%
9	I would not buy the product at a higher price	17.9%
10	I can get an eco subsidy (reduction in price or tax) from the government	17.3%
11	It has resale value	16.7%
12	It is clearly a sustainable product	15.7%
13	It is an innovative product	15.0%
14	The product uses advanced intelligent technology	14.7%
15	The design is good	14.2%



Beauty/personal care

1	It is healthy or good for the skin	39.9%
2	The product is high quality/grade	35.1%
3	The product is made using naturally sourced ingredients	29.8%
4	The brand/business is trustworthy	24.9%
5	It is clearly a sustainable product	23.9%
6	I like the smell/feel	19.4%
7	I can refill the container	19.1%
8	It is a domestic product	17.2%
9	The amount of plastic in the packaging/container is reduced	17.0%
10	The container can be collected/reused	16.2%
11	I would not buy the product at a higher price	15.2%
12	It has Fairtrade certification or similar	13.9%
13	The product is popular or a best seller	13.1%
14	There is a focus on traceability	12.0%
15	I'm aware of the CO2 reduction	10.8%



Food and beverages

1	The product is high quality/grade	39.5%
2	The product is made using naturally sourced ingredients	33.3%
3	It is healthy or good for the skin	31.8%
4	It is clearly a sustainable product	27.1%
5	The container can be collected/reused	24.7%
6	The brand/business is trustworthy	23.9%
7	I can refill the container	23.9%
8	It is a domestic product	23.3%
9	The amount of plastic in the packaging/container is reduced	18.3%
10	It is a local speciality or is made using traditional local techniques	15.8%
11	I'm aware of the CO2 reduction	14.5%
12	I like the smell/feel	14.3%
13	It has Fairtrade certification or similar	14.1%
14	There is a focus on traceability	12.3%
15	The product is popular or a best seller	11.7%

* Extract the top 15 items.

* The six-country average is the average of responses from Japan, China, France, Germany, Indonesia and Thailand. The number for n in each country is 1,000.

* Orange text indicates items that are strongly related to Sustainability.

Chapter 3

Sustainability and Communication

Looking into activities for
business sustainability

67.4%

Businesses should make
information about their sustainable
practices more easily accessible

77.8%

Average of 6 countries
(Japan, China, France, Germany, Indonesia, Thailand) (n=6,000)

In Thailand and Indonesia, corporate communication on Sustainability also influences purchases

Regarding the influence of “Sustainability-related brand communication” by companies and product brands on purchasing, the average for the six countries for the total influence of “A lot” plus “Some” is 74.0%, but the average for Generation Z is 81.2%.

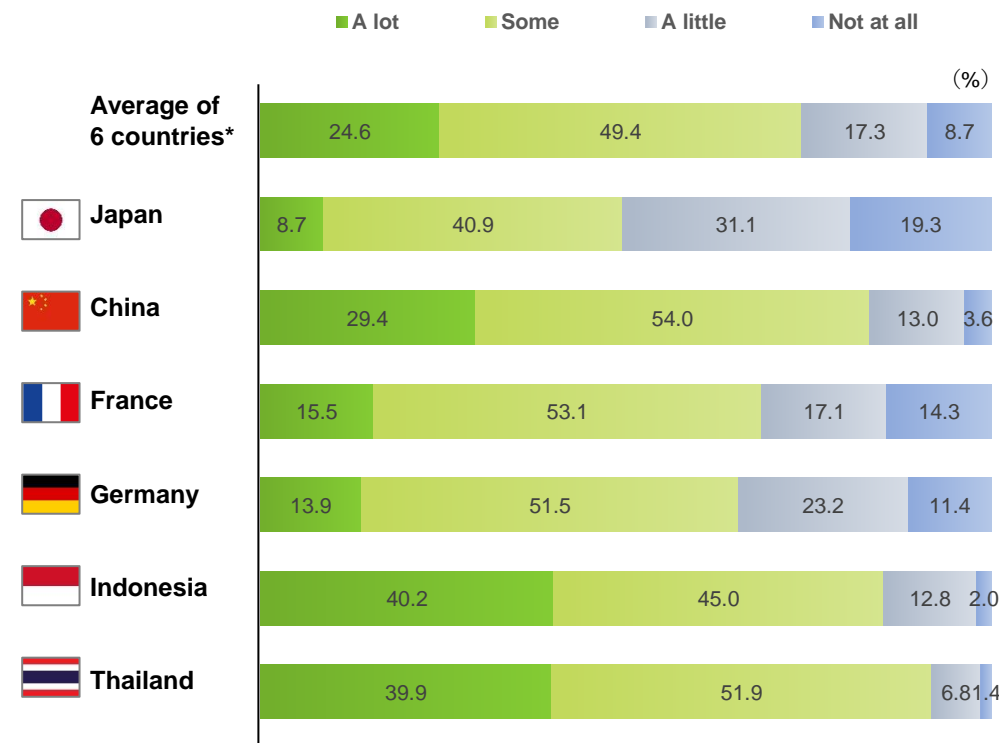
In Thailand and Indonesia, a large number of respondents (40%) answered that they were affected “A lot,” and the total number of respondents who were affected “A lot” or “Some” was about 90%.

In Japan, France and Germany, more than 10% of respondents said they were “Not at all” affected. In Japan, 8.7% of respondents said they were affected “A lot,” while 19.3% of respondents said they were “Not at all” affected. It is assumed that communication regarding sustainability can lead to a certain level of non-responsiveness or negative response with few positive supporters. Even if those opposed were not the majority, not everyone agreed favorably. Therefore, the question is how to communicate by expressing a range of values.

Country-Specific Characteristics

- In Japan, about 70% of the respondents answered “Some” and “A little” influence, while about 20% of the respondents answered, “Not at all.”
- China, Indonesia and Thailand are favorably affected by corporate communications, with 30% to 40% selecting “A lot.”
- In France and Germany, over 10% of the respondents answered that they are influenced “A lot” and 50% are influenced to “Some” extent.

The influence of “communication on sustainable practices” by companies and product brands on purchasing



* The percentages above were averaged from the answers given by 1,000 respondents in each of the six countries polled.

The responsibility for promoting Sustainability is not solely that of the national government

In all the countries except Germany, "National government" was ranked first as the answer to the question: "Which entity do you think should take responsibility for promoting Sustainability?"

In Germany, more respondents answered "Global business" than "National government."

Germany (61.0%) and France (53.0%) had the highest percentages of "Global business" followed by Indonesia (40.6%). In Germany, environmentally friendly "Green start-ups" have accounted for 30% of all start-ups in recent years.

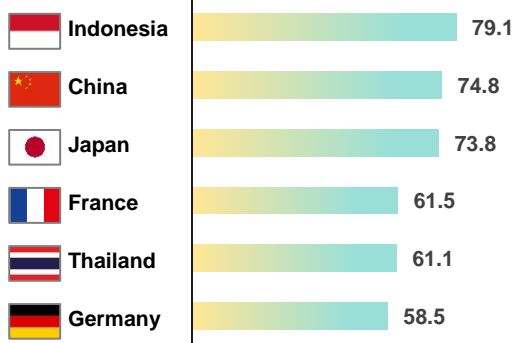
"Local government" was selected by more than 60% of respondents in China and Indonesia. In Japan, 39.8% of respondents selected "Local government," and it showed that the older the respondent's age, the more likely they were to select "Local government" rather than "National government."

Country-Specific Characteristics

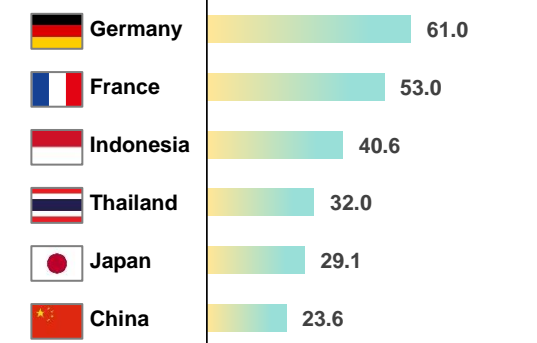
- Germany expects "Global business" to promote Sustainability more than "National government."
- In Thailand, about half of the respondents chose "Everyday people" as the entity responsible for promoting Sustainability.

Which entity do you think should take responsibility for promoting Sustainability?

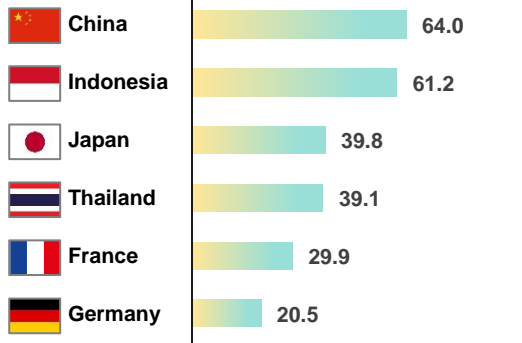
National governments (%)



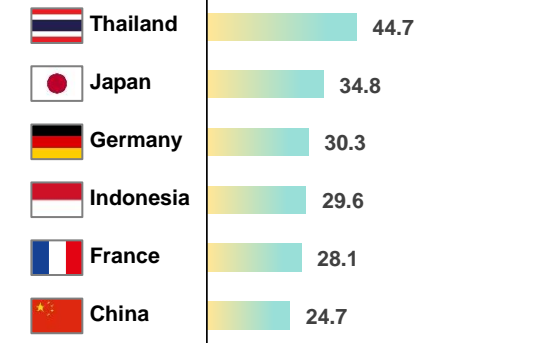
Global businesses (%)



Local governments (%)



Everyday people (%)



* n in each country is 1,000

For Sustainability education, NPOs were the top selection in three countries

When asked to select “All organizations/people in your country that you think are actively communicating Sustainability to people and encouraging them to take action,” and the most common answer in Japan was “None of the above”(31.3%), followed by “Local business” (26.4%) and “National government” (23.8%).

Thailand, Germany and France selected “NPOs,” while “Ordinary citizens with a particular interest in social activism” was selected in Indonesia, Thailand and France.







Generation Z in Indonesia selected “Influencers such as YouTubers/TikTokers” the most (59.3%). (Indonesia as a whole was +12.8 ppt)

In Germany, 42.6% of Generation Z respondents selected “Media organizations/journalists” (Germany as a whole was +11.2 ppt); 41.9% selected “Influencers such as YouTubers/TikTokers” (+20.6 ppt); and 39.7% selected “Intellectuals such as researchers and university professors” (+4.4 ppt), indicating “Individuals” are ranked higher than “Organizations.”

Country-Specific Characteristics

- Japan had the highest percentage at 30% for “None of the above.”
- In France, “Media and journalists,” “NPOs,” and “Ordinary citizens with a particular interest in social activism” were almost equally selected at 30%.
- In Germany, the highest percentage of respondents selected “Experts such as researchers and professors.”

Organizations and people who are actively communicating Sustainability and encouraging action

 Japan (2023) (n=1,000)	 China (2023) (n=1,000)
1 None of the above 31.3%	1 National governments 64.0%
2 Local businesses 26.4%	2 Local governments 50.3%
3 National governments 23.8%	3 International coalitions 43.7%
 France (2023) (n=1,000)	 Germany (2023) (n=1,000)
1 Media and journalists 30.7%	1 Experts such as researchers and professors 35.3%
2 Non-profit organizations 30.6%	2 National governments 32.1%
3 Ordinary citizens with a particular interest in social activism 30.6%	3 Non-profit organizations 31.6%
 Indonesia (2023) (n=1,000)	 Thailand (2023) (n=1,000)
1 National governments 57.6%	1 National governments 47.2%
2 Ordinary citizens with a particular interest in social activism 53.1%	2 Ordinary citizens with a particular interest in social activism 45.5%
3 Local governments 52.1%	3 Non-profit organizations 38.9%

* Extract the top 3 items in each country.

●● Summary of the 2023 survey

Chapter 1: Interest in Sustainability

In all six countries, an average of 80% of respondents said that climate change is affecting the “Food and water security” and “Cost of living.” Also, “Natural disasters,” “Ocean plastic waste,” “Water pollution and shortages,” “Food waste,” and “Air pollution” were the top social issues of concern in more than three countries. This is consistent with the fact that “Reducing waste by sorting rubbish and waste and recycling” was recalled as an image of Sustainability in all six countries. While “Restrictions on the use of plastic” and “Restrictions on buying clothing with a significant environmental impact” were accepted by a majority in all countries, “Increases in price of products in order to reduce their environmental impact” was unacceptable to a majority in Japan and France, suggesting that restrictions for Sustainability are more easily accepted than high prices/taxes.

Chapter 2: Sustainability-related Behaviour and Consumption

While more than 80% of respondents on average in the six countries felt that “food prices will increase in 2023,” 80% of respondents in Japan, France and Germany said “I am worried about future living expenses” and “Even if the cost of living increases, my income will not.” It is clear that respondents in Japan, France and Germany were sensitive to additional payments due to economic uncertainty. In a positive sign, about 70% of respondents on average across the six countries felt that “the choice of environmentally and socially conscious products has increased,” and about 60% of respondents in the food and beverages and daily consumer goods categories said that “sustainable options are made available at reasonable prices. “Eco-friendly bags,” “refilling” and “my bottle,” which reduce waste, are also popular with a majority of respondents in the six countries.

Chapter 3: Sustainability and Communication

The total for “Sustainability-related communication by companies has influence” and “A lot” plus “Some” influence on purchasing was about 70% on average in the six countries. About 80% of respondents answered: “Companies should make information on their Sustainability efforts more easily accessible,” indicating that they want companies to communicate more proactively. Some 60-80% of respondents in each country cited “National government” as the entity responsible for promoting Sustainability, and 50-60% of respondents in France and Germany cited “Global business.” In more than three countries, the top actors raising awareness about Sustainability were the “National government,” “NPOs” and “Ordinary citizens.”

People are realizing that climate change and the effects of war and conflict are affecting their daily lives and prices, and they are beginning to make efforts to reduce waste and accept restrictions on their purchases and actions. On the other hand, with rising prices and increased general sense of insecurity regarding food and water, people do not have the capacity to choose higher-priced products even if they are environmentally friendly. We also caught a glimpse of their expectations for companies to provide sustainable options at reasonable prices and communicate about their Sustainability efforts. As part of the efforts to further change people's awareness, it is also expected that companies will promote initiatives that enable people to visualize and get a grasp of their contribution to Sustainability, such as consideration for the local environment in material selection and procurement and activities to reduce waste.

●●● Survey Outline

Third Sustainable Lifestyle Awareness Survey (SLS2023)

Survey method	Internet survey
Target country	Japan, China, France, Germany, Indonesia, Thailand (6 countries)
Respondents	18-69 years old
Sample number	6,000ss (1,000ss for each country)
Survey period	July-Aug, 2023

Second survey (SLS2021)

Survey method	Internet survey
Target country	Australia, Brazil, China, Germany, France, UK, USA, India, Japan, South Korea, Sweden, 6 ASEAN countries (Indonesia, Malaysia, Philippines, Singapore, Thailand, Vietnam) (17 countries in total)
Respondents	18-69 years old (18-44 years old for ASEAN)
Sample number	7300ss (300ss each for ASEAN and 300ss 500ss each for other countries)
Survey period	July and October 2021 / March 2022 (France only)

Reference: Scores for the U.S. are taken from the [Dentsu Consumer Navigator: Sustainability 2023]

Survey method	Internet survey
Target country	US, Canada
Respondents	18-69 years old
Sample number	US: 1,000ss/Canada 600ss
Survey period	June 2023

Sustainable Lifestyle Report 2023

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