



**SUSTAINABILITY ACROSS CULTURES:
INSIGHTS INTO CHINA, INDIA, SWEDEN
AND THE US**

August 2021

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INTRODUCTION

Over the past few years, and increasingly over the Covid-19 pandemic, governmental bodies and international brands have been challenged to align their values with more ethical and concrete Corporate Social Responsibility (CSR) driven initiatives. Many use the [UN's 17 Sustainable Development Goals](#) (SDGs) as a reference point to define their sustainability strategy and priorities – an initiative adopted by the United Nations General Assembly since 2015 as a universal call-for-action to achieve a better and more sustainable future for all.

While some countries may be better positioned to achieve certain sustainability goals, brands and governments have to juggle with the reality of their market – ranging from growth and development to socio-economics, infrastructure in place, and local cultural aspirations and expectations – to define what their sustainability priorities should be.

This report is based on a quantitative survey, led in collaboration with Schlesinger Group, across four markets which are at different stages of their sustainability journey, namely China, India, Sweden and the US. The report aims to understand how culture shapes a population's understanding and expectations of sustainability and what it means to them. Looking at the [SDG Index](#) and the [2021 Ranking](#), we will assess if government actions are truly aligned with their people's expectations, and if not, how these discrepancies can be explained from a societal and cultural perspective. Finally, the research behind this report has also allowed us to gather insights into the role of brands and how their sustainability efforts are perceived.



METHODOLOGY

Our methodology combines a quantitative survey with qualitative insight.

The **quantitative survey** was conducted by our partner [Schlesinger Group](#), and includes over 4,000 individual responses from consumers across China, India, Sweden and the US.

The **qualitative insight** was gathered by cultural and planning experts in these key markets. Through extensive desk research, they have provided additional insight and rationale to put the results of this survey into perspective.

The countries within this report were selected based on their 2021 ranking among the 193 UN Member States, as well as on the sustainability challenges they currently face. The aim was to present countries with varying challenges and cultural standpoints.



Rankings

Overall performance measured across all 193 UN Member States:

Rank	Country	Score
2	 Sweden	85.61
32	 United States	76.01
57	 China	72.06
120	 India	60.07



Many thanks to our survey sponsor, Schlesinger Group, and to Garvi Dhar, Wang Fangqing, Eric Orłowski and Vijay Parthasarathy for their valuable cultural insights.

THE UN'S 17 SDGs

The **Sustainable Development Goals** (SDGs), also known as the Global Goals, were adopted by the United Nations in 2015 as a universal call-to-action to end poverty, protect the planet, and ensure that by 2030 all people enjoy peace and prosperity.

The 17 SDGs are integrated – they recognise that action in one area will affect outcomes in others, and that development must balance social, economic and environmental sustainability. Countries have committed to prioritise progress for those who are furthest behind.

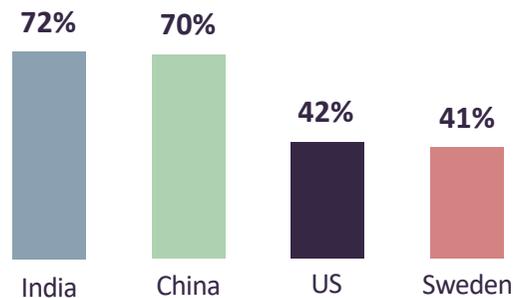


IS SUSTAINABILITY A PRIORITY?

We asked respondents to evaluate how they feel about sustainability, to assess whether it is important to them or whether it is a topic that makes them feel indifferent.

56% of respondents across all 4 markets state that they care a lot about their country reaching sustainability goals.

However, this feeling varies greatly between countries:



Respondents from the US and Sweden tend to be aware of their country's sustainability goals, however do not actively follow the progress towards these.

How can we explain these figures from a cultural standpoint?

The US

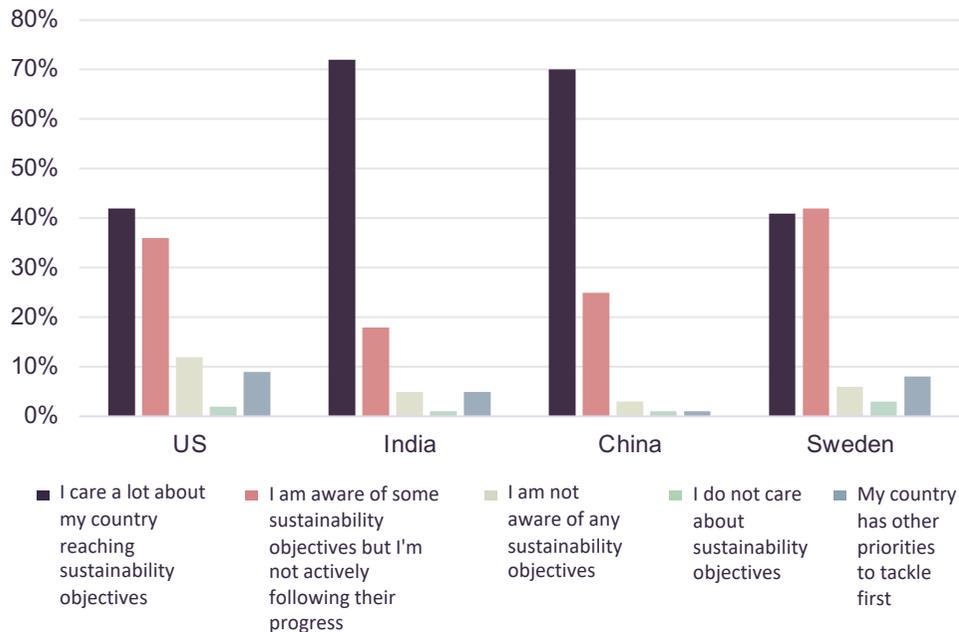
- Development in the US has been imbalanced; it has been heavily focused on the **economy**, on **US individualism, personal benefits and convenience**, seemingly more so than on social and environmental dimensions. Some report **activism fatigue** (from recurring racial violence, inequality, gun violence and protests, for example) as a reason for lower engagement in environmental issues.
- The US has also experienced great turbulence in terms of political adherence to sustainable goals. The Obama administration displayed great involvement, whereas the Trump administration put this framework and its targets to one side. Biden's decision to re-join the **Paris agreements in 2021** hopes to re-establish the US's place regarding sustainability.

Sweden

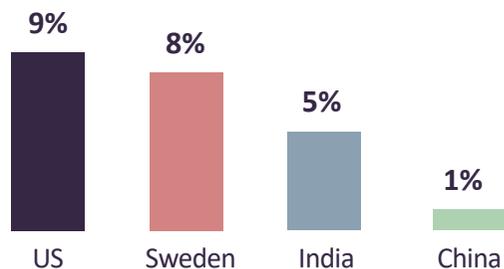
- Sweden can be considered an **environmental pioneer**. As early as 1967, Sweden was the first country in the world to pass an environmental protection act. In 1972, it was also the first to host a UN conference on the global environment. Since then, Sweden's economy has grown substantially, all while reducing its carbon emissions and controlling pollution levels.
- Over half of Sweden's national energy supply now comes from renewables, and greenhouse gas emissions are reducing thanks to sustainable legislations. This shows a **long-term and deep-rooted commitment to the environment** from the Swedish authorities – a reality that other countries are only just beginning to witness, which might explain why people don't feel they need to be so involved.

IS SUSTAINABILITY A PRIORITY?

How do you feel about sustainability in your country?



“My country has other priorities to tackle first”



How can we explain these figures from a cultural standpoint?

India

- 9 out of 10 consumers surveyed in India reported that **Covid-19** has affected their views on sustainability and their awareness of this topic, especially with regards to **health, wellbeing and the environment**. For many, poor health – or even climate change – has had a dramatic impact on their household income, and made populations place even more emphasis on working towards a sustainably developed country.
- Recently, India’s Government has been very vocal about raising awareness of sustainability-related campaigns, such as the **Swachh Bharat Mission**, launched with the aim of achieving universal sanitation coverage.

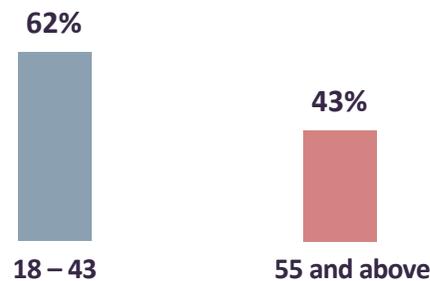
China

- In order for China to achieve the 2030 Agenda for Sustainable Development, part of the plan includes a **major social mobilisation strategy**, aimed at increasing awareness, recognition and participation from populations. In 2021, ‘sustainability’ and more specifically ‘protecting the environment’ have become national causes, underlined in the **Government’s Five Year National Plan**.
- Chinese populations are much more exposed to environmental issues than their Western counterparts. In Shanghai, inhabitants sometimes breathe air that is **4 times more polluted** than red alert levels in the West. Tap water isn’t safe for consumption and food and pollution scandals are common. As a result, Chinese populations are not fighting ‘for’ a greener environment, they are **protecting themselves ‘from’ a polluted environment**.

THE GENERATIONAL GAP

Across all 4 markets, we can observe a divide between age groups:

“I care a lot about my country reaching sustainability objectives”



How can we explain the fact that younger generations seem to care more about this topic?

Sweden

- The Swedish population as a whole generally care about sustainability. Nonetheless, the younger generations take this one step further and accept a **degree of personal responsibility to act sustainably**, often articulated by small changes in day-to-day life from **using reusable coffee cups**, to **buying LED light bulbs**, **using public transport** and **alternative forms of transport**.
- In Sweden, it is also possible to pursue academic studies related to sustainability with several universities and schools who offer Education for Sustainable Development (ESD) classes or curriculums.
- Young local figures such as Greta Thunberg have voiced their concerns and gained incredible visibility both in Sweden and around the world.

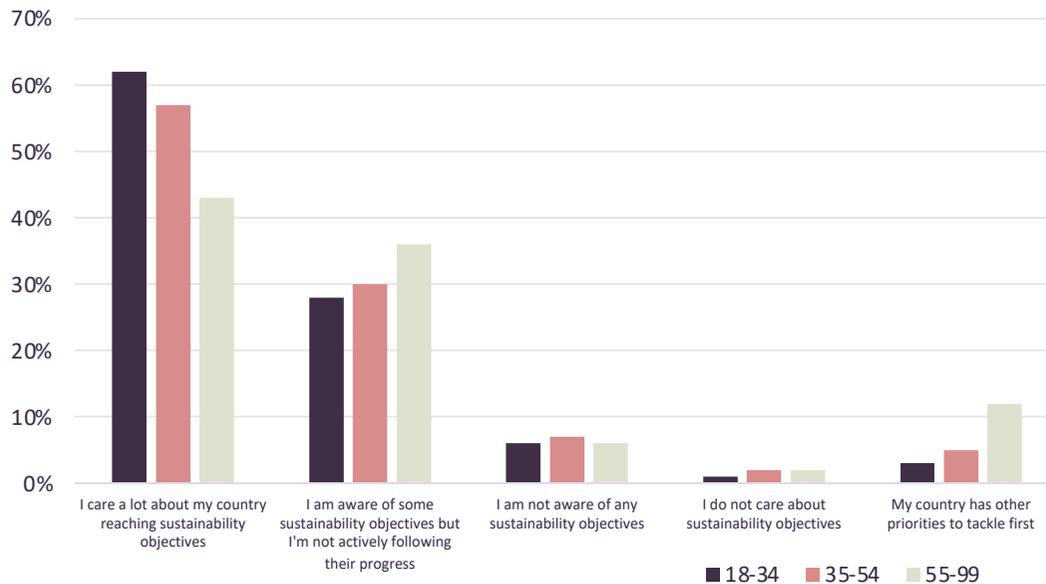
US

- In the US, a recent study showed that Millennials are nearly twice as willing to pay more for eco-friendly products than Baby Boomers. In fact, **for Millennials and Gen Z, the environment is their number 1 concern**, just before unemployment, healthcare and disease prevention. Born in the age of digital media and communications, these generations are considered more health-conscious, environmentally and socially aware than the wider population.



THE GENERATIONAL GAP

How do you feel about the topic of sustainability in your country?
(per age group, across all countries)



Insights into sustainable mindsets across generations

China

- Chinese people aged 21 to 40 are the most sustainability-conscious group. According to a 2020 survey by Syntao, 80% of these ‘consciousness pioneers’ are willing to buy goods from second-hand websites. Furthermore, those under 49 are likely to pay a premium for products that are created sustainably.
- Overall, China’s Gen Z (known as Zoomers), show **strong cultural confidence and sustainability consciousness**. They are not attached to big label brands but instead highly regard the core values behind them. They care about consuming environmentally friendly products and express their personality through the ‘spiritual’ characteristics of the goods they purchase.

India

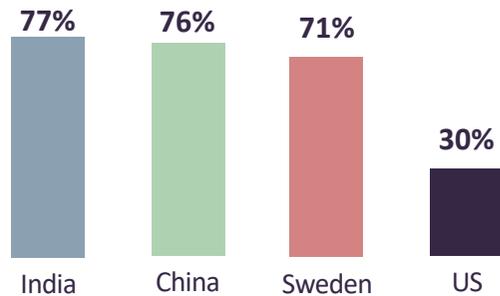
- India launched the **Eco Schools Programme** in 2015, which currently operates in 83 schools across the country. This programme provides an eco-conscious school curriculum for future generations and aims to promote awareness to younger generations on sustainable development issues.
- In India, younger generations are considered digital natives, consuming news over a variety of platforms. Consequently, these generations are exposed to wider topics, including class boundaries and DEI, for example.
- Older generations in India believe natural calamities are Nature's way of balancing out and regenerating; whereas younger generations are more aware of mankind's irreversible impact on the environment.



WHEN POLITICS INFLUENCE AWARENESS

Prior to taking part in this survey, were you aware of the 17 sustainability goals defined by the United Nations, which are aimed at achieving a better and more sustainable future for all?

Proportion of respondents who answered 'Yes'

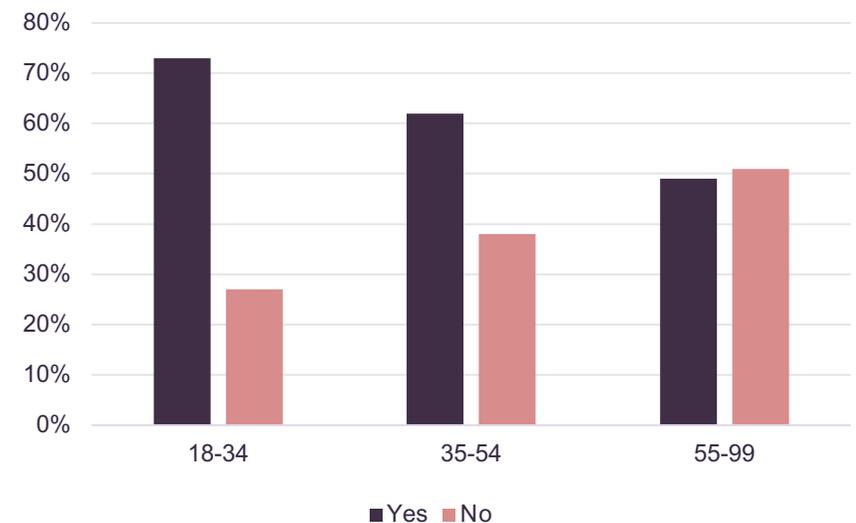


How can we explain significantly lower awareness in the US?

The high figures recorded in India, China and Sweden can be explained by multiple factors: the **impact of the COVID-19 pandemic** on sustainability and the environment, the **growing concerns around climate change and temperate increases**, as well as the various **initiatives and communications launched at government level**.

On the other hand, in the US, a much lower percentage of the population were aware of the SDGs than the global average. A 2019 Ipsos survey also shows similar results. During the Trump era, the Government recognised the SDGs as a framework, but **never endorsed any of the 17 individual goals**. The tide is slowly turning in the Biden era, especially with the aim to make **half of all new vehicles sold in 2030 electric**, in a executive order signed in August 2021.

Age once again appears to play a role here, as awareness is stronger among younger generations across all 4 countries:



TOP 3 GOALS PER COUNTRY

We asked respondents to name the top 3 SDGs they believe their country should be working towards as a priority. We then compared these to the key goals identified by the UN for their country. By doing this, we were able to assess whether there are any discrepancies between the two, and could look into some of the cultural reasons that explain why these goals are considered a priority in their country.

THE US

TOP GOALS THE US SHOULD FOCUS ON ACCORDING TO RESPONDENTS:



In recent years, US citizens have witnessed the effects of climate change first-hand, such as with the 2020 wildfires in California and the 2021 big freeze in Texas. These extreme weather events may contribute to citizens wishing to prioritise climate action.



Air and water pollution remains an issue in many major US cities, especially those with large populations. Furthermore, the Flint water crisis, which saw several people – including a former governor – being charged earlier this year, may have had an impact on the population's prioritisation of the issue.



The Employment Policy Institute estimates that 16.2 million workers in the US lost ESI (Employer-Sponsored Insurance) as of May 2020, after being laid off due to the pandemic. This may have had a direct impact on people's increased emphasis on health in the country. Although the US is among the world's richest countries, its healthcare system has high cost barriers: 25% of high-income US citizens state that costs prevent them from receiving care, as well as 50% of lower-income adults.

TOP GOALS IDENTIFIED BY THE UN FOR THE US IN 2021:



The US is in a period of major systemic social challenges. The Black Lives Matter movement exposes racial violence and police brutality, while also opening discussions on the US's wider systemic inequalities. These are major challenges to be overcome by the US which also have significant spillover effects on the environment.



After Trump's withdrawal from the Paris Agreement, there is again a focus to regain action through the Biden administration, with the recent executive order on electric vehicles and the decision to re-join the Paris Agreement in January 2021.



Each year, the US population grows by more than 1.7 million people. The country consumes renewable resources twice as fast as they can be regenerated, and similarly, the country is absorbing waste twice as fast as it can sustain. The US faces a paradox, with companies acknowledging climate change and sustainable production as an issue, yet lobbying against efforts for change or being slow to implement meaningful steps.

TOP 3 GOALS PER COUNTRY

INDIA

TOP GOALS INDIA SHOULD FOCUS ON ACCORDING TO RESPONDENTS:



The Covid-19 crisis and its various consequences (such as job losses and the impact on mental health) has lead to the realisation that sustainable consumption and healthy habits are vital. Social influencers across the country have boosted the importance of forming and maintaining healthy habits, such as yoga, meditation and mental health in general.



In 2020, the Government introduced a new Education Policy to make India a “global knowledge superpower” via the idea of a universal education for all. Nonetheless, in a country marked by deep generational social and economic inequalities, the promise of socially lifting those from poorer backgrounds has been barely felt. Education therefore still remains a top priority for many.



In 2015, 50% of the population (578 million people) had no access to proper toilet facilities. Thanks to initiatives such as The Clean India Campaign and The Swachh Bharat Mission which aim to achieve universal sanitation coverage, the number of people without access to toilets has reduced significantly (by an estimated 450 million people). The pressing need for sanitation has lead to huge developments in this area, and is still top of people’s minds.

TOP GOALS IDENTIFIED BY THE UN FOR INDIA IN 2021:



India continues to see a rise in caste violence and crime in both rural and urban areas. The State has previously been accused of complicity in caste-based crimes, and laws have since been introduced to help break this cycle. It is so far unproven if these laws are effective.



Despite the Government’s focus on reducing the gender gap in the workplace, women in India still lost a disproportionate amount of jobs during the course of the pandemic; while women constitute 39% of the Indian workforce, they accounted for 54% of job losses. Owing to this may be the expectation that women should prioritise care for family and the community over their own needs.



Rapidly changing laws and fluctuations in business practices have made growth opportunities in India slow and limited. With demonetisation, the introduction of GST taxation bills, and the requirement to link government IDs to every document, India’s GDP is currently at its lowest in 24 years (showing a decrease of 23.9% in the first quarter alone of the 2020-21 financial year).

TOP 3 GOALS PER COUNTRY

CHINA

TOP GOALS CHINA SHOULD FOCUS ON ACCORDING TO RESPONDENTS:



Despite being the top goal identified by our respondents, the Chinese Government was initially reticent to adopt this SDG, and rephrased it from *“Ensure that people enjoy freedom of speech, association, peaceful protest and access to independent media and information”* to *“ensure public access to information and protect fundamental freedoms, in accordance with national legislation and international agreements”*, a much vaguer interpretation that fits with China’s need for control over freedom of speech and media propaganda.



In big cities like Shanghai, sorting waste became a mandatory government policy in July 2019. Although China has shown promising actions, changes in leadership and discrepancies from one region to another means landfill and incineration are still predominant means of municipal solid waste disposal in China. Waste management therefore still remains an issue at the top of people’s minds.



Major cities, such as Shanghai, are known for high air pollution, contributing to an estimated 30 million air pollution-related deaths since the year 2000 (an average of 1.4 million deaths per year). In order to respond to the health challenges of the Covid-19 pandemic, China has increased investment in public health infrastructure and woven the world’s largest social safety net with basic medical insurance covering more than 1.3 billion people.

TOP GOALS IDENTIFIED BY THE UN FOR CHINA IN 2021:



While a lot of progress has been made to eradicate poverty, about 2 million people are still at risk of falling back into this threshold due to the great inequalities and unemployment that have stemmed from the Covid-19 pandemic. Nonetheless, although unemployment levels in urban China rose to 6.2% in February 2020, the situation appears to be improving with a lower recorded rate of 5% in June 2021.



Through the Belt and Road Cooperation development strategy, China has invested in nearly 70 countries and organisations, helping them build greater self-reliance and narrow disparities between the Global South and Global North. Although this is a priority outlined by the UN, this comes at a cost for the Chinese population, as Government spending seems to be focused abroad, and general health expenditure in the country is almost half of the rest of the world’s average.



Species protection is a major challenge for China. In 2021 alone, the Government added a further 517 species to the list for protection, including the pangolin, suspected for a while to be the source of the Covid-19 virus. Compared to other UN members, China is late to act on biodiversity protection, but is rapidly making progress. China’s challenge is to maintain economic and social development with less harm to biodiversity as a result.

TOP 3 GOALS PER COUNTRY

SWEDEN

TOP GOALS SWEDEN SHOULD FOCUS ON ACCORDING TO RESPONDENTS:



Climate action is top-of-mind for Swedish people, as this is a continuously recurring topic in public discourse. Greta Thunberg's protest outside the Swedish parliament in 2018 when she was just 15 years old has inspired thousands of students worldwide to pressure their governments to meet targets. According to a 2020 survey by the Swedish Environmental Protection Agency, 95% of Swedish citizens believe their country will be affected by climate change in the future, and 81% believe Sweden has the ability to slow it down.



Although Sweden generally has good access to water, the country's southern, central and coastal regions have recently experienced drought and strained water availability. The topic of water scarcity is only just beginning to be discussed, and it's becoming clear that Sweden needs to be better prepared for a future when water shortages and droughts may become more common.



The importance given to this goal by respondents may be explained by the increased focus on physical and mental health since the beginning of the pandemic, as well as a focus on reducing unhealthy eating habits, one of the greatest risk factors for ill-health and premature death in Sweden.

TOP GOALS IDENTIFIED BY THE UN FOR SWEDEN IN 2021:



Although Sweden has a 10-year framework and their own Environmental Objectives System, responsible consumption and production is an especially important area to tackle. In 2019, Swedish people produced 20kg per capita of electronic waste – that's more than Singapore, Saudi Arabia and just 1kg short of the US (21kg).



Sweden aims to tackle the population's increasing tendency for over-consumption, as almost half of all adults in Sweden today are overweight or obese. Furthermore, under this goal Sweden also aims to ensure environmental sustainability and biodiversity in agriculture, while strengthening all sustainability dimensions in the entire food chain.



Sweden has set itself high goals, which it must now live up to, such as the generational goal, and the numerous objectives for the environment, employment and climate. Adding to this are other climatic issues, such as the rapidly diminishing forestland in Sweden, with around 2.7 million hectares which still lack formal protection.

SDGs: WHO SHOULD BE LEADING THE WAY?

When asked who should be raising awareness on the topic of sustainability, the consensus across all surveyed countries is that there is a level of distrust in brands and companies to commit to sustainable goals due to the perception that companies are more focused on making a profit rather than contributing to global development.

US

Respondents believe that raising awareness should take place at government level. There is a lack of trust for companies to do this without a hidden agenda or without profit in mind. The consensus is that businesses should stick to their field of expertise.

In the US, the overall consensus is that corporations spend an overwhelming amount on keeping shareholders happy, rather than creating jobs, boosting wages and caring for the wellbeing of working families. This contributes to the fact that 7 in 10 US citizens don't believe companies who claim to be 'eco-friendly', and to their overall sensibility to 'greenwashing'.

China

Respondents state that the Government should retain national control over the initiative and help steer companies in the right direction. Chinese citizens don't trust companies as they believe they care more about turning a profit than about sustainability.

In China, respondents believe that companies use sustainability as a means to avoid negative PR. That being said, it is acknowledged that it isn't easy for SMEs, especially those in rural areas, to adhere to sustainable standards, resulting in several companies being investigated for failing to comply. The Government therefore has a significant role to play to help companies reach these standards and adhere to the regulations set.



SDGs: WHO SHOULD BE LEADING THE WAY?

India

Respondents believe that the Government should be responsible and also actively involved in raising awareness of sustainability. Brands and businesses can then step up to raise awareness around the government initiatives; though it is understood that these exist to turn a profit.

In India, the consensus is that the Government should be responsible for launching sustainable initiatives, which will result in society following suit. The current Prime Minister, Narendra Modi, is focused on driving various programmes including 'Make in India', 'Skill India', and 'Digital India', all focused on developing electronics and creating jobs for Indian youth, and the 'Swachh Bharat Mission', to improve sanitation in the country.

Sweden

Respondents state that authorities should be responsible as they hold significant power. Brands can follow suit and raise awareness but shouldn't 'greenwash' or act in their sole interest. Consumers also have the power to initiate change by putting pressure on brands and elected officials.

According to several reports from Handelsrådet and TrustPilot, Swedish citizens generally have a very low level of trust in communications marketing, and other related materials that stem from corporations and companies. Recurring scandals such as H&M using sweatshop-like work environments and the Volkswagen emissions scandal have increased this feeling.

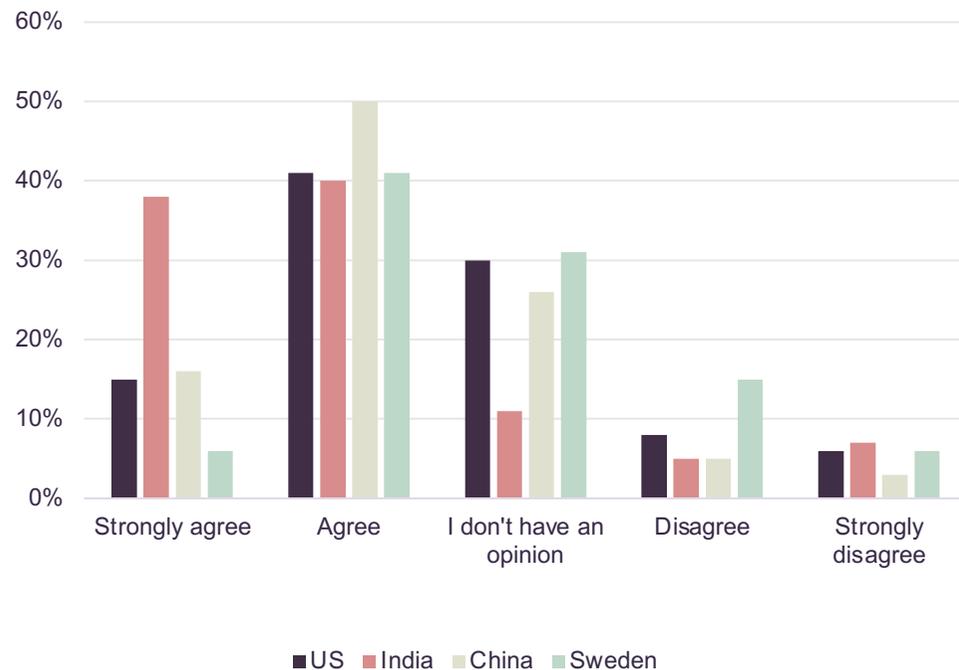


BRANDS' COMMITMENT TO SUSTAINABILITY

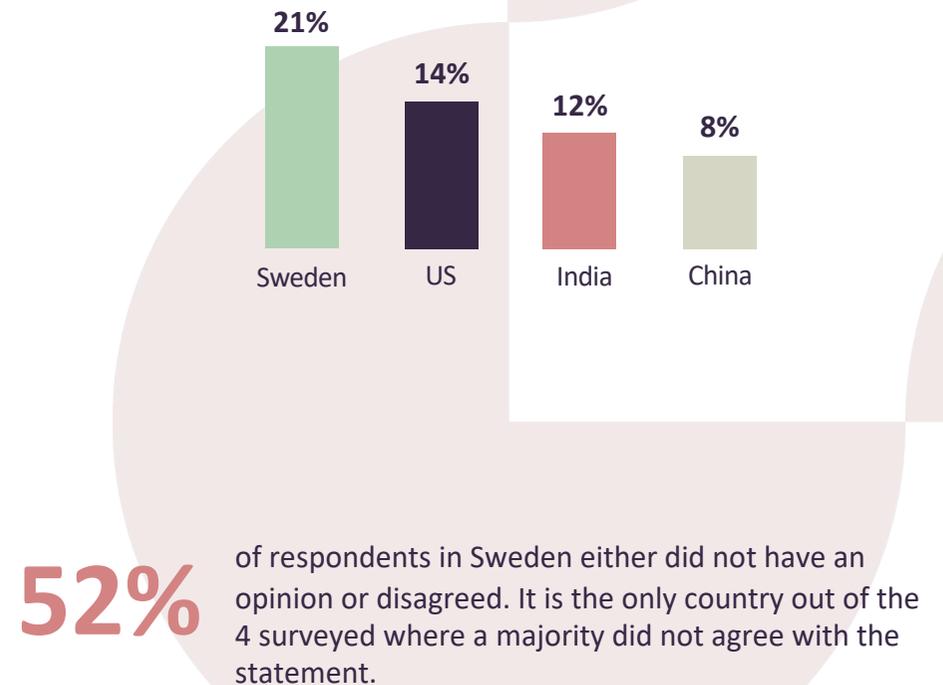
As being more sustainable and implementing better practices is a growing concern for global brands and companies, we were keen to understand how respondents perceive their communications around this topic.

To do so, we asked them to rate the following statement:

I trust companies that display their commitment to sustainable goals on their website or through communications.



Share of respondents for each country who disagree (strongly or not) with the statement:



BRANDS WHO ARE DOING IT RIGHT

We asked all respondents to name a brand or organisation in their country that is well-known for working towards the sustainability goals outlined for their country. Below are the companies that came up the most frequently for each country.

Top companies mentioned in the US:



In 2020, **Amazon** launched a \$2 billion Climate Change Fund, to invest in clean energy and sustainable technologies across a number of industries and to reduce the impact of climate change. However, around the same time, the company purchased the naming rights to Seattle's major indoor sports facility, which will be known as the 'Climate Pledge Arena', perhaps contributing to the reason why Amazon was top of mind here.

Tesla has launched many sustainable initiatives; it is part of the Zero Emission Transportation Association, and its technology patents are publicly free to use in order to accelerate the development of zero-emission vehicles across the globe.

Top companies mentioned in Sweden:



In Sweden, formal organisations such as **Greenpeace** and **UNICEF** are expected to take responsibility for establishing a more sustainable society. In this sense, it isn't surprising that NGOs were listed rather than companies.

Furthermore, practically speaking, a company exists to turn a profit, whereas an NGO exists to fulfil the purpose they have set out to fulfil. This therefore demonstrates that trust in institutions does not necessarily translate to trust in companies.

BRANDS WHO ARE DOING IT RIGHT

Top companies mentioned in China:



In July 2021, **Huawei** released its 2020 Sustainability Report, highlighting the company's belief that "technology should be people-centric". The company has also focused on cutting carbon emissions, promoting renewable energy, and contributing to a circular economy. In 2020, its CO2 emissions per million renminbi of sales revenue showed a 33.2% reduction compared to the base year (2012), beating their initial target set in 2016 of 30%.

Alibaba is well known for its commitment to sustainability and the SDGs, and it considers acting in a responsible way an essential part of its business model. The company's philanthropic commitment spans a range of key areas, from rural development, to environmental protection and poverty alleviation, via the launch of its Poverty Relief Program in 2017. Over the past year, Alibaba has invested nearly 3.4 billion renminbi to help fight the pandemic and helped lift more than 832 rural counties in China above the poverty line.

Top companies mentioned in India:



In India, Tata and Reliance are perceived less as companies, and more as government partners as they have played such a critical role in revolutionising the country over the years.

Tata ranked among the Top 15 Global Sustainability Leaders according to the GlobeScan SustainAbility Leaders Survey 2020, and Tata Power (their electric utility division) is the first Indian utility brand to commit to being carbon neutral by 2050.

Reliance's telecommunications subsidiary, Jio, has made considerable investments to expand the telecoms infrastructure in India and to give people access to low-cost phones and affordable internet. Jio is now increasing its focus on developing further areas such as digital services, education, healthcare and entertainment in order to support economic growth and social inclusion in the country.

CONCLUSION

The UN's Intergovernmental Panel on Climate Change (IPCC) report on 9 August 2021 issued a “code red for humanity” warning. While it isn't too late for humankind and our planet, a drastic U-turn and huge collective effort are required from our governments, our business communities and across society in general to raise awareness and make change happen throughout the global community.

Our survey clearly identified commonalities across cultures, especially when it comes to age groups: younger generations are seen as leading the way for a more sustainable future, as well as governments being entrusted to lead the sustainability agenda over corporates.

However, it is apparent that for brands to lead successful CSR initiatives, deep cultural analysis is required to fully engage with the wider public and achieve tangible sustainability targets that not only benefit local communities but also the greater common global goals. Time is of the essence and it is only with this level of granularity that full engagement and action will be successfully achieved with various communities worldwide.

Culture is a key influencer of behaviour as it shapes our perception of the world around us. This is also true when it comes to sustainability. A study conducted by researchers from the Bankwest Curtin Economics Centre and University of Western Australia in 2018 demonstrates that language (one component of culture) shapes our behaviour towards sustainability: speakers of languages without a distinct future tense (such as German or Chinese) show more empathy and sensitivity towards the environment and sustainability than people who speak future-tensed languages (such as French or English). By speaking about the future in the present tense, it makes it a lot more tangible and real. In fact, the study suggests that if a future-tense language changed to a present-tense language, there would be a 20% increase in the individual's tendency to help protect the environment, and a 24% increase in willingness to pay higher taxes to fund environmental policies.

The agenda for the future of our planet and humankind is ours to make provided that we are aware of all of the different perspectives we are bringing to the table. Differences that can create real opportunities.



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