



# 可持续发展及可持续消费 公众认知、态度、行为研究 2016

A study on Chinese Consumer's  
Awareness, Attitude and Action  
(3A) toward Sustainability and  
Sustainable Consumption  
2016



商道縱橫  
SynTao—Sustainability Solutions



界面新闻



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## Study Introduction

China is on the way to a sustainable future...

With building a Sustainable future becoming a priority in China, the outlines of the government's current five-year plan for economic and social development in China puts a strong focus on innovation and green economy. Consumers' engagement and support are critical for China to achieve the Sustainable Development Goals that the country is committed to achieve.

To develop a baseline picture of Chinese consumers' awareness, intents and behaviors toward sustainability and sustainable consumption and readiness to be engaged in sustainability efforts, SynTao partnered with Jiemian, one of the most famous social media platform in China, to conduct an online survey of Chinese consumers aged mainly from 18 to 40 years across six regions, including South, North, East, Northeast, Southwest and Northwest.

It is particularly difficult to get to the truth concerning consumer behavior toward sustainability because of the gap that could exist between intents and taking actions. To get closer to the truth we asked our survey respondents about their perceptions as well as actual practices.

The data collected included: Consumers awareness of sustainability, consumers' willingness to personally engage with sustainability efforts, products purchasing intents, buying decision criteria and how would the consumer prefer to be communicated to about sustainability?

The primary propose of this study is to provide, a comprehensive understanding of the changing attitudes and behaviors of consumers when it comes to sustainability. The study is grounded in insights that are critical for companies to further develop their sustainable efforts and brand awareness, as well as engage consumers in sustainability efforts effectively in the future. Through this study, SynTao and Jiemian also aim to engage more stakeholders to drive forward social and environmental progress. It is the first time for SynTao to undertake such a survey and we consider there is merit in repeating it in future years to assess how attitudes and behaviors develop over time.



## Related Definitions

### Sustainable Development

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Refers to a development that meets the needs of the present without compromising the ability of future generations to meet their own needs. Sustainable development stresses three fundamental dimensions namely economic, economic, social and environmental sustainability, which are independent and complementary to each other.

Poverty eradication, changing unsustainable and promoting sustainable patterns of consumption and production and protecting and managing the natural resource base of economic and social development are the overarching objectives of and essential requirements for sustainable development.<sup>1</sup>

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### Sustainable Consumption

Defined as "The use of services and related products, which respond to basic needs and bring a better quality of life while minimizing the use of natural resources and toxic materials as well as the emissions of waste and pollutants over the life cycle of the service or product so as not to jeopardize the needs of further generations".<sup>2</sup>

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### Sustainable products

Sustainable products are those products providing environmental, social and economic benefits while minimizing the negative impact on the socioeconomic environment over their full life cycle and value chain.<sup>3</sup>

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<sup>1</sup>Report of the World Commission on Environment and Development: Our Common Future (Brundtland Report) published in March 1987 and Johannesburg Plan of Implementation.

<sup>2</sup>The original definition of sustainable consumption has been developed during the 1994 Oslo Symposium on Sustainable consumption.

<sup>3</sup>United Nations Environment Program (UNEP) / Wuppertal Institute for Sustainable Consumption and Production.

# About the Study

## Methodology

The study results are based on the findings of an online survey designed to capture the awareness, attitudes, and behaviors of the respondents towards sustainability and sustainable consumption. The survey has been distributed and promoted by Jiemian through their APP and website to attract a tremendous number of consumers.

During a survey period of two weeks, we received 10000 responses. The majority of respondents are from North (28.49%), South (28.2%) and East (25.87%) China.

## Profile of respondents

1. Among all the respondents, the people from the South, North, and East are more concerned about sustainability and sustainable consumption.

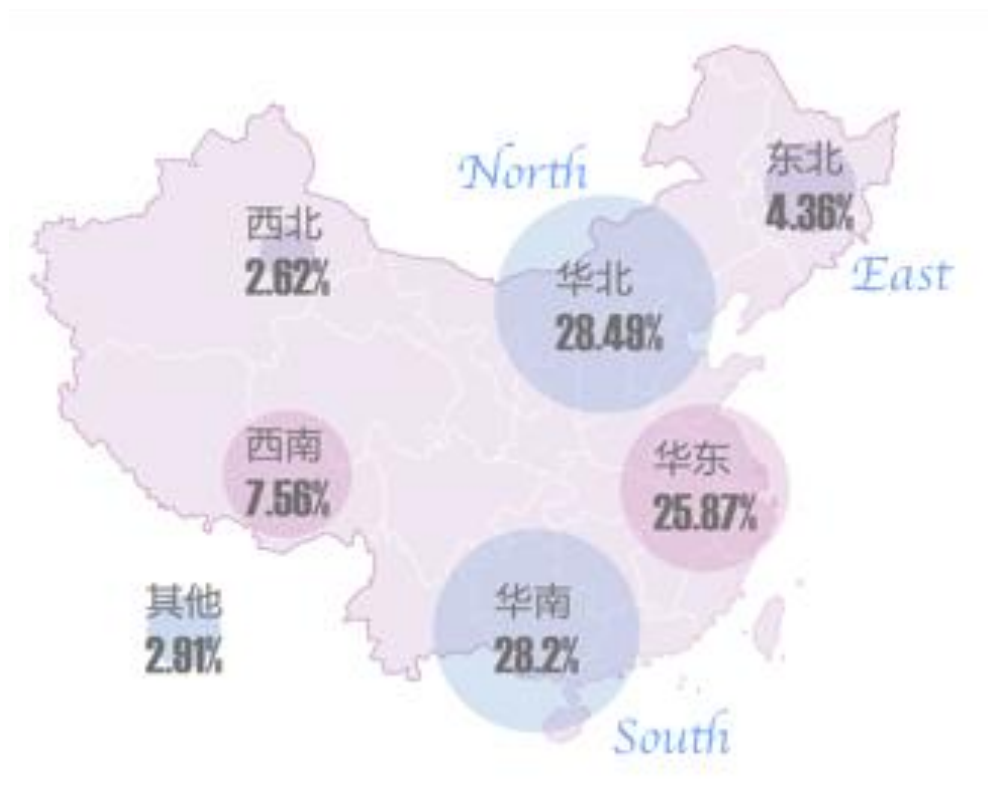
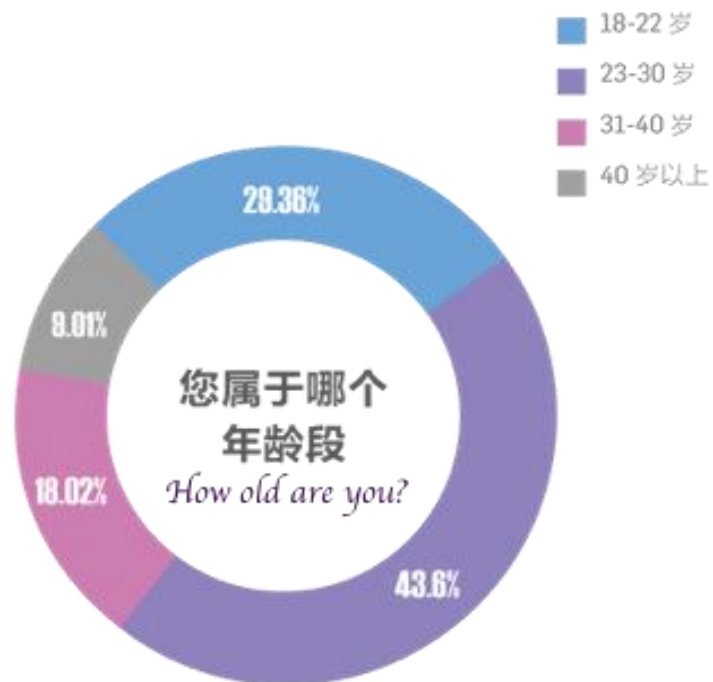


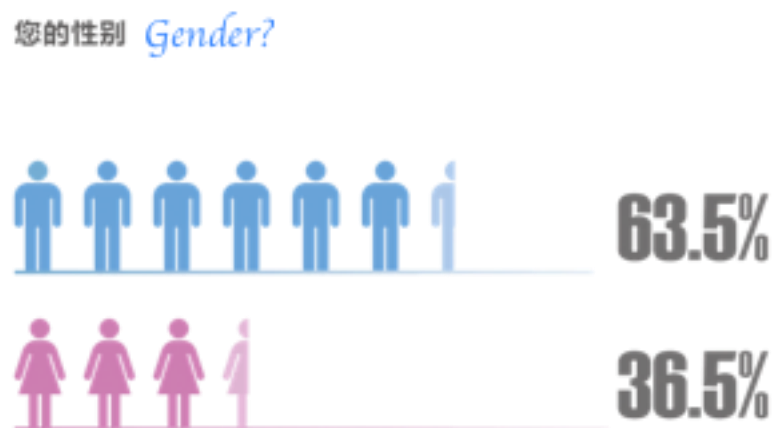
Chart-1

2. The young generation is more interested in this topic. The majority of the respondents are of post-1980's. Among which, over 70% respondents are aged no more than 30, who are so-called millennials, born post-1985.<sup>4</sup>



**Chart-2**

3. Among all respondents, men are more interested than women about sustainability-related surveys.

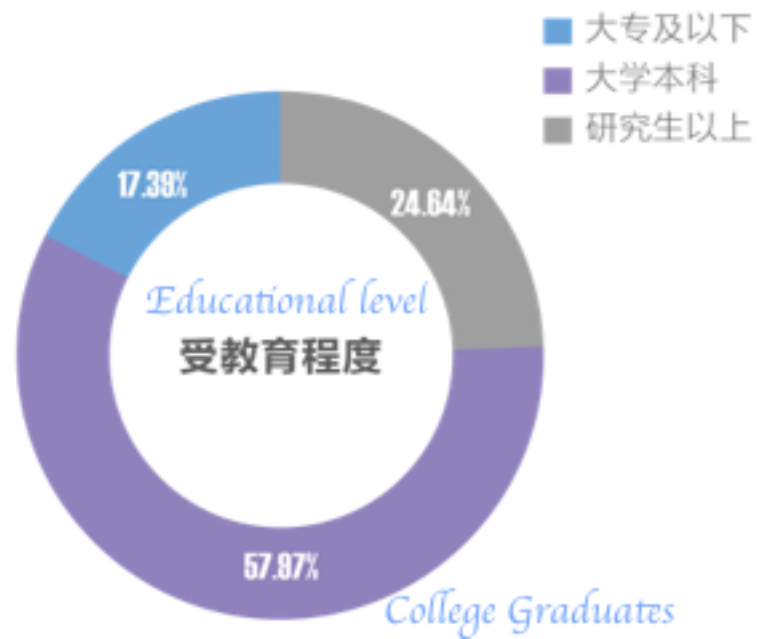


**Chart-3**

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<sup>4</sup> As the survey has been distributed through Jiemian APP and website, the profile of respondents is might be influenced by Jiemian target audience.

4. Most respondents (58%) are college graduates.<sup>5</sup>。



**Chart-4**

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<sup>5</sup>As the survey has been distributed through Jiemian APP and website, the profile of respondents is might be influenced by Jiemian target audience.



# Key Findings of the Survey

## Part 1: Awareness of sustainability and sustainable consumption



## 1. Consumers' awareness and concern about sustainability are high. Nine-In-ten Chinese people are concerned about sustainable development

We asked respondents whether they are concerned about sustainable development and what are SDGS they are concerned about.

It is evident that there could be a gap between awareness and taking action but the findings are already encouraging as public engagement, and support is essential for China to achieve the SDGs that the country is committed to achieve.

It is gratifying to see that our survey respondents have already the relevant information and awareness for sustainable development, most of them already took steps to understand what sustainability means for them. However, there is still much room Chinese people to raise their awareness to cover all the world-changing objectives. Consumers need to be educated to be a part of the solution for every single goal.



As seen in the figure below, nearly nine-in-ten (90.7 %) of citizens we talked to mention that they are concerned about sustainable development. The top issues they associate with the concept covers almost all the SDGs, top of the list are clean water and sanitation (92.38%), good health and well-being (81.76%), responsible consumption and production (80.45%), quality education (74.71%), combat climate change and its impacts (77.48%), affordable and clean energy (74.92%).

The reason behind these issues being more relevant for our survey respondents may be because the latest are more related to people's own benefits.

Other issues drew attention but were embraced less actively, such as sustainable cities and communities (48.8%), oceans, seas and marine resources conservation (45.4%), gender equality and women's empowerment (35.29%), inequality reduction within and among countries (31.76%), global partnership for sustainable development (27.65%).

- Sustainability becomes more and more important for everyone's life. Over 90% respondents show concern over sustainability.

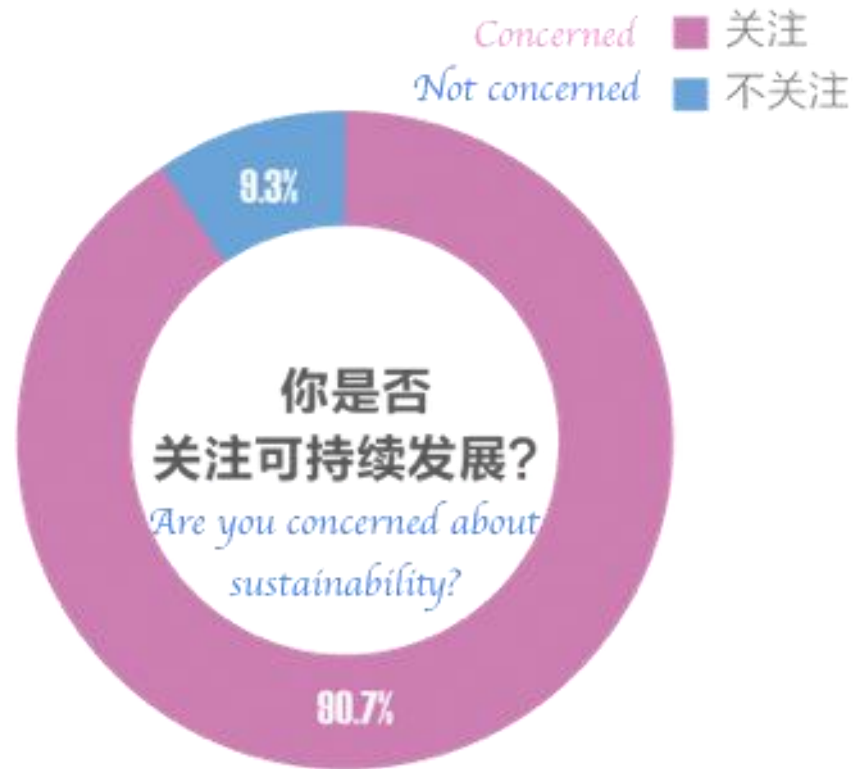


Chart-5

- Environment** ➤ Among all the SDGs regarding environment issues, water and sanitation (92.38%), climate change (77.46%), and affordable and clean energy (74.92%) are the most relevant issues for our survey respondents.
- Social** ➤ Regarding social related issues among SDGs, Health and Wellness (81.76%), education (74.71%), hunger and food security (59.12 %) are most important issues that draw concern among respondents.
- Economic** ➤ In terms of economic issues related to GDS, sustainable consumption and production (80.45%), economic growth (58.65%) and infrastructure and industrialization (58.94%) are the most relevant issues to consumers.

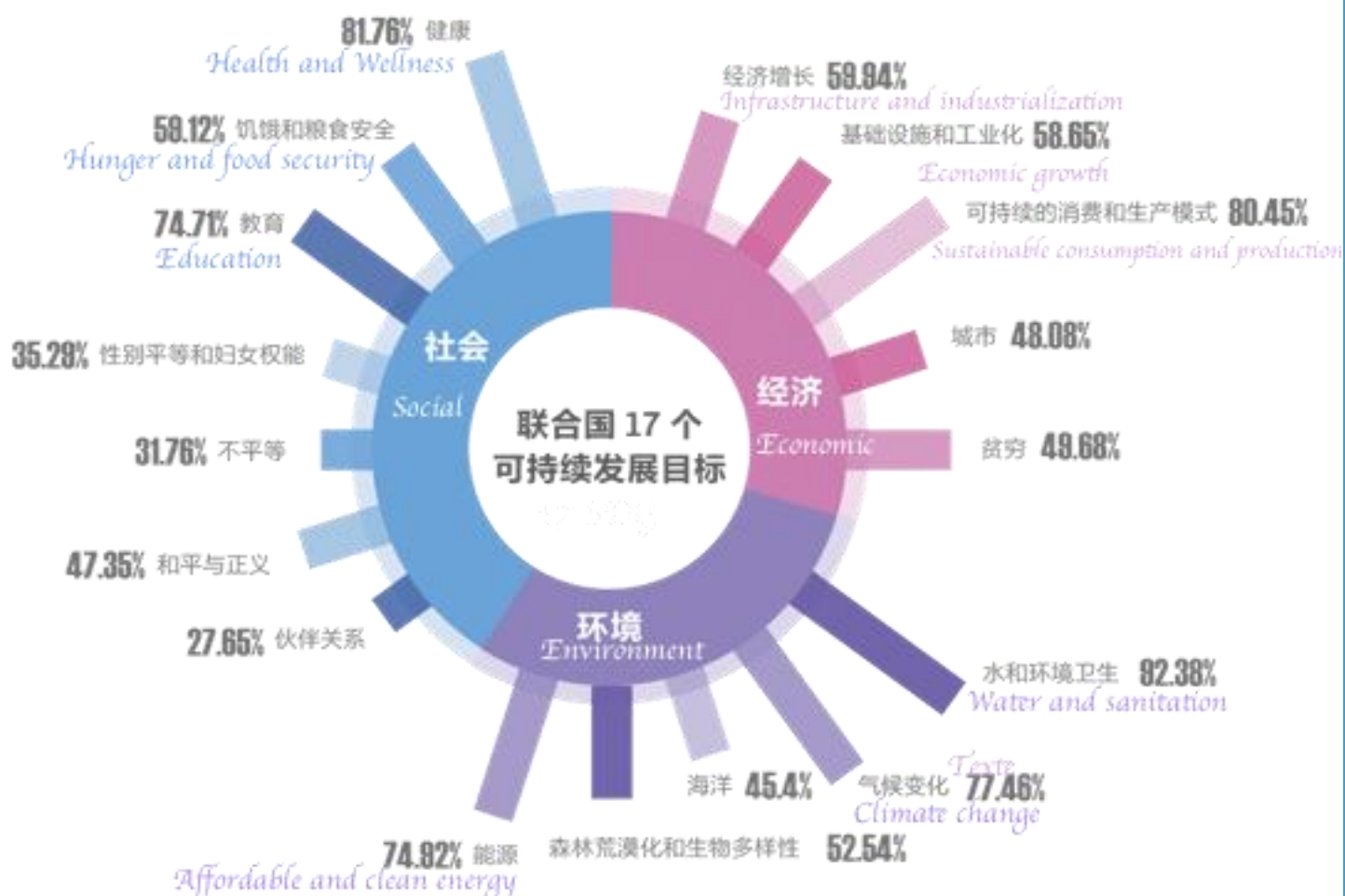
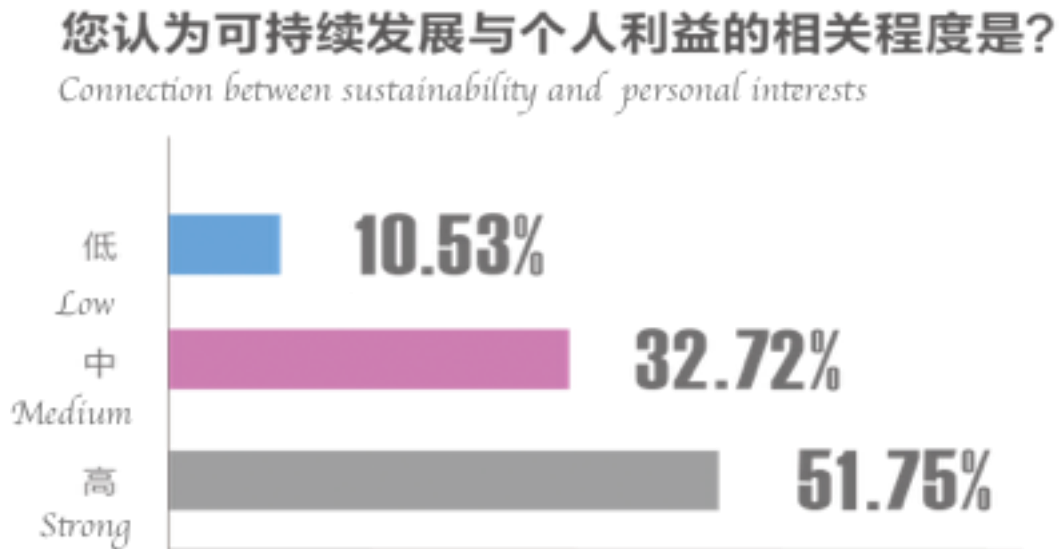


Chart-6



- More than half of the respondents (51.75%), believe that there is a strong connection between sustainability and their personal interests.



**Chart-7**

## 2. Concerns over sustainable products and consumption are very high.

Findings from the survey show that 85.42 % of consumers are concerned about product sustainability. More than eighty percent of them (86.39%) showed concern for sustainable consumption as well. As seen in the figure bellow there was a significant percentage of respondents (80.37%) believing sustainability adds value to products.

Companies should consider more proactively communicate their sustainability efforts and encourage consumers' engagement through awareness building and education about sustainable consumption and lifestyle.

- About 90% respondents pay attention to sustainable consumption.

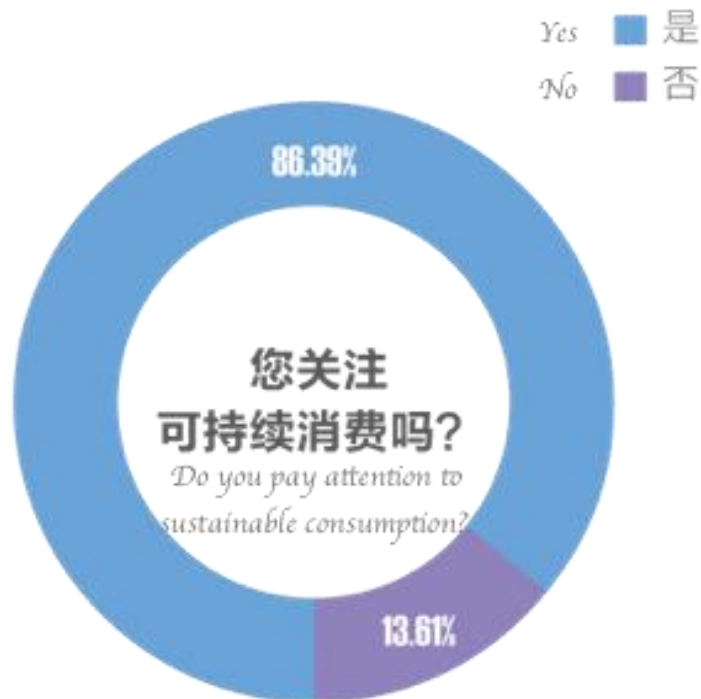


Chart-8

- Most of respondents (85%) are concerned about products' sustainable performance.

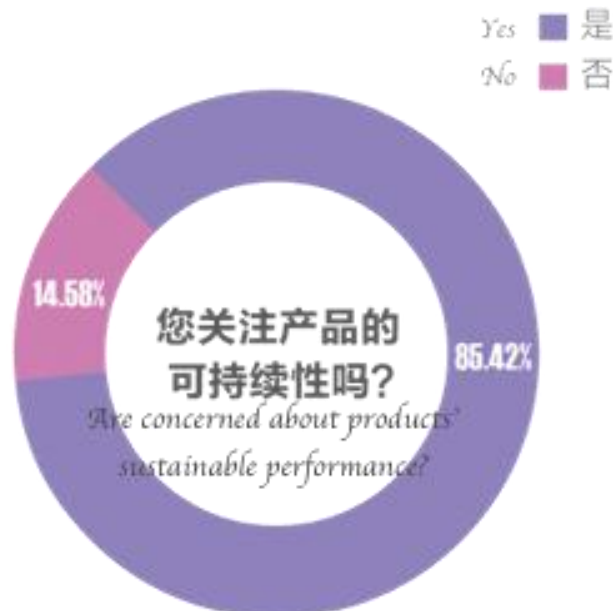
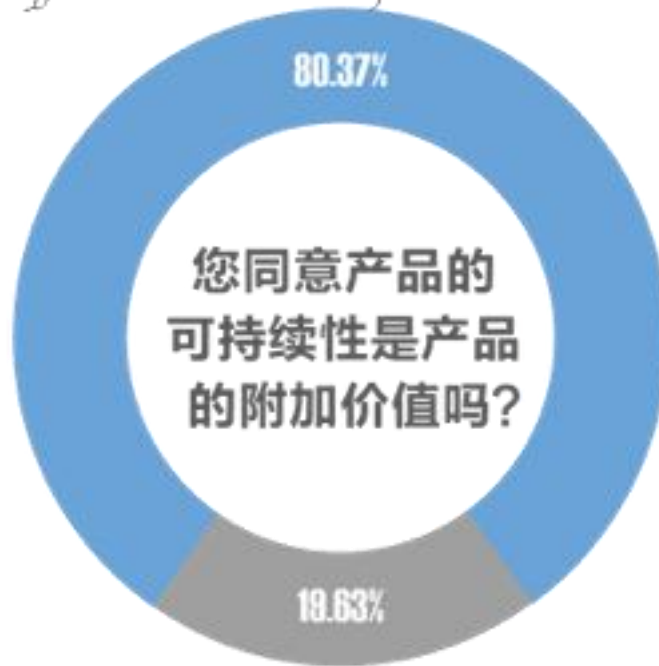


Chart-9

- **80.37% respondents agree that corporate's sustainability commitments and efforts add value to the products.**

*Do you agree with the following Statement:  
Corporate's sustainability commitments and  
efforts add value to the products.*

■ 同意 Agree  
■ 不同意 Disagree



**Chart-10**

## Key Findings

### Part 2: Consumers Intents of Sustainability and Sustainable Consumption





The survey results show that more and more people start to embrace sustainability as a lifestyle, they are engaged in various activities for a good cause, as more respondents believe that sustainability is related to their own interests and brings real benefits to their life, including better natural environment, living standards, and health and wellness.

There definitely will be a market for sustainable products and services with 73.43 % of customers saying they are willing to buy sustainable products. 5-in-ten consumers (54.41%) are even prepared to pay more for products with social and environmental benefits, which is good news for companies. However, success will require the establishment of trust with consumer and sustainability commitments is a far more efficient strategy to reach Chinese consumers than sales and coupons.

### 1. Most of the respondents believe sustainability really means to their life

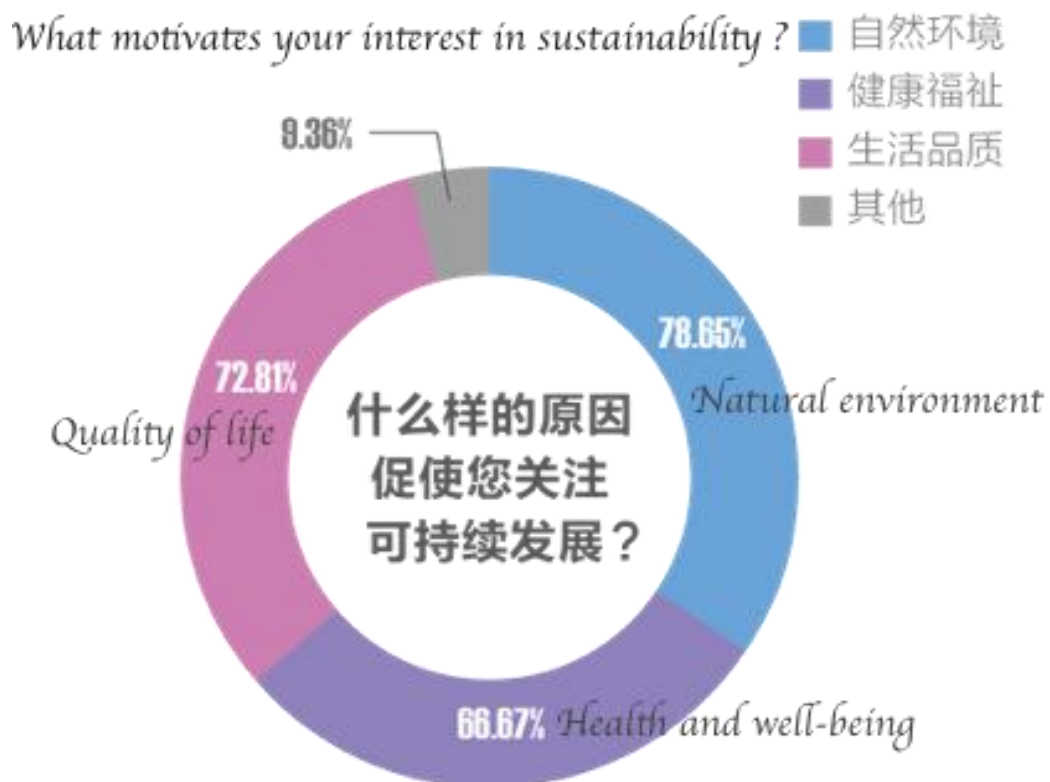


Chart-11

## 2. Customers want to engage with sustainability efforts personally.

Across China, citizens stand ready to address sustainability issues personally. The leading ways consumers want to get involved are saving resources (82.24%) and purchasing sustainable products (79.82%), and low carbon transportation.

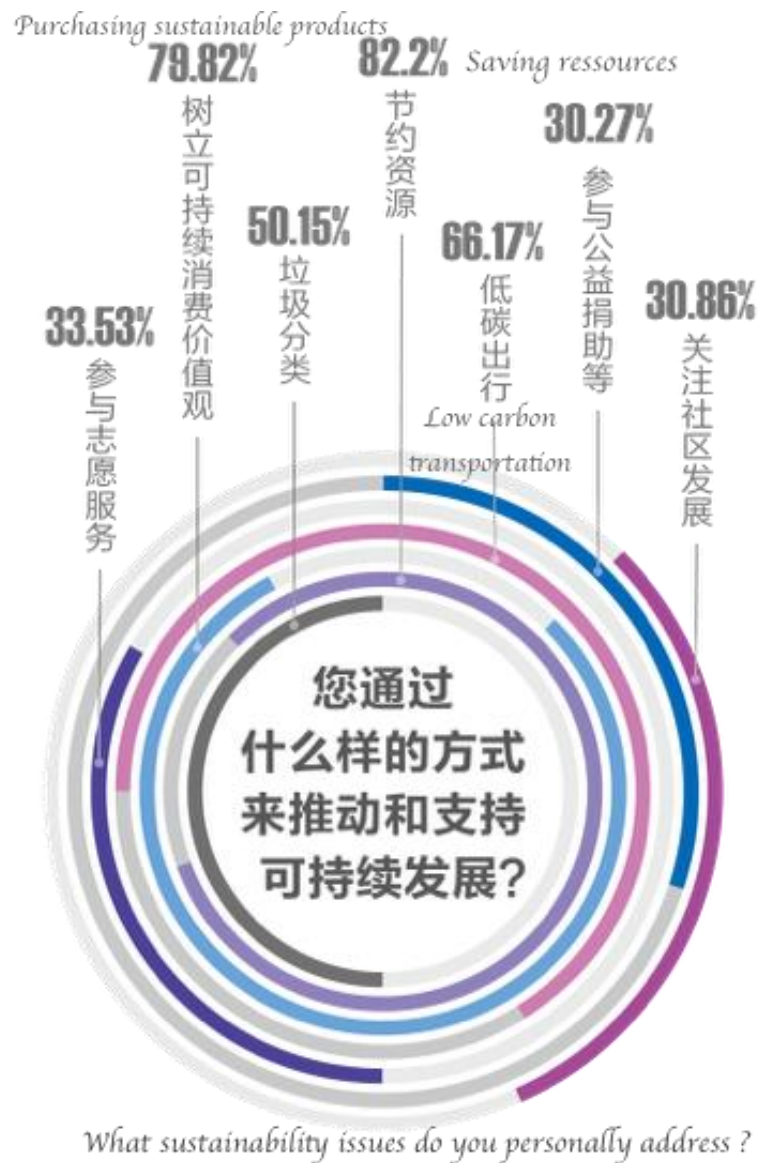


Chart-12

### 3. Sustainability influences 73.43 % of Chinese consumers' purchase intent

Customers were asked whether sustainability would change their purchases behaviors. This survey result shows that consumers not only try to have a significant positive impact through purchases but also products' sustainability performance is one of the key reasons that will influence their buying decisions.

- **73.43 % of survey respondents have the intention to buy sustainable products**

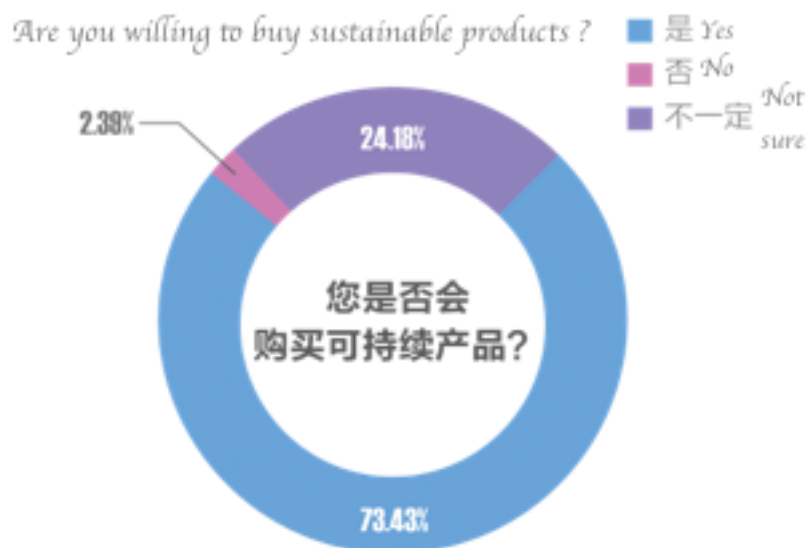


Chart-13

- **Given a choice between two products, more than half of them (60.12%) consistently would select the product that is associated with social or environmental benefits over one that is not.**

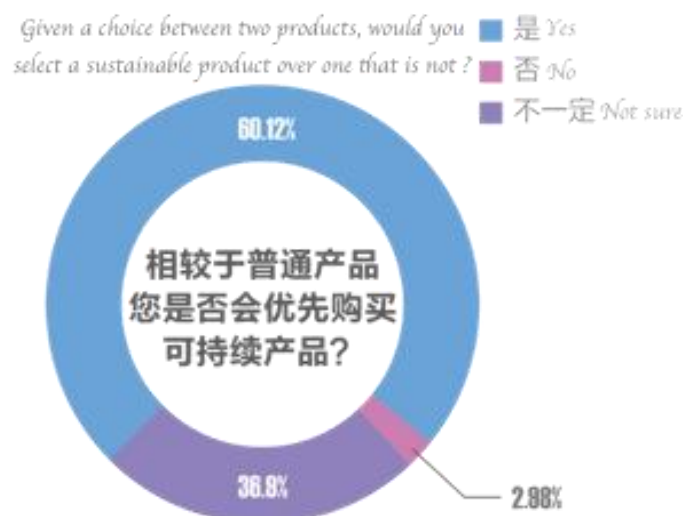


Chart-14

- **Eight-in-ten consumers consider a sustainable product "good for them."**

Consumers believe the products with better sustainability performance are associated with an added value, such products are made by companies with higher production and services offering standards as besides the business commitment, they also care about the social and environmental benefits of the products.

As showed in the figure below, the online survey results reveal that a sustainable product somehow means safety, eco-friendly, good quality performance, healthy, and high-cost efficiency.



**Chart-15**



#### 4. 54.41% of Chinese consumers are willing to pay more for sustainable products

More than half (54.41%) consumers surveyed claimed they would be prepared to pay more for sustainable products. A minority of consumers, about 37%, says they are not sure to be willing to pay a price premium for sustainable products.

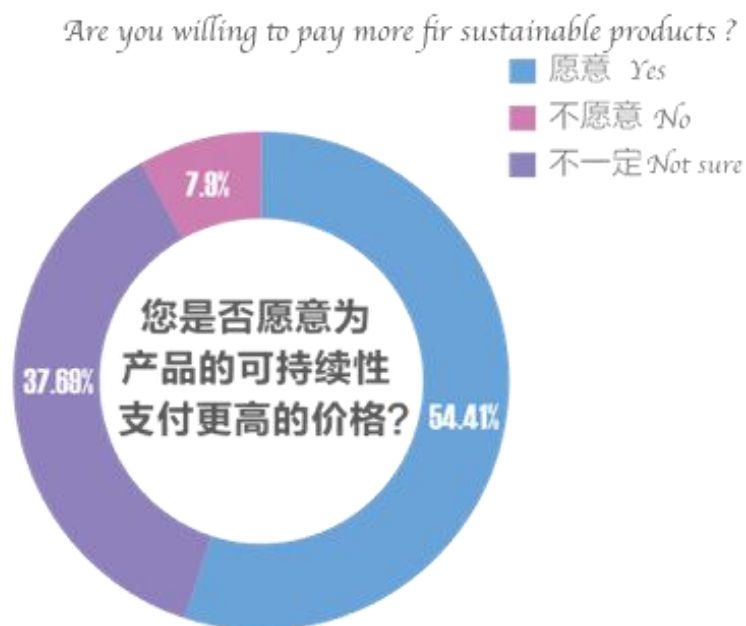
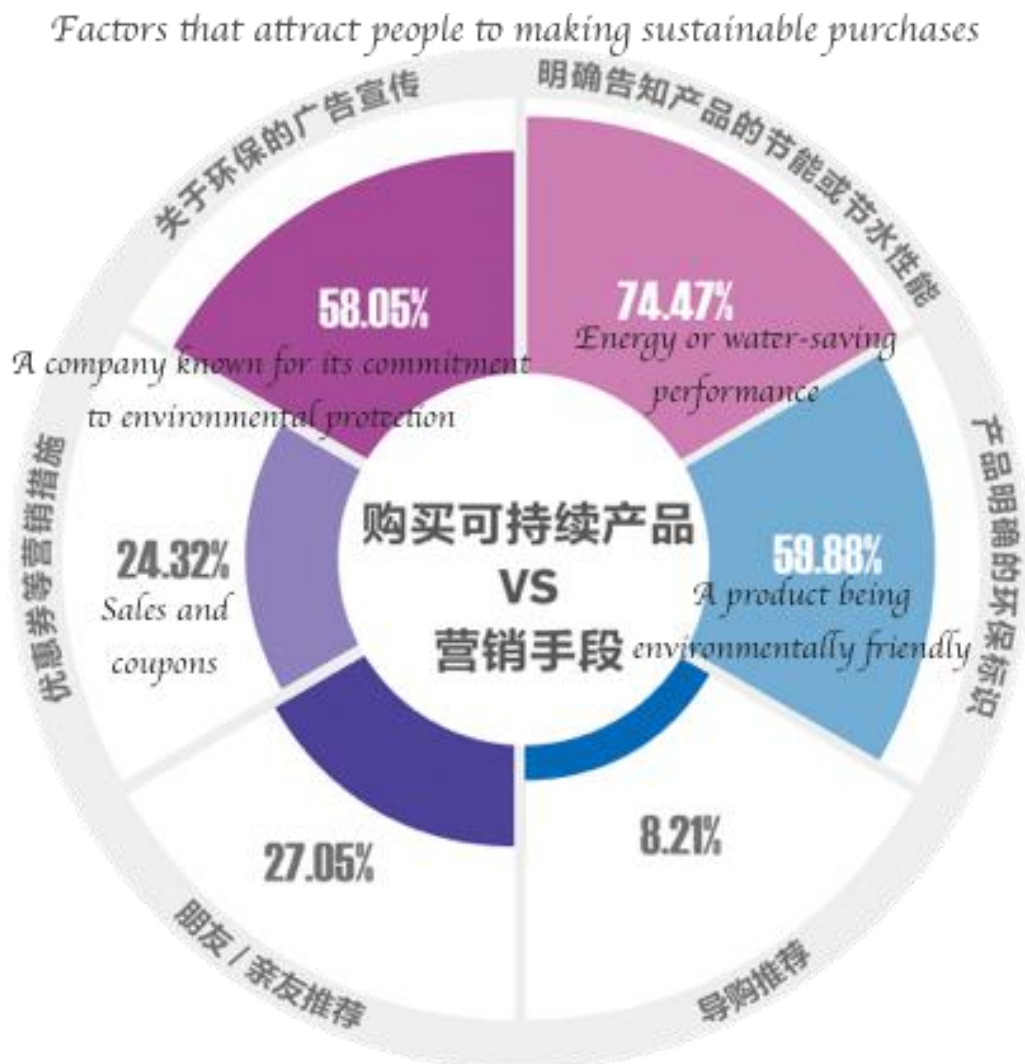


Chart-16

- Factors that attract people to making sustainable purchases products having an energy or water-saving performance (74.47%), a product being environmentally friendly (59.88%), and a company known for its commitment to environmental protection (58.05%). Sales and coupons did not even make the top three.
- It seems that personal values are more important for Chinese consumers than personal benefits, such as cost. To reach consumers and promote sustainable consumption, marketers need to have credible, relevant commitments and communicate about that, using the right tactic and connect messaging with the causes that matter to consumers and that also align with the company commitments.



**Chart-17**

## 5. In-store communication strongly influences 89.3% consumers' purchasing intents

When it comes to retailing options, in-store shopping is the favorite one to buy sustainable products. As the majority of consumers are unaware of what makes a product sustainable versus good for them, they may be confused by the messages in the media or simply not yet inspired to look for them. In-store communication seems to strongly influence their sustainable purchasing decisions and drive them to purchase. In the store, consumers can see the product in person before buying it and clearly identify green products with the help of the existing marketing programs leveraged by retailers to draw attention to this category of goods.

Thus, retailers need to provide more coordinated communication and education about sustainability, while online platforms need to put more effort in gaining the trust of consumers. It is all about trust as in China it is no more relevant to say that consumers prefer in-store shopping to avoid delivery fees or have the item immediately. Ordering online for home delivery is very convenient, even without transportation costs and waiting time.

Consistent, aligned messaging in stores, online, in advertising and involving other touchpoints is necessary to increase the sustainable conversion rate.

Findings show that nearly nine-in-ten (89.3%) sustainable products seekers prefer to make their purchases inside an actual store. Although online shopping is more convenient, it remains the second preferred retailing option (56.67% respondents), followed by specialized distributors (41.59% of those surveyed). Only a few respondents (24.16%) mention overseas distributors as their preferred retail option to seek such products.



**Chart-18**

## Key Findings

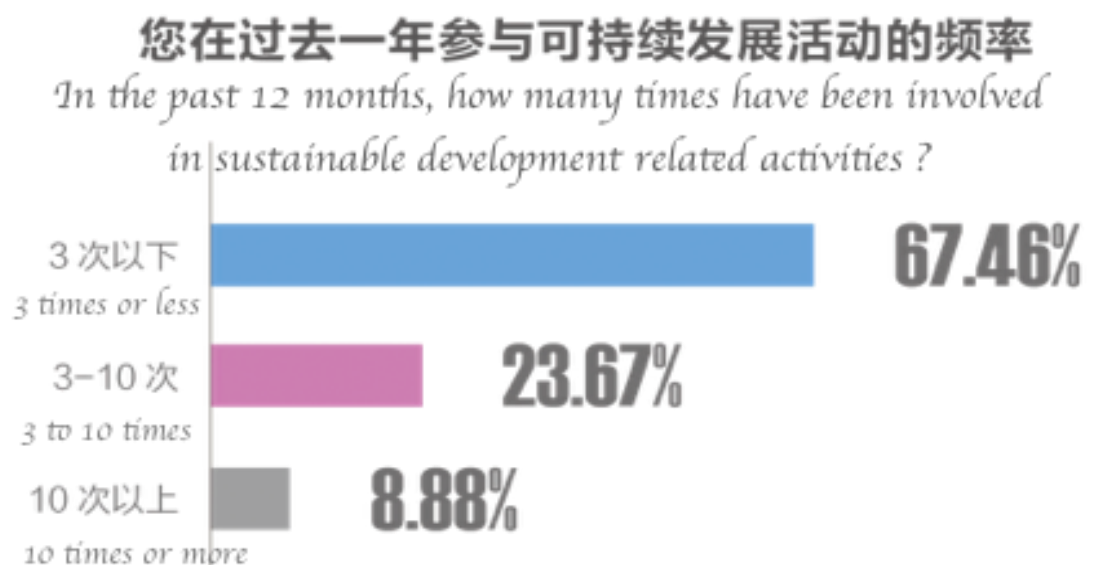
### Part 3: Consumers behaviors of Sustainability and Sustainable Consumption.



Overall the results suggest there is a high level of awareness of sustainability amongst Chinese consumers, with the majority of them saying they are concerned about sustainability issues. However, the study findings show that there is a gap between consumers' intellectual agreement about sustainability being important and the extent to which they are taking action.

Communication is therefore needed to enhance consumers understanding of sustainability issues and convert good intentions into action. Companies need more than ever to bring responsible business commitments to the forefront of their brands to engage more consumers across multiple channels and touch points.

- **The majority of the respondents (67.46%) indicate they have been involved in sustainable development related activities only three times or less. Only 8.88% of them have been involved ten times or more in past 12 months.**



**Chart-19**

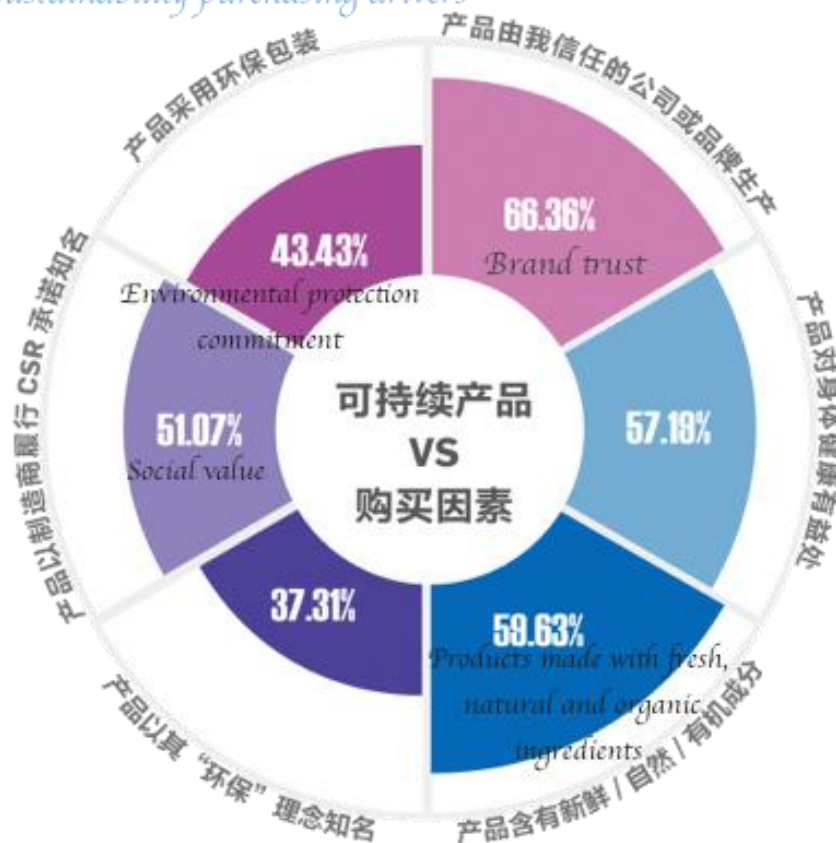
- **Brand trust: Top sustainability purchasing driver for 66.6% Chinese consumers.**

Topping the list of sustainability factors that influence purchasing for the majority of Chinese consumers (66.6%) are the company or brand trust.

Beside brand trust, Chinese consumers are increasingly concerned with not only the wellness and health effects of the consumption of products, but today's consumers also purchase products that are right for them, respectful for the environment and good for society.

Products made with fresh, natural, and organic ingredients carry almost similar weight (59.63%) like those made by companies with either social value (51.07%) or environmental protection commitment (43.43%).

*Sustainability purchasing drivers*



**Chart-2**

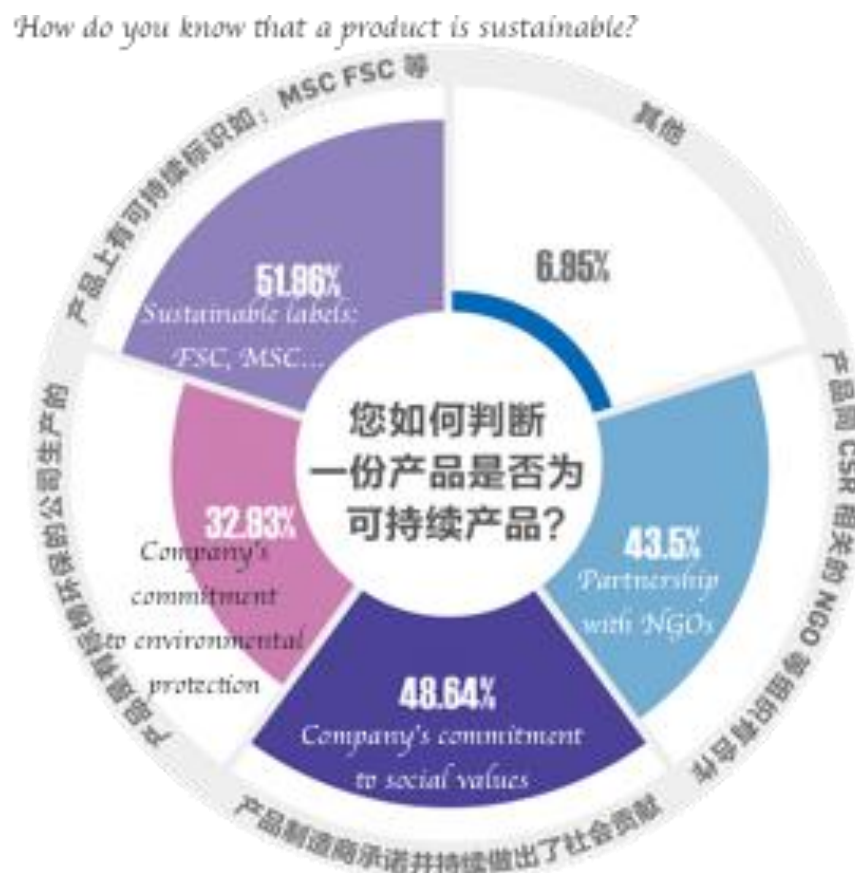
- **Chinese consumers expect companies to communicate better about their sustainability commitments**

Today's Chinese consumers seem more informed and empowered than ever before. Feeling a greater sense of personal impact through their purchasing decisions, but also through their willingness to pay more and make a financial sacrifice to amplify social and environmental change. They are trying to be responsible citizens of the world, and they expect the same from companies. The latest are not only expected to make different sustainable commitments but also to communicate about those commitments

Nearly one-in-two (51.96%) pay attention to companies' "supply chain sourcing policies." They believe that the company behind the sustainable product should commit to suppliers that compliant with relevant certification scheme related to sustainability such as the Forest Stewardship Council (FSC) and the Marine Stewardship Council (MSC).

Commitments to either social values or environmental protection are also necessary (each influencing 48.64% and 32.83% of respondents definition of a sustainable product, respectively).

Many (43.5%) also include company having a partnership with non-profits organizations working on issues consumers care about most in their criteria for defining a sustainable product.



**Chart-21**



## Conclusion and Insights for Companies

The 2016 study on Chinese consumers' awareness, attitude and behavior toward sustainability and sustainable consumption reveals a high level of awareness and support of sustainability from Chinese consumers. Today's empowered consumers are willing to personally address social and environmental issues and make sacrifices for the greater good.

Despite the fact that the leading way consumers want to get engaged is sustainable purchase, they remain the open-minded partners for collaboration to drive forward social and environmental progress.

It is clear that there is still more work ahead for companies to engage consumers, providing more opportunities for participation. The findings from this study reveal several insights for businesses looking to achieve that.

1. The leading businesses of the future will be those committed to integrating sustainability into their business strategy, with goods and services that address society's most urgent challenges.
2. As consumers grow more conscious about the environmental and social impacts of their purchasing decisions, sustainability becomes an integral part of the overall product offering and reinforcing brand positioning. Companies that communicate with messaging that resonates and accurately reflects their sustainability commitments have the opportunity to boost their brand's profile and win consumers trust and loyalty.
3. It is important to know how the consumer would like to be communicated to about sustainability. There is a need to have credible, relevant commitments and communicate about those commitments using the right tactic and connect messaging with the causes that matter to consumers.
4. As the intent-to-action gap seems to have less to do with consumers' willingness to participate in sustainability efforts. What companies could consider is to provide more innovative ways to effectively engage consumers, for instance cause marketing or volunteerism activities, besides just provide the product with good sustainability performance.

# Organizational Instruction

## About Syntao:



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SynTao is a leading consultancy promoting sustainability and responsibility in the Asian region With global vision and local practices. We provide consulting, research and training services in Corporate Social Responsibility (CSR) and Socially Responsible Investment (SRI), with a particular focus on Environment, CSR strategy planning, report counseling / writing, stakeholder communication, public project design / supervision and evaluation, case development, responsible investment and corporate culture. As one of the earliest CSR professional consultants in China, SynTao was established in Beijing in 2005, the company has accumulated rich experience in corporate social responsibility and sustainable development.

Currently, Syntao has offices in Beijing, Shanghai, Guangzhou and Chengdu.

Company Website :

<http://www.syntao.com>

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## About Jiemian:



Jiemian is a social media platform that allows users to get the latest news. It was founded by China's largest newspaper group, Shanghai United Media Group (SUMG), together with eleven companies in the fields of the Internet, finance, and media. In July 2016, Jiemian raised a 300 million RMB round of Series B financing led by KUNLUN Trust Co., Ltd. Jiemian has more than 8 million subscribers as of June 2016. And, the app has been downloaded over 20 million times.

On the PC side, with 2.9 million average daily UV, 20 million PV, and 20 minutes and 42 seconds average reading time, Jiemian has become one of news platforms with the highest user stickiness.

Company website :

<http://www.jiemian.com/>

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