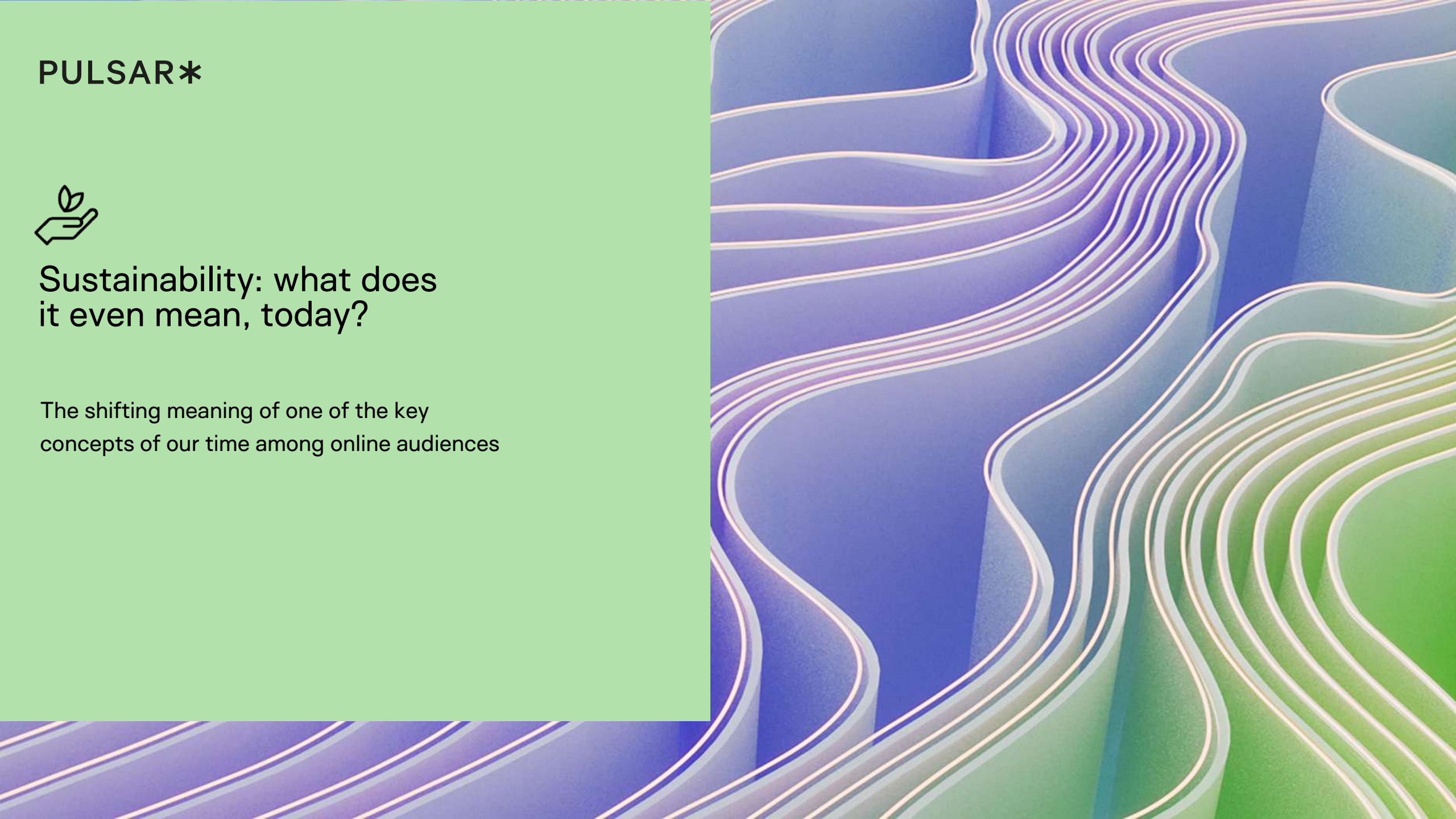# PULSAR*

# Sustainability: what does it even mean, today?

The shifting meaning of one of the key concepts of our time among online audiences

# Sustainability – It Means Something Different to Everyone

Sustainability is one of the most important ideas, and words, of our time. But as interest in the concept keeps growing, its meaning is becoming murkier, and harder to grasp: the word seems to mean very different things to companies, investors, shoppers, activists, institutions, and citizens.

This report covers:

- How usage of "sustainability" has shifted over the past decade

- The key moments in those shifts over the past few years

- The main audiences participating in this conversation

- The main industries involved in public conversation around sustainability

## APPROACH
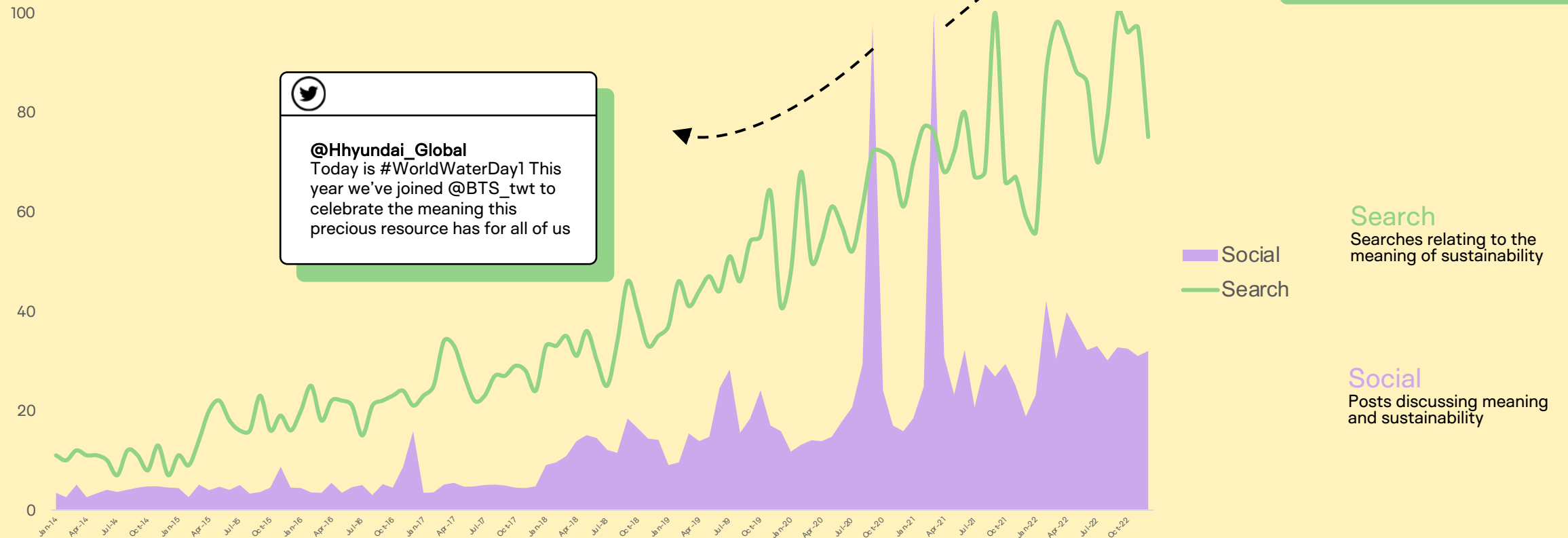
### Data Collection Period:

July 17th – Dec 14th 2021

### Channels:

- Twitter
- Reddit
- Facebook
- Instagram
- TikTok
- Pinterest
- Tumblr
- YouTube
- Blogs
- Forums
- Online News
- Amazon Reviews
- Sermo
- Trustpilot
- Expedia
- Google Search

### Markets/Languages:

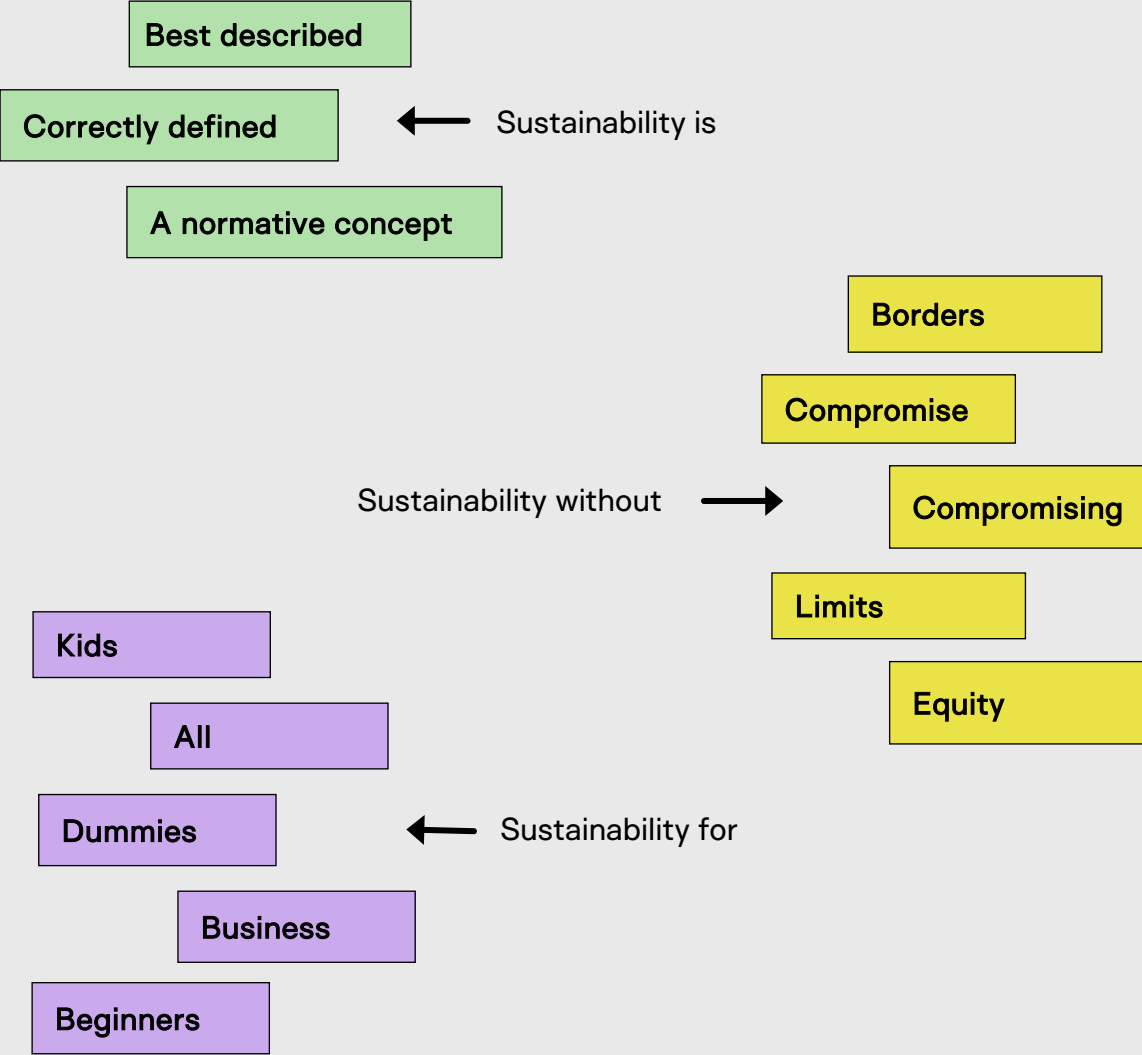Global data collection. Analysis in English-language

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# The Meaning of Sustainability

**Interest in Sustainability and meaning began to take off in 2015, in a trend that has only intensified since.** The gradual incline in search queries reflects growing mainstream interest in every aspect of sustainability. The social mentions, meanwhile, reflect less a widespread curiosity then they do attempts to assert meaning and distinct interpretations. This is clearly evidenced in the two most-engaged-with posts, the first of which, posted in the wake of Greek wildfires, dismisses green capitalism as a panacea. The more optimistic Hyundai X BTS post underlines the importance of water to wider sustainability efforts – and the importance of sustainable ethics and activism to a Gen-Z audience.

they told us to reduce, reuse, recycle, they sold us veganism, fuel efficient cars, "oragnic," "sustainable," and "eco friendly." green capitalism is meant to deceive us, not save us

**@Hhyundai_Global**
Today is #WorldWaterDay1 This year we've joined @BTS_twt to celebrate the meaning this precious resource has for all of us

Social
Search

**Search**
Searches relating to the meaning of sustainability

**Social**
Posts discussing meaning and sustainability

Search and social interest in "meaning of sustainability" across the globe, Jan 2014 – Jan 2022. Source: Pulsar TRENDS and Google Trends
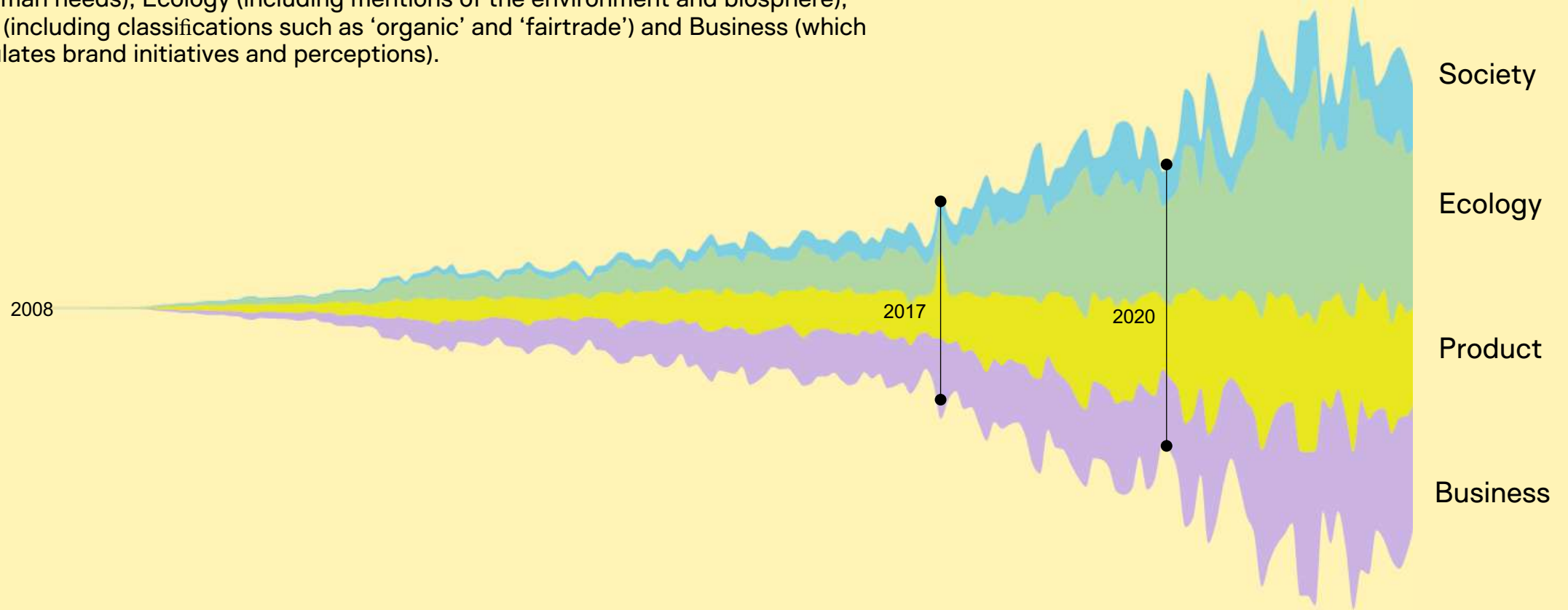
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# In Search of Sustainability

Taking a closer look at some of the most popular queries to feature various verbs and prepositions alongside 'sustainability' presents an indicator as to curiosity and future actions. We appear to have moved far beyond questions of sustainability's broad definition or inherent worth. Instead, the focus appears to be on drawing conceptual borders, piecing together strategems and introducing others, from kids to businesses, to the idea.

Best described

Correctly defined ← Sustainability is

A normative concept

Borders

Compromise

Sustainability without → Compromising

Limits

Equity

Kids

All

Dummies ← Sustainability for

Business

Beginners

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# The Evolving Dimensions of Sustainability

To better understand the shifts in the sustainability conversation, we divided conversational data from 2008 onwards into four distinct categories: Society (including social justice and basic human needs), Ecology (including mentions of the environment and biosphere), Product (including classifications such as 'organic' and 'fairtrade') and Business (which encapsulates brand initiatives and perceptions).



2008

2017

2020

Society

Ecology

Product

Business

Historical view of sustainability by dimension between Jan 2008 and Jan 2022. Source: Pulsar TRENDS
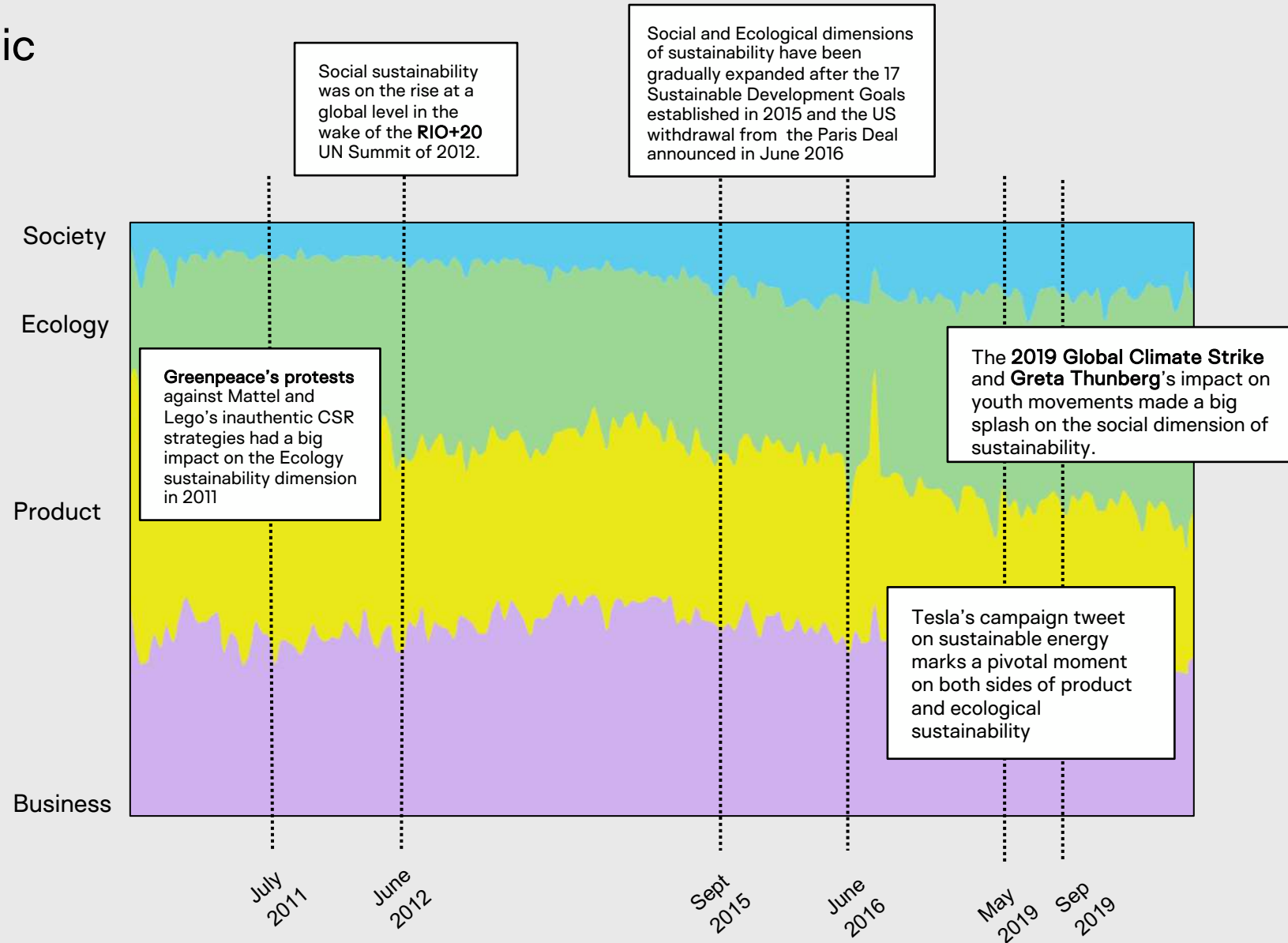
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# The Key Events in How the Public Talk About Sustainability

The initial findings, that Product and Business have ceded ground to Society and Ecology, might appear counterintuitive given the focus of brands and organizations on sustainability. But this appears attributable to two factors. Firstly, that the former two have grown in absolute terms, and have only shrunk relative to the latter two – a corollary of COP26, Greta Thunberg and numerous other movements and moments.

Secondly, several behaviors on the part of manufacturers and businesses that were noteworthy a decade ago have now become expected. A company, for instance, is rarely lauded for having a CSR programme, but rather lambasted for not having one. So what were the individual moments that saw mass redistributions of attention?

Ecology appears to be the category most liable to suddenly spike, a result of the category being more driven by news, science and instances of activism than comparatively steady consumer behavior. It's also notable that certain news stories, such as those involving Tesla, can reside in more than one category, resulting in a substantive uplift for each.

Social sustainability was on the rise at a global level in the wake of the **RIO+20** UN Summit of 2012.

Social and Ecological dimensions of sustainability have been gradually expanded after the 17 Sustainable Development Goals established in 2015 and the US withdrawal from the Paris Deal announced in June 2016

**Greenpeace's protests** against Mattel and Lego's inauthentic CSR strategies had a big impact on the Ecology sustainability dimension in 2011

The **2019 Global Climate Strike** and **Greta Thunberg**'s impact on youth movements made a big splash on the social dimension of sustainability.

Tesla's campaign tweet on sustainable energy marks a pivotal moment on both sides of product and ecological sustainability

Society

Ecology

Product

Business

July 2011

June 2012

Sept 2015

June 2016

May 2019

Sep 2019

Historical view of sustainability by dimension between Jan 2008 and Jan 2022.
Source: Pulsar TRENDS

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# What We Talk About When We Talk About Sustainability

To give some illustration of what a diverse and multi-varied topic sustainability remains, we've mapped several of the largest discussion points within this conversation onto the same visualization. Each of these relates in some way to a problem or solution, placing the emphasis by turn on governments, on individuals, on institutional edict, and on decentralised technology.
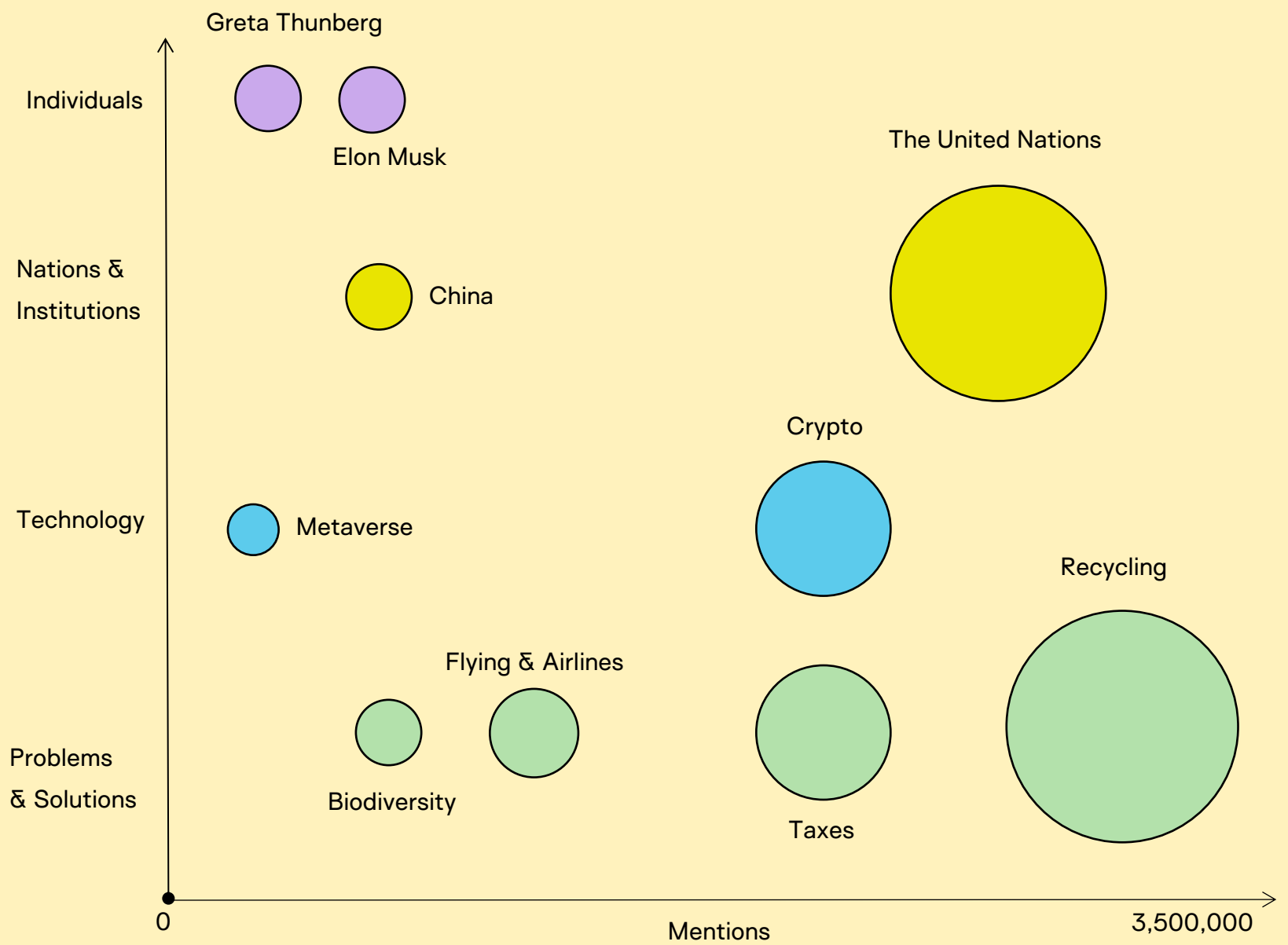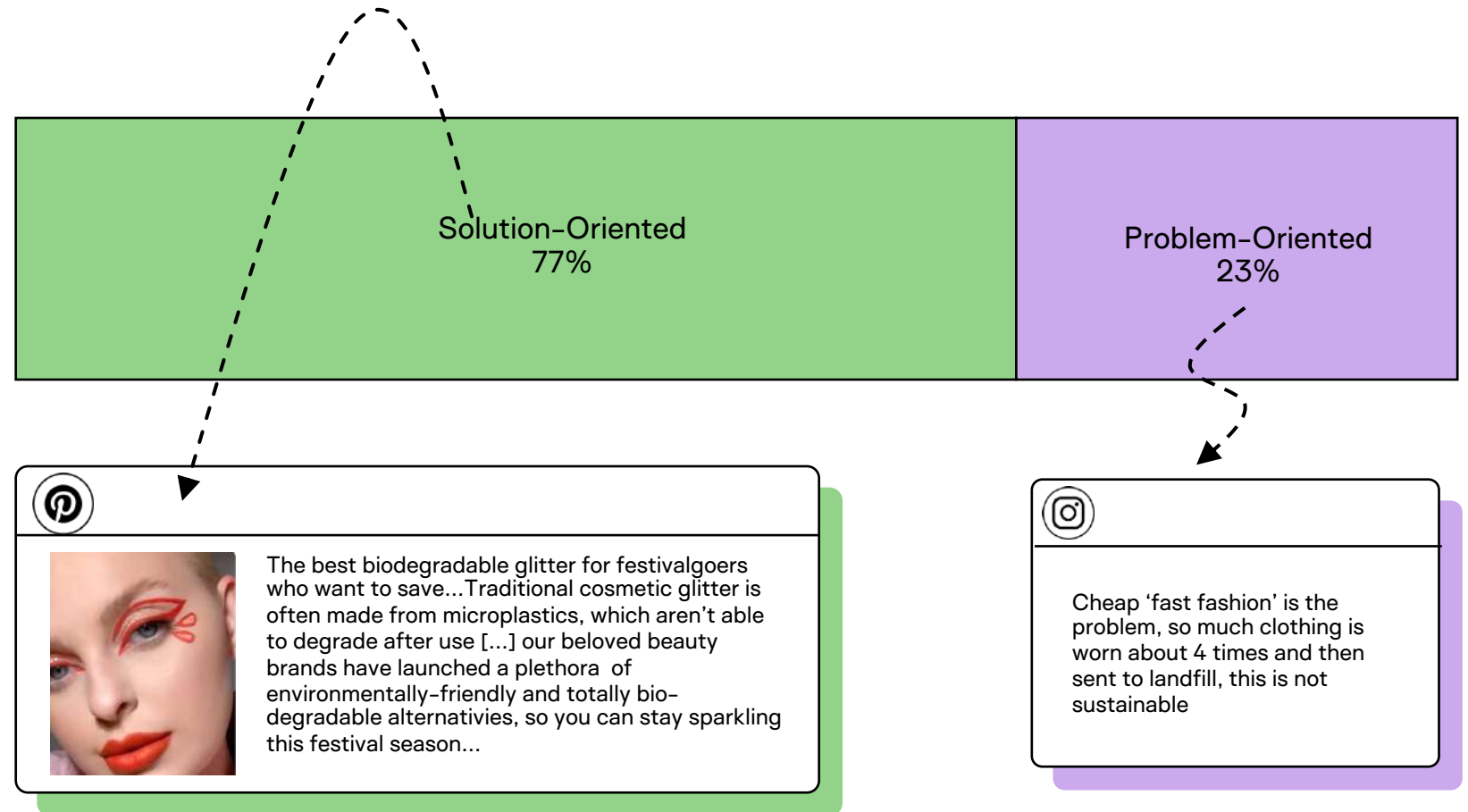
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# Sustainability: a Very Solution-Oriented Conversation

This idea of problem and solution is a pervasive one – and one that ultimately comes out on the side of the former. For all that the movement is often characterized by its detractors as being apocalyptic or millenarian in tone, the evidence would suggest that participants are far more interested in identifying and supporting solutions than they are in recrimination and nihilism.
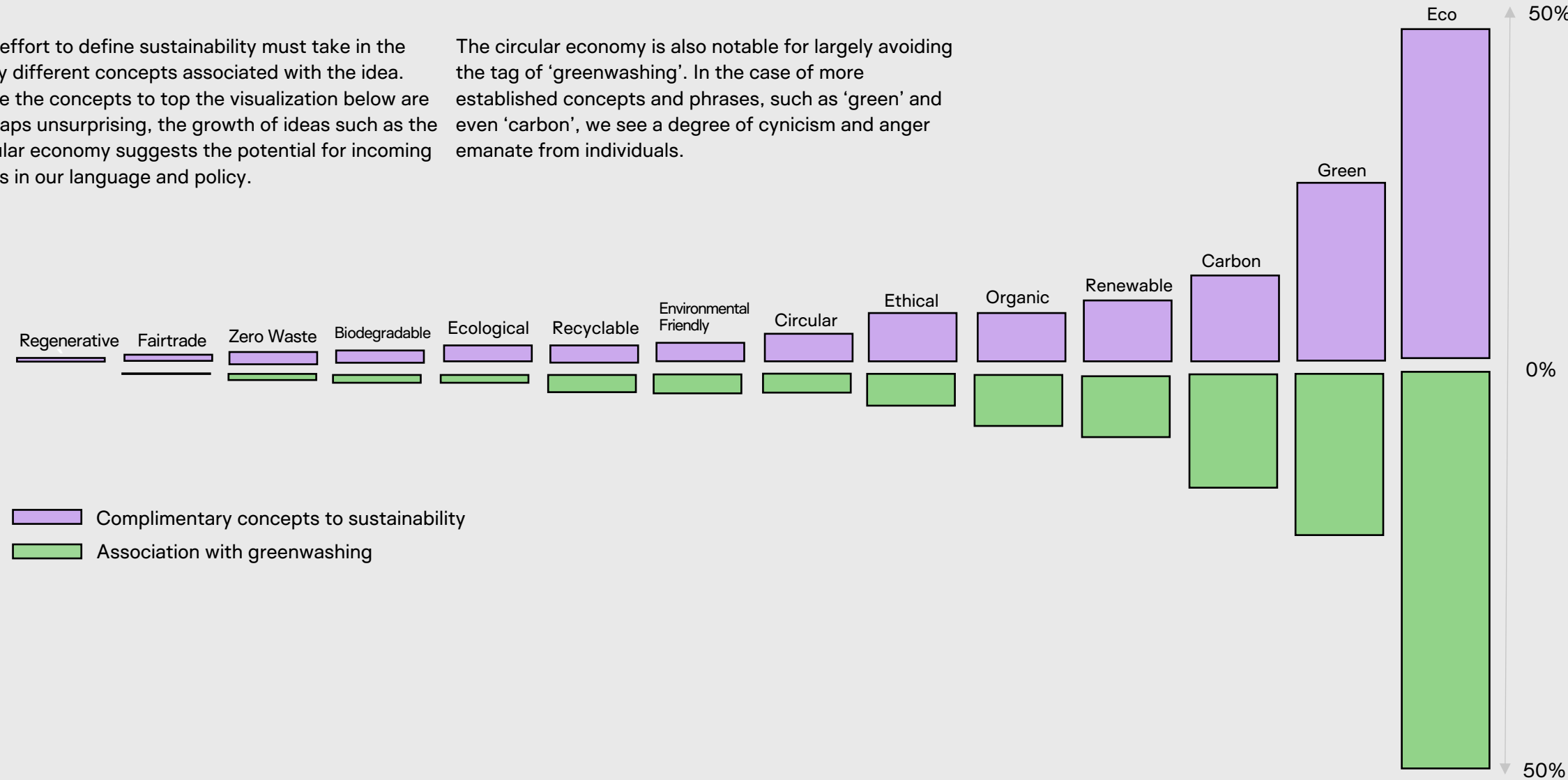
In spite of brands presenting themselves as problem rather than solution, this does not appreciably change the data, and we can see that a comparable ratio holds true amongst individual users too.

Solution-Oriented
77%

Problem-Oriented
23%

The best biodegradable glitter for festivalgoers who want to save...Traditional cosmetic glitter is often made from microplastics, which aren't able to degrade after use [...] our beloved beauty brands have launched a plethora of environmentally-friendly and totally bio-degradable alternatives, so you can stay sparkling this festival season...

Cheap 'fast fashion' is the problem, so much clothing is worn about 4 times and then sent to landfill, this is not sustainable

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# The Concepts Associated with Sustainability & Greenwashing

Any effort to define sustainability must take in the many different concepts associated with the idea. While the concepts to top the visualization below are perhaps unsurprising, the growth of ideas such as the circular economy suggests the potential for incoming shifts in our language and policy.

The circular economy is also notable for largely avoiding the tag of 'greenwashing'. In the case of more established concepts and phrases, such as 'green' and even 'carbon', we see a degree of cynicism and anger emanate from individuals.



Legend:
- Complimentary concepts to sustainability
- Association with greenwashing

Bar chart categories (left to right): Regenerative, Fairtrade, Zero Waste, Biodegradable, Ecological, Recyclable, Environmental Friendly, Circular, Ethical, Organic, Renewable, Carbon, Green, Eco

Axis markings: 50%, 0%, 50%

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# Which Media Outlets are Shaping Sustainability

Clearly, media outlets play a crucial role in dictating the path conversation takes, and the different affinities that form. When we organise these according to number of mentions, The Guardian emerges as the largest. More surprising the the presence of Eluxe Magazine, which is massively amplified by fashion posts on Pinterest, the largest of which generate as many as 36k engagements.



Californian Firm Touts 'Mushroom Leather' as Sustainability Gamechanger Now is the Time for a 'Great Reset'



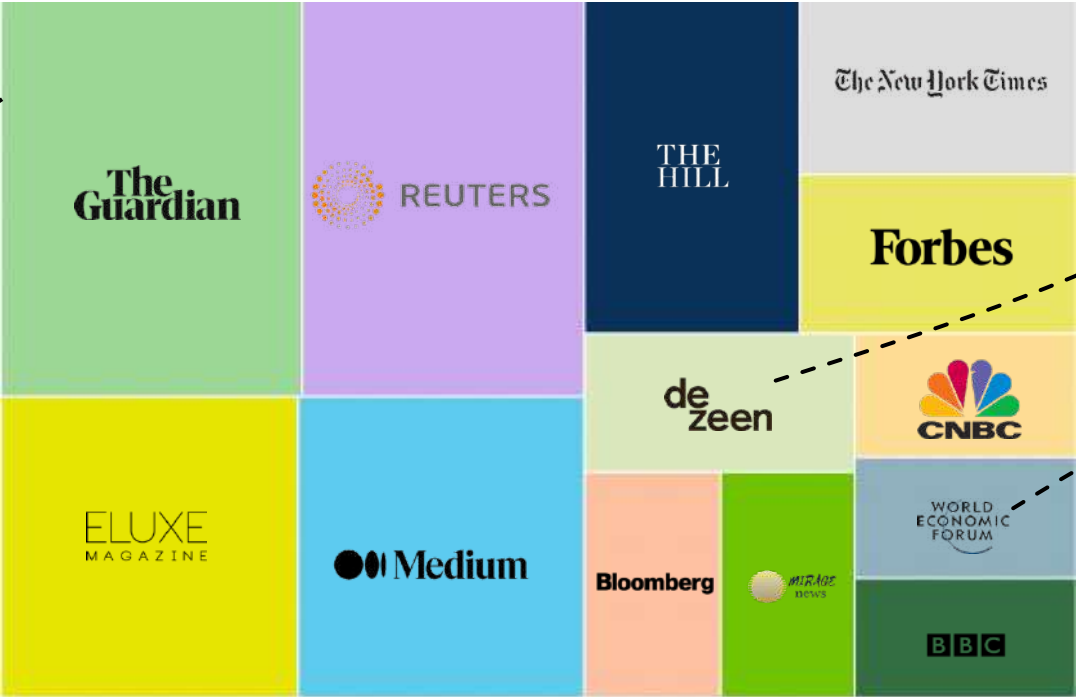Foster + Partners Wraps Dubai Expo Mobility Pavilion in Stainless Steel Fins



The Ethical Fall Fashion Collections 2021: Our Picks



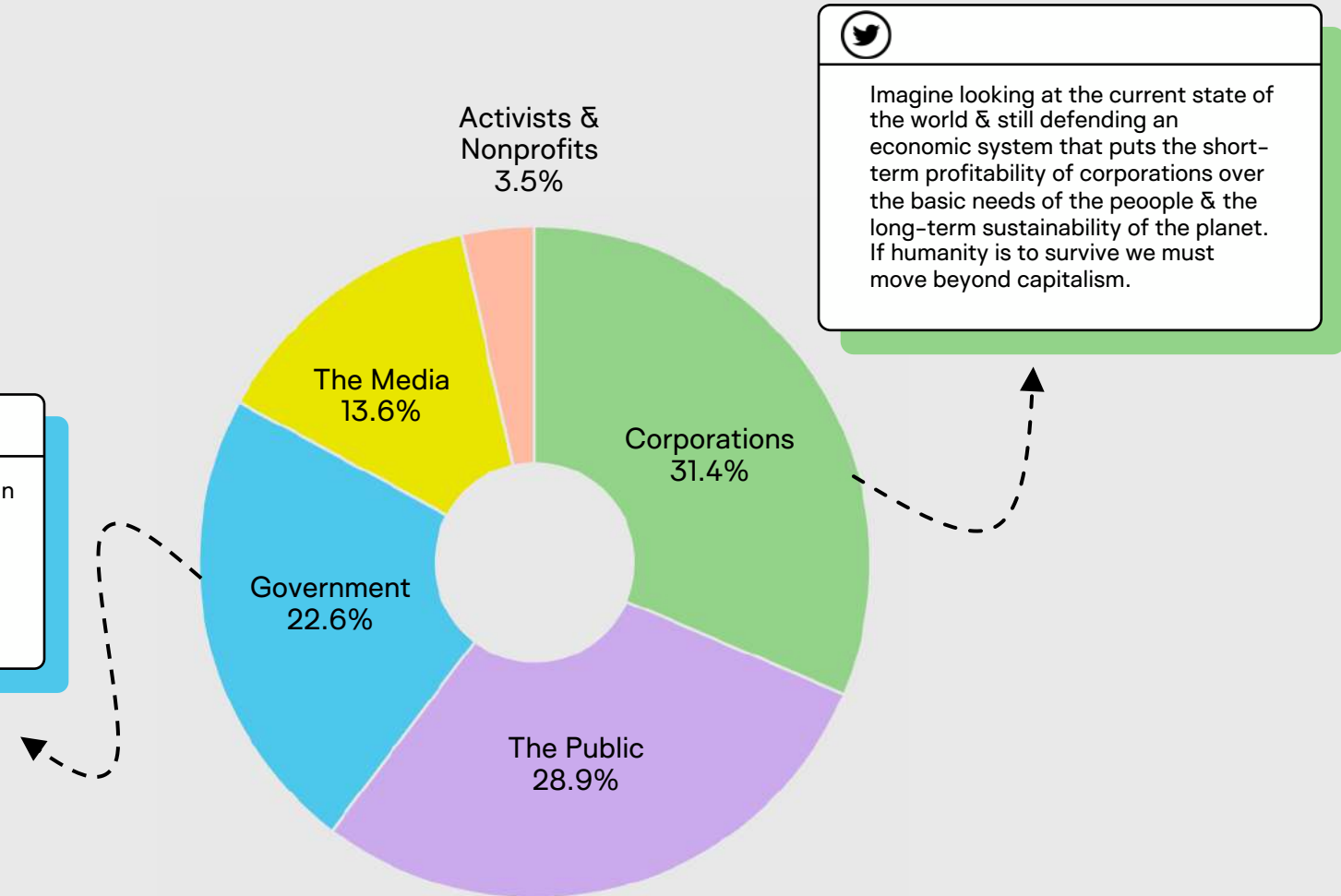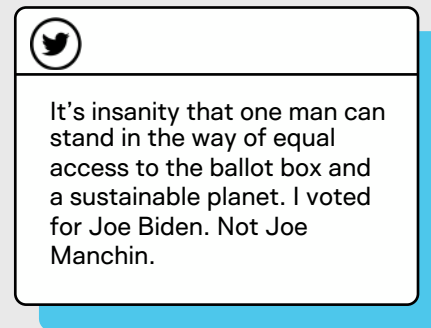*Now is the Time for a 'Great Reset'*

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# The Most-Shared Retailer Websites

Complementing news websites, which help forge opinions on sustainability, retailer websites act as indicators of consumer behavior and preference. Fashion is the category most represented here, as users both share sustainable looks and products, and also engage in the peer-to-peer commerce epitomised by Etsy and Depop. These platforms signal an assumption of responsibility on the part of the consumer. Not only do they demand sustainable practices from brands, they are also willing to step outside the traditional retail space to purchase products that match their own ethical specifications.
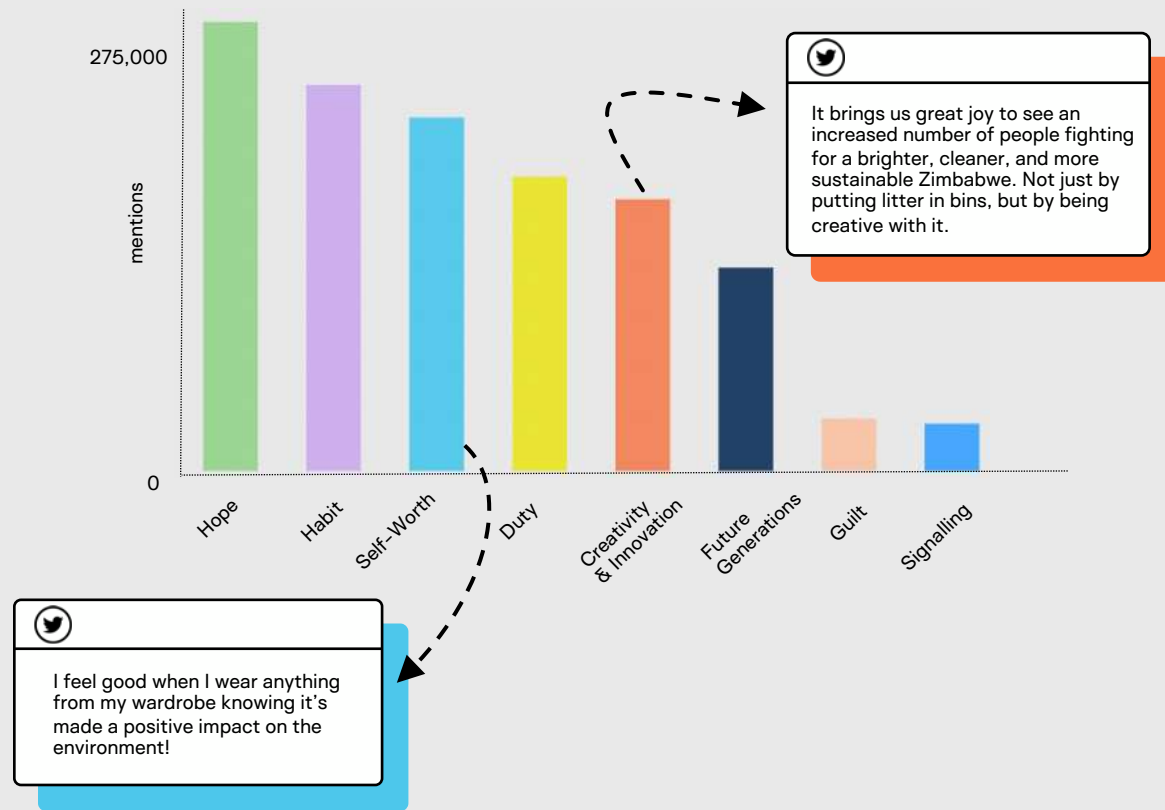
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# Who are the Perceived Actors in Sustainability?

In the wider conversation about sustainability, corporations emerge as the most-spoken about actors. In part, this is due to the corporations themselves, who are largely keen to assume positions of leadership. At the other extreme, we see many instances of individuals decrying the entire corporate and capitalistic system as the root cause of the climate crisis. In the substantial middle, however, we see myriad different behaviors on the part of the consumer that involve calling our brands for perceived bad behavior, and supporting initiatives or products viewed as genuinely sustainable.

It's insanity that one man can stand in the way of equal access to the ballot box and a sustainable planet. I voted for Joe Biden. Not Joe Manchin.

Imagine looking at the current state of the world & still defending an economic system that puts the short-term profitability of corporations over the basic needs of the people & the long-term sustainability of the planet. If humanity is to survive we must move beyond capitalism.

Activists & Nonprofits
3.5%

The Media
13.6%

Corporations
31.4%

Government
22.6%

The Public
28.9%

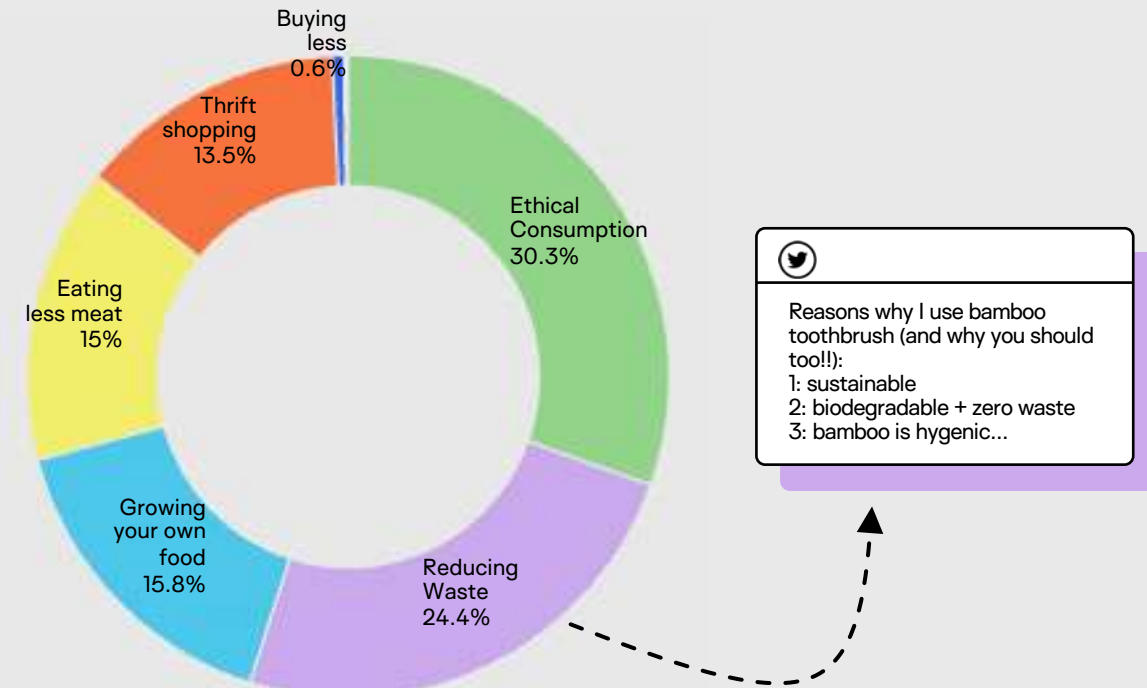PULSAR✳

# Sustainability Motivators...

Why do people engage in sustainability-related behaviors? As seen before within the problem-solution dichotomy, it's largely positive motivators, such as hope and self worth, that are most-referred to. Habit also appears as a powerful factor within longer-term behavioral change.

It brings us great joy to see an increased number of people fighting for a brighter, cleaner, and more sustainable Zimbabwe. Not just by putting litter in bins, but by being creative with it.

I feel good when I wear anything from my wardrobe knowing it's made a positive impact on the environment!

**mentions**

275,000

0

Hope | Habit | Self-Worth | Duty | Creativity & Innovation | Future Generations | Guilt | Signalling
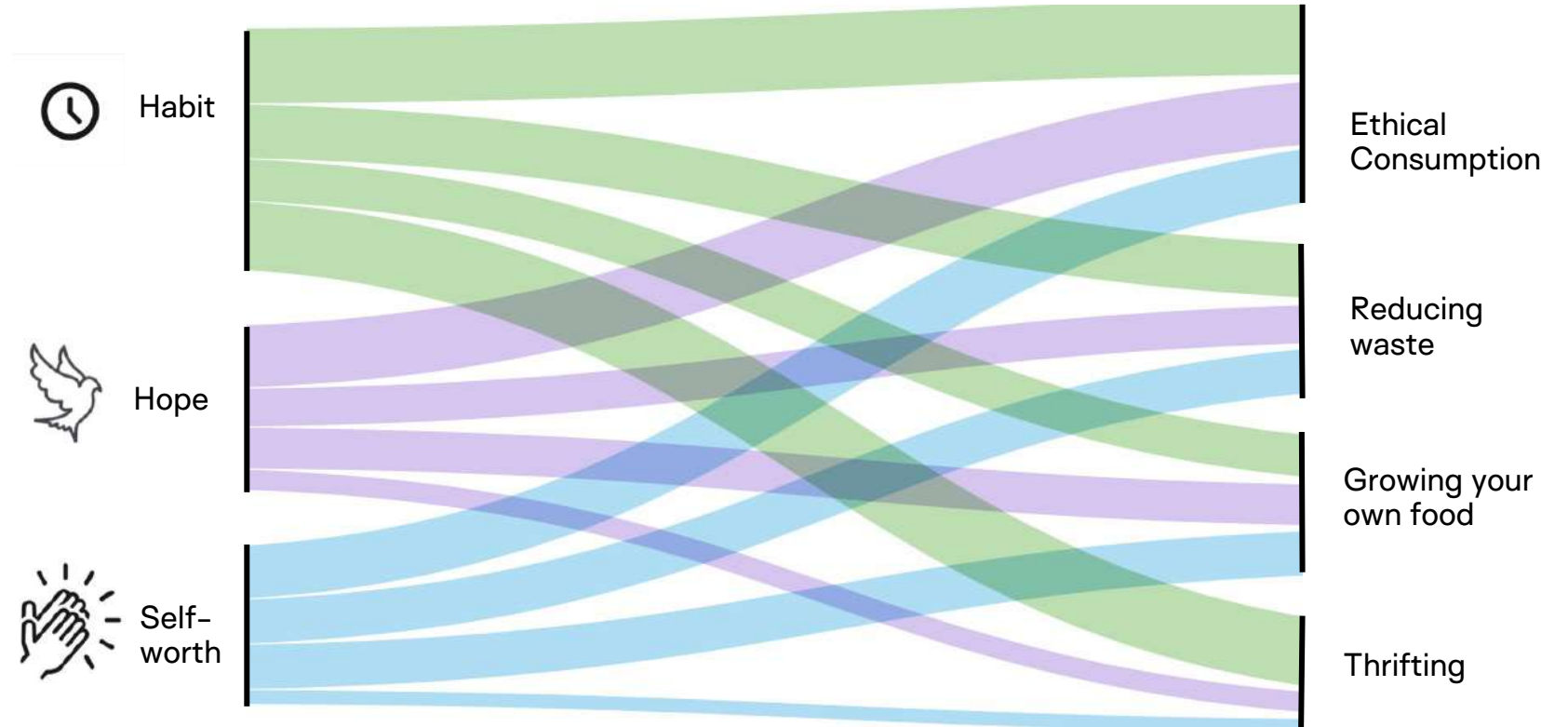
# ... and Behaviors

So what are are these new behaviors? Ethical consumption, which is to say the buying green or ethical products, emerges as the most-cited. These behaviors that emerge to the fore appear to revolve around either more exacting standards, or else a desire to create less waste and unwanted goods.

**Buying less** 0.6%

**Thrift shopping** 13.5%

**Ethical Consumption** 30.3%

**Eating less meat** 15%

**Growing your own food** 15.8%

**Reducing Waste** 24.4%

Reasons why I use bamboo toothbrush (and why you should too!!):
1: sustainable
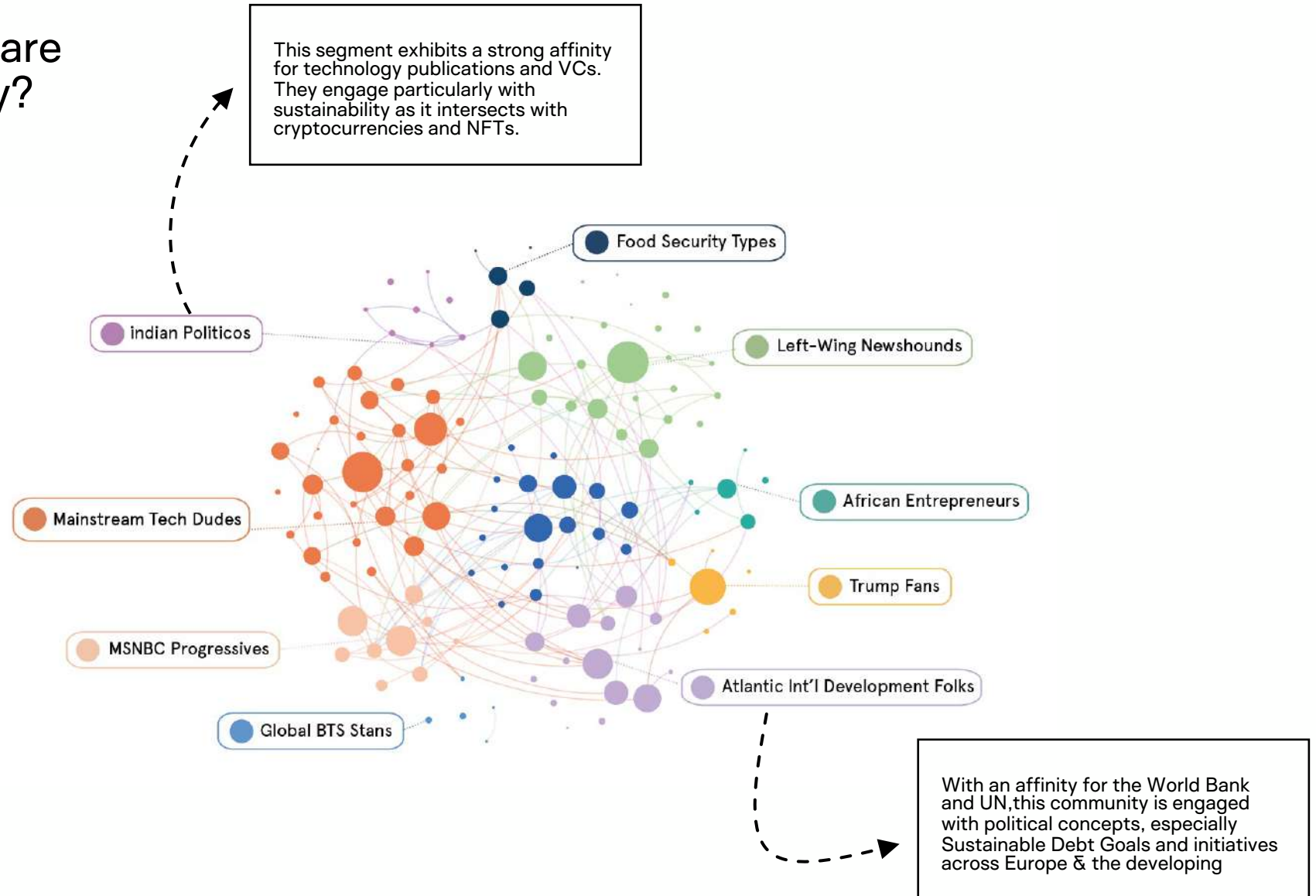2: biodegradable + zero waste
3: bamboo is hygenic...

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# The Behaviors tied to Hope, Habit & Self Worth

By overlaying these two datasets, to understand how motivation can pair with behavior, we see various patterns emerge. Thrift shopping, for instance, is not driven by any visceral or ideological conpulsion as much as it is by habit. In contrast, growing your own food, which often requires greater investment and upskilling on the part of the consumer, appears disproportionately attributable to more potent emotions such as hope and self-worth.

Habit

Hope

Self-worth

Ethical Consumption

Reducing waste

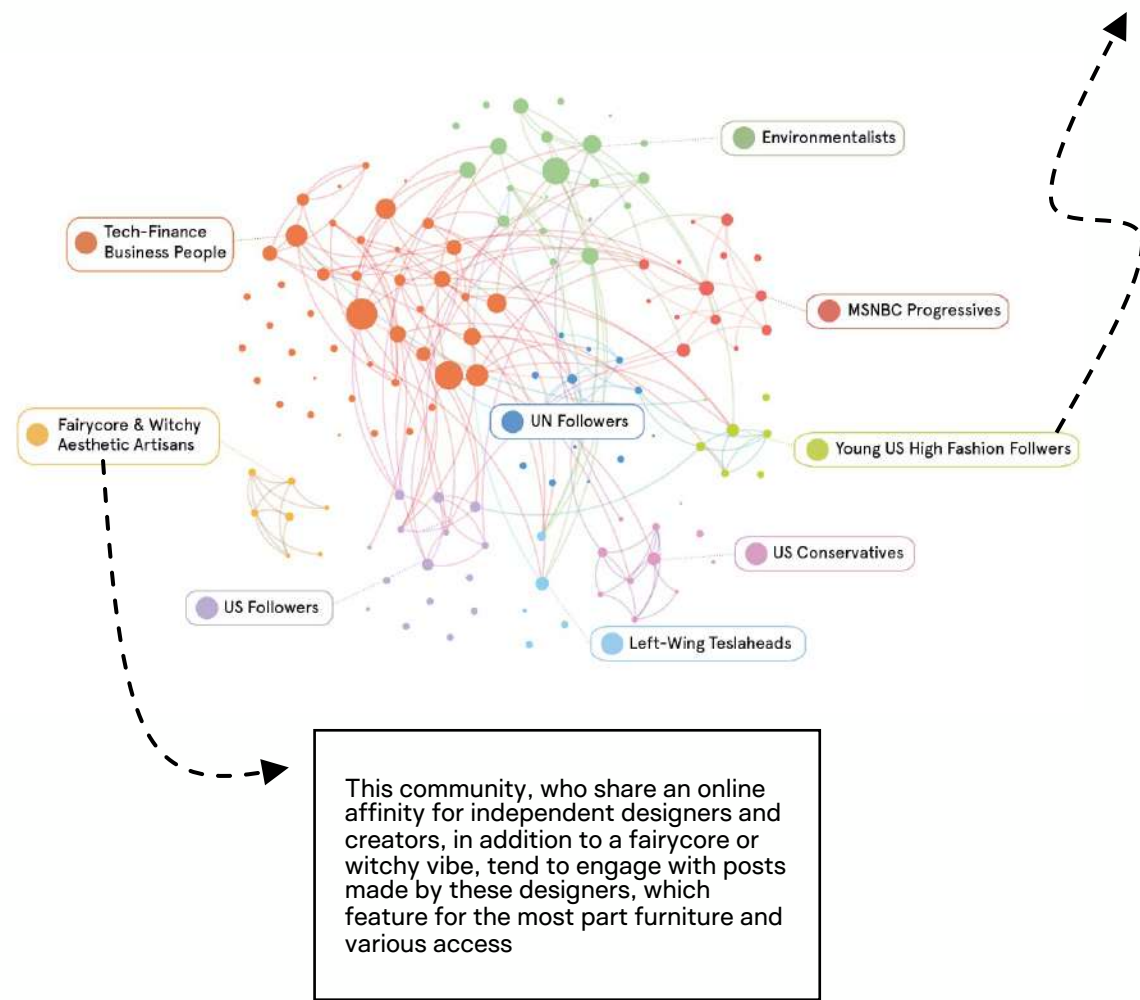Growing your own food

Thrifting

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# Which Global Communities are Engaging with Sustainability?

We can organize the participants of the sustainability conversation according to their shared affinities and online behaviors (the greater the number of nodes, the larger the segment, while larger nodes suggest a higher degree of interconnectivity). What becomes immediately apparent is just how global and widespread this conversation is, with participants ranging across both the globe and the political spectrum.
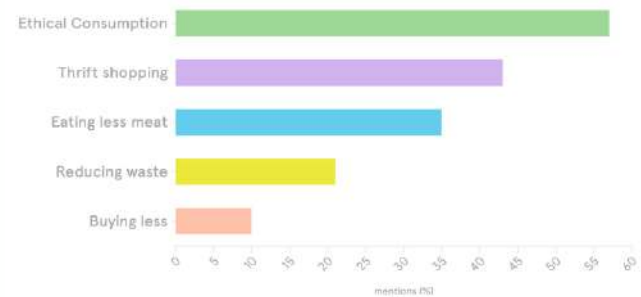
This segment exhibits a strong affinity for technology publications and VCs. They engage particularly with sustainability as it intersects with cryptocurrencies and NFTs.

With an affinity for the World Bank and UN, this community is engaged with political concepts, especially Sustainable Debt Goals and initiatives across Europe & the developing



- Food Security Types
- Left-Wing Newshounds
- indian Politicos
- African Entrepreneurs
- Mainstream Tech Dudes
- Trump Fans
- MSNBC Progressives
- Atlantic Int'l Development Folks
- Global BTS Stans

Global audience segments in the sustainability conversation on Twitter between Jul 17 – Dec 14 2021. Source: Pulsar TRAC

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# US Audiences, Sustainability & Purchase Behavior

Beyond the 'sustainability' conversation at large, we can also take a closer look at one particular aspect of this conversation – namely, instances in which purchasing behavior is linked to sustainability. To some extent, this acts as microcosm of the wider conversation, and several of the key groups are the same. This makes sense, given how central consumer behavior is to the wider trend. However, dialling in also shines a light on more niche groups with their own distinctive habits, from Young US High Fashion Followers to Fairycore & Witchy Aesthetic Artisans.

Environmentalists

Tech-Finance Business People

MSNBC Progressives

Fairycore & Witchy Aesthetic Artisans

UN Followers

Young US High Fashion Follwers

US Conservatives

US Followers

Left-Wing Teslaheads

This community, who share an online affinity for independent designers and creators, in addition to a fairycore or witchy vibe, tend to engage with posts made by these designers, which feature for the most part furniture and various access

**Young US High Fashion Followers Deep Dive**

Ethical Consumption
Thrift shopping
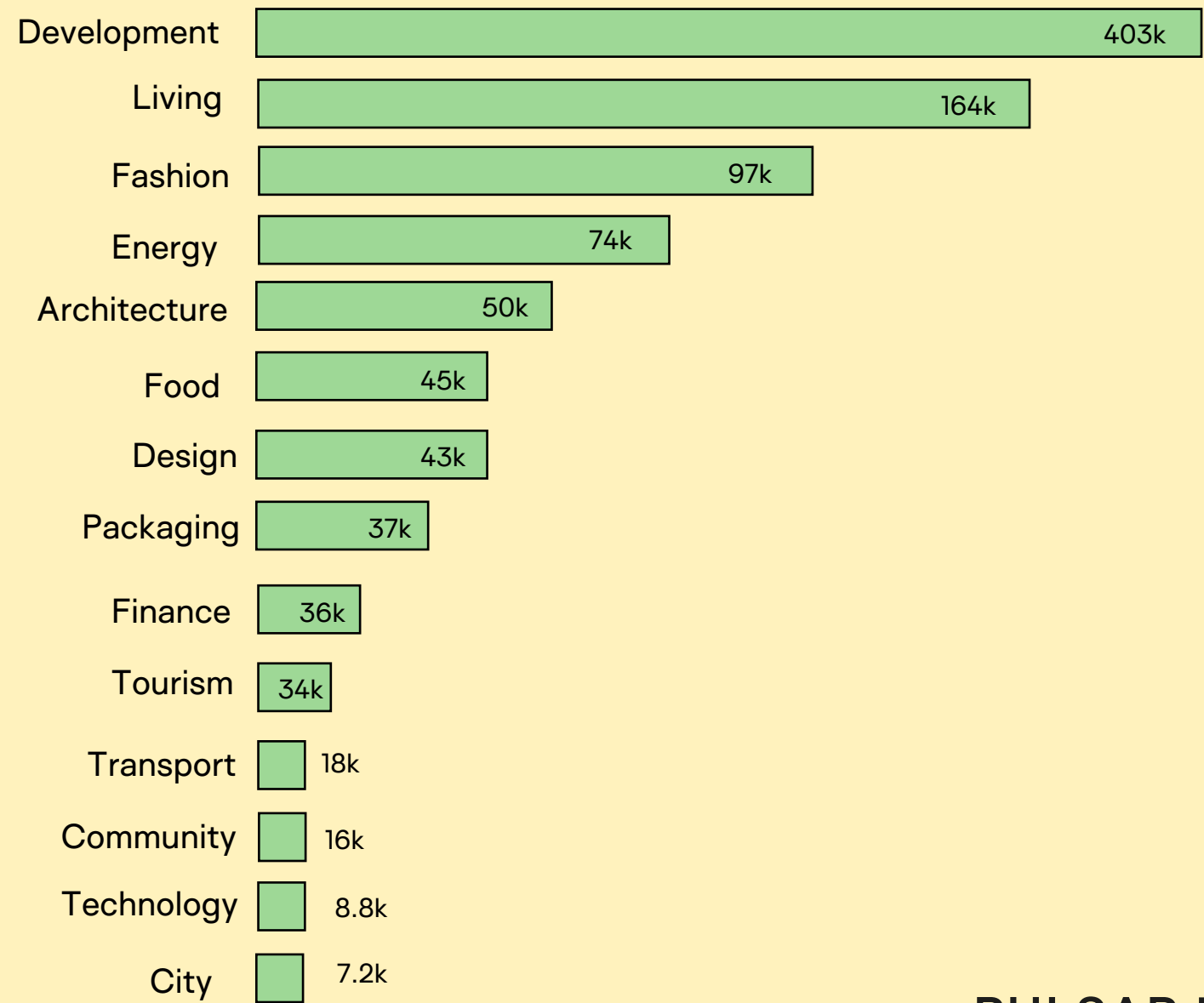Eating less meat
Reducing waste
Buying less

mentions (%)

🐦 **Most-engaged with original post**

It's not "this product is environmentally friendly" it's "do I "need" this? Can I repair what I already have? Can I borrow from someone? Can I buy it secondhand?" Consumerism in the global north isn't sustainable & we don't talk about that enough re. the #Climate Emergency
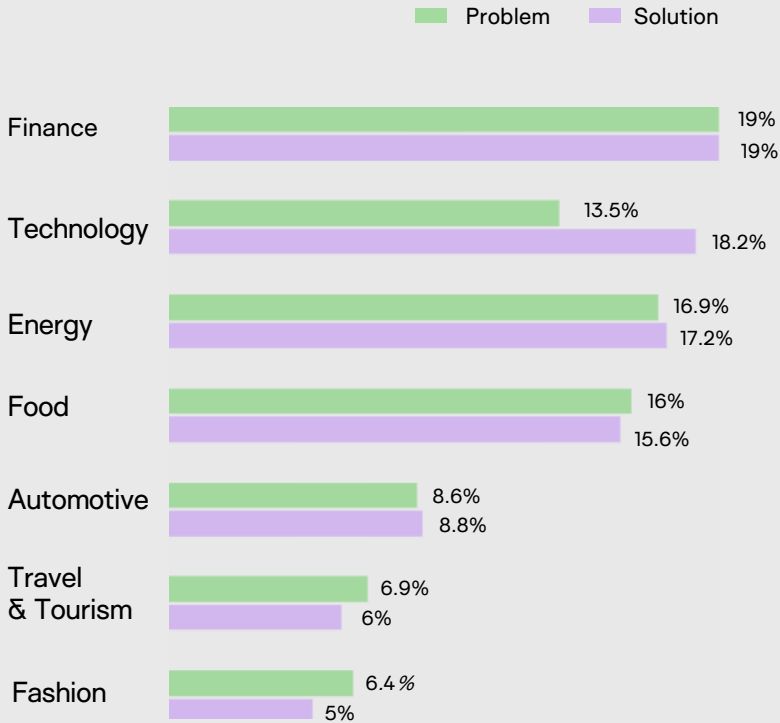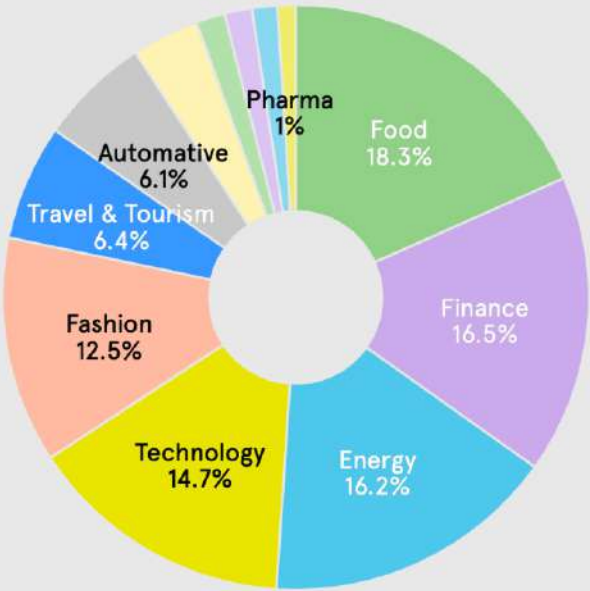
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# Sustainable…What?

Complete the phrase. What word is 'sustainable' most-commonly-used in conjunction with? Development comes out on top, in a further indicator of the SDG's growing influence and popularity, while the universality of 'living' beats 'fashion', which has cropped up repeatedly within both links shared and buyer behavior, into third place. Throughout, we see the emphasis placed variously on the consumer (living), institutions (development), producers (energy, agriculture) and brands (fashion, food, packaging).

| Category | Mentions |
|---|---|
| Development | 403k |
| Living | 164k |
| Fashion | 97k |
| Energy | 74k |
| Architecture | 50k |
| Food | 45k |
| Design | 43k |
| Packaging | 37k |
| Finance | 36k |
| Tourism | 34k |
| Transport | 18k |
| Community | 16k |
| Technology | 8.8k |
| City | 7.2k |

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# Industries: Part of the Problem or Part of the Solution?

Solution-based conversations might outnumber those detailling problems overall, but this does not hold true on a sector by sector basis.
In fact, when we see the extent to which an individual sector makes up the 'solution' or 'problem' conversations, most are viewed as equal parts 'good' and 'bad'. The one exception concerns 'technology'. Within the current wave of nascent techno-optimism, technology companies are seen as providing the solution, whether through pioneering digital-first experiences, such as the Metaverse, or refining, and making more energy efficient, everyday activity.



Legend: ■ Problem ■ Solution

Pie chart:
- Pharma 1%
- Food 18.3%
- Automative 6.1%
- Finance 16.5%
- Travel & Tourism 6.4%
- Energy 16.2%
- Fashion 12.5%
- Technology 14.7%

Bar chart (Problem / Solution):
- Finance: 19% / 19%
- Technology: 13.5% / 18.2%
- Energy: 16.9% / 17.2%
- Food: 16% / 15.6%
- Automotive: 8.6% / 8.8%
- Travel & Tourism: 6.9% / 6%
- Fashion: 6.4% / 5%

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# Spotlight: the Dimensions of Food & Drink Sustainability

Clearly, there is no one way for a brand to be sustainable. Within the food industry, different brands become identifiable in the mind of the consumer with different types of sustainable behavior. In this instance, we've compared the world's largest three food & drinks brands with three renowned for their sustainable ethoses. In amongst all the variance, one initiative that recurrently provokes public engagement and conversation is carbon reduction, followed by efforts to reform and reimagine supply chains.
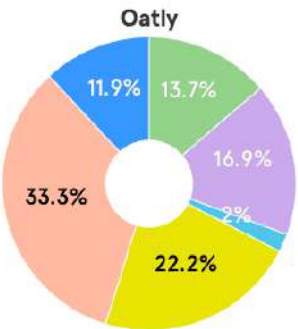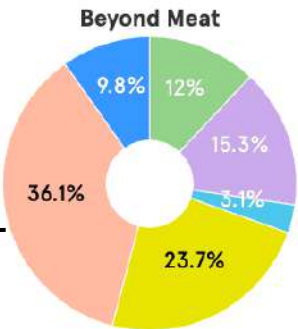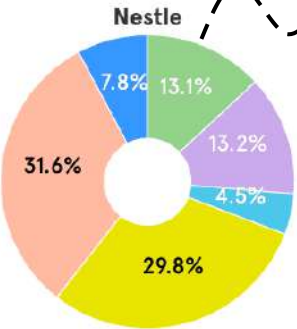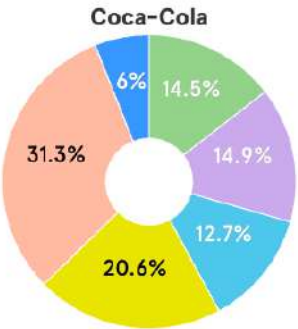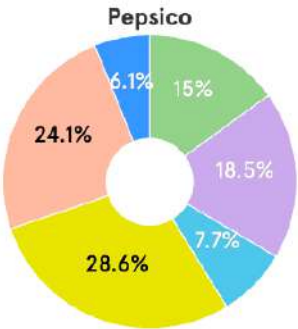
I really like this apporoach (from Rachel Liggett at Nestle) about how sustainability is not just about materials, but also METHODS!

**Pepsico**
- 15%
- 18.5%
- 7.7%
- 28.6%
- 24.1%
- 6.1%

**Coca-Cola**
- 14.5%
- 14.9%
- 12.7%
- 20.6%
- 31.3%
- 6%

**Nestle**
- 13.1%
- 13.2%
- 4.5%
- 29.8%
- 31.6%
- 7.8%

**Beyond Meat**
- 12%
- 15.3%
- 3.1%
- 23.7%
- 36.1%
- 9.8%

**Oatly**
- 13.7%
- 16.9%
- 2%
- 22.2%
- 33.3%
- 11.9%

**Innocent Drinks**
- 7.2%
- 22.1%
- 1.9%
- 13.6%
- 45.9%
- 9.3%

Vox
**Yes, plant-based meat is better for the planet**
The environmental debate over meatless meat, explained.

Legend:
- Sustainable Packaging
- Renewable/Natural Materials
- Reducing/Zero waste
- Fairtrade/Supply Chain
- Carbon Reduction
- Transparent Information

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Pulsar is the leading AI-powered audience intelligence platform, combining conversational and behavioral signals from the world's leading digital sources to help organizations understand their audiences and create messages that matter to them.

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