

October 27, 2021

Hakuhodo Survey on Decarbonization Awareness and Action among *Sei-katsu-sha*

**Action: How can we inspire Japanese *sei-katsu-sha* to take decarbonization action?
Findings from a survey conducted in September 2021**

**60% of *sei-katsu-sha* want to know how to contribute to decarbonization in daily life
Having fun and a sense of contribution is key to facilitating action**

Hakuhodo Inc.'s MIRAI Business Division and the Hakuhodo SDGs Project teamed up to conduct a nationwide study, the Hakuhodo Survey on Decarbonization Awareness and Action among *Sei-katsu-sha*, in September 2021.

Many agree that the household sector holds the key to achieving the greenhouse gas (GHG) reduction target of 46% (vs. the 2013 level) to be reached by 2030, as the sector is expected to reduce its emissions by 66%. A previous report (on decarbonization awareness findings, published on October 18), found that despite their strong interest and willingness to contribute to a post-carbon society, *sei-katsu-sha* do not know exactly what to do, largely due to a lack of relevant information. This report on action seeks to identify effective information and approaches to drive *sei-katsu-sha* to decarbonization action. The survey was conducted over September 18–19, 2021 covering 1,400 males and females aged 15–79 across Japan.

Key Findings

Beginning with simple steps in daily life

- 56.3% of respondents were interested in obtaining information about simple steps in daily life and products/services that contribute to decarbonization.
- Asked about areas of interest for decarbonization action, 42.0% of respondents cited food and beverages, followed by electricity, gas, water supply and other infrastructure facilities, with 40.1%, and daily commodities, toiletries and sanitary goods, with 29.4%, indicating their focus on the immediate environment.

Not only affordability but also a sense of contribution and fun learning

- Asked about what information might drive decarbonization action, respondents cited affordability and simple steps in daily life, followed by labeling of CO₂ reductions from using a product, and labeling of CO₂ reductions from changing how they use a product. The results point to people's preference for quantifying and visualizing their contribution through behavioral change.
- As the most convenient way of obtaining information, 40% of respondents preferred websites that aggregate decarbonization information and simple steps in daily life and video- and content-based websites that make it fun to learn, respectively. Relatively more people in older age groups cited informative websites, while Gen Z people (aged 15–24) preferred to enjoy learning.

From reducing use to repair: Broad options for decarbonization action while enjoying life

- Asked about effective incentives for action, most respondents cited reward schemes and discounts, but Gen Z and females under 40 were more motivated by product appeal, such as looking stylish or cute (*kawaii*).
- Waste recycling and reducing wasteful power and water usage were among the low-hanging fruits for the respondents. Elsewhere, people placed more emphasis on repairing and reusing (not purchasing) products than on purchasing zero- or low-carbon products.
- Food was a favorite topic for respondents when presented with information on simple steps in daily life, including local production for local consumption and how to enjoy unmarketable fish. A considerable percentage of respondents also wanted information on repairing instead of disposal or selling services.

Our Observations

We found that toward realizing a post-carbon society, *sei-katsu-sha* are looking primarily for information on simple steps they can take in daily life. However, it is up to information providers to find the appropriate content and best way to convey that information.

Quantification of reduction efforts was one of the most motivating information items, which indicates that people want specifically to feel a sense of contribution in return for their personal actions.

With environmental issues thus far, expectations were on ethics-driven action on the part of *sei-katsu-sha*, such as cutting back and recycling. Although the results of this survey still point to this tendency, they also indicate a change of attitudes in favor of engagement in proactive and enjoyable decarbonization experiences, with many respondents, particularly among Gen Z, preferring to enjoy learning, as well as stylish and cute products. Presenting decarbonization action alternatives such as the purchase of second-hand products and the use of rental products as “ideas to enjoy life” may also be an effective measure to facilitate action.

Given that the topic tends to be centered on learning and ethics, success in facilitating decarbonization action appears to depend on the provision of information and suggestions on how *sei-katsu-sha* can enjoy such action as part of their lifestyles. (Observations provided by the analyst)

Survey outline

Method:	Internet survey
Respondents:	1,400 males and females aged 15–79 across Japan *The results were weighted back for analysis purposes to reflect the demographic composition by gender and age. Data cited in this document are weighted-back figures
Survey area:	Nationwide
Survey period:	September 18–19, 2021
Conducted by:	H.M. Marketing Research, Inc.

Implementing bodies

This survey was jointly conducted by the MIRAI Business Division, Hakuhodo’s new business development arm, and the Hakuhodo SDGs Project, a company-wide initiative to support companies’ SDGs efforts.

MIRAI Business Division

Launched in 2019, the MIRAI Business Division is a Hakuhodo unit dedicated to developing new businesses. Based on a commitment to collective business creation, Hakuhodo itself becomes an owner of the businesses developed and brings together a variety of partners with the goal of creating new businesses of value to *sei-katsu-sha*. Drawing on Hakuhodo’s strengths in creativity and bringing stakeholders together, the Division designs new societies and industries of the future.

Hakuhodo SDGs Project

The Hakuhodo SDGs Project was launched as a company-wide initiative to help clients achieve business innovations from the perspective of the SDGs. Members of the Project include staff with marketing/branding, PR, business development, R&D and creative experience and expertise in the SDGs. They are primarily involved in solution development, corporate management support, business development support, and marketing support to serve the business objectives of the next generation, i.e., integrating the economic and social impacts of companies.

■ About Hakuholdo

Founded in 1895, Hakuholdo is an integrated marketing solutions company headquartered in Tokyo, Japan. With offices in 20 countries and regions, and over 10,000 specialists working in Japan and around the world, Hakuholdo is the world's second largest advertising agency according to *Ad Age's* "Agency Report 2022." It is the core agency of the Hakuholdo DY Group.

Sei-katsu-sha insight is the foundation for Hakuholdo's thinking, planning, and brand building. It reminds us that consumers are more than shoppers performing an economic function. They have heartbeats. They are individuals with distinct lifestyles. Hakuholdo introduced this term in the 1980s to emphasize its commitment to a comprehensive, 360-degree perspective on consumers' lives.

With *sei-katsu-sha* insight as its cornerstone, Hakuholdo combines creativity, integrative capabilities, and data and technology to play a leading role in evolving companies' marketing activities and generating innovation for the digitalized era. This enables the company to impact and provide value to *sei-katsu-sha* and society.

Renowned for its creativity, Hakuholdo has won the Grand Prix at Cannes Lions International Festival of Creativity twice, and was named Network of the Year at ADFEST 2021.

To learn more, visit: www.hakuholdo-global.com

* See pages 4 to 8 for more details.

Media contact:

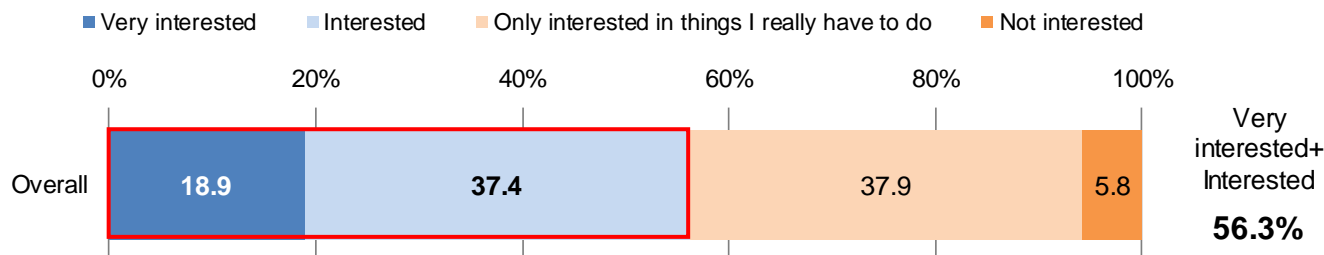
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A closer look at the findings

Interest in simple steps toward decarbonization

Almost 60% of the respondents were interested in obtaining information on simple steps in daily life and products/services that contribute to decarbonization (56.3% were very interested or interested).

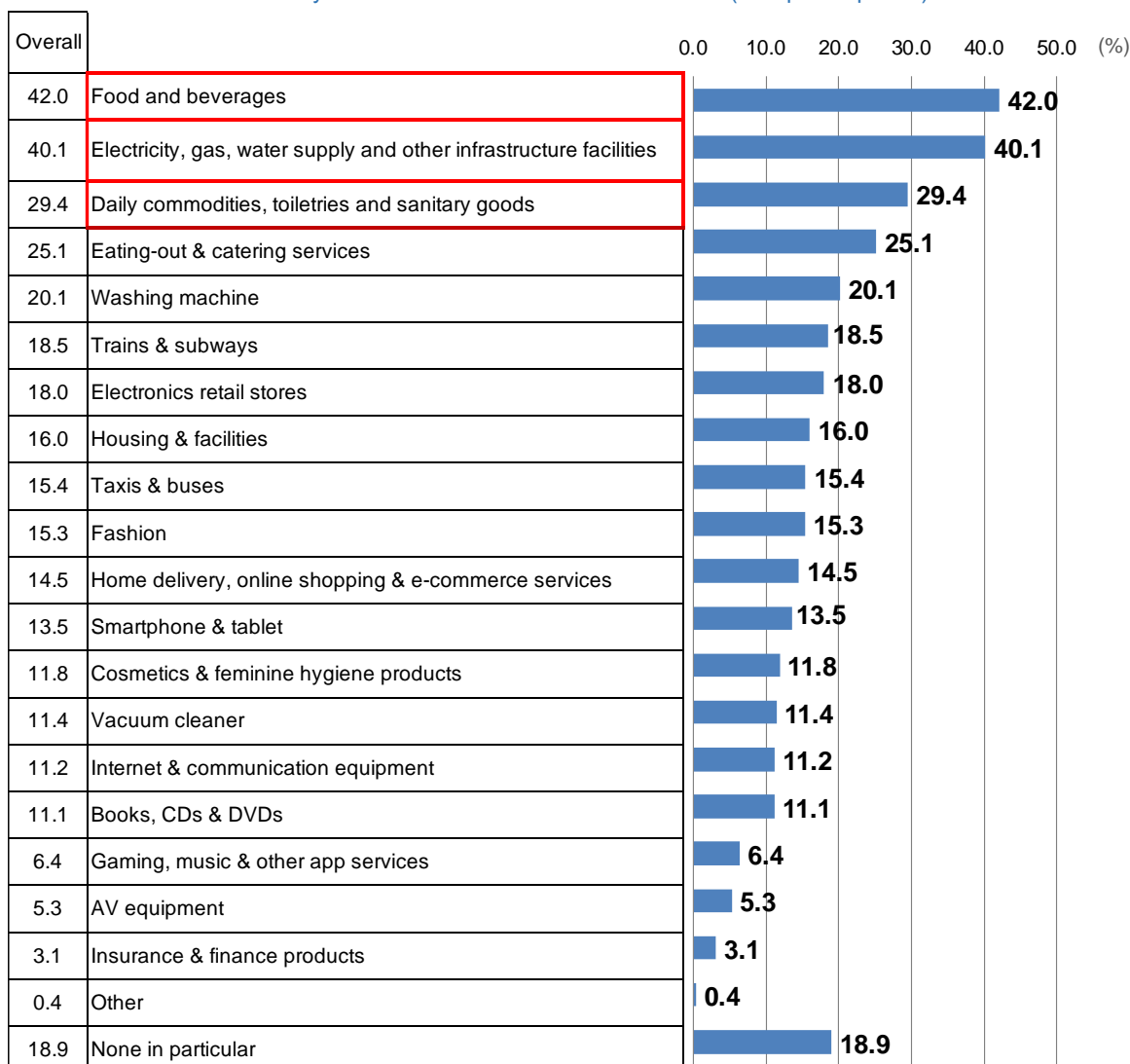
Q: To what degree are you interested in obtaining information on simple steps in daily life and products/services that contribute to decarbonization?



Areas of interest in taking action

People's interest in decarbonization action is focused on their immediate environment, with many respondents citing food and beverages (42.0%), electricity, gas, water supply and other infrastructure facilities (40.1%) and daily commodities, toiletries and sanitary goods (29.4%).

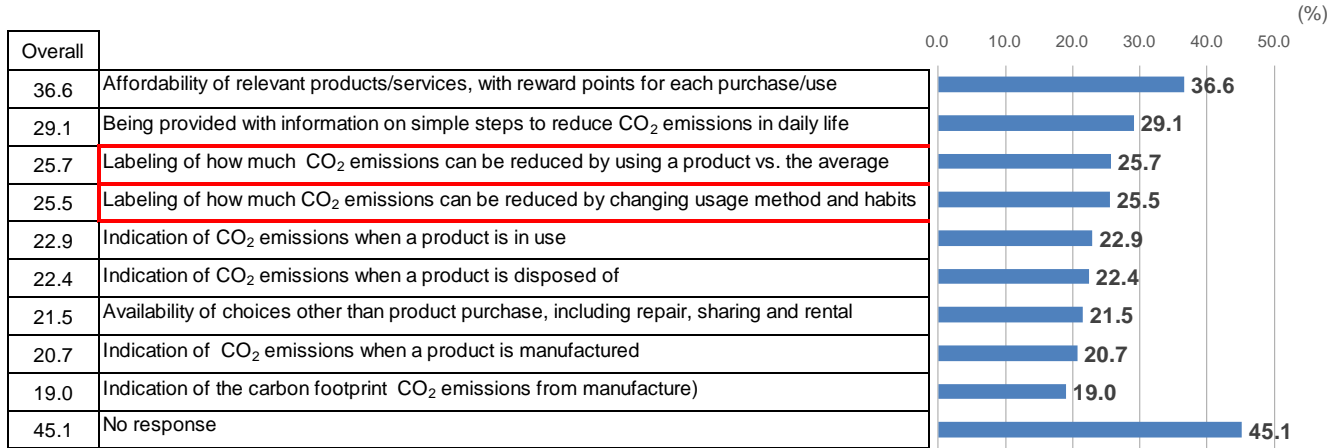
Q: Where would you like to start decarbonization action? (Multiple response)



Information to drive decarbonization action

When asked about what kind of information might drive decarbonization action, most respondents cited affordability of relevant products/services, with reward points for each purchase/use (36.6%), followed by being provided with information on simple steps to reduce CO₂ emissions in daily life (29.1%), labeling of how much CO₂ emissions can be reduced by using a product vs. the average (25.7%) and labeling of how much CO₂ emissions can be reduced by changing usage method and habits (25.5%). The results point to people's preference for quantifying and visualizing their contribution through behavioral change.

Q: What kind of information do you think might drive decarbonization action? (Multiple response)

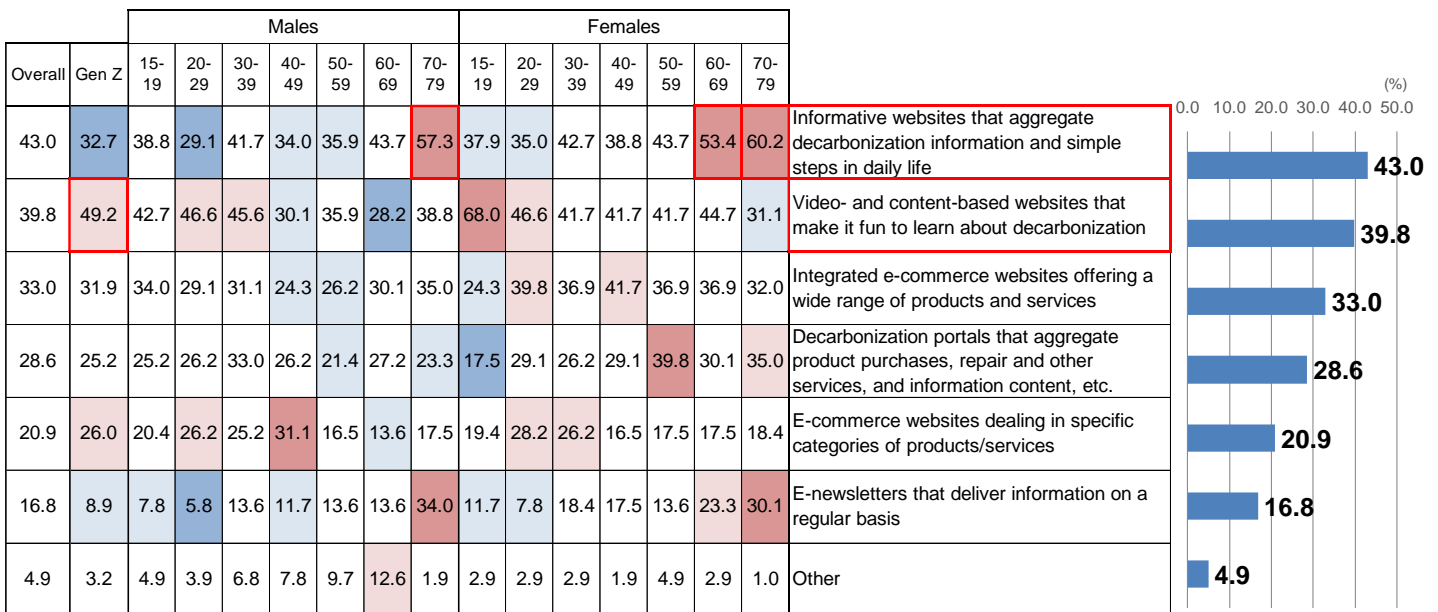


Convenient form of information provision

Respondents were presented with multiple types of websites focusing on decarbonization, and asked which of them would be most convenient. The results indicate that most people prefer informative websites that aggregate decarbonization information and simple steps in daily life (43.0%), followed by video- and content-based websites that make it fun to learn about decarbonization (39.8%).

Differences may be observed among gender and age groups, with older people preferring informative websites while Gen Z people are more attracted by websites designed to make learning fun.

Q: What form of decarbonization information would be most convenient for you? (Multiple response)

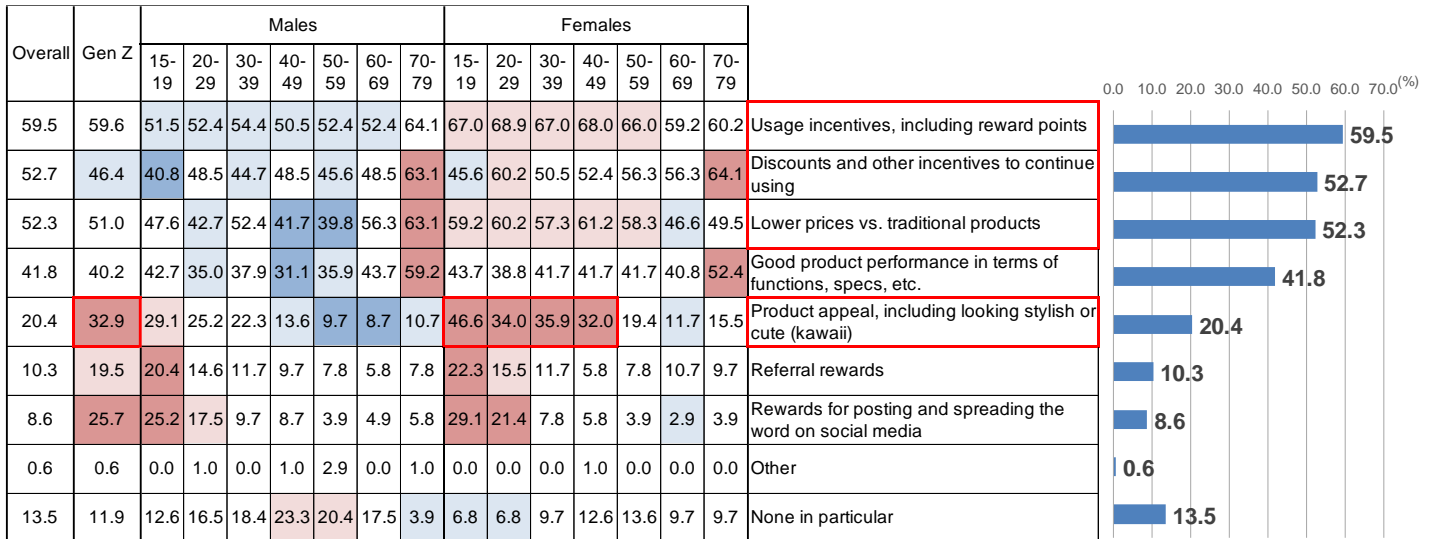


■ Incentives for decarbonization action

The most popular incentives to drive decarbonization action included financial incentives such as usage incentives, including reward points; discounts; and lower prices.

For Gen Z and females in their 20–40s, however, product appeal, including looking stylish or cute (*kawaii*), was more likely to induce action, with the share of this response exceeding the overall score by more than 10 points in those groups.

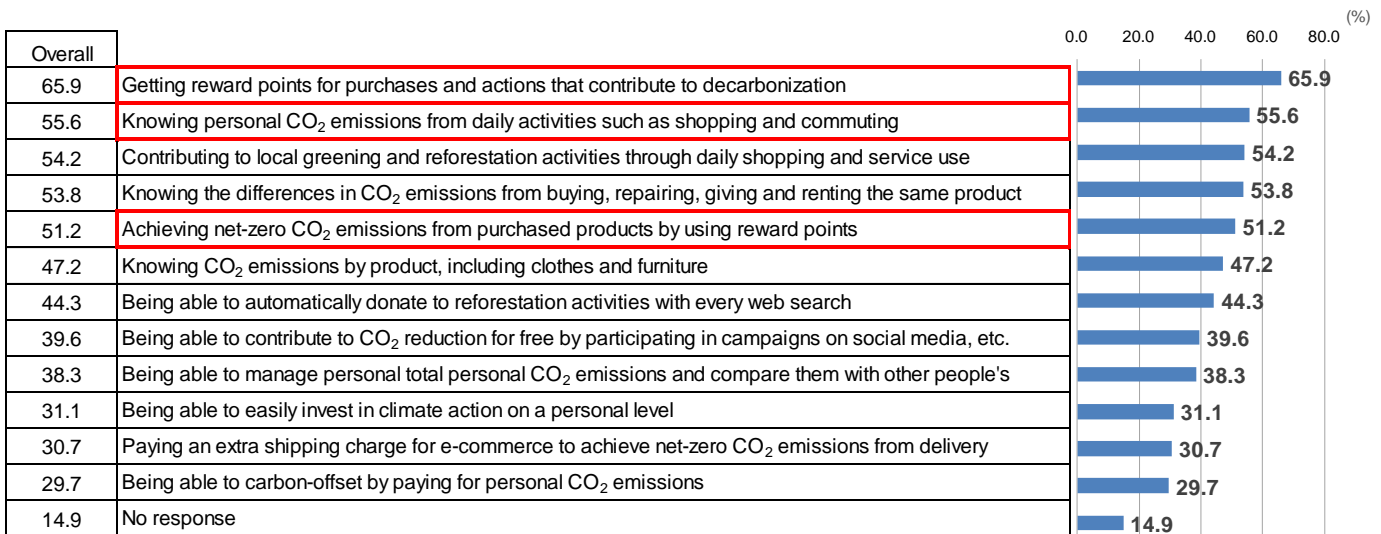
Q: What incentives might be effective in driving decarbonization action?
(Multiple response)



■ Intention to use services

As regards the services that they would like to use, most respondents preferred getting reward points for purchases and actions that contribute to decarbonization (65.9%), followed by services that quantify emission reduction, including knowing personal CO₂ emissions from daily activities such as shopping and commuting, and achieving net-zero CO₂ emissions from purchased products by using reward points.

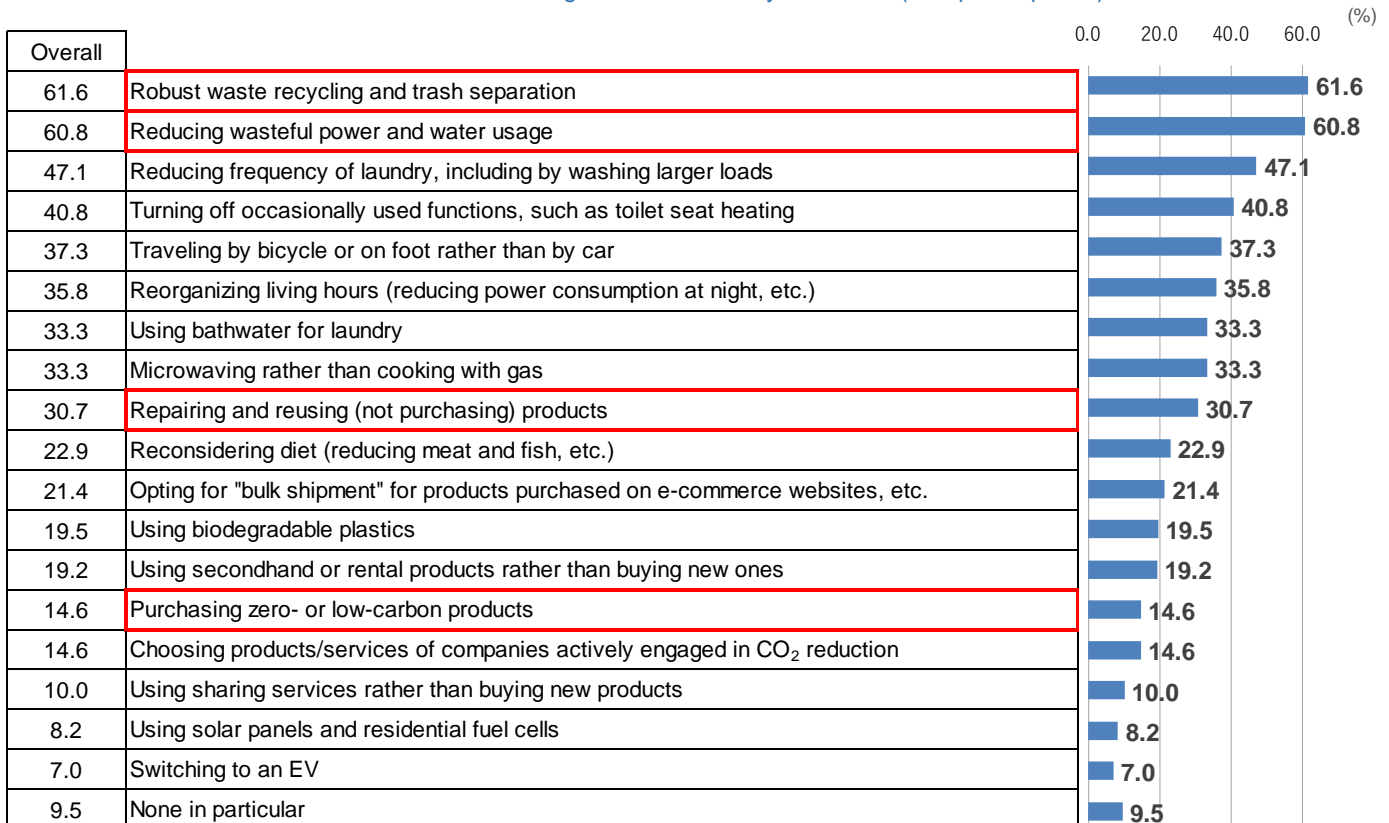
Q: To what extent would you like to use the following services? (Very much+Somewhat)



■ Efforts within reach

When asked about the efforts for a post-carbon society within their reach, most respondents cited robust waste recycling and trash separation (61.6%), and reducing wasteful power and water use (60.8%). Elsewhere, people placed more emphasis on repairing and reusing (not purchasing) products than on purchasing zero- or low-carbon products.

Q: Which of the following efforts are within your reach? (Multiple response)



■ Attractiveness of information on simple steps in daily life by topic

We presented multiple topics regarding simple steps in daily life for reducing CO₂ and asked the respondents to evaluate their attractiveness. The results indicate that most people are interested in transporting: information on local production for local consumption (67.7%), consumption: information on repairing (not disposal or selling) services (62.3%) and diet: information on how to enjoy unmarketable but actually tasty fish (62.0%). Thus, people seem to find food-related information attractive.

Q: How attractive are the following topics on simple steps to reduce CO₂ emissions?
(Very attractive+Somewhat attractive)

