

We Do Open Source Intelligence



synthesis

Sustainability IRL:
Decoding The Audience for Sustainability

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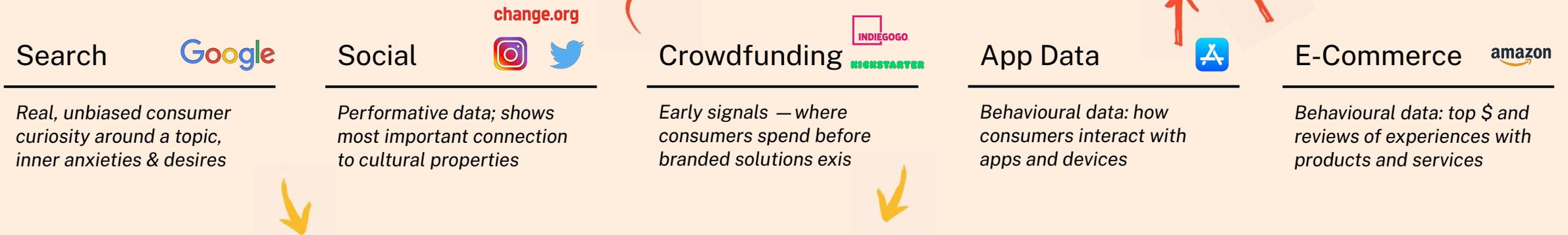
We Do

**Open Source Intelligence
for Good.**

We layer **Open Data** to expose opportunity.

Sleep Innovation - For a global pharma brand

Combining **sleep app records** (behavioural data) with **solutions** people buy (crowdfunding, e-commerce data) to generate innovation platforms, prioritized by consumer demand and estimated \$\$ opportunity



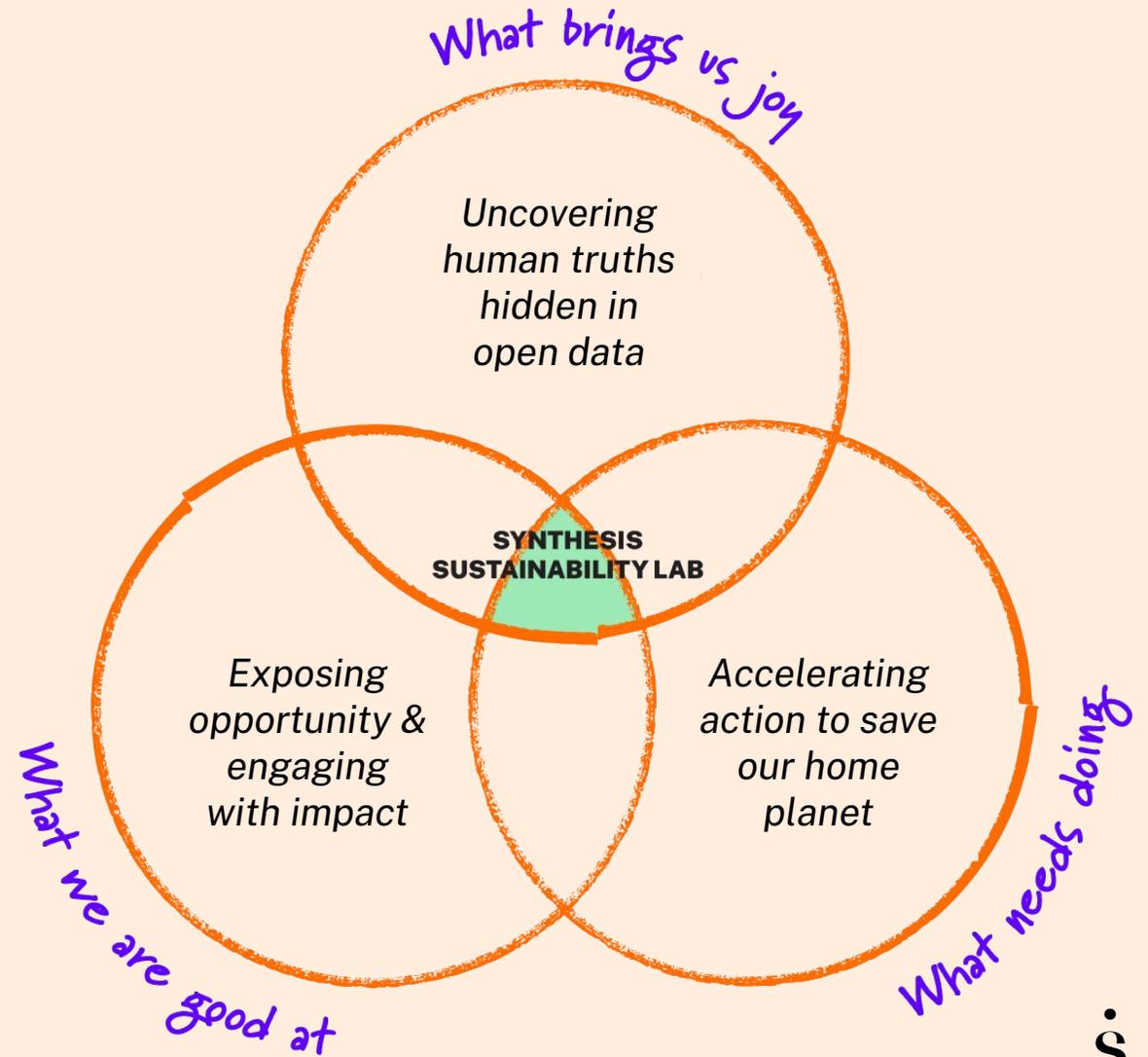
Reaching New Audiences - For Alliance to End Plastic Waste

Layering **topics** people search about (behavioural data) with **media, movements, influencers, brands** they engage with (social networks), **causes and innovations** they support (petition, crowdfunding data) for targeted consumer outreach

synthesis Sustainability Lab

Where we harness Open Source Intelligence in service of **sustainable solutions** and **purpose-driven initiatives**

We collaborate with NGOs, governments and businesses to boldly address the climate emergency



Synthesis Sustainability Lab

We help purposeful organisations connect with consumers.



Who do we need to win over to scale impact?

Know your growth consumer



*What **issues** do they care about and how do we get them to **take action**?*

Translate interest into action



*What sustainable solutions should we **invest** in?*

Explore and invent better futures

SUSTAINABILITY IRL

A landmark study to uncover the sustainability audiences in Singapore

sustainabilityIRL.synthesis.partners

The Need.

We know that people want to act on the climate emergency. Searches around plant-based diets, zero waste and sustainable living are all rising, globally.

But people interpret sustainability very differently. Because their lives, worldviews and experiences vary.

Even the most well-intentioned brands and organisations have blind spots when it comes to people's perceptions of sustainability.

The result? Marketing sustainability is *hard*.

Initiatives often target the same people, regardless of issue (usually the advocates who were going to engage anyway), creating an echo chamber.



Why Audiences?

Marketing today is hyper-personalised, designed to persuade and influence, based on a deep understanding of the consumer. But because we don't know enough about the 'consumers' of sustainability, this hasn't happened to the same degree on climate action.

We need to change that.

Like any effective brand campaign, we believe the start point is understanding the distinct audiences engaging with sustainability.

By decoding their values and motivations for caring, we can derive lessons for influencing those who are passive or apathetic.

And we can begin to create strategies to engage the widest possible audience — breaking the 'eco' chamber.



Methodology: Mapping behavioural networks to uncover the community of **Sustainability audiences** in Singapore.



Expansive definition of Sustainability

Comprehensive list of sustainability-related SG accounts with influence.

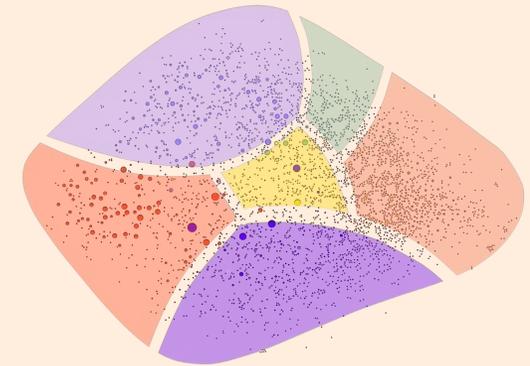
Including govt entities, NGOs, movements, brands, influencers, media, etc.



Building the Community

Capturing thousands of individual Singaporeans who engage with sustainability accounts, and their interests *beyond* sustainability.

(All analysis is done at aggregate level in compliance with GDPR)



Clustering Audiences

Using network mapping, we identify distinct audience segments based on their behavioural similarities and differences.

Why

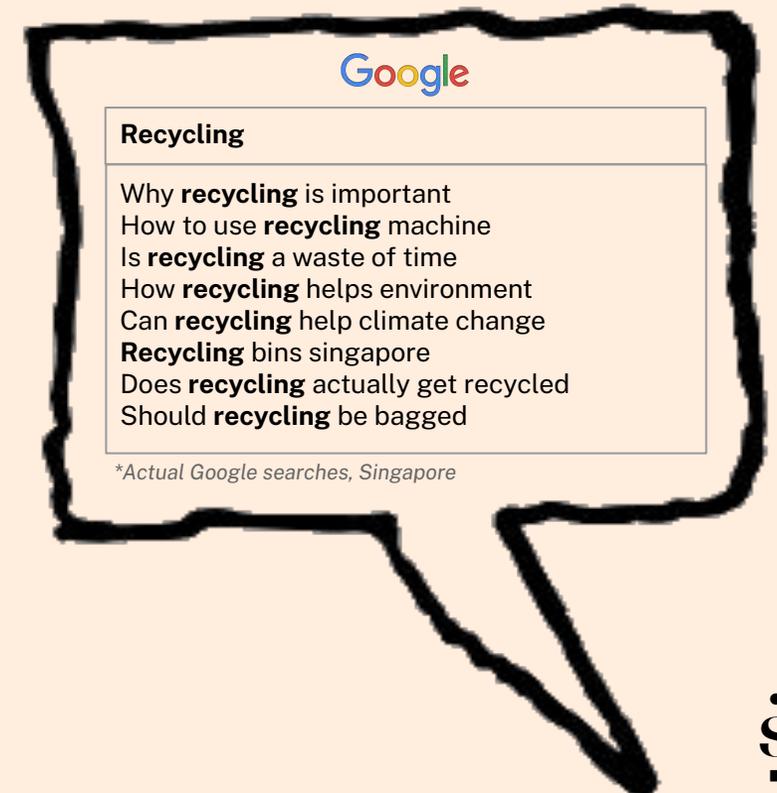
**Open Source Intelligence
for Sustainability.**

WHAT MAKES US DIFFERENT.

Organic consumer narratives, without the leading questions.

We analyse behaviours & conversations that are already happening.

Social posts that people are sharing, unprompted.

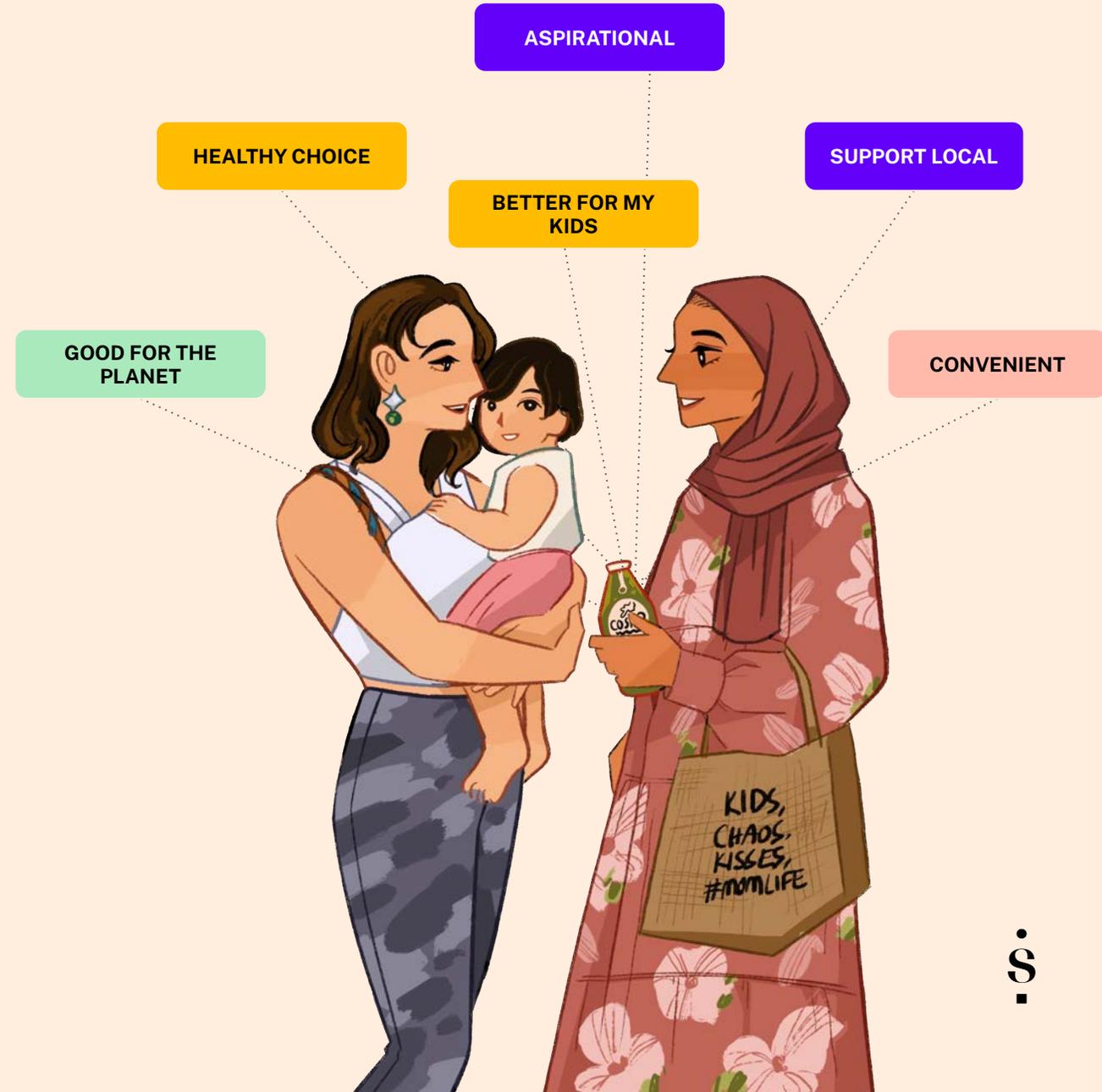


WHAT MAKES US DIFFERENT.

Sustainability in the **context** of people's lives.

Changing people's values is way harder than appealing to the values they already hold.

Values matching + influence networks = **real change.**

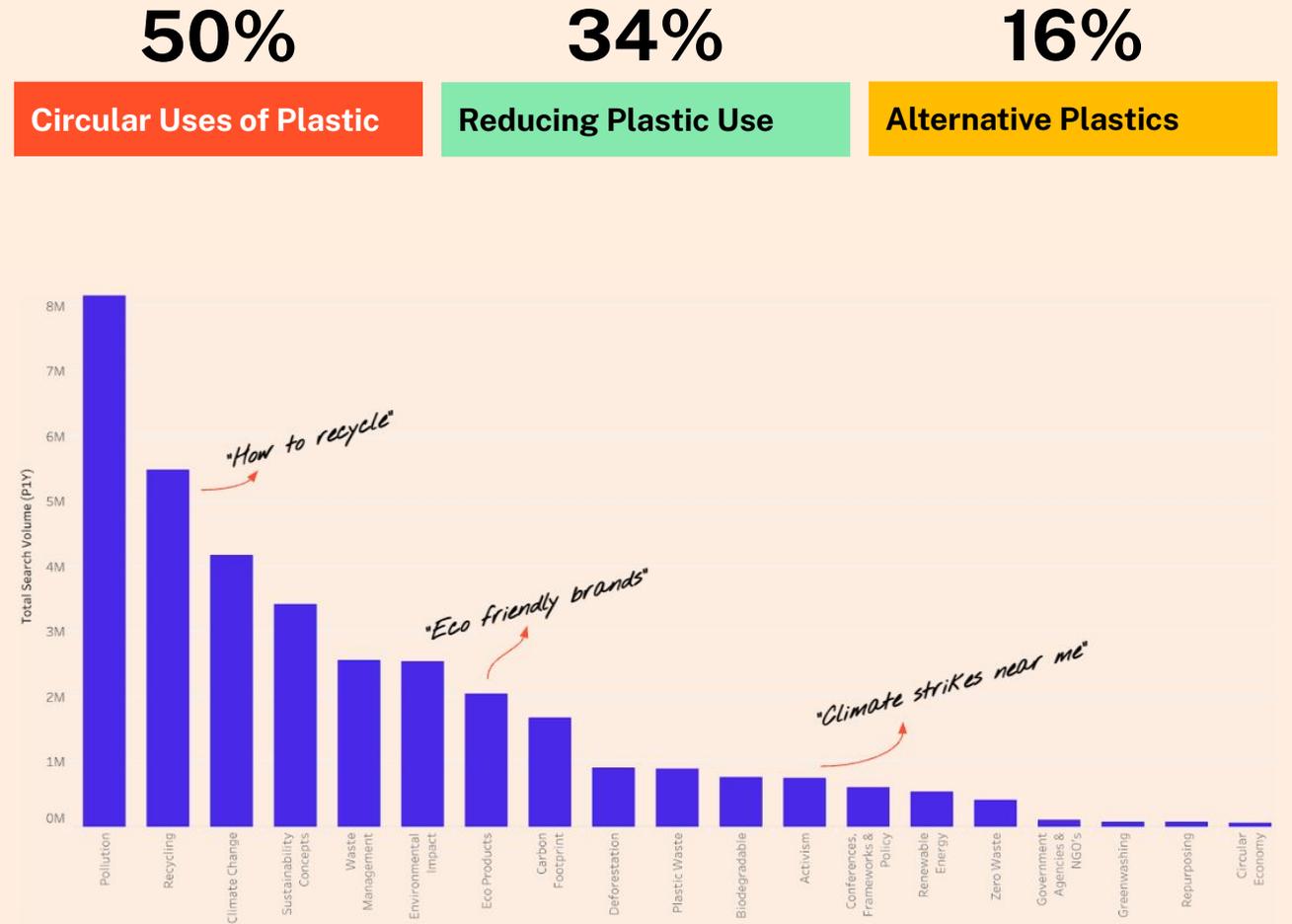


WHAT MAKES US DIFFERENT.

Scale of consumer demand.

We aggregate thousands of connections, millions of posts, searches, reviews.

Giving stakeholders the confidence to act and invest.

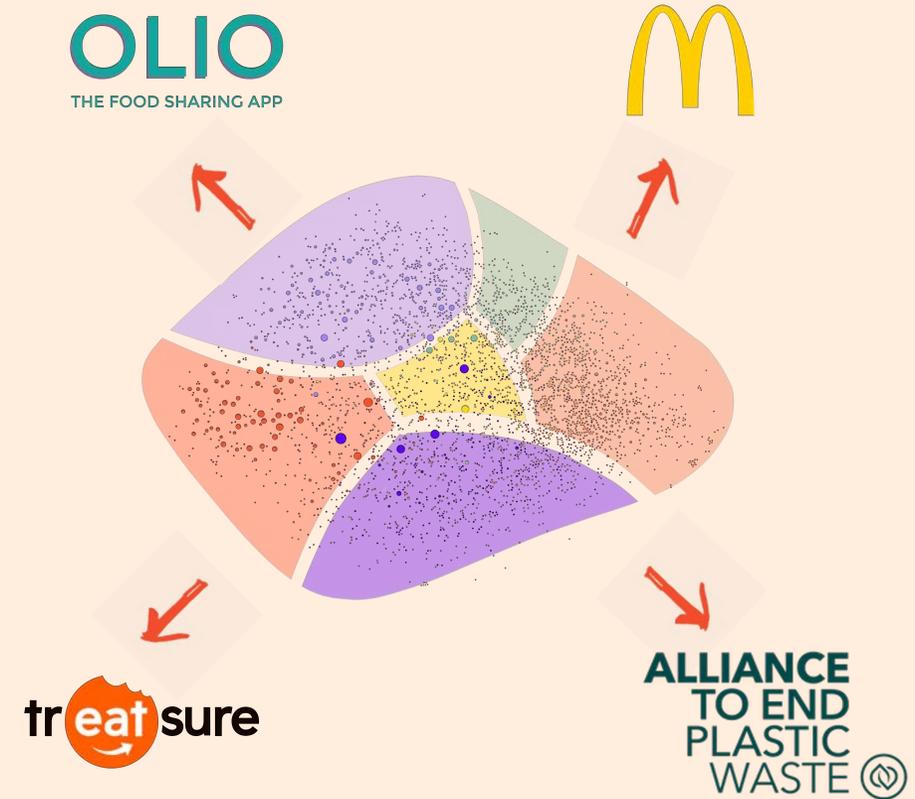


WHAT MAKES US DIFFERENT.

Sustainability shouldn't be proprietary.

We co-invest in datasets that support multiple purposeful organisations.

Easily refreshed & repurposed, by design.



How much

**Do Singaporeans *actually*
care about sustainability?**

Almost 2 million (or 1 out of 3) Singaporeans actively engage with Sustainability...



*Total gen pop audience engaging with Sustainability: 1.5M-1.9M.

Audience sizing derived from Facebook Audience Insights - size of audience engaging with defining properties for each segment.

... But the ways they engage are very different.



Ideological
Systemic
Influential

Practical
Everyday
Individual

Awareness
& Education

Manifestos
& Policy

Petitions
& Rallies

Technology
innovation

Switching
Brands

Recycling

Reusing

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Audience sizing derived from Facebook Audience Insights - size of audience engaging with defining properties for each segment.



Eco Changemakers & Socially Engaged Mavens are the most passionate advocates, but are smallest by gen pop size.



Eco changemakers
(43 -69k)



Socially Engaged Mavens
(211 -290k)



Eco Futurists
(210 -300k)



Optimistic Providers
(496 -860k)



Pragmatic Heartlanders
(874 -1.3M)



Pop Culture Followers
(1 -1.4M)

*Audience sizing derived from Facebook Audience Insights -size of audience engaging with defining properties for each segment.

Pop Culture Followers & Pragmatic Heartlanders are the biggest growth audiences to win over.



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Meet the Sustainability Audiences



We Found Six Sustainability Audience Personas — Which One Are You?



Do this quiz to find out:

form.typeform.com/to/ZTkp6QZO



Eco Changemakers.

Gen Pop size: 43-69k (Smallest, Rank 6th)

Who they are

Passionate advocates for the environment and very well-informed across a range of issues. Will engage in intellectual discussion and will not shy from in-depth research on topics they care about, esp. on Twitter.

Sustainability is a core value and shapes every aspect of their lives — what they buy, eat, read, support, discuss.

Their Role in Driving Impact

- Inspiring others with what's possible
- Leading community initiatives
- Making the complex actionable, translating into tangible behaviours

Notable Voices

Influential Voices: [Pamela Low](#) (climate advocate), Desmond Lee, Louis Ng, [Tabaogirl](#), Naomi Klein

NGOs: The Sustainability Project, Green Nudge, Greenpeace, WWF, [CAPE](#)

Movements: SG Climate Rally, [BYO Singapore](#), Zero Waste SG

Brands: [Eco.Le](#) (bulk store), The Green Collective, Package Free Shop, Edible Garden City, SusGain

Media: HuffPost Green, Treehugger, EcoWatch, Yale Env 360, [Vegan Bowls](#), [Waste Free Planet](#)

Entry Points into Sustainability

They lead action within their own communities, while looking to global thoughtleaders for guidance.

⚠️ **The heart of the movement - engage them as allies to the cause**



Socially Engaged Mavens.

Gen Pop Size: 211 - 290k (Small, Rank 5th)



Who they are

A politically engaged, progressive-leaning audience.

Strong advocates of social justice and equity. They are vocal allies, especially around issues impacting marginalised communities, like elder poverty, LGBTQ rights and migrant welfare. Beyond social issues, their interests are in arts, design and literature.

Their Role in Driving Impact

- Deconstructing issues to raise individual awareness
- Educating on the link between sustainability and social issues
- Holding leaders and organisations accountable through vocal criticism

Notable Voices

Media: New Yorker, Rice Media, Kinfolk, Design Milk, Diet Prada, Rachel Pang Comics, Our Grandfather Story, The Woke Salaryman

Influential Voices: AOC, [Nguan](#) (local photog), [Teresa](#) (artist), [Tanaka Tatsuya](#), [We're Not Really Strangers](#), Subhas Nair, Alfian Sa'at, Cherian George, Charlie Lim, Margaret Zhang

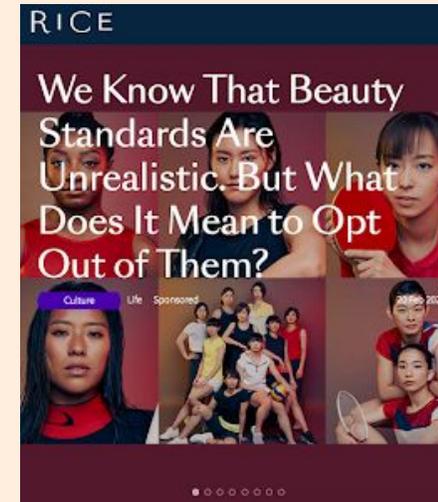
Movements: Fashion Revolution, [Stories of Elderly Hawkers](#), SG Climate Rally

Brands: [Esse](#), Everlane, Olive Ankara, Books Actually, Open Farm Community, Gillman Barracks

Entry Points into Sustainability

Sustainability is as much social as it is environmental. They support with their voice and by preferring ethical brands.

⚠ **Most critical audience - demands transparency and authenticity**



Pop Culture Followers.

Gen Pop Size: 1 - 1.4M (Biggest, Rank 1st)



Who they are

Younger millennial and Gen Z audience, leaning female.

In tune with Western pop culture, celebrity news, latest entertainment, viral memes. Support popular, social causes as a way belonging. Being 'woke' or socially conscious is increasingly seen as a norm to them.

Their Role in Driving Impact

- Amplifying causes and bringing them into mainstream culture
- Rally in support through petitions and movements (even if online)

Notable Voices

Media: Nat Geo Travel, Washington Post, 9GAG, BBC, The Dodo, WSJ, Vogue

Influential Voices: Michelle Obama, Emma Watson, [Jay Shetty](#), Ellen, Kim Kardashian, Gigi Hadid, David Attenborough

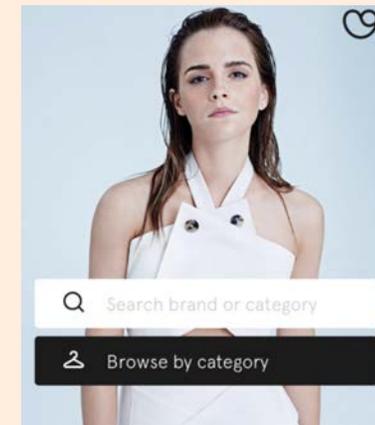
NGOs/organisations: WWF, UNESCO, UN, Unicef, Pink Dot, Greenpeace

Brands: Netflix US, Fenty Beauty, Colorpop, Nike, GoPro, Patagonia

Entry Points into Sustainability

They're influenced by celebs, brands and well-known movements.

 **Big growth audience, but brands and influencers need to help them connect the dots between their choices and impact**



Pragmatic Heartlanders.

Gen Pop Size: 874k - 1.3M (Big, Rank 2nd)



Who they are

Middle class Singaporeans. Predominantly Chinese. Even gender mix.

Represent an SG-first worldview. They are in tune with local news and entertainment, shopping accessible, mainstream homegrown brands.

Stability and social progress are most important to them. They are dedicated to their careers and families.

Their Role in Driving Impact

- Shifting the Overton window
- Small individual changes (e.g. recycling) as entry point for building more impactful, sustainable habits

Notable Voices

Media: [Noontalk Media](#) (Chinese media), [YES 933](#), [SGAG](#), [The Smart Local](#), NOC, 8 Days, Channel 8, UWeekly, Zaobao, Straits Times

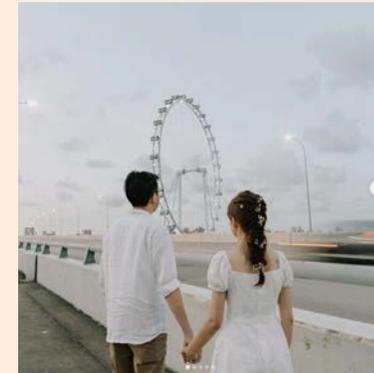
Influential Voices: [He Ying Ying](#), [Shaun Chen](#), [Jamie Pang](#), Jade Rasif, JJ Lin, Charlotte Mei, Lee Hsien Loong, Joseph Schooling

Brands: Love Bonito, Multifolds Wedding Photography, [Bobby Kiran](#), Fashmob, [Lovet](#)

Entry Points into Sustainability

Climate issues are low priority. They follow the gov't's lead and engage when policies affect them personally. Media plays a big role in bringing issues to their attention.

⚠ Sizeable but passive audience - show how issues and initiatives can impact them directly, to connect



Optimistic Providers.

Gen Pop Size: 496 - 860k (Medium, Rank 3rd)



Who they are

Young women in their late 20s/early 30s. Likely new mums or mums with young children.

They care deeply about providing the best for their family – be it through the experiences they expose their kids to, or healthy, sumptuous meals.

They seek to retain a positive personal image and connection with their peers, even as they move into parenthood.

Their Role in Driving Impact

- Supporting green brands through their purchase decisions
- Instilling positive eco habits and values in their children

Notable Voices

Media: [Bring Your Kid Out](#), 8 Days Eat, [Eatbook](#), [Have Halal Will Travel](#), Suria

Influential Voices: [Elaine](#), Zonia Raymond, Lian Meiting, [The Chill Mom](#), [Runway Mummy](#), [Eat What Tonight](#), [Khairul Amin Kamarulzaman](#), [Nadiah M.Din](#), Nadya Hutagalung

Brands: [Cedele](#), Fave, [Disney Studios SG](#), [Innisfree](#), [ToppingsKids](#), [The Elly Store](#), [Amazing Graze](#), The Malayan Council, [Tudung People](#), The Body Shop, [Tiga Folks](#)

Entry Points into Sustainability

Lifestyle trends and popular eco brands. They are motivated by better, healthier options - for themselves and the planet.

⚠ Main decision makers for their households. Connect consumer value with sustainability to win with them



Eco Futurists.

Gen Pop Size: 210 - 300k (Small, Rank 4th)



Who they are

Skews male, college educated. Ambitious individuals likely working in tech or finance jobs. They are career oriented and passionate about startups & venture capital.

Tech is at the core of this audience's interests. They're likely to invest in new technological innovations and products, and keep closely in the loop on innovation trends.

Their Role in Driving Impact

- Using their skills and industry connections to help accelerate / scale new solutions

Notable Voices

Media: Harvard Business Review, The Financial Times, The Economist, Tech in Asia, Tech Crunch, Forbes Tech, TED Talks

Influential Voices: Elon Musk, Bill Gates, Tim Cook, Jeff Bezos, Sam Altman

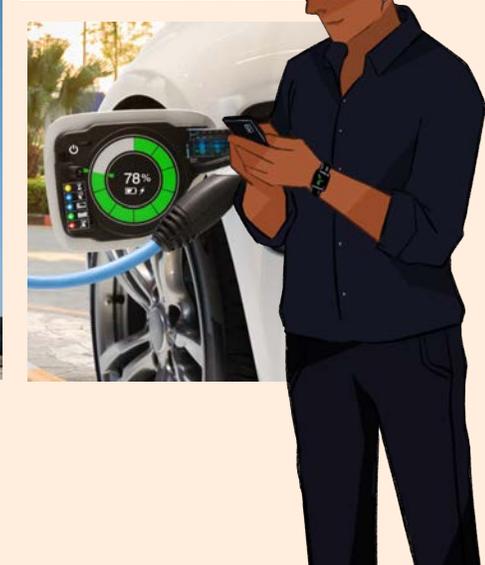
Brands: 500 Startups, Tesla, McKinsey and Company, Bitcoin, BCG, Startup X, Mashable

Entry Points into Sustainability

They believe in the power of tech and accelerating systemic solutions, less so their own individual actions.

 **They are solutionists & early adopters.**

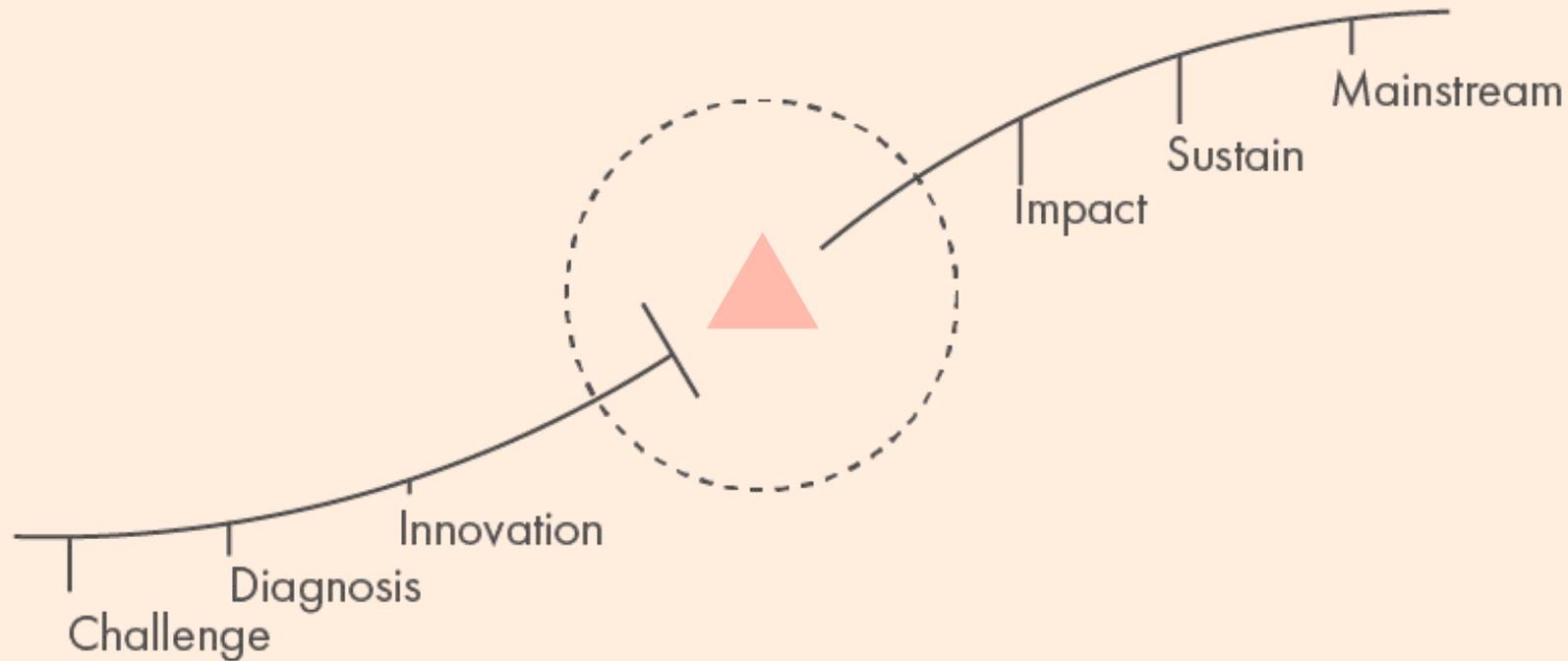
Engage them through green innovations, tech leaders and initiatives that enable them to use their skills for good.



Applying for Action

Use cases

Many of the ideas and innovations for change already exist...



Source: Forum for the Future - Six Steps model

**How can we help you
accelerate & scale?**

Use Cases for this Dataset.

Behavioural segmentation + social posts from Sustainability audiences



Risks & Opportunities

Identify your most **critical audiences** and their pressure points

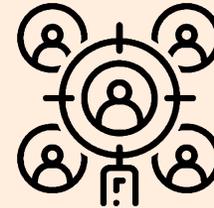
Know who your specific **growth audiences** are and how you can engage them



Category Relevance

Know the issues and initiatives you have the **credibility** to drive, and what audiences' expectations of your organisation are

Learn from best & worst in class initiatives - identified through the consumer lens



How to Communicate

Develop **activation strategy** for amplifying sustainability initiatives and promoting green product lines effectively

- Messaging
- Partnerships
- Tone of Voice
- Do's and Don'ts



Track Impact

Quantify the **consumer value** of sustainability initiatives and campaigns

Real-time tracking to measure impact on priority audiences

In-depth: Sustainability Roadmap for F&B brand.

Objective.

- Build a 3-year roadmap and **change management plan** to drive more **sustained, strategic action** on sustainability.
- Identify sustainability focus areas most **relevant** and **urgent** to act on locally.

Approach.

- **Knowledge rewind** to review global impact areas, brand commitments. **Regulatory scan** to integrate current and upcoming legislation to comply with. **Stakeholder and supplier interviews** to assess internal priorities and capabilities.
- Measure **consumer demand** on a wide range of issues like plant-based meat and sustainable packaging, leveraging Synthesis' SG sustainability audiences segmentation dataset

Approach Overview. Multiple POVs to set the foundations of Sustainability Strategy.



What is the business / policy relevance and consumer demand driving sustainability?

Sustainability Focus Areas. 10 identified areas for SG.

SUSTAINABLE PACKAGING Reduce plastic use and waste in packaging	WATER & ENERGY EFFICIENCY Better resource usage and conservation through running and building of restaurants	PRIORITIES SURFACED FROM KNOWLEDGE REWIND, REGULATORY SCAN, INTERVIEWS
SUSTAINABLY SOURCED INGREDIENTS Drive food security and quality in greener ways	REDUCE EMISSIONS FROM LOGISTICS Achieve clean mobility through greener fuel and vehicles	
DIVERSITY & INCLUSION Embrace diversity. Eliminate discrimination and disadvantages against minority groups	REDUCE FOOD WASTE Minimise volume food waste and improve management of generated waste	STRONG CONSUMER SIGNALS OF DEMAND
CHARITY & VOLUNTEERING Make an impact in the community, help the underprivileged	PLANT-BASED DIETS Minimise carbon impact of food and ingredients, provide options for vegans and vegetarians	
FAMILY WELLBEING Promote wellbeing in families and support kids' education	BIODIVERSITY & CONSERVATION Protect wildlife and environment through awareness-building and supporting initiatives	

What are the most pertinent sustainability issues locally?

Recommended action for projects. Demands vs. capabilities.

	YEAR 1 ACT NOW	PLAN NOW	YEAR 3+ PREPARE
	Amplify/Continue (Y1) Support existing projects Communicate initiatives	Grow (Plan in Y1 for Y2) Build demand. Partner government. Leverage global IP	Gap (Plan in Y1 for Y2) Develop and improve capability. Explore new partnerships
	Monitor (Y2+) Track gov stance & consumer narratives. Prepare for shifts.		
LEGISLATION & BRAND COMMITMENT	Regardless of level of mandate or consumer demand	Regardless of level of mandate	Strong mandate or Weak signals of gov mandate and consumer demand...
CONSUMER RELEVANCE		Strong consumer demand	strong consumer demand...
BRAND & CAPABILITY FIT	... McDonald's SG is already doing this	... McDonald's SG can access capabilities, but is not executing yet	... but McDonald's SG does not have capabilities yet
			... and McDonald's SG does not have capabilities yet

Complexity and investments required
Do we have existing capabilities within our market and global operations?
Is this aligned with our brand proposition?

Which projects should we prioritise in Y1-3?

In-depth: Consumer demand for sustainability.

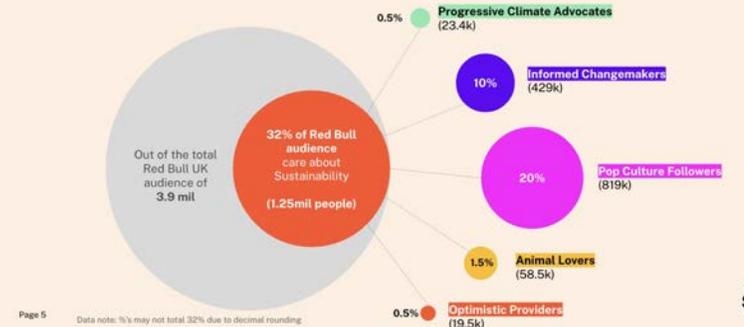
Objective.

- Measure **consumer demand** for sustainability, in order to make the business case for more proactive brand action on issues.
- Assess the **opportunities and risks** for Red Bull in engaging audiences around sustainability.

Approach.

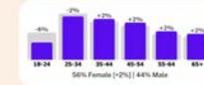
- Matching Red Bull UK's social audience to category-agnostic segmentation of UK **sustainability audiences**, in order to gauge how much its consumers care about sustainability.
- **Prioritising** sustainability audiences to design for -based on measures of vocality (how critical) and size (critical mass)
- Development of **communications platforms** with recommendations based on the topics, media, influencers, posts that priority audiences engage with most

Red Bull's active audience can be mapped into one of five UK sustainability segments.



Informed Changemakers

Red Bull audience size: 429k (10%) | Gen Pop: 1.3m (3%)



What I Value

Civic Responsibility
I feel compelled to stand up for public issues I believe in, especially for marginalised people and groups.

Contribution
I want to create positive change in society. I recognise my own privilege in being able to be an ally to the underprivileged and marginalised.

Integrity
It is important to understand and get to the heart of issues so we can find the most equitable solutions.

Sustainability Topics

Climate Justice	1.49x (vs. base)
Green Deal	1.22x
Fossil Fuels	1.21x
Climate Change	1.18x
Carbon Footprint	1.05x

Why Challenging

Sust. not always the main focus
Primarily care about social equity and justice lenses. Other issues (e.g. race, inclusivity) often take priority.

Emotion may be the catalyst, but solutions need to be rooted in fact
Require cogent arguments for why and how they should take action.

The Risk/ Opportunity

Vocal and action-oriented
Will campaign for causes they care about, driving issues to the fore.

High potential to connect
Esp. through issues relating sustainability to social equity.

Informed Changemakers

Red Bull audience size: 429k (10%) | Gen Pop: 1.3m (3%)

Comms Platform Recommendations

Engage by elevating the conversation to systemic causes and solutions. Offer avenues to understand and make change at the root of the issues.

- Focus the conversation on partnerships that have the potential to drive systemic change, at scale – **industries**, producers, conglomerates, **policies**.
- Balance tips on how to make individual impact with ways for them to hold take **businesses** and **governments** to task.
- Acknowledge root causes and systemic challenges sustainability problems (e.g. **inadequate recycling systems**)
- Avoid statements that can be construed as overly simplistic as this can risk being read as misleading, or greenwashing.



Example Tweets:

"No matter how uncomfortable and unprofitable that may be... We must change almost everything in our current societies... The bigger your carbon footprint – the bigger your moral duty... The bigger your platform – the bigger your responsibility". - [@suzi](#)

"If How do emissions from meat, dairy and other foods compare? The climate impact of beef and lamb dwarfs that of other foods. But producing beef is more than twice as carbon intensive as producing lamb. Find out why 🐮" - [@suzi](#)

"Microsoft is on a mission to recapture all the carbon it's ever produced - and it really means it. An impressively ambitious and hopefully inspires more positive personal and corporate change 🌱" - [@suzi](#)

How much do our consumers care about sustainability?

Who are our most critical audiences and what are the risks/challenges they present?

How should we engage them? Tone, messaging hooks, topics, etc.

synthesis Sustainability Lab

An Open Call for Partners in Purpose

We can't secure a sustainable future, alone.

Get in touch with us:

audrey@synthesis.partners

ash@synthesis.partners

Data Policy

DATA MINIMISATION

We **only collect the data we need for the task** in hand and for historical benchmarking.

ANONYMISATION

As far as possible, we work with **fully anonymized data**. We do this by removing altogether or scrambling personal identifiers or aggregating other identifiers such as geo-tagging.

BEING FORGOTTEN

Our data collection, processing and storage **respect an individual's right to be forgotten**. If we collect content from a public platform that is later deleted it is automatically removed from our data set.

CONFIDENTIALITY

Data is **never shared with unauthorized third parties** outside Synthesis, even informally.

DATA COLLECTION

We **collect data from Public Sources and Anonymized Data Sources**. We do NOT access content from closed or private spaces within social platforms and we **do not collect sensitive data** about individuals.

SHARING DATA

We **never share raw data with our clients or 3rd parties**. Only aggregated and/ or fully anonymized data may be shared.

SECURITY

Our data is **stored on Google Cloud Platform (GCP)** and is password protected, restricted to authorized team members and all access history is logged.