The Passionates: Values and Emotions Will Shape the Future of Business

An influential – and growing – market segment cares intensely about big issues in society, and they want the companies they buy from, work for, and respect to do the same.
How much should you care about an especially demanding minority of your market?

If they’re in the group we’ve dubbed the Passionates, you should care a lot. Because if you don’t show that your values align with theirs, they won’t buy from you, work for you, or even respect you.

Passionates care about multiple important global issues, and they care about all of them with equal intensity. Everything matters to them: themselves, other people, society as a whole, the planet. And while they currently make up only 20% of the general population, they’re likely to become more dominant over time. That makes them an increasingly influential market force to reckon with.
We asked 10,000 adult residents of the United States and Canada to tell us how strongly they care about 17 critical global issues ranging from healthcare access, climate change, and income inequality to data privacy, sexual harassment, and the influence of social media on society. Respondents first chose the five issues they care about most. Then, on a scale of 1 to 4, we asked them to rate how intensely they experienced 12 specific emotions (with 4 representing the strongest concern) when thinking about these issues. We presented six positive emotions (admiration, enthusiasm, inspiration, optimism, pride, and relief) and six negative emotions (alienation, anger, disgust, fear, frustration, and sadness).

Given the importance of the issues, we were not surprised to find that all respondents care about each one to some extent. The five issues respondents cited most often included healthcare access, climate change, mental health, poverty and hunger, and education. However, the results also revealed one group of people who seem incapable of being nonchalant about any of the issues. Indeed, this distinct group cares 37% more strongly, on average, about every single issue we asked about.

For example, the Passionates care 35% more strongly than all respondents about healthcare access, 33% more strongly about climate change, and 39% more strongly about mental health (Figure 1).

Like everyone, this group cares more about some issues than others. However, nothing is unimportant to them; they care deeply even about the issues they consider a lower priority, and they do so with greater intensity and commitment than other people do.

Therefore, it makes sense to name this distinct group the Passionates.

What is a Passionate?

Figure 1: Intensity of emotional response to top 5 global issues

- **Passionates**
- **Everyone else**

<table>
<thead>
<tr>
<th>Issue</th>
<th>Passionates</th>
<th>Everyone else</th>
</tr>
</thead>
<tbody>
<tr>
<td>Climate Change</td>
<td>3.5</td>
<td>2.0</td>
</tr>
<tr>
<td>Education</td>
<td>3.3</td>
<td>2.0</td>
</tr>
<tr>
<td>Poverty &amp; Hunger</td>
<td>3.6</td>
<td>2.0</td>
</tr>
<tr>
<td>Mental Health</td>
<td>3.7</td>
<td>2.0</td>
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<tr>
<td>Healthcare Access</td>
<td>3.8</td>
<td>2.0</td>
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What characterizes Passionates?

Passionates made up one in five, or 20%, of our survey respondents.

Like the general population, half the Passionates are male, and half are female. They are slightly more likely to live in the United States than in Canada, but they are otherwise not concentrated in any particular geographic region. Their household income distribution also mirrors that of the general population, which suggests that income is no more significant than any other factor in making someone feel strongly about global issues.

We also found Passionates among every generation, although the younger someone is, the more likely they are to be a Passionate (see Figure 2).

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To understand why this matters, consider that for many of the issues we covered in the survey, the more strongly respondents feel, the more closely they align with traditionally liberal political views. Despite popular wisdom that people inevitably become more conservative with age, research consistently shows that individuals’ political attitudes remain “remarkably stable” throughout their lives, according to a study in The Journal of Politics. We expect, then, that as the remaining Gen Zers enter adulthood (the youngest are halfway through grammar school), the influence of Passionates on the market will grow accordingly – and it will not wane as each generation ages.
Passionates care significantly more than other people about certain issues. They feel:

19% more strongly about business leaders promoting a positive environment on social media
18% more strongly about sustainable sourcing
16% more strongly about poverty and hunger
13% more strongly about data privacy
12% more strongly about access to quality education
9% more strongly about the importance of workplace diversity
9% more strongly about access to healthcare
9% more strongly about the importance of individual rights

They are also 7% more likely to say that the drawbacks of social media outweigh its benefits.

Another way in which Passionates stand out is their sunny outlook: They’re 7% more optimistic than the general public. Further research is needed to determine the impact of COVID-19, but at the time of the survey (January 2020, before the pandemic spread to North America), 74% of Passionates said they felt positive about the future, compared to 67% of other respondents.

This finding seems counterintuitive: one might assume at first that being acutely concerned about the importance and urgency of every global issue would make people feel anxious or even desperate about the need to change things. However, it’s possible that feeling strongly about an issue gives Passionates a greater belief that they’re capable of shaping the world as they envision it.

What we do know with certainty is that Passionates believe in taking action to make the world a better place – and they expect business leaders to do the same.
What do Passionates want from business leaders?

They expect you to act, and if they don’t approve of your efforts, their judgment is swift and unsparring.

Passionates share the general population’s belief that governments should take the greatest responsibility for solving global problems, but that communities, individuals, and businesses also play a role. Where they differ is that unlike most people, Passionates won’t let your company off the hook.

They want business leaders to care about the issues they care about, and to go beyond just releasing a strongly worded statement. They expect you to act, and if they don’t approve of your efforts, their judgment is swift and unsparring.

It’s so much more important to Passionates that a company is making a difference in the world that they’re significantly more likely to use that as a criterion when deciding whether to buy from, work for, or even respect a company:

90% consider it in a buying decision (vs. 77% of everyone else)

92% consider it in an employment decision (vs. 82% of everyone else)

93% consider it when choosing whether to respect a company (vs. 84% of everyone else)

We do not believe this is a coincidence. If anything, it suggests that Passionates are looking to act on their beliefs.
What makes Passionates want to buy from you?

Passionates consider the same traditional factors when making a purchase that everyone else does; they just don’t consider them quite as important.

- **84%** say price is important (vs. **88%** of everyone else)
- **84%** say quality is important (vs. **89%** of everyone else)
- **83%** say product/service details are important (vs. **86%** of everyone else)
- **83%** say a positive buying experience is important (vs. **84%** of everyone else)

What really stands out to Passionates, compared to everyone else, are the intrinsic characteristics of your company’s leaders. For example, they care more than other respondents that your leaders are authentic (75% to 62%), empathetic (71% to 53%), and that leaders’ public positions on issues align with their own (64% to 51%).

Passionates are also far more sensitive than the general population to aspects of how you run your business and think about your products, such as organizational transparency (75% to 62%) and whether your product is aesthetically pleasing (73% to 62%) (Figure 3).

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What makes Passionates want to work for you?

Like everyone, Passionates care about pay; 82% say salary is an important consideration in choosing an employer. But it matters less to them than it does to the general public (85%). So does a positive work experience (85% to 87%).

When deciding who to work for, Passionates are more likely than others to watch for indications that an organization is ethical and committed to more than just making a profit.

82% care about leaders’ authenticity (vs. 79% of everyone else)
82% value organizational transparency (vs. 78% of everyone else)
82% factor in leaders’ openness to new ideas (vs. 78% of everyone else)
81% consider leaders’ ability to effect change (vs. 77% of everyone else)
81% look for leaders’ empathy (vs. 72% of everyone else)

It’s telling that Passionates believe these factors are as important as or only slightly less important than salary.

Interestingly, the survey also suggests that Passionates consider how their choice of employer might reflect on them: 71% of Passionates say they consider online reviews showing what other people think of the company when deciding where to work, compared to just 52% of other people (Figure 4).
What makes Passionates respect your company?

Passionates respect a company for the same utilitarian reasons other people do, but as with the factors that influence their buying decisions, these matter to them less than how a company and its leaders behave compared to the general population:

- **85% cite the quality of the company’s products and services** (vs. 88% of everyone else)
- **84% cite the features and performance of those products and services** (vs. 87% of everyone else)
- **84% cite price** (vs. 86% of everyone else)

Leaders’ ethical behavior, authenticity, passion and trustworthiness, and organizational transparency matter more or less equally to everyone in determining whether a company is worthy of respect. However, Passionates diverge from other respondents in notable ways when it comes to the following factors:

- **Leaders’ openness to new ideas** (83% to 78%)
- **Leaders’ ability to effect change** (82% to 79%)
- **Corporate actions in the community** (82% to 78%)
- **Leaders’ empathy** (82% to 74%)

In addition, when deciding whether to respect a company, 78% of Passionates think it is important to feel as if they belong to a community connected to it. A similar percentage consider the company’s partner ecosystem and the aesthetics of the company’s products or services in their decisions. These factors were important to only two-thirds of other respondents (Figure 5).
Passionates may only account for one in five of your current and prospective employees and customers. Not only is this a significant minority now, but their proportion of the population is likely to continue to grow.

Millennials, who were born between 1980 and 1994, are assuming leadership roles, and they are making or authorizing significant purchasing decisions. Gen Z is right behind them; the oldest members of that generational cohort (born in the mid-1990s) are finishing college, stepping onto career paths, and launching their adult lives, while slightly younger Gen Zers are in secondary and post-secondary school, taking their first jobs, and starting to flex their spending power.

Because we only surveyed adults, we can’t predict whether the youngest Gen Zers (who, again, are in grammar school), or the generation that follows them (just beginning school) will be even more passionate than preceding generations. But if we extrapolate from current trends, we think it’s clear that Passionates will influence the market for years to come.

As Passionates become increasingly prevalent in the population and insistent on realizing their passions, you can’t afford to ignore them. In fact, your company needs to clear a much higher bar just to induce them to consider working for, buying from, or interacting with you at all. And to do that, you need above all to cultivate the intrinsic characteristics of your company that they consider essential:

• Determine how Passionates feel about a key issue, align your organization’s position with theirs, and take some clear and irrefutable action to show it, such as redesigning a product to be more environmentally friendly or seeking out and showcasing clients who support their values.

• Demonstrate the authenticity, empathy, and transparency they seek as you pursue goals like recruiting new employees and introducing new marketing campaigns.

• Create a way for them to connect by engaging with you, such as launching a forum where consumers can interact with other customers or by encouraging employees to volunteer with their co-workers in the local community.

We expect Passionates to become an increasingly large and influential part of your workforce and customer base. Showing them that you share their passions is essential to your future success – and now is the time to consider how you intend to do that.
Dan Wellers is a Senior Analyst and the Digital Futures global lead at SAP Insights research center.

Connor Gaspar is a Research Data Scientist at SAP Insights research center.

Fawn Fitter is based in San Francisco, where she writes about the intersection of business and technology.

About This Research

The SAP Insights research center conducted this research study to measure the general population’s sentiment and reactions to global issues. The study took place online in January 2020, and 10,000 total responses (8,905 usable) were collected from individuals equally across Canada and the United States. The respondents from each nation were demographically representative across five key factors: age, gender, household income, race, and geographic region.

The SAP Insights research center supports the discovery and development of new research-based thinking to address the challenges of business and technology executives.