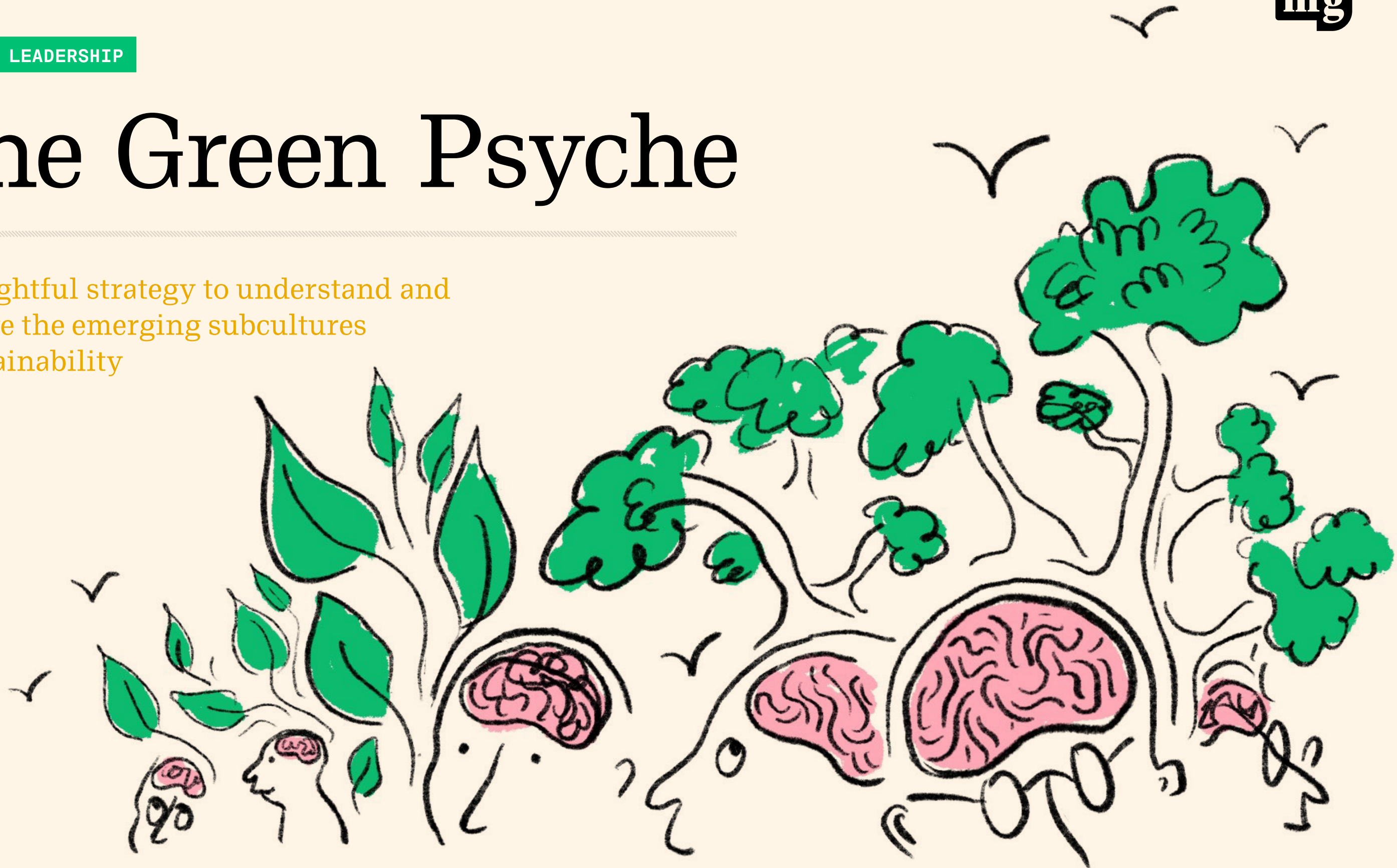


THOUGHT LEADERSHIP

The Green Psyche

A thoughtful strategy to understand and leverage the emerging subcultures of sustainability





Today, how we choose to navigate the climate crisis defines our sense of identity and our place in the world

In 2023, the topic of sustainability—and the climate crisis currently facing our planet—has been all but omnipresent. Climate protests brought city centers across the world to a standstill,¹ while NASA reported that July was the hottest month since global temperature records began.² Meanwhile, heat waves and natural disasters exacerbated by climate change have caused untold devastation and contributed to the displacement of millions of the world’s most vulnerable people.³

So, it’s hardly surprising that, for many of us, concerns about sustainability and our impact on the planet play a major role in governing how we navigate the world and interact with others—from the products that we buy to how we plan our vacations, from the content we share on social media to the politicians and parties we vote for. Across almost every aspect of our daily lives, the social pressure to live a more sustainable life and consider our impact on the planet has become virtually inescapable.

However, the ways in which consumers respond to that pressure can vary enormously. There may once have been a time when it made sense to talk about the “green consumer”—the idea that brands could cleanly separate the people who cared about sustainability from those who didn’t. But in 2023, that notion feels increasingly antiquated. Today, there is no singular “correct” way to be a green consumer; instead, we are all forced to make tough choices about how much and in what ways to let concerns about the planet impact our lifestyles, our political views, and our purchasing habits.

This report sets out to unpack the emerging subcultures of sustainability, and the various ways in which people across the globe are responding, both behaviorally and emotionally, to the pressures of climate change. Today, consumers’ attitudes towards sustainability are more than a political dividing line: they exact a mental and emotional toll that experts argue is becoming increasingly central to our sense of self and our place in the world.

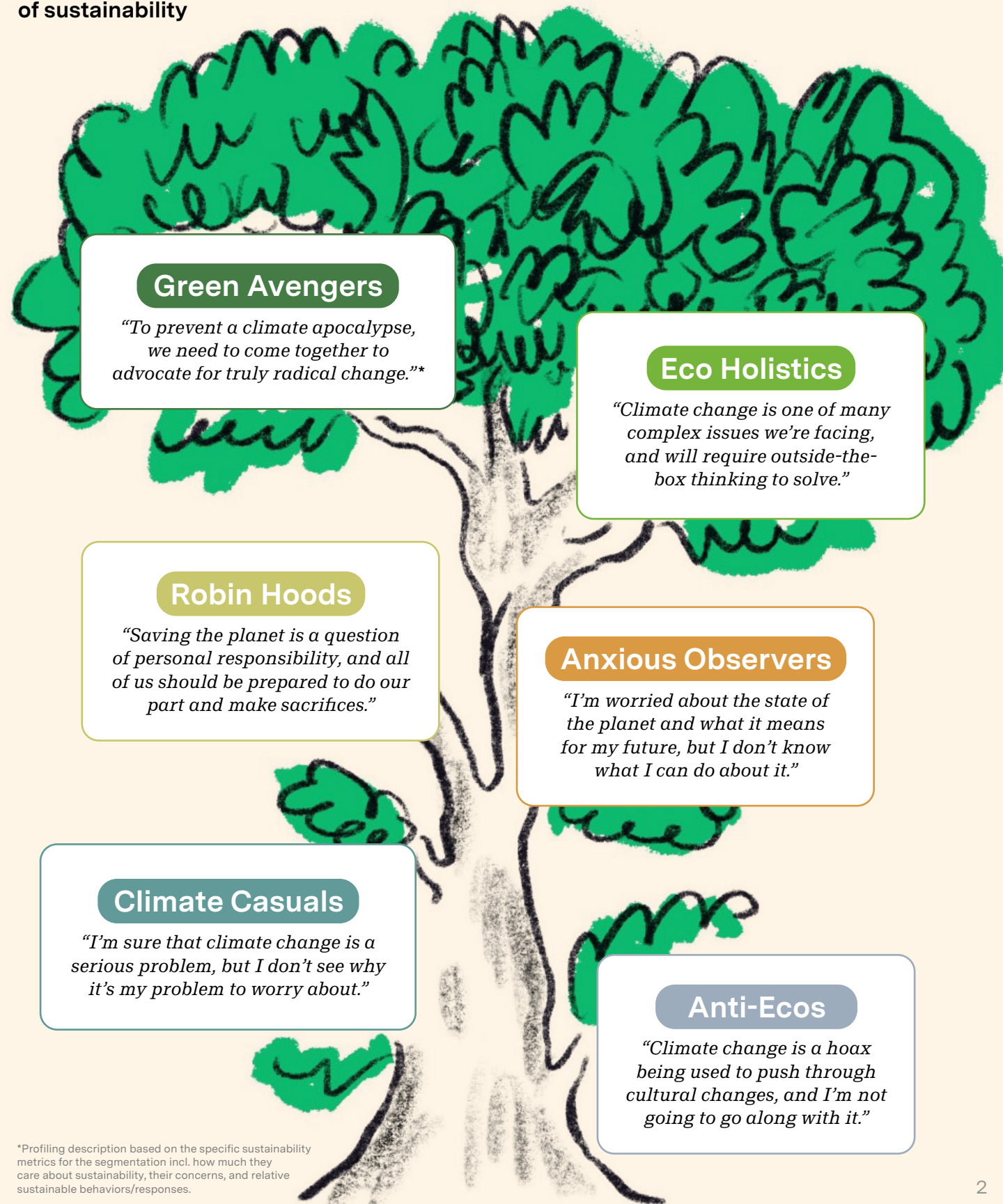
IN THIS REPORT, YOU’LL FIND...

- ✓ How sustainability became a key cultural identifier
- ✓ Understanding the six segments of sustainability
- ✓ Leveraging these segments to market green products and drive support for green policy

Accordingly, NRG recognized the need for a segmentation model that explores subtle nuances that are forming within these subcultures. The model was developed using in-depth studies of consumer attitudes towards sustainability across four key markets—the US, UK, Germany, and France. By understanding the needs and priorities of these segments, brands, marketers, and policymakers can more accurately predict how consumers will respond to their sustainable products, marketing efforts, and policy initiatives; and can ultimately help refine more effective messaging within these areas to foster greater support for sustainability among consumers.

¹ Kate Abnett, “Global climate protests demand world leaders phase out fossil fuels,” Reuters, September 15, 2023
² “NASA Clocks July 2023 as Hottest Month on Record Ever Since 1880,” NASA, August 14, 2023
³ Edna Mohamed, “Climate change displacement: ‘One of the defining challenges,’” Al Jazeera, September 15, 2023

AT A GLANCE The six segments of sustainability



Green Avengers

*“To prevent a climate apocalypse, we need to come together to advocate for truly radical change.”**

Eco Holistics

“Climate change is one of many complex issues we’re facing, and will require outside-the-box thinking to solve.”

Robin Hoods

“Saving the planet is a question of personal responsibility, and all of us should be prepared to do our part and make sacrifices.”

Anxious Observers

“I’m worried about the state of the planet and what it means for my future, but I don’t know what I can do about it.”

Climate Casuals

“I’m sure that climate change is a serious problem, but I don’t see why it’s my problem to worry about.”

Anti-Ecos

“Climate change is a hoax being used to push through cultural changes, and I’m not going to go along with it.”

*Profiling description based on the specific sustainability metrics for the segmentation incl. how much they care about sustainability, their concerns, and relative sustainable behaviors/responses.



Particularly for younger generations, climate fears define how we understand our place in the world and our relation to others

How an individual relates to the sustainability movement is determined, to a large extent, by the era in which they were born. Boomers were born before we properly understood the long-term ecological consequences of industrial activity, Gen X came of age during the inception of early green movements, Millennials have witnessed climate change become a full-blown global crisis, and Gen Z have been born into a world that seems to be constantly on fire. Consequently, these different formative experiences have shaped the way in which these different generations have responded to the climate crisis.

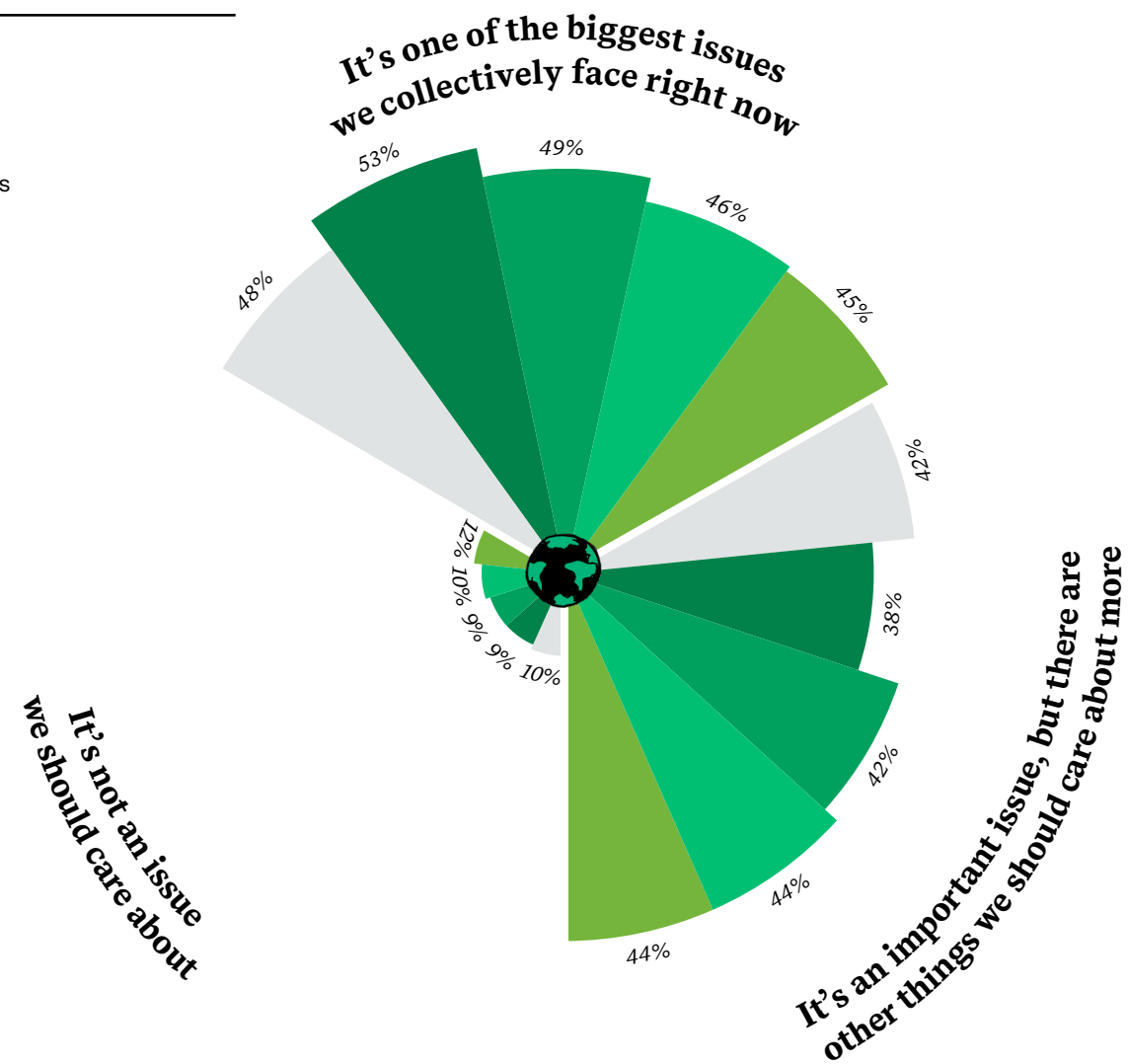
Young climate activists such as Greta Thunberg and Vanessa Nakate have helped to cement the reputation of Gen Z as the most “climate conscious” generation. The data certainly backs up this perception; over half of this generation see sustainability as one of the biggest issues currently facing our species.

More than that, however, climate change has become a major source of daily anxiety for Gen Z and, to a lesser extent, Millennials. That’s because, fundamentally, these consumers are caught between a rock and a hard place. On the one hand, they’re the generations most likely to feel a sense of social pressure to make the world a better place; they’ve grown up barraged by media that tells them to “be the change.” But at the same time, they’re also the generations least likely to feel that the actions they take can actually have a meaningful impact on the fight against climate change.

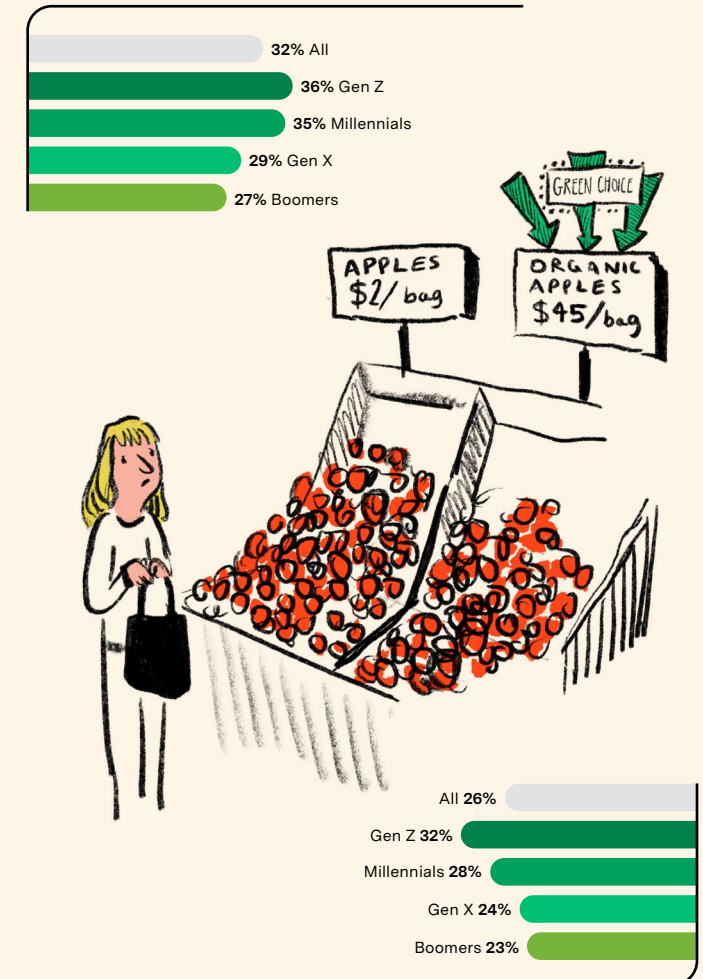


Q: HOW IMPORTANT DO YOU THINK SUSTAINABILITY IS, COMPARED TO OTHER GLOBAL ISSUES?

- All
- Gen Z
- Millennials
- Gen X
- Boomers



Q: DO YOU FEEL A LOT OF SOCIAL PRESSURE TO LIVE A SUSTAINABLE LIFESTYLE?



Q: DO YOU FEEL OTHER PEOPLE/ENTITIES ARE BETTER EQUIPPED THAN YOU TO MAKE THE WORLD A BETTER PLACE?

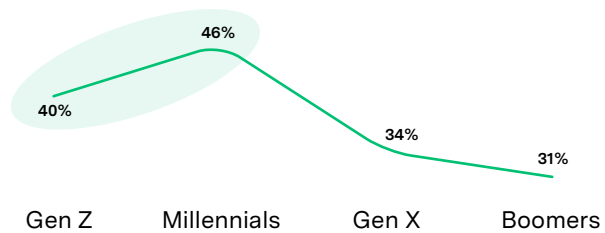
In extreme cases, these contradictions can lead people to embrace the mindset of “climate doomerism”—an attitude that holds that we are on an inevitable path towards climate catastrophe, and therefore any attempt at personal mitigation is inherently futile.⁴ **Twenty-eight percent of Gen Z, for example, now believe that it’s “too late” to do anything about climate change.**

This sort of doomerism, however, is still a minority view. In fact, younger generations are, on the whole, *more likely* to report a general sense of optimism about the future of our planet than their older counterparts.



Q: HOW OPTIMISTIC ARE YOU ABOUT THE HEALTH AND FUTURE OF OUR PLANET?

Percentage reporting high optimism (8 to 10 on a scale of 0 to 10)



So, how is it that these younger consumers are able to maintain this sense of optimism, despite feeling, at best, a highly limited sense of personal agency in the fight against climate change?

The answer lies in a redefinition of what sustainability is and how we, as individuals, ought to relate to it. For younger generations, sustainability is not purely a question of personal responsibility, in the way it was to many of their parents. It’s not just about watching your carbon footprint and making sure to recycle. Instead, it’s a question of *justice* and *accountability*.

Indeed, many young people now see climate change as a willful policy choice that was inflicted on them by the actions of shortsighted governments and corporations. **Sixty-percent of Gen Z, for example, believe that oil and gas companies knowingly lied to the public about the climate impact of fossil fuels and ought to be punished for it.** This, in particular, highlights the societal expectations that await oil and gas companies, who will need to do their utmost to demonstrate taking responsibility for climate change and paying penance, if you will, via sustainability initiatives.

The upshot of this is that these younger generations see climate change and other sustainability challenges as problems that can only be solved through radical *collective*—rather than individual—action. On their own, they may feel powerless, but they also harbor a deep sense that a better world is possible, provided that people are able to mobilize around the right levers of power, be those political parties, consumer boycotts and pressure movements, grassroots activism, or other forms of collective empowerment. But generational understanding on its own can only take us so far when it comes to grasping our relationship with sustainability. Instead, we must acknowledge that **more traditional demographic and psychographic metrics, such as gender, race, and even politics, are no longer enough to paint a comprehensive picture of our sustainability sentiments.** In fact, sustainability has arguably become a part of consumers’ personhoods and imprinted itself on their psyche.



⁴ Sarah Jaquette Ray, “Generation Z is ‘traumatized’ by climate change—and they’re the key to fighting it”, *Fortune*, August 19, 2020

How consumers relate to sustainability has now become an identity marker

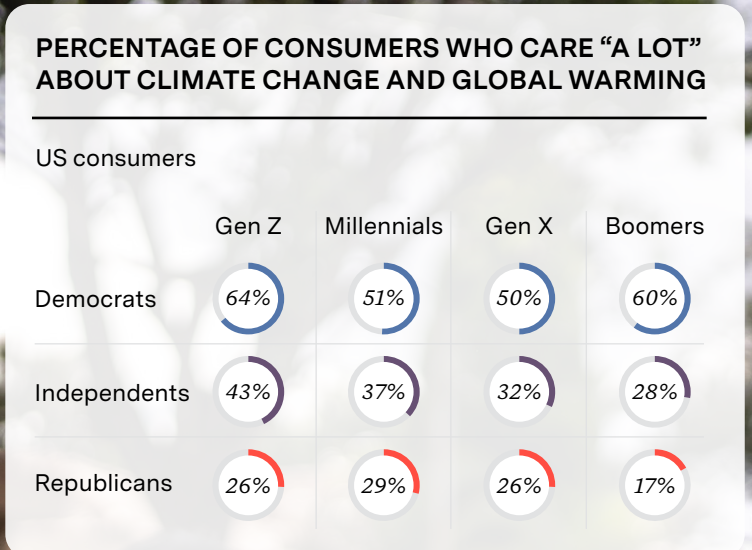
There may once have been a time when it was possible to “opt out” of the conversation around climate change and sustainability; if so, that time has well and truly passed. These days, it’s impossible to turn on the news or scroll social media without being reminded of the ecological challenges facing our future.

How we choose to respond to those challenges, therefore, says a great deal about our values, beliefs, and priorities—and can have enormous repercussions for how we move through the world and interact with others. In 2023, a person’s attitudes towards sustainability can dictate the brands they buy from, the parties they vote for, and the forms of transport they use—among many other such variables. For some, those attitudes can even play a key role in major life decisions such as having kids or choosing what industry to work in.

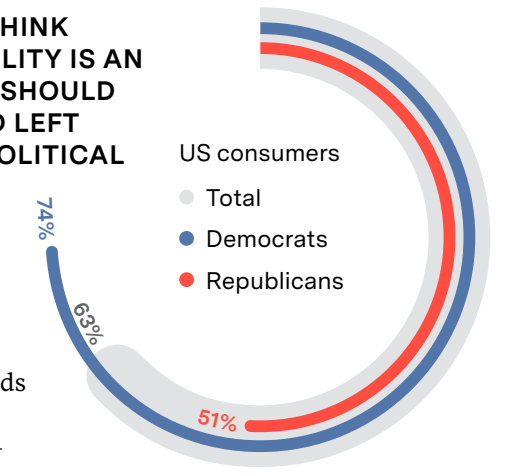
Indeed, experts are becoming more vocal about the rise of “eco-grief,” “solastalgia,” and “climate anxiety” describing the sense of fear and despair related to the planet that are wreaking havoc on our mental health and wellbeing.⁵ They are making the case that the state of the planet is no longer solely political but is actually leaving a very real and extreme emotional mark on us. It seems we’ve entered the era of sustainability’s effect on our soul. As such, consumers’ relation to the concept of sustainability has become every bit as important a marker of identity as traditional demographic or psychographic features. And understanding those relationships has become critically important for any business looking to safeguard its reputation or position itself as a [values-driven organization](#).



⁵ Nina Raffio, “Eco-grief is real — here’s what you can do about it” USC News, September 6, 2023



Q: DO YOU THINK SUSTAINABILITY IS AN ISSUE THAT SHOULD TRANSCEND LEFT VS. RIGHT POLITICAL DIVISIONS?

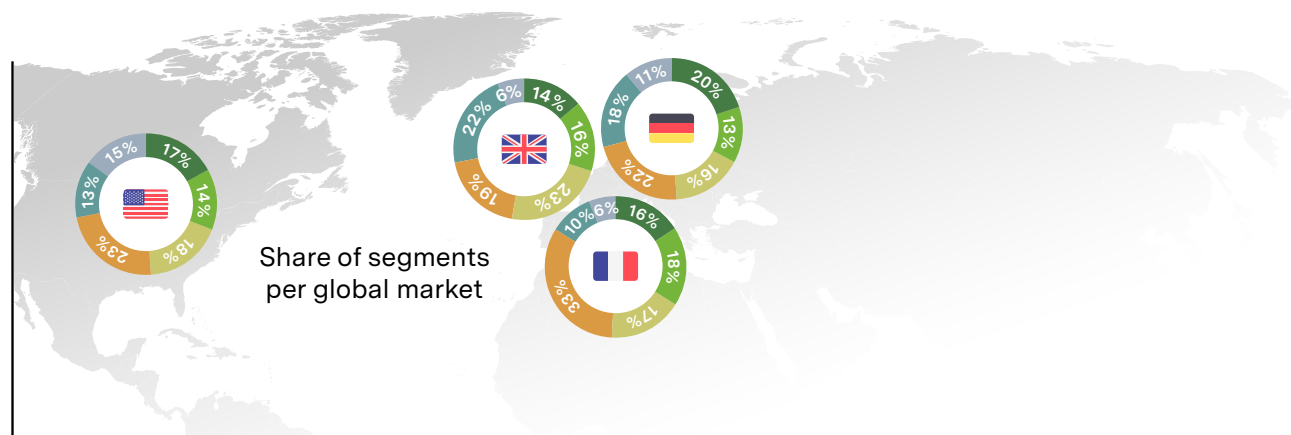


Of course, consumers’ feelings towards sustainability are not wholly independent from other identity markers. Notably, there’s still a strong correlation between political beliefs and attitudes towards climate change. In the US, for example, Democrats of all ages are substantially more likely than Republicans to care about the topic.

But the picture is far more complicated than it once was. Outright climate denial has become rarer on the right of the political spectrum than it used to be—even if conservatives may still disagree with liberals over what the policy response to climate change ought to be, or how much we ought to prioritize it relative to other issues. And **most Americans—even a narrow majority of Republicans—say that sustainability should be an issue that transcends traditional left vs. right politics.**

It’s unsurprising, therefore, that we have begun to see the emergence of distinct tribal identities rooted in how consumers choose to relate to ecological issues—identities that correlate with, but also exist independently from, existing personal, social, and political relations. Accordingly, it is crucial to apply a more thoughtful and personalized approach to successfully capture the nuances that emerge beyond demographic/psychographic indicators. And by understanding the differing green psyche’s of consumers; marketers, brands, and policymakers can strategically target the differing needs, wants, and expectations of these individuals. In particular, our research suggests that **there are six key segments that can help us to understand consumers’ relationships to the sustainability debate.**

The six segments of sustainability



CARES ABOUT CLIMATE CHANGE*

METHODOLOGY

Segments were identified based on a cluster analysis of consumers' responses to a broad range of attitudinal and behavioral questions, including:

- **How much they care about sustainability overall**
(i.e., On a scale from 0 to 10 where zero meant "don't care about sustainability at all" and 10 meant "care about sustainability much more than everyone else")
- **Their willingness to pay for sustainable alternatives, the degree of pressure they feel to live more sustainably, and if they care about their personal carbon footprint or not**
- **Their overall sense of responsibility in the fight against climate change**
(i.e., "I feel personally responsible" versus "I feel other people/entities are better equipped to make the world a better place")
- **How they believe sustainability should be prioritized relative to other political and cultural issues**
(i.e., whether or not they "care a lot about climate change/global warming or other ecological issues")
- **Levels of optimism and pessimism about the future of our planet**
(i.e., whether or not they believe it is "too late to do anything about climate change")
- **Preferred policy and/or personal responses to sustainability challenges**
(i.e., whether or not they feel pressure to become more sustainable, they believe there will need to be "radical and transformative changes," and/or that "people will need to make personal sacrifices to their quality of life")



SUSTAINABILITY KNOWLEDGE

Green Avengers



Green Avengers strive for radical change, both on a personal and policy level

“Our planet is dying, and we’re running out of time to fix it. I’m doing what I can in my personal life to make a change, but that’s not going to be enough on its own; we need to hold governments and corporations to account, and come together to advocate for truly radical social changes. That’s why I see it as my responsibility to be vocal about the need for change, and to stay constantly vigilant for misinformation.”*

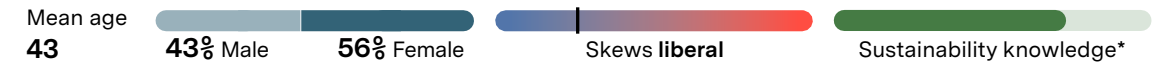


*Profiling description based on the specific sustainability metrics for the segmentation incl. how much they care about sustainability, their concerns, and relative sustainable behaviors/responses.

TL;DR three things to know about this segment

- 1 Among all the segments, Green Avengers feel the greatest sense of urgency about the climate crisis.
- 2 They see governments and big corporations as necessary allies in the fight against climate change, and believe they can be pressured into doing the right thing through collective action.
- 3 As such, they often act as “sustainability watchdogs,” doing their own research and holding brands to account for the promises they make.

WHO ARE GREEN AVENGERS?



*only applicable in US and UK markets

Of all the segments, Green Avengers care the most about sustainability. To them, sustainability isn’t just another issue we need to do something about; it’s *the* issue, the defining question of our time that should be prioritized above all others. The planet is on fire, and all of us have to do our part to help put it out.

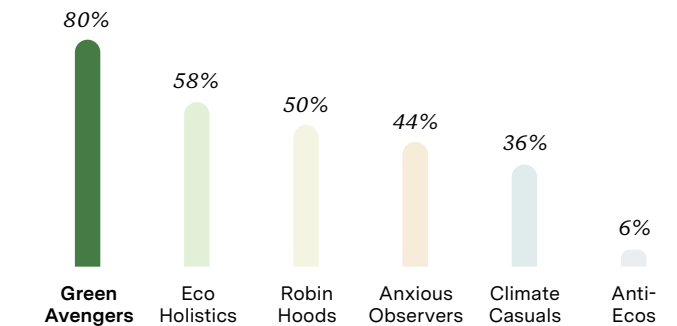
For Green Avengers, this heightened sense of urgency drives a strong sense of responsibility that spans across both the personal and political realms. Consequently, many of them have already made substantial lifestyle changes—ranging from reducing meat intake, to recycling more often, to cutting down on unnecessary travel.

Crucially, however, Green Avengers also believe that individual lifestyle changes, on their own, won’t be enough to successfully mitigate against the worst case scenarios of climate change. They believe that true change can only be achieved through concerted collective action; by people coming together and using their voices to force governments and corporations to make a commitment to acting in the best interests of the planet.

As such, they’re the group that is the most likely to have attended a public protest about sustainability or to have shared content relating to sustainability on social media. They’re also the most likely to support government mandates that compel individuals or corporations to act more sustainably—such as restricting the sale of single-use plastics, issuing heavier fines to companies that violate environmental regulations, or banning short-haul flights.

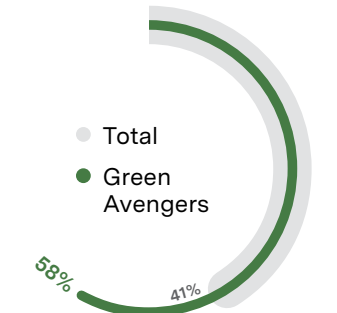
In many ways, Green Avengers see themselves as watchdogs who are responsible for holding politicians and businesses to account. They emerge as highly values driven influencers, which—as unpacked in our [recent paper on corporate reputation](#)—highlights that they can be extremely useful for evaluating how well a company’s sustainability initiatives and communications impact reputation. Indeed, seven out of 10 Green Avengers say that they will often research the sustainability of a product before deciding whether to buy it—scrutinizing product reviews and the brand’s website, and keeping an eye out for news stories that show whether the brand in question has successfully managed to live up to its sustainability promises.

Q: DO YOU BELIEVE SUSTAINABILITY IS ONE OF THE BIGGEST ISSUES WE FACE RIGHT NOW?

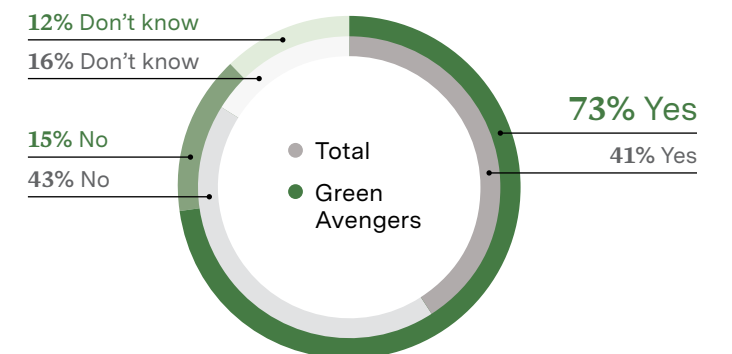


Q: DO YOU FEEL PERSONALLY RESPONSIBLE FOR MAKING THE WORLD A BETTER PLACE?

% Selected ‘this describes me’



Q: HAVE YOU EVER MADE ANY CHANGES TO YOUR PERSONAL LIFE SPECIFICALLY TO BECOME MORE SUSTAINABLE?



Eco Holistics



Eco Holistics see the bigger picture, and believe in the value of innovation in fighting climate change

“Climate change is a major threat, but we need to understand it in the context of other ecological and geopolitical challenges. At the end of the day, complex problems require complex solutions. That means that solving the climate crisis is going to take action on both the state and the individual level. And it means governments and private sector companies working hand-in-hand together to find truly innovative and cost-effective solutions.”



TL;DR three things to know about this segment

- 1 Eco Holistics care about sustainability almost as much as Green Avengers, and feel a strong sense of personal compulsion to take action.
- 2 However, unlike Green Avengers, they see sustainability as one of many important challenges facing our planet—not the only concern we should be focusing on.
- 3 They believe that addressing the climate crisis will require private sector innovation alongside a mix of top-down and bottom-up action.

WHO ARE ECO HOLISTICS?



*only applicable in US and UK markets

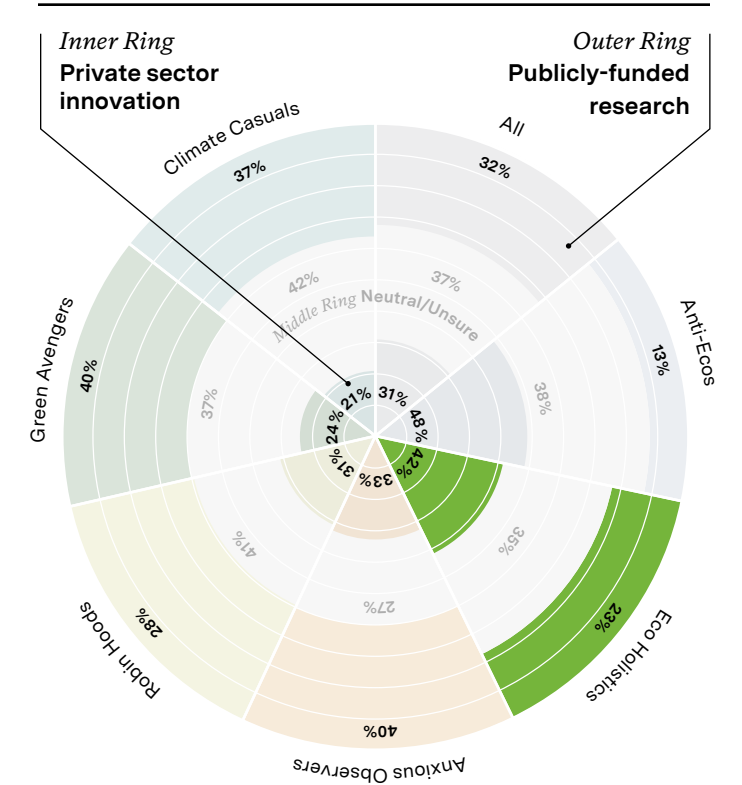
Eco Holistics care deeply about the topic of sustainability—almost as much as Green Avengers do. But unlike Green Avengers, they don’t see it as the be-all and end-all that should be governing all public policy. Instead, they’re more likely to see sustainability as one of many complex, multifaceted challenges facing our species—alongside issues such as cybersecurity, geopolitical instability, and wealth inequality. As a result, they’re far less likely than Green Avengers to believe that governments should prioritize fighting climate change over and above economic growth.

Balance is the name of the game for this group, in more ways than one. While Green Avengers believe that the climate crisis necessitates radical social change—driven by governments and other state-level actors—and Robin Hoods see sustainability as a question of personal responsibility, Eco Holistics fall somewhere in the middle. For them, top-down and bottom-up actions are equally important in the fight against climate change—and both have the capacity to make a meaningful difference.

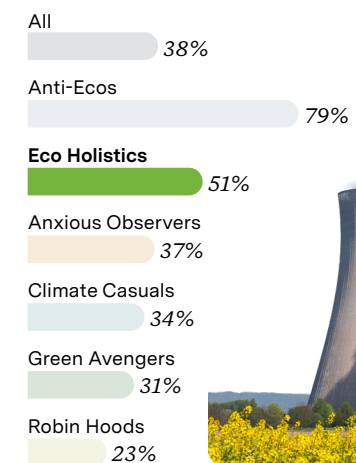
Notably, there’s a strong streak of tech-optimism that runs through this group. Compared to other climate-conscious segments like Green Avengers and Robin Hoods, this group is slightly more conservative in their general political outlook; which may have something to do with the fact that they tend to believe that governments should be doing more to incentivize private sector innovation to fight climate change. By the same token, **they’re also the most likely consumers to have bought a hybrid or electric vehicle.** Again, it’s all about balance—in this case, the public and private sectors working hand-in-hand to tackle the crisis our species is facing.

An extension of this tech-forward approach to solving climate change is Eco Holistics’ strong support for nuclear power. Just over half of them believe that nuclear energy should be an important part of the energy mix for their countries—making them, with the exception of the Anti-Ecos, the most pro-nuclear consumer segment.

Q: CLIMATE CHANGE CAN BE BEST ADDRESSED BY...



Q: DO YOU BELIEVE NUCLEAR POWER SHOULD BE AN IMPORTANT ENERGY SOURCE FOR YOUR COUNTRY?



Robin Hoods

Robin Hoods believe in personal sacrifices and are among the most willing to implement lifestyle changes



“All of us have a responsibility to do our bit in the fight against climate change, and no act is too small! I do everything I can to live a more sustainable life and am willing to make the necessary sacrifices, especially since I can’t seem to trust governments or corporations to get their act together. You know what they say, you want something done right then do it yourself. I’ll share my tips and tricks with anyone who will listen!”



TL;DR three things to know about this segment

- 1 Robins feel a strong personal responsibility to save the planet, which manifests in making sacrifices and cutting back on unnecessary consumption.
- 2 They believe we should be holding each other accountable, and will go out of their way to offer guidance to others on how to live a more sustainable life.
- 3 To Robins, big business is the enemy; they believe in shopping locally or buying second hand wherever possible.

WHO ARE ROBIN HOODS?



**only applicable in US and UK markets*

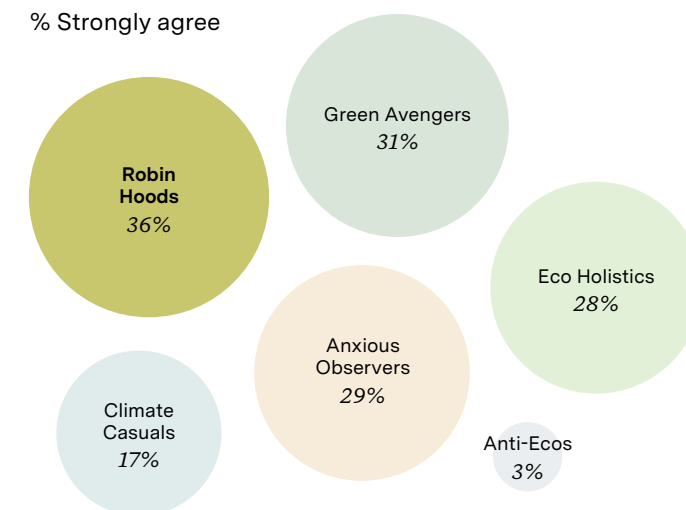
Robins personify the concept of the “conscious consumer.” For them, sustainability is, first and foremost, a matter of personal responsibility. When it comes to saving the planet, they firmly believe that no action is too small, and that each and every one of us ought to be doing our bit for the cause.

Like Green Avengers, Robin Hoods feel a strong personal obligation to help solve the climate crisis. But whereas Green Avengers prioritize political engagement and organization, Robins instead tend to manifest that sense of obligation into conspicuous personal sacrifices. They have a strong “less is more” mentality; many of them have tried to reduce their environmental footprint by taking public transport and/or repairing or upcycling old products.

Further, they strongly feel that all individuals should adjust their behavior to live more sustainably—regularly encouraging their circle around them to make more sustainable choices. To an extent, this way of thinking is borne out of an instinctive distrust of governments and political parties. For Robin Hoods, it’s individuals—and individuals alone—who have the power to truly affect change.

For the same reason, Robins can also be highly skeptical of the sustainability claims made by large corporations. To many of them, the safest way of being a climate-conscious consumer is to eschew major brands altogether, buying products instead from local businesses or from second-hand stores.

Q: DO YOU AGREE THAT PEOPLE NEED TO BE PREPARED TO MAKE SACRIFICES TO THEIR QUALITY OF LIFE TO SAVE THE PLANET?



Q: DO YOU AGREE THAT WHEN IT COMES TO MAKING A DIFFERENCE TO THE ENVIRONMENT NO ACTION IS TOO SMALL?



THE SUSTAINABILITY ISSUE ROBIN HOODS CARE ABOUT THE MOST → ACTIONS THEY TAKE

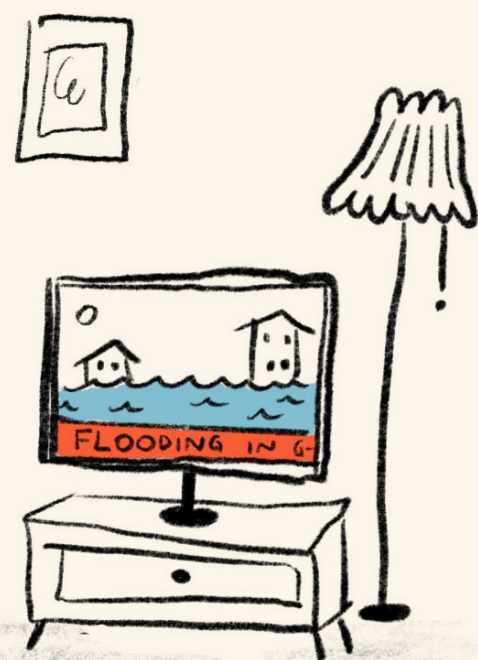
- 1 Plastic pollution/waste → 47% have tried to consume fewer single-use plastic products
- 2 Factory farming and animal welfare → 30% have tried to reduce their meat consumption
- 3 Water scarcity → 42% have tried to reduce their fast fashion consumption

Anxious Observers

Anxious Observers are desperately in search of a sense of empowerment



“I don't really understand a lot of the debate about sustainability, but I do know that if I think about it too long, it makes me feel a deep sense of anxiety. Everyone's telling me to make more sustainable lifestyle choices, and I've tried hard to do so—but I just don't know if it's really having an impact. Sometimes it all feels a bit pointless, you know? Like it's too little too late.”



TL;DR three things to know about this segment

- 1 This segment primarily consists of eco-anxious Gen Z and Millennials.
- 2 While some have given up hope altogether, most of them are just trying their best; making the sustainable choice where possible, but held back by a sense that their actions are just a drop in the ocean.
- 3 Anxious Observers are looking for a sense of empowerment that doesn't require drastic lifestyle changes—for example, picking the more sustainable brand over the alternatives.

WHO ARE ANXIOUS OBSERVERS?



*only applicable in US and UK markets

By some margin, this is the segment that feels the most fear and anxiety about climate change.

Consisting primarily of Gen Z and Millennials, they are riddled with eco-anxieties⁷ and a sense that a lot of their sustainability efforts are in vain. While some of them take it to the extreme and believe it's fully too late for us to do anything about climate change (the so-called “climate doomers”), even those who feel we still stand a chance find the climate crisis to be a great source of existential anxiety. **This group, for example, is the most likely to say that their concerns about climate change have put them off from having children.⁸**

Compared to Green Avengers, Eco Holistics, and Robin Hoods, Anxious Observers are significantly less likely to have made major lifestyle changes in pursuit of sustainability or to have contributed to sustainability-focused political movements. But that's not due to a lack of concern about the state of the planet. Indeed, Anxious Observers care a great deal about climate change and other ecological issues—and are the consumers *most* likely to report feeling a sense of social pressure to live more sustainably.

The problem, however, is that they don't believe that any actions they could take would have a meaningful impact, given the enormity of the crisis facing our planet.⁹ And many of them simply don't know where to get started; out of all the segments, they're the least well-informed about sustainability. In some cases, that may reflect a conscious decision to avoid thinking too hard about the topic, given that they've already decided there's not much they can do about it.

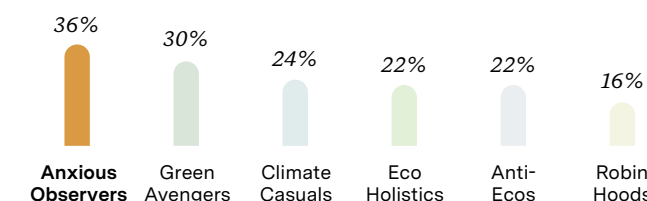
Ultimately, **what these consumers are really looking for is a sense of empowerment.** They want to be given the tools and the know-how necessary to scrape back a sense of agency in the face of impending ecological collapse; to feel like they're back in the driver's seat again.

⁷Christine Ro, “Younger workers have higher eco-anxiety than those who've come before them. It's affecting where they can — and will — work.” BBC, March 1, 2023
⁸Shannon Osaka, “Should you not have kids because of climate change? It's complicated.” The Washington Post, December 2, 2022
⁹Shannon Osaka, “Why climate 'doomers' are replacing climate 'deniers'” The Washington Post, March 24, 2023

That's why, even though Anxious Observers generally haven't made the drastic lifestyle choices of a Green Avenger or a Robin Hood, they are the group that shows the greatest willingness to pay a premium for more sustainable products and services. Picking the free-range beef over the factory-farmed alternative—even if it's a little pricier—is the exact kind of low-effort action that helps Anxious Observers feel like they're reclaiming a small sliver of agency for themselves.

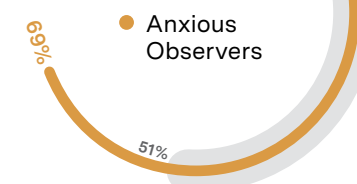
Q: DO YOU BELIEVE IT'S TOO LATE FOR US TO DO ANYTHING ABOUT CLIMATE CHANGE?

% Selected ‘this describes me completely’



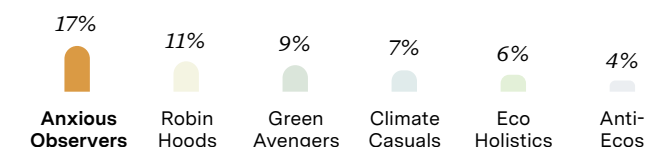
Q: WOULD YOU BE WILLING TO PAY MORE FOR A PRODUCT IF YOU KNEW IT WAS MORE SUSTAINABLE THAN THE ALTERNATIVE?

● Total
● Anxious Observers



Q: DO YOU FEEL A LOT OF SOCIAL PRESSURE TO LIVE A SUSTAINABLE LIFESTYLE?

% Selected ‘this describes me completely’



Climate Casuals

Climate Casuals accept the science of climate change, but don't believe that it's *their* problem to solve

"I know that the climate crisis is a serious issue—but I don't see why it's my problem to solve. I'm sure there are politicians and other experts thinking hard about all of this, they're probably much better suited to doing something about it than I am. Don't get me wrong, I'm not against sustainability; but I'm not going to go out of my way to do something about it if the cost—in terms of time, money, or energy—is too high."



TL;DR three things to know about this segment

- 1 While Climate Casuals accept that climate change is a serious issue, it's not one that has much of a material impact on their lives.
- 2 For these consumers, there are other issues that are more pressing than sustainability; they see it as someone else's problem, not theirs.
- 3 However, Climate Casuals can be convinced to make sustainable choices—but only if there's a financial incentive for them to do so.

WHO ARE CLIMATE CASUALS?



*only applicable in US and UK markets

Climate Casuals, for the most part, accept the science of climate change, and agree that it's probably a cause for concern. Unlike most of the other segments, however, it's not a problem that they personally feel compelled to do something about. This is a segment who sees themselves as largely insulated from the effects of climate change, and for whom there are many other issues—including public health, civil rights, and economic and racial justice—that are far more relevant to their day-to-day lives.

The climate crisis, to Climate Casuals, is not a problem they bear particular responsibility for solving, nor one they could do very much about even if they wanted to. Most of them feel that there are other people and organizations out there with far more power to affect change than they have—and are generally happy to let the true experts and policymakers get on with solving the issue on their own. Less than a third of Climate Casuals, for example, say that they care at all about their personal carbon footprint—fewer than any other segment aside from the Anti-Ecos.

In general, Climate Casuals are highly unlikely to take sustainability into account when purchasing products, planning a trip, or making major lifestyle decisions. **The big difference, however, between Climate Casuals and Anti-Ecos is that the former aren't morally opposed to the concept of sustainability;** they don't see it as a scam or an agenda being forced upon them by others.

As a result, Climate Casuals do often end up making sustainable lifestyle choices—but only when those choices happen to align with their other wants and needs. Ten percent of Climate Casuals, for example, own a hybrid or electric vehicle—but that's typically because they like the brand or they thought it was a cost-effective investment,¹⁰ not because they're trying to save the planet.

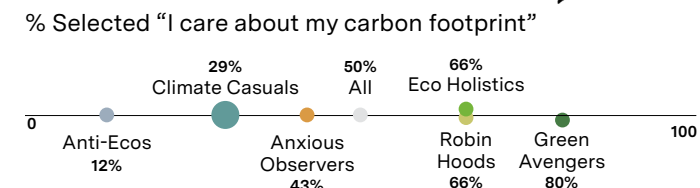
More than anything, Climate Casuals crave value for money. **Seventy-five percent of them say that, when choosing between different products or services,**

¹⁰Jack Ewing, Clifford Krauss, Lisa Friedman, "The Clean Energy Future Is a Battle for Hearts and Minds" The New York Times, August 17, 2023

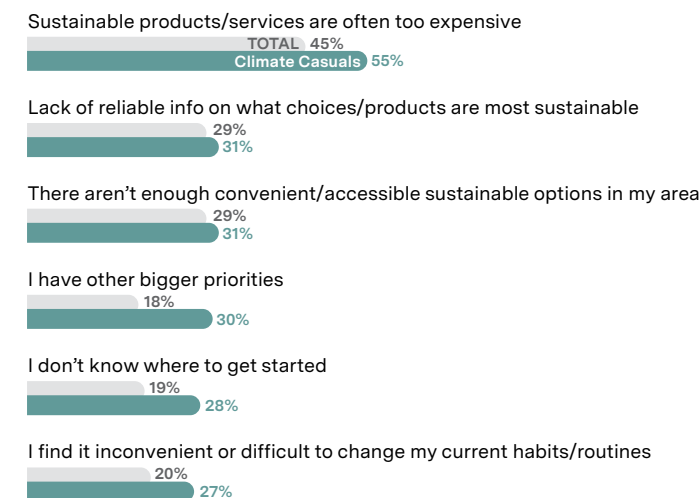
they care more about the price than any ethical or environmental factors. And when asked about the factors that are preventing them from living a more sustainable life, over half cited the fact that environmentally friendly products are typically more expensive than their less sustainable alternatives.

Brands that are looking to convince Climate Casuals to engage with their sustainable product offerings, therefore, will likely have more success if they focus on the financial arguments over moral ones—demonstrating the ways in which products that are built to last can end up being the smarter financial choice in the long-run.

Q: DO YOU CARE ABOUT YOUR PERSONAL CARBON FOOTPRINT?



Q: WHAT FACTORS ARE KEEPING YOU FROM LIVING A MORE SUSTAINABLE LIFESTYLE?



Anti-Ecos

Anti-Ecos are extremely hostile to sustainability, and naturally suspicious of brands that advertise their eco-credentials



“Do people not realize that the climate on this planet has always been changing? I wish people thought a bit more critically and did their own research, instead of blindly following all of these doom-mongering ‘experts.’ If you ask me, this whole sustainability racket is a ploy by woke elites to try to put more restrictions on our freedom. Frankly, I’m sick of it.”

TL;DR three things to know about this segment

- 1 Anti-Ecos are the only segment that don’t view climate change as settled science.
- 2 Instead, they tend to feel that sustainability is a nefarious agenda being forced upon them by out of touch cultural elites—and that many people who claim to care about the environment are simply virtue-signaling.
- 3 As a result, they feel little to no compulsion to live a more eco-conscious lifestyle, and may even outright reject products that are marketed as sustainable.

WHO ARE ANTI-ECOS?



*only applicable in US and UK markets

In many ways, Anti-Ecos are the segment that sits furthest outside the consumer mainstream. For one thing, they’re the only group that is mostly made up of climate deniers; fewer than a quarter of them believe that climate change is an established scientific fact. They’re also the segment that is **most likely to believe that individuals ought to do their own research when it comes to sustainability**, instead of simply accepting what “experts” tell them to believe.

Most Anti-Ecos don’t see the need for immediate action to address the climate crisis at either the personal or the state level. And they resist pressure from political leaders to do more when, in their opinion, those same expectations aren’t applied to other countries. A majority of Anti-Ecos, for example, think that countries like China and India deserve more blame for the climate crisis than the EU or the US.

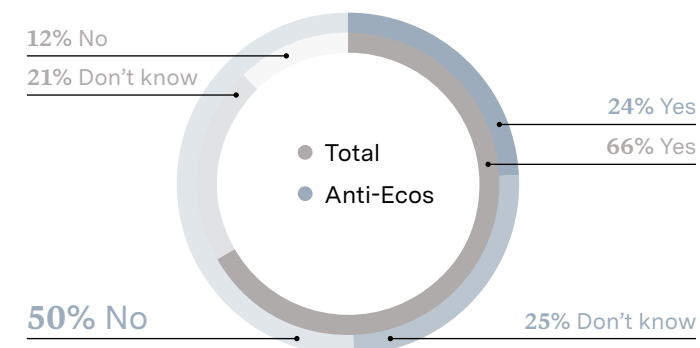
It would be a mistake, however, to think of the Anti-Ecos as ignorant or uninformed—even if their opinions are outside the scientific and political mainstream. In fact, this group shows a remarkable level of familiarity with sustainability-related concepts and terminology; more so than any other segment save from Green Avengers.

This is likely because many of the Anti-Ecos are avid consumers of right-wing, anti-woke media. They watch YouTube channels and listen to podcasts where the hosts regularly discuss sustainability in order to disparage it. These consumers aren’t lacking for information, in the way that Anxious Observers and Climate Casuals are; but the information they have is often used to construct and reinforce a narrative in which sustainability is part of an insidious and self-destructive cultural agenda.

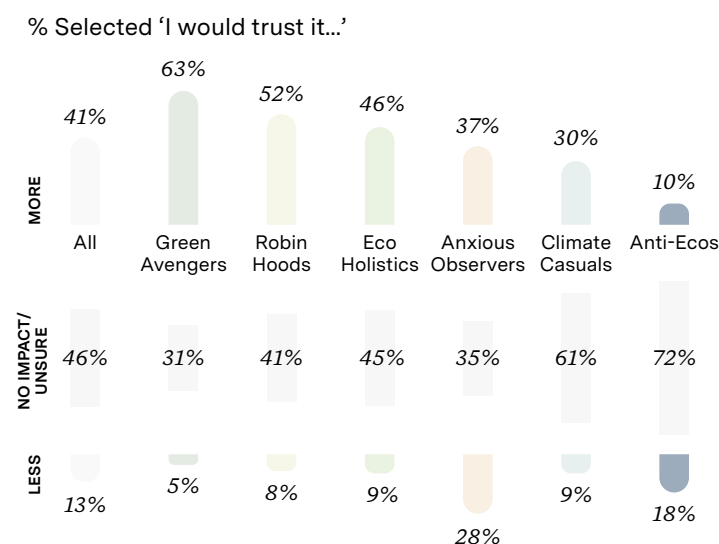
Because they see climate change as, at worst, a hoax and, at best, a problem that has been significantly blown out of proportion,¹¹ Anti-Ecos are highly resistant to the idea of making personal changes to their lifestyles. And they’re extremely unlikely to pick the more sustainable option when choosing between multiple different brands—unless that product or service has other features to recommend itself to them.

In fact, for Anti-Ecos, seeing a product advertised as “sustainable” or “environmentally friendly” can be an active turn-off, since it signals to them that the product is likely going to be more expensive, and that the company behind it probably doesn’t share their cultural values. Only 10% of Anti-Ecos say that they would trust a brand more if it marketed itself as “sustainable,” while almost twice as many say sustainable marketing would decrease their level of trust.

Q: DO YOU THINK THAT CLIMATE CHANGE IS AN ESTABLISHED SCIENTIFIC FACT?

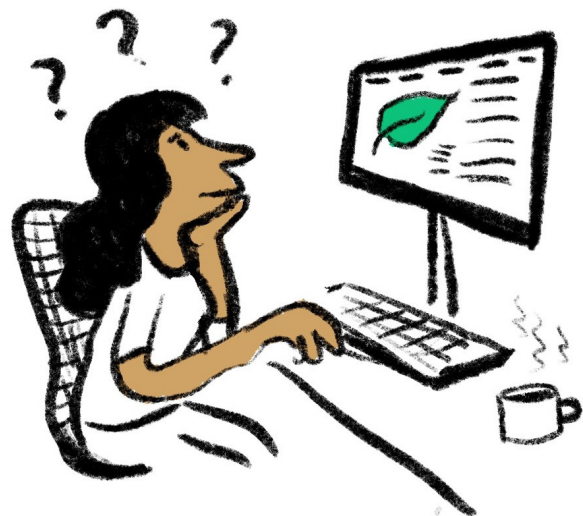
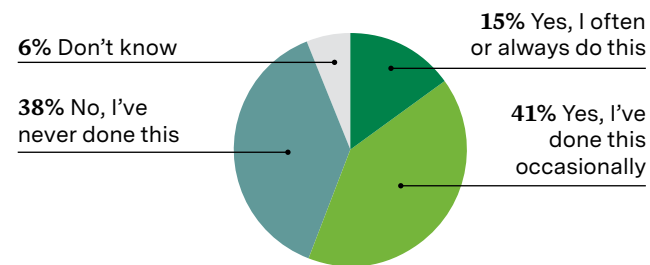


Q: IF YOU SAW A BRAND MARKET ITSELF AS “SUSTAINABLE,” WHAT IMPACT WOULD THAT HAVE ON YOUR LEVEL OF TRUST?



¹¹Giancarlo Pasquini, Alison Spencer, Alec Tyson And Cary Funk, “Why Some Americans Do Not See Urgency on Climate Change” Pew Research Center, August 9, 2023

Q: DO YOU EVER RESEARCH THE SUSTAINABILITY OF PRODUCTS AND SERVICES BEFORE MAKING A PURCHASING DECISION?



Q: WHAT INFO SOURCES DO YOU USE TO DETERMINE THE SUSTAINABILITY OF A PRODUCT OR SERVICE?

Consumers who research sustainability before making purchasing decisions



Across these segments, consumers crave greater authenticity in green marketing initiatives

For brands, understanding these six segments—and the different relationships that they have with the concept of sustainability—is a critical step in the process of creating tailored messaging campaigns that can effectively bring customers onboard with your corporate sustainability initiatives. After all, there are a seemingly endless variety of ways for brands to talk about their sustainability credentials—and messaging that effectively resonates with one person may fall flat or even be an active turn-off to another.




Getting that messaging right is especially important given that consumers are becoming increasingly proactive about interrogating the sustainability of the companies that they do business with. Fifty-six percent of consumers, for example, say that, on at least one occasion, they've gone out of their way to research the sustainability of a product or service before deciding whether to purchase it.

And as consumers have become more vigilant¹² about examining the sustainability credentials of the companies they buy from, so too have they become more alert to brands that make big promises but fail to actually walk the walk. The concept of “greenwashing” has received increased focus from regulators and the media in recent years;¹³ and 34% of consumers say they've seen at least one example of a sustainability-focused marketing campaign that they felt was “inauthentic.”

Ultimately, brands that can position themselves at the forefront of the fight against the climate crisis can unlock substantial good will, and even command a price premium—but only if they are able to convince their customers that their commitment to sustainability is deeply embedded into the core of their business model, not simply an opportunistic marketing stunt.

¹²Shane Price, “Why Sustainability Is A Strategic Imperative, Not An Option,” Forbes, August 18, 2023
¹³Olivia Rudgard, “Regulators Are Trying to Stop Greenwashing Before It Gets Worse,” Bloomberg, September 17, 2023

HOW BRANDS CAN BUILD TRUST IN SUSTAINABILITY INITIATIVES

	OPPORTUNITIES	CHALLENGES	RECOMMENDATIONS
GREEN AVENGERS	Green Avengers firmly believe that large corporations should be playing a bigger role in the fight against climate change—and want to reward companies that make a genuine commitment to sustainability. 	Given their deep knowledge about sustainability, they also tend to be highly critical of perceived inauthenticity. If they think you're greenwashing, they're likely to be vocal about it on social media.	Lean on Green Avengers as early adopters for green products and services, and seek them out as product testers and focus group members. If you can convince them that your commitment to sustainability is genuine, you'll probably be able to convince others.
ECO HOLISTICS	Eco Holistics are excited about futuristic, technology-led solutions to the climate crisis. As such, they're a key audience for products like electric vehicles and eco-friendly home technology.	Because of how much they value innovation, this group has high expectations for sustainable products and services. They don't accept that sustainability has to mean compromising on quality or cost.	Highlight your investment in eco-conscious R&D and the ways in which you're leveraging new technologies to increase sustainability of products and services while also creating value for customers.
ROBIN HOODS	Robins love to act as sustainability evangelists. If they fall in love with a green brand, they're the group most likely to spread the word to friends and family. 	This group tends to be highly distrustful of large corporations. To them, sustainability generally means making do with less and shopping local—not spending money on the latest green gadgets.	Emphasize your community engagement and your partnerships with smaller retailers. Provide them with information on how to extend the lifespan of your products or recycle/repurpose them, and help them to share that information with others.
ANXIOUS OBSERVERS	Anxious Observers are looking for low-effort ways to feel like they're making a difference in the fight against climate change, and so are willing to pay a significant premium for truly eco-friendly products and services.	Many of them are suffering from “green marketing fatigue”; they've seen so many brands claim to be sustainable, but they don't know what to look for to tell apart the companies who truly care about the planet from the ones who don't.	Focus on accessible and transparent messaging, taking them on an educational journey to build trust. Give them ways to feel more agency and control—such as tools for measuring their environmental footprint.
CLIMATE CASUALS	Climate Casuals are generally going to pick the more sustainable option where possible, but only in cases where they're not losing out on price or quality.	They generally pay little attention to sustainability focused marketing initiatives, and are highly unlikely to take the initiative themselves to make the more sustainable choice.	When marketing to this group, treat sustainability as a “nice to have” rather than an essential, and ensure that it's highlighted in the context of other features such as product quality, cost, or reliability.
ANTI-ECOS	N/A 	Anti-Ecos are highly skeptical of brands' sustainability initiatives. At best, they ignore them; at worst, they can be an active turn-off.	Try to avoid targeting members of this group with sustainability-led campaigns—or find ways to show how sustainability can exist in tandem with, rather than in opposition to, traditional social values.



Understanding these segments can lead to better policy outcomes and more effective climate activism

Policymakers and pressure groups, too, can benefit greatly from an understanding of these segments; they define not only the types of climate-related policy interventions consumers are willing to support, but also the kinds of activities they're likely to see as acceptable or unacceptable when it comes to advocating for those policies.

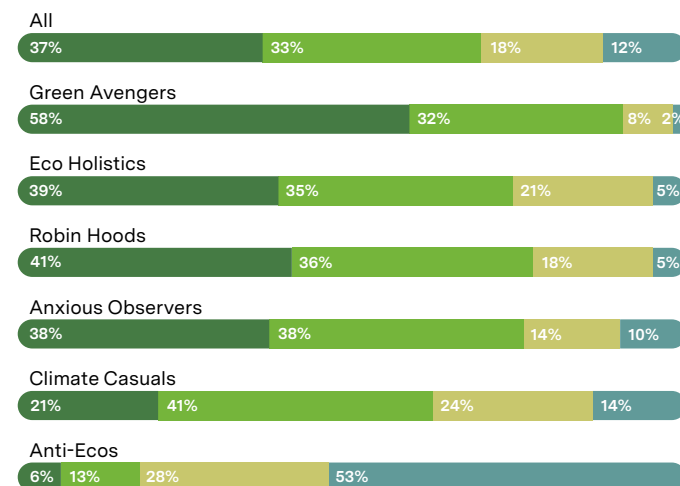
This is particularly relevant at a time when the debate about climate activism has become more intense than ever. Protests organized by groups like Just Stop Oil in the UK and Last Generation and Ende Gelände in Germany—from blockading roads and airports to disrupting sports matches and other high profile events—have drawn eyeballs while also attracting intense criticism and backlash.

Most consumers aren't yet at the point where they see these sorts of disruptive tactics as justifiable; only 18%, for example, support the practice of climate protestors gluing themselves to roads to disrupt traffic. But this doesn't mean that they don't see a need for governments to take a more aggressive stance in tackling the climate crisis. **Fifty-percent of consumers say that they'd like to see their government spend more on sustainability-related programs**—compared to just 16% who think spending should be cut.




However, figuring out the exact types of policies that the public is likely to respond positively to can be easier said than done. Even more so given that the global cost of living crisis has rendered consumers hypersensitive to any sustainability initiatives that are seen as placing a financial burden on ordinary people—as demonstrated by the recent backlash against London's Ultra-Low Emission Zone.¹⁴ But by understanding the needs and priorities of these six segments, policymakers and pressure groups can more accurately predict how consumers will respond to different policy initiatives, and develop more effective messaging to build support for those initiatives.

Q: WHEN VOTING, HOW MUCH DO A CANDIDATES' POSITIONS ON CLIMATE CHANGE AND SUSTAINABILITY MATTER TO YOU?

- It's essential that a candidate has policies I agree with
- A candidate's policies matter a lot to me
- A candidate's policies matter a little to me
- I don't care about a candidate's policies



HOW POLICYMAKERS AND PRESSURE GROUPS CAN BUILD PUBLIC SUPPORT FOR SUSTAINABILITY INITIATIVES

	OPPORTUNITIES	CHALLENGES	RECOMMENDATIONS
GREEN AVENGERS	Of all the segments, Green Avengers are the most likely to support radical and far-reaching policy initiatives like the Green New Deal ¹⁵ —and the most likely to volunteer their time and money to green causes.	Green Avengers strongly believe in accountability, and will be vocal in the disapproval if they perceive lawmakers as being slow to act or too cozy with environmentally irresponsible industries.	Treat Green Avengers as partners in sustainable policy-making; target them with green messaging and take advantage of their willingness to be public advocates for green politicians and policies.
ECO HOLISTICS	Eco Holistics believe in the value of public/private partnerships, and tend to be strongly supportive of investment in green infrastructure and the creation of subsidies and tax incentives for green businesses. 	Because they believe in the value of free enterprise and innovation, Eco Holistics may react more negatively than other segments towards policies that are perceived as “anti-growth,” such as placing restrictions on certain industries or carbon intensive activities.	Avoid turning this group off through tactics and policies perceived as unnecessarily disruptive, and showcase ways in which public policy can amplify and encourage private innovation.
ROBIN HOODS	Due to their strong belief in personal responsibility for tackling the climate crisis, Robins are generally open to making lifestyle changes when the state encourages them to do so, and are keen to donate to advocacy and conservation groups.	Due to their general distrust in governments and politicians, it can be hard to convince Robins that your commitment to sustainability is genuine.	Prioritize policies that can empower Robins to act as “sustainability champions,” allowing them to lead by example and become early adopters of green lifestyle habits.
ANXIOUS OBSERVERS	Anxious Observers are likely to support policy initiatives that seek to address their fears about the long-term future of the climate—especially those that are positioned as a way of generating intergenerational equity and securing a future for today's young people.	Since they lack organization—and many of them believe meaningful change is already too late—it may be difficult to effectively rally this group en masse behind green causes. 	Communicate the way in which green policies can safeguard their futures and create long-term security.
CLIMATE CASUALS	Climate Casuals are, in theory, open to supporting green policy initiatives—provided that they aren't seen as coming with a high price-tag or at the expense of issues they care more about.	In general, Climate Casuals tend to be more concerned about issues that are more materially relevant to them, and believe green policy should never come at the expense of dealing with what are, to them, more pressing worries.	Emphasize the non-environmental benefits of sustainability initiatives, such as jobs created by green investment or the way in which green infrastructure can lead to healthier lifestyles or facilitate racial justice. 
ANTI-ECOS	While broadly reluctant to support sustainability initiatives, Anti-Ecos do often have an interest in animal welfare, so may vote in support of wildlife conservation programs or some regulations on the agricultural industry.	Otherwise, Anti-Ecos are highly resistant to almost all green policies—especially those which they see as a threat to their personal well being or liberty.	With a few key exceptions, accept that this will be a difficult group to bring on-side for green policies, and prioritize other messaging.

¹⁴ Bethany Dawson, “London's Sadiq Khan moves to soften impact of clean air plan after backlash” Politico, August 4, 2023
¹⁵ Joshua Nevett, “Young climate Green Avengers turn up the heat on Keir Starmer” BBC, July 16, 2023

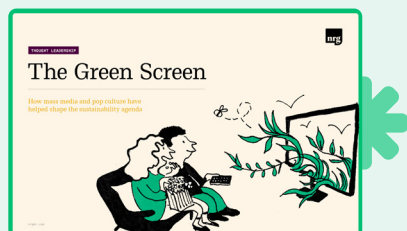
Now more than ever, it's vital to understand that the "green consumer" is not a monolith

Historically, brands and policymakers alike tended to look at the question of sustainability through the lens of the so-called "green consumer"—the idea that there was a specific subset of people out there who cared deeply and passionately about sustainability, and would respond positively to sustainability initiatives in a way that others wouldn't.

But as we've seen throughout this report, that binary way of thinking does a disservice to the complexities of public opinion and the realities that govern how consumers think about the topic of sustainability and how it impinges on their individual experiences or their daily lives. And, in the end, it can limit the effectiveness of green marketing efforts as well as public policy initiatives.

In reality, there is no singular "green consumer" nor "anti-green consumer." The divide between the two groups is highly porous and context-dependent—and within both of those buckets there exists a broad spectrum of opinions and attitudes. And it's only by truly understanding and appreciating that diversity of thought that we can achieve true progress when it comes to tackling the environmental issues currently facing humanity.

For more on consumers' relationship with sustainability, see NRG's previous research: [The Green Screen](#).



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METHODOLOGY

Unless otherwise specified, data in this report comes from a study of 2,717 consumers, ages 18-64—including 1,503 in the US, 408 in the UK, 405 in Germany, and 401 in France—conducted online in June 2023. The audience in each market was selected and weighted to be demographically representative in terms of age, gender, and income (and race in the US).

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