

The question we're seeking to answer:

**How do we make  
sustainable options most  
attractive to consumers?**

# What's in this document

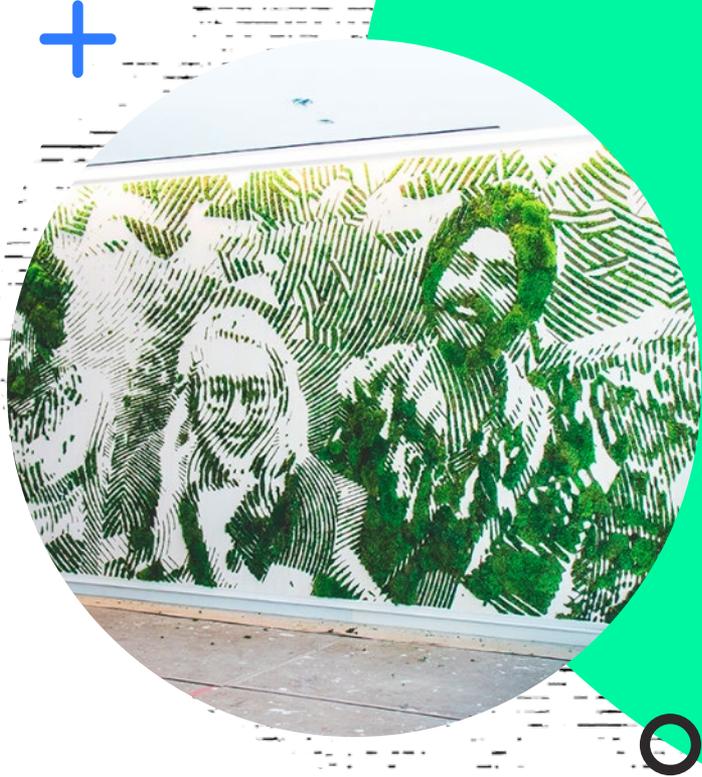
- 1/ Consumer insights from discover.ai
- 2/ Changing consumer behavior, with examples
- 3/ Four themes from the discussion
- 4/ About Oxford and discover.ai



*“The planet is dying and only a small group of the population is worried about it, the leaders are aware and pretend to be interested in it ...”*

Quote from analysis of social media conversations in the [discover.ai](#) platform





**We have curated relevant content from online spaces** - chat on social media, commentary from bloggers, exchanges on online forums, evocative open ended questions in an online survey ...

With the help of Ai, **we explored this vast wealth of content to discover what people really think** and really do around the ever more pressing question of sustainability ...



**We ask ...**

***What do consumers see lies ahead in all our futures?***

***What are their perspectives on the environmental crisis and how are they coping?***

***And how can their stories offer inspiration for viable strategies for business leaders?***



# First

People's stories all seem to reflect  
a 'grieving' frame of mind

# People's stories all seem to reflect a *'grieving' frame of mind*

... mapping more or less to a **journey of grief** and **5 key stages of grief** that often get talked about



## DENIAL

Denial is **the conscious refusal to perceive that painful facts exist**

## ANGER

There is much to process - **anger gives an emotional outlet** and feels empowering

## BARGAINING

Bargaining can help those suffering loss **to regain control of the narrative**

## DEPRESSION

Facing up to **overwhelming sadness, appropriate response to overpowering loss**

## ACCEPTANCE

Embracing the extent of the loss rather than fighting it, **starting a new journey with responsibility and action**

# People's stories all seem to reflect a *'grieving' frame of mind*

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DENIAL



Powerlessness ...



Optimism ...

ANGER

BARGAINING

DEPRESSION

ACCEPTANCE

Consumers experience the existential crisis we are living through as a kind of **grieving** and describe potent feelings of ...

## POWERLESSNESS ... bigger than us

People feel overwhelmed. A sense of inevitability and frozen helplessness. A kind of denial, 'looking the other way'

### Human response ...

It's part of natural evolution, so ...

It's our fault ... but it's too late

It's terrifying (so best not think about it)



*I am very concerned about climate change, but sometimes I get overwhelmed by what I can do so I don't think about it*



*I am not that concerned cause I know bad things will happen but no matter what we do it won't work so that's why I'm not too concerned*

*What is required is a type of justice that is rooted in our love for this planet, not one that is based in our fear of what will happen if we don't*



# DENIAL

*I am concerned that we need to take better care of the planet, but I see multiple efforts moving in that direction that are making a difference*



*I'm personally less worried, **society has taken note of climate change and adopted technology** to reshape the climate*



*I do see the impact on a daily basis, but we all need to be as responsible as possible: **the ecology of everyday life is within everyone's reach***



Consumers experience the existential crisis we are living through as a kind of **grieving** and describe potent feelings of ...

## **OPTIMISM ... it's moving in the right direction**

Humans are survivors. People want to feel hope. Nurturing a sense of optimism can be a survival strategy

### **Human response ...**

People cite evidence of efforts to change

People want to believe in technology/change

Optimism can motivate/attract action

# **DENIAL**

# Situation Denial

Is the conscious refusal to perceive that painful facts exist  
In 'denying' we can escape intolerable thoughts, feelings, or events

# Opportunity

Making the crisis feel surmountable and tolerable

*Can business explicitly drive more grand scale, systemic, real change  
that feels critical mass, compelling, credible and gathers people in?*

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Powerlessness ...

## ANGER



Futility ...

## BARGAINING

## DEPRESSION

## ACCEPTANCE



Optimism ...



Holding out for a hero ...

Consumers experience the existential crisis we are living through as a kind of **grieving** and describe potent feelings of

## FUTILITY ... a path to self-destruct

Can be seen philosophically; an aspect of human condition. Main sense is frustration - we know what we need to do but it needs everyone to sign up

### Human response ...

Human beings just in 'self destruct' mode

Human inability to change behavior

If only everyone would play their part



*I know that it's up to us as humans to take care of what we have, but **if people don't put in the work I can't worry about their mistakes***

*Though brands are expressing confidence in their ability to create change, **when it comes to implementing sustainable solutions, we have a problem — ALL OF US***

*It is a complex subject because it needs a complete overhaul of our way of life to change things, **everyone seems concerned, but no one is really ready to change their lifestyle***



Consumers experience the existential crisis we are living through as a kind of **grieving** and describe potent feelings of ...

## HOLDING OUT FOR... heroes, in a leadership void

Disasters have heroes... and there is a leadership vacuum. A call for business to step up?

### Human response ...

A sense people miss real leadership from a convincing government

Lack of real resources, policy and regulation

# ANGER

I have a kind of general anxiety for the planet, that **anything I could do would not be enough and it is time for governments and big companies to change themselves fundamentally**



I'm concerned because our **leaders aren't telling us what's really going on and we are left in the dark about a lot of behind-the-scenes stuff**  
I hope that we the people will realize how much more control we have than we think, and I wish we would all gather and do what's right and what should have been done a long time ago



let's be the climate leader the world needs, not because America prides itself on being "the best," but because our unique position as a global exemplar, for better or worse, requires it



# Situation Anger

Adjusting to a new reality high in emotional discomfort there is much to process; anger can give an emotional outlet  
(NB Anger can feel empowering when people feel vulnerable)

# Opportunity

Offer constructive outlets, provide empowerment

*Can business be the hero not the villain; provide the sense of leadership and drive for action with the concrete change agenda people need and miss?*

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## BARGAINING



Distancing ...



Pragmatism ...

## DEPRESSION

## ACCEPTANCE

Consumers experience the existential crisis we are living through as a kind of **grieving** and describe potent feelings of ...

## DISTANCING ... not in my lifetime

People set themselves apart; step back from the crisis. It's someone else's problem. Not for me

### Human response ...

Shrugging off responsibility; abdication

Passing the buck to the next generation



*I do see myself as concerned but I also feel like it's gonna be more of an issue for future generations and I feel as though I would be gone by then*



*I think that most people go for the reward of a coffee/snack now because **they have no hope for the future and would rather make life now just a bit more bearable***

*I am worried but it is not my first concern because it seems distant to me and its a concern for future generations and I do not have children*



# BARGAINING

Consumers experience the existential crisis we are living through as a kind of **grieving** and describe potent feelings of ...

## PRAGMATISM ... I do my bit

People play their part but see it's small-scale. These acts can feel soothing, but do they achieve scale of change needed?

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### Human response ...

I sort my garbage, turn off the lights ...

(But maybe that's not enough?)

My actions are a drop in the ocean

# BARGAINING

*Global warming particularly worries me, I try to sort the garbage, turn off the lights, not use much heating, etc.*



*This problem worries me however I managed to tell myself that I am doing my part at my level*



*I'm worried about the future of our planet and try to recycle as best I can, do good deeds But I'd be lying if I said it was my No 1 priority*



# Situation Bargaining

Bargaining can help an individual suffering loss to regain control of their inner narrative, as they process what is happening

# Opportunity

Help us to process, change the narrative and regain control

*Can business make the many needed individualized changes easier, more accessible for all and 'totalize' positive impact to magnify and so to motivate the collective of personal effort?*

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Pining ...



Grieving ...

## ACCEPTANCE

Consumers experience the existential crisis we are living through as a kind of **grieving** and describe potent feelings of ...

## PINING ... for my children and my children's children

People articulate a sort of 'grief for the future'. The pain they feel imagining the future they leave to loved ones

### Human response ...

The future is palpably frightening

Apocalyptic ... yet real, down to earth, now this is felt potently as a parent's/caregiver's desire to protect



*I'm fighting for climate justice so my grandchildren, and my grandchildren's grandchildren, can see the beauty this extraordinary planet has to offer*



*I don't think it will impact me but I worry about my children having to go through the end of the world*

*I worry that there will not be enough resources for the future population of this earth and I also worry that our planet will be destroyed and it is not a place that I would want to bring a child into*



*Protection of the environment ... because our children will suffer, and future generations will certainly not know the snow-capped mountains, may never see a hedgehog, no more birds*



*Im so worried ... we can see something is happening ... when I hike, nature has changed even in the beautiful wild miles*



*The earth is our beautiful home, there is no need to worry too much, as long as we take care of the surrounding environment*



Consumers experience the existential crisis we are living through as a kind of **grieving** and describe potent feelings of ...

## **GRIEVING ... so much beauty in the world**

People describe lovingly the natural world they cherish and the loss and pain as they see this sliding away

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### **Human response ...**

Clinging hard to the beauty we hold dear

How much we have ...

... and how much we have to lose

# **DEPRESSION**

# Situation Depression

Facing the certainty of loss and its overwhelming sadness. Depression often viewed socially as unnatural; people want to do something positive to “fix” it. Yet overwhelming sadness an appropriate response to overpowering loss

# Opportunity

Engage with potency of despair, to galvanise action in a bigger sense

*Can business invoke wider responsibility speaking in potent emotive ways - speaking to the caregiver innate in all of us? Invoking nature's beauty in poignant ways?*

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Grieving ...

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## ACCEPTANCE



Apprehension.



Recognition.

Embracing the extent of the loss rather than fighting it, starting a new journey with responsibility and action

Consumers experience the existential crisis we are living through as a kind of **grieving** and describe potent feelings of ...

## APPREHENSION ... palpable changes all around me

People see the world changing day to day. It feels like a prophecy coming true - shocking and frightening

### Human response ...

Rapid, remarkable weather change **seen**

Wider impact (fire, flood, drought) hard to ignore

Sense of speeded up clock; ticking time bomb



*I am afraid that in my future there will be no more animals, that we will live an apocalyptic borderline life*



*Climate change is a worry - I see and experience the results of it (California fires and weather volatility from droughts to floods)*

**A Greek Island is entirely zero waste**

In a world first, the island of Tinos is now energy self-sufficient and has permanently closed its landfill. Upat.

Source: The Guardian

*I am concerned about the pollution of the waters and the heat that just keeps rising and snowing in certain areas it never does it's very strange and I feel that it might be too late and not enough is being done but we can't shut down everything in the name of the environment*

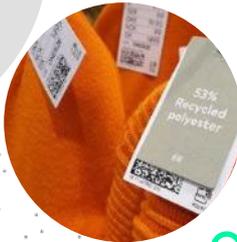


# ACCEPTANCE

*i worry about climate change that will alter our mountains and seas and **generations** after me won't be able to enjoy the same things I've had the luxury of taking for granted*



*This worries me a lot and has conditioned my choice of company: I work in a company in the recycling of clothes, with the mission to reduce the number of textile waste*



*I am very worried about the overproduction of everything, clothes and that companies do not take any safe measures, very worrying the overproduction of food that is not consumed and waste, when there are many countries in famine*



Consumers experience the existential crisis we are living through as a kind of **grieving** and describe potent feelings of ...

## **RECOGNITION ... life as we know it will (need to) change**

People recognise urgency of the situation and feel a need to lead with urgent action (fuel, transport, production)

### **Human response ...**

Direct impact on day-to-day life recognized

A move to more direct immediate action

# **ACCEPTANCE**

# Situation Acceptance

Embracing the extent of the loss rather than fighting it,  
starting a new journey with responsibility and action

# Opportunity

Embrace loss, accept responsibility and define actions

*Can business use truth to garner greater urgency and show how positive impact can materialise with greater behavior change - modelling a zero-tolerance movement, 'cap' on consumerism, a whole scale move to alternative energy, a purist use of only sustainable material*

## The price of change ... a note on 'value'

A clear message about the price of making sustainable choices. For many 'better' choices are not accessible, and this can feel infuriating, like a double bind. A strong sense of uprising resentment and a widening social rift

### Human response ...

If its not affordable, it's not an option

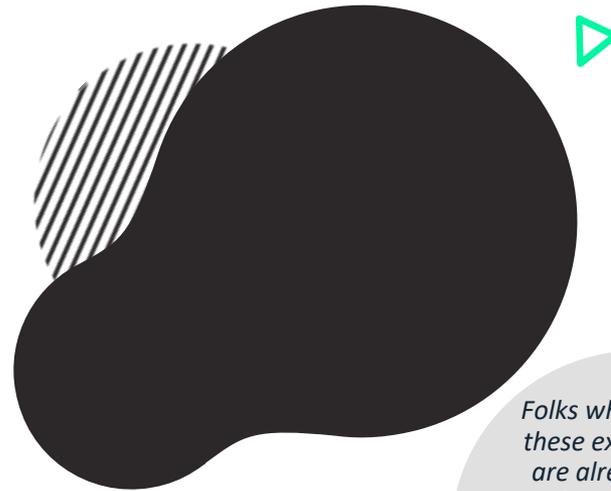
Many excluded from the 'better choices'

Feel judged/stigmatized - deeply unfair

Can go on to question if real sustainability merit

Resentment is rife; privileged indulgence and a green veneer

Can create/exacerbate social rift and unrest

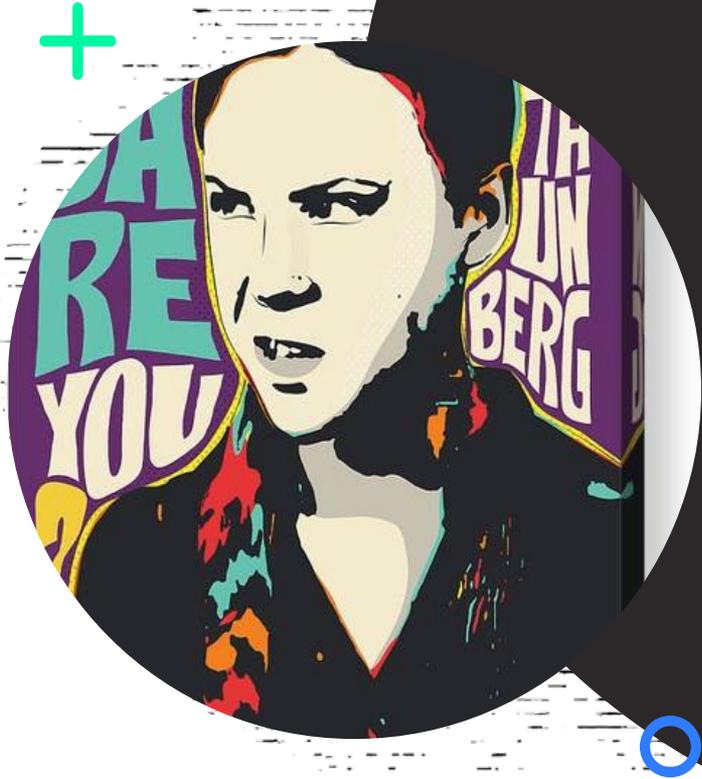


*Folks who can afford these expensive cars are already fooling themselves into thinking they're saving the environment; that their EV is carbon neutral or anywhere close to that*

*One of the problems we face is that because organic products can be so much more expensive than non-organic, those of us who are struggling financially would rather prioritize being able to afford food, than the global sustainability of foods*

*Yeah, I've got a heat pump (electric heater) in my garage, it's cheaper to buy but much more expensive to run on electricity that natural gas*

*@user @user Indeed, the world is a better place having expensive electric cars that the majority can't afford, and also spending billions in going to Mars*

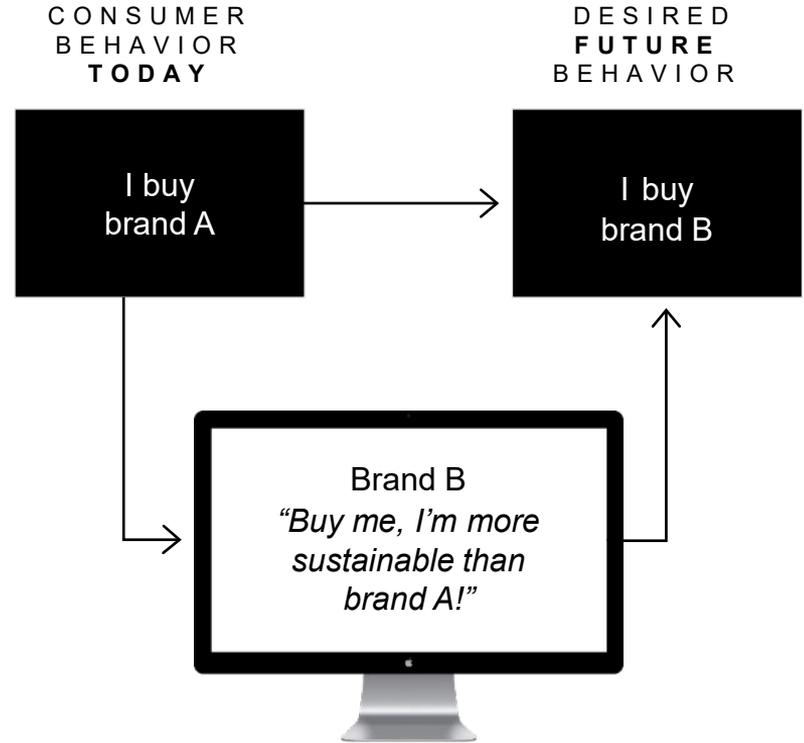


*“If the tide is going to turn on climate, before all that we hold dear is swept away, then it is nothing less than essential that business goes from being a blocker on sufficient action to being an enabler...”*

Dr. Rupert Read, Director - Climate Majority Project,  
Author WHY CLIMATE BREAKDOWN MATTERS

**To change behavior,  
we need to tap into  
how people feel**

Most brands  
**approach**  
**sustainability**  
in a very rational way



# Examples of brands communicating rationally about sustainability



## KEEP IT COOL.

**IF EVERYONE IN THE UNITED STATES WASHED THEIR LAUNDRY IN COLD WATER ...**

- THE ENERGY SAVED IN ONE YEAR WOULD EQUAL THE ENERGY PRODUCED AT THE HOOVER DAM FOR 4 YEARS
- WHICH IS ENOUGH TO POWER THE EMPIRE STATE BUILDING FOR THE NEXT 444 YEARS
- AND COULD REDUCE CO<sub>2</sub> EMISSIONS BY UP TO 11 MILLION METRIC TONS EVERY YEAR

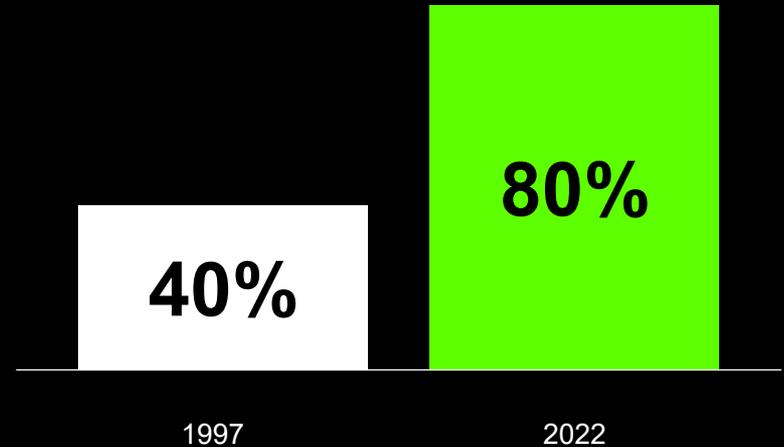
**A HOUSEHOLD SWITCHING TO COLD WATER WASHING FOR A YEAR ...**

- WOULD SAVE ENOUGH ENERGY TO WATCH TV FOR 1,363 HOURS
- PLAY XBOX 360 FOR 684 HOURS
- CHARGE AN IPHONE 4S 30,861 TIMES
- OR POWER AN AVERAGE NEW REFRIGERATOR FOR NEARLY 4 MONTHS

**TIDE COLDWATER IS A SPECIALLY FORMULATED DETERGENT THAT PROVIDES A DEEP CLEAN IN COLD TEMPERATURES. IT IS A SMART, PRACTICAL CHOICE FOR CONSUMERS LOOKING TO CUT HOUSEHOLD COSTS AND UTILIZE THE MONEY AND ENERGY-SAVING BENEFITS OF USING COLD WATER FOR THEIR LAUNDRY. WASH IN COLD WITH TIDE COLDWATER AND SAVE UP TO 50% OF ENERGY PER WASH CYCLE.**

Data provided by the Alliance to Save Energy and based on national average electric costs (TOD), water heater at 90°F, warm to cold water switch, 7 loads/wk, and assuming the efficiency of electricity generation and transmission of 33%. Created in partnership with e8offsets.

# Emotional considerations increasingly drive brand preference



Source: Brand Keys survey of 4.3m consumers across 25 years

# Brands that connect emotionally

Denial

Anger

Bargaining

Depression

Acceptance

Provide tangible, critical mass change

Enable empowerment. Campaign for (government) change

Help people see how their 'bit' is contributing to a greater good i.e. show total impact

Talk to the caregiver in all of us. In highly emotive ways

Enable mass action fast, with greater behavior change  
Model a zero-tolerance movement

 TESLA

patagonia®



seventh<sup>co</sup> generation.

TRADER JOE'S

patagonia®



 HONEST



# Brands that connect emotionally

**patagonia**® a good example across the entire 'grieving journey'

Denial

Anger

Bargaining

Depression

Acceptance



Launching electric cars. Unlike other car companies at the time, who focused on features and better fuel consumption of gas cars



Provides grants to environmental groups working to fight climate change and protect biodiversity. Since 1986, have pledged 1% of sales to preserve nature



The REI members club. Demonstrating and communicating the collective impact of their members actions and contributions.



Talking to the caregiver.  
*"Our responsibility to leave world better than when we found it."* Safe products plus support for communities and invest now and into future



A purest use of only sustainable materials. Sustainably sourced store building materials. Store operations, lighting, refrigeration, paint all eco friendly.

Tapping into the  
'bargaining' feeling  
by focusing on the  
**total impact**  
of all of our actions



Through its #SkiptheRinse campaign, Finish is asking consumers to skip pre-rinsing their dishes before loading them into the dishwasher, an action that can save up to 20 gallons of water per dishwashing cycle.

**4 themes from  
the discussion**

# 1. Make it more emotional, less rational



*We need more storytelling; more hugs than handshakes*

*We can inspire with case studies, reframe conversations*

*It's different for each generation: angry language from GenZ, not their responsibility but are living with the consequences*

*Mental health IS sustainability GenZ has climate anxiety, e.g. Paramount's Yellowstone, set in Montana, showcases the beauty of nature. Viewers want to be back in nature.*

*Emotional connection needs to be specific: 'what's' in it for me?'*

*How do people see themselves in this? Owing human health is critical to sustainability*

For consumers this is emotional, but as marketers / brands, we are very rational with claims

## 2. No one brand or organization has the answer

Collaboration is key, but is not what marketers are used to doing, or trained to do.

One answer is to have collective solutions – from the source all the way through



*Marketers are trained to compete, not collaborate, but we HAVE to do this together to save the planet*

*Don't keep pushing the decision down to the consumer, we need a collective decision*

*Customers don't want brands to own behavior that's for the better good, but as marketers we want it to be ownable*

*Win for customer, retailer and consumer*

*Retailers can play a big role, e.g. Colgate worked with Amazon and saw a bigger lift; Walmart insists on 'how to recycle' on all their packaging*

*Sustainability has become a business / brand tablestake; a long-term mindset is necessary and it can't be measured immediately*

*Apple's Mother Nature ad is powerful: ask HER how we're doing?*

### 3. Identifying the 'say vs do' gap



*A functional claim is too rational; we need to tell the story to help people convert*

*Consumers are interested in doing something for climate change, but have difficulty in converting when they can't see what's in it for me?*

*Keep it short and powerful! Toothpaste message is "turn off the water"*

*Target messages differently: older segments prefer more passive 'proudly supportive of American farmers' language v. younger responds to more active 'I buy it because it's from regenerative agriculture' language*

*If we make it simple, we can solve problems on a much larger scale*

Behavior change is hard;  
we need to make it easy

What is the behavior we  
want people to adopt?

## 4. Internal culture change is critical



*It takes a lot of education and changing of the conversation to integrate it into the company; social governance now has a seat at the table in every department, but it took 4 years.*

*Metrics are critical. How to measure what's good; and how to identify what is getting in the way*

*'Eco-toxicity' exists where there are internal educational gaps*

*Although we're making great progress, our employees are sceptical; we need an internal campaign; we must inspire change to enable it*

*Internal toolkit to convince and inform how individuals are having an impact*

Leaders need to connect strongly on sustainability

Making it a priority will help create organizational change

# **About Oxford and discover.ai**

**discover.ai**

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Human insight,  
super-charged by bespoke AI

Beyond the obvious  
and culturally nuanced

O X F O R D

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Enabling good growth  
for people, planet and profit

Behavior changing strategy,  
simple and joined up

**We've worked together seamlessly for many years,  
helping companies and brands grow in a meaningful way**

O X F O R D

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