



discover.ai O X F O R D



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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DEPRESSION

ACCEPTANCE



Powerlessness ...



Optimism ...

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 ...

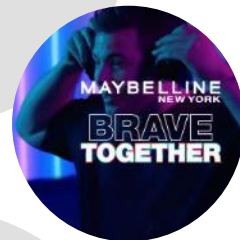
It's part of natural evolution, so ...

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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DENIAL



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

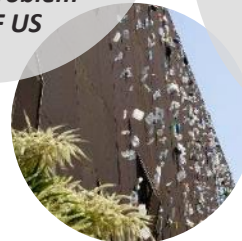


*I know that it's up to us as humans to take care of what we have, but **if people don't put in the work I can't worry about their mistakes***



*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***



ANGER

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***



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



*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*



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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DENIAL



Powerlessness ...

ANGER



Futility ...

BARGAINING



Distancing ...

DEPRESSION



Pragmatism ...

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 ...

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?

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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DEPRESSION



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



gettyimages
Credit: Richard Baker

DEPRESSION

*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

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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Pragmatism ...

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DEPRESSION



Pining ...



Grieving ...

Facing up to overwhelming sadness, appropriate response to overpowering loss

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. Optat.

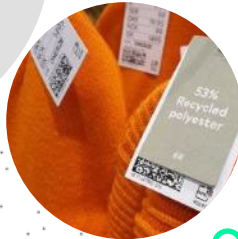
I am concerned about the pollution of the waters and the heat that just keeps rising and snowing in certain areas it never does it's very strange and I feel that it might be too late and not enough is being done but we can't shut down everything in the name of the environment



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

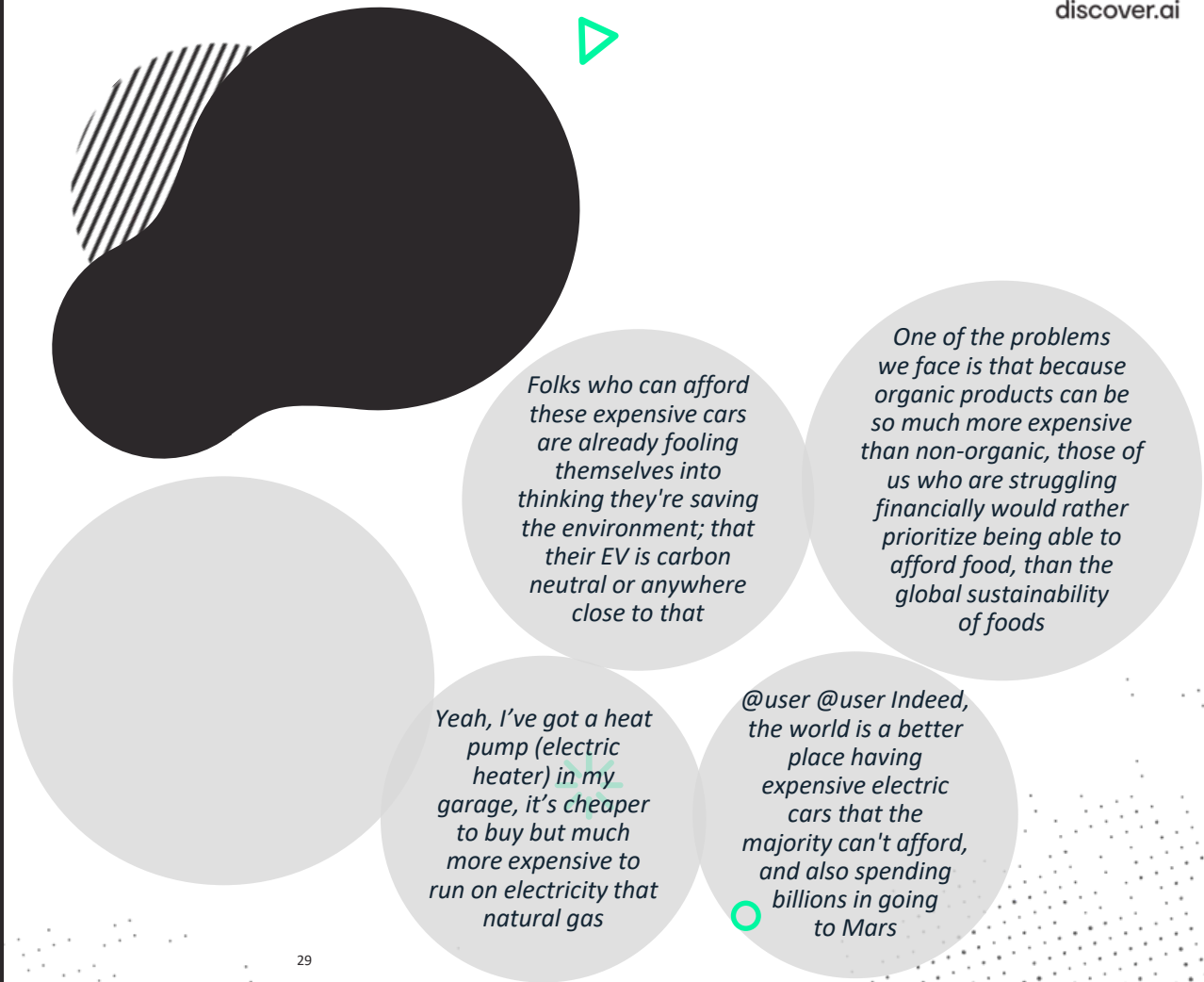
Many excluded from the 'better choices'

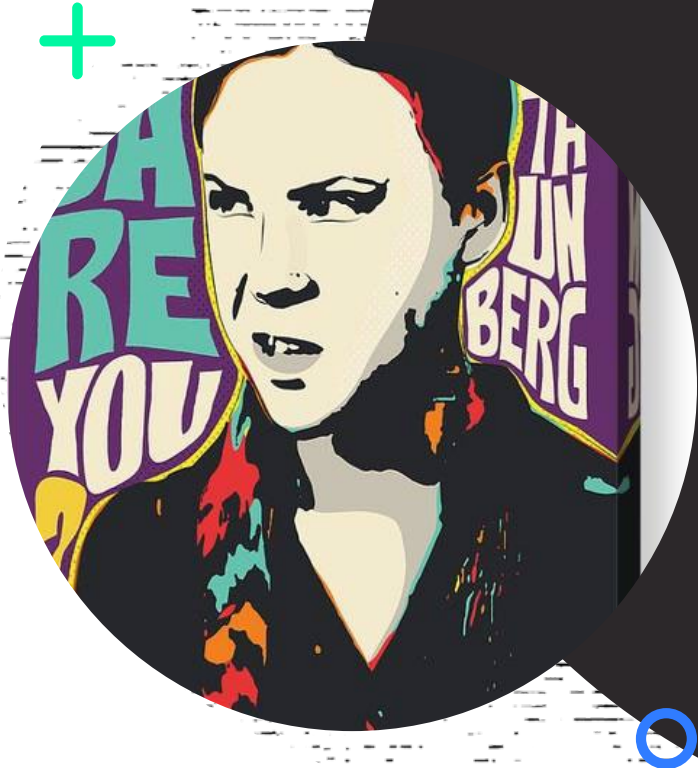
Feel judged/stigmatized - deeply unfair

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



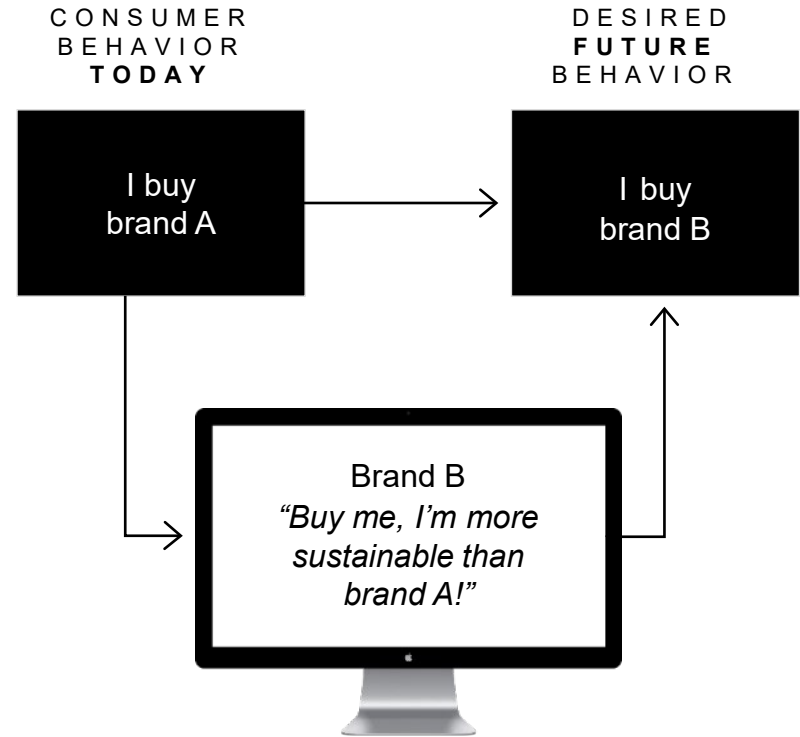


“If the tide is going to turn on climate, before all that we hold dear is swept away, then it is nothing less than essential that business goes from being a blocker on sufficient action to being an enabler...”

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.

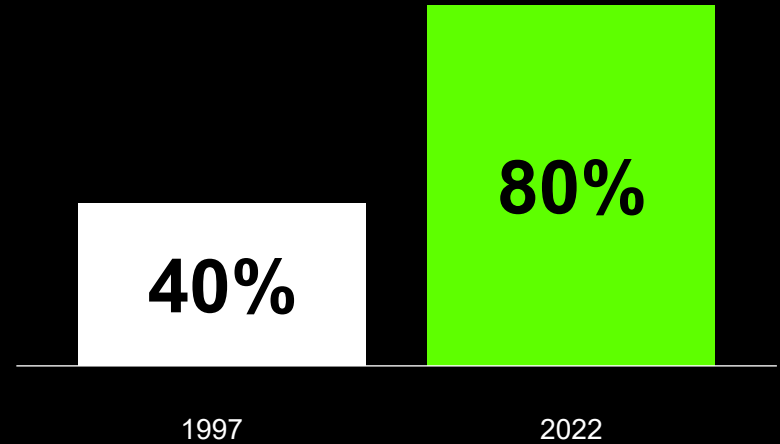


 IF EVERYONE IN THE UNITED STATES WASHED THEIR LAUNDRY IN COLD WATER ...	A HOUSEHOLD SWITCHING TO COLD WATER WASHING FOR A YEAR ...
 THE ENERGY SAVED IN ONE YEAR WOULD EQUAL THE ENERGY PRODUCED AT THE HOOVER DAM FOR 4 YEARS	WOULD SAVE ENOUGH ENERGY TO WATCH TV FOR 1,363 HOURS
 WHICH IS ENOUGH TO POWER THE EMPIRE STATE BUILDING FOR THE NEXT 444 YEARS	PLAY XBOX 360 FOR 684 HOURS
 AND COULD REDUCE CO ₂ EMISSIONS BY UP TO 11 MILLION METRIC TONS EVERY YEAR	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 (TDEU), water heater at 90°F, warm to cold water switch, 7 loads/wk, and assuming the efficiency of electricity generation and transmission of 28%. Created in partnership with allstate.

Emotional considerations increasingly drive brand preference



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

Brands that connect emotionally

Denial

Provide tangible,
critical mass change

 **TESLA**

patagonia

Anger

Enable empowerment.
Campaign for
(government) change

patagonia

Bargaining

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



Depression

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

seventh^o
generation.

 **HONEST**

Acceptance

Enable mass action
fast, with greater
behavior change

Model a zero-
tolerance movement

TRADER JOE'S



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**

*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

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

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

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

Behavior change is hard;
we need to make it easy

What is the behavior we
want people to adopt?



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



4. Internal culture change is critical

Leaders need to connect strongly on sustainability

Making it a priority will help create organizational change



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



**About Oxford
and discover.ai**

discover.ai

Human insight,
super-charged by bespoke AI

Beyond the obvious
and culturally nuanced

O X F O R D

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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