



# Everything You Learned About Communications Is Wrong When It Comes to Sustainability

*How traditional marketing approaches cross the line into greenwashing, and will get your brand into trouble*

JAN 2025

For nearly two decades, ERM Shelton has been asking people about their perceptions, behaviors and expectations of companies regarding sustainability and corporate responsibility.

## Methodology

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Our 2024 online survey was fielded from April 22–30, 2024, surveying a total of 7,145 respondents in:

- *The Americas*: U.S.A. (n=2,063), Canada (n=409) and Brazil (n=467)
- *Europe/EMEA*: United Kingdom (n=404), Spain (n=431), Germany (n=427) and Poland (n=422)
- *Middle East/Africa*: UAE (n=407), Nigeria (n=426) and Turkey (n=421)
- *APAC*: China (n=434), India (n=423) and Australia (n=411)

In the overall analysis, the data was weighted by subregions to be globally representative. The margin of errors are as follows:

- *Overall margin of error*: +/-1.2%
- *U.S.A. margin of error*: +/-2.2%
- *All other countries margin of error*: +/-4.9%

# Communicating sustainability is an increasingly complex challenge.

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And the messaging bull's-eye is constantly moving, due to:

- Ever-evolving sustainability language (that resonates or alienates)
- Ever-evolving consumer sustainability knowledge
- Ever-evolving consumer care-about
- Ever-evolving greenwashing boundaries
- Ever-evolving laws and regulations
- Ever-evolving infrastructure (e.g., what, where and how to recycle)

Communications must continuously  
calibrate to the ever-changing  
sustainability landscape.

# But companies can't afford to simply stop communicating about sustainability.

We've seen in study after study that consumers want to know what companies are doing to solve the world's environmental problems.

**And they are purchasing accordingly.**





# 90%

of consumers say a company's **environmental reputation** has an impact on their **purchasing decisions**.

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96%	95%	91%	90%	88%	86%	81%
India	China	Nigeria	UAE	Brazil	Turkey	Spain
79%	75%	72%	66%	65%	65%	
Poland	Germany	Canada	UK	U.S.A.	Australia	

Source: Global Eco Pulse® 2024 — globally weighted by subregion  
Q: How much impact, if any, does a company's environmental reputation have on your decision to buy its products? Moderate to very strong  
(n=7,145)



# 86%

of consumers say a company's **involvement in social issues** has an impact on their **purchasing decisions**.

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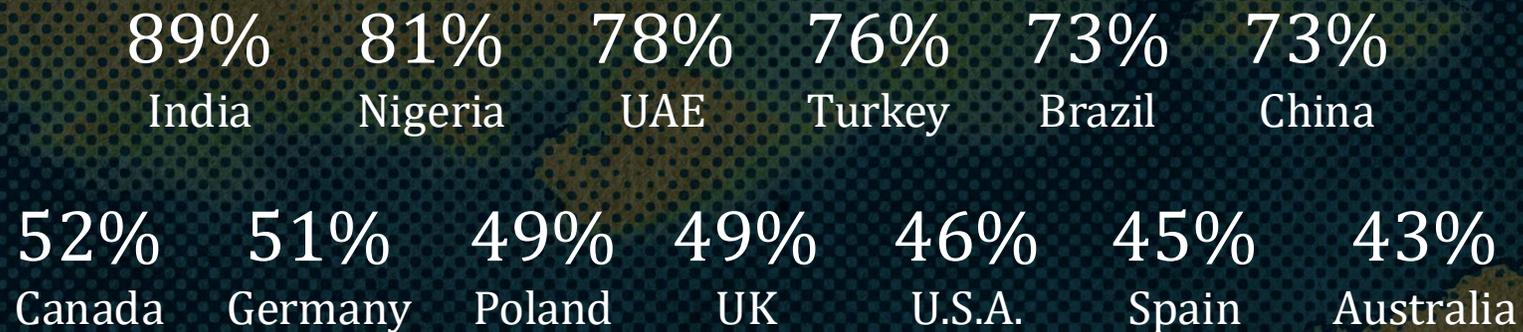
94%	93%	89%	88%	83%	80%	79%
India	China	UAE	Brazil	Turkey	Nigeria	Spain
74%	67%	64%	60%	59%	57%	
Poland	Germany	Canada	U.S.A.	UK	Australia	

Source: Global Eco Pulse® 2024 — globally weighted by subregion  
Q: How much impact, if any, does a company's involvement in social issues or its nonprofit partnerships and donations have on your decision to buy its products? Moderate to very strong (n=7,145)



# 75%

want to be seen as someone who  
buys and uses eco-friendly products.



Source: Global Eco Pulse® 2024 — globally weighted by subregion  
Q: How much do you agree or disagree with the following statement:  
Buying/using eco-friendly products is an important part of my personal image?  
(n=7,145)



# 44%

can name (unaided) a product or brand they've purchased — or not purchased — because of the environmental or social record of the manufacturer.

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So what's driving  
those decisions?



# Globally, 85% agree

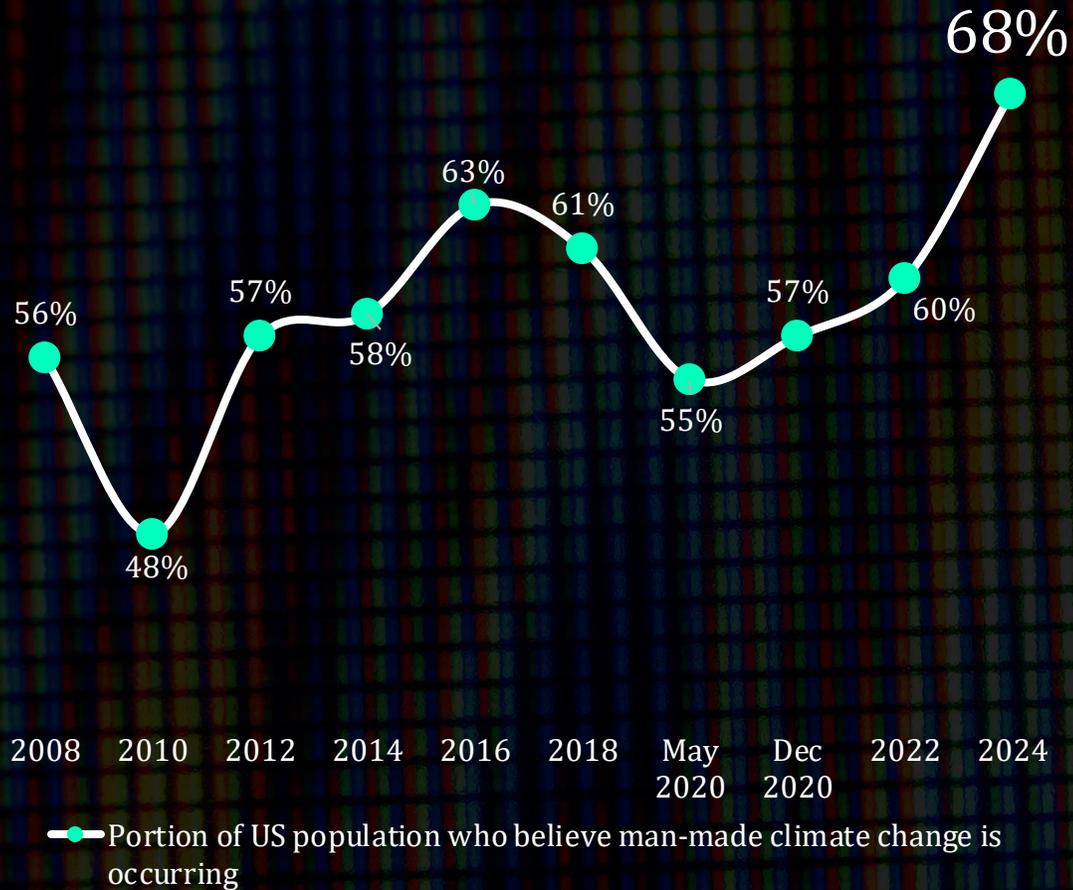
that global warming — or climate change — is occurring,  
**AND it is primarily caused by human activity.**

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94%	89%	89%	85%	81%	79%	79%
India	Brazil	UAE	Nigeria	Turkey	UK	China
77%	70%	70%	70%	68%	68%	
Spain	Germany	Poland	Canada	U.S.A.	Australia	

Source: Global Eco Pulse® 2024 — globally weighted by subregion  
Q: How much do you agree or disagree with the following statement: Global warming — or climate change — is occurring, and it is primarily caused by human activity? (n= 7,145)





# 68%

of Americans believe that not only is climate change occurring, but that it is also caused by human activity — **the highest level in 16 years!**

Source: Global Eco Pulse® 2024

Q: How much do you agree or disagree with the following statement: Global warming — or climate change — is occurring, and it is primarily caused by human activity? (U.S.A. n=2,063)

And they expect  
companies to solve it.



# In fact, 76%

**hold companies strongly/very strongly responsible for making changes that would positively impact the environment.**

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83%	81%	80%	78%	76%	76%	71%
India	Brazil	China	Germany	Nigeria	Spain	UK

67%	64%	64%	63%	61%	41%
UAE	Canada	Australia	Turkey	U.S.A.	Poland



# 83%

believe companies should bear some to most responsibility for the end-of-life disposal of their products.

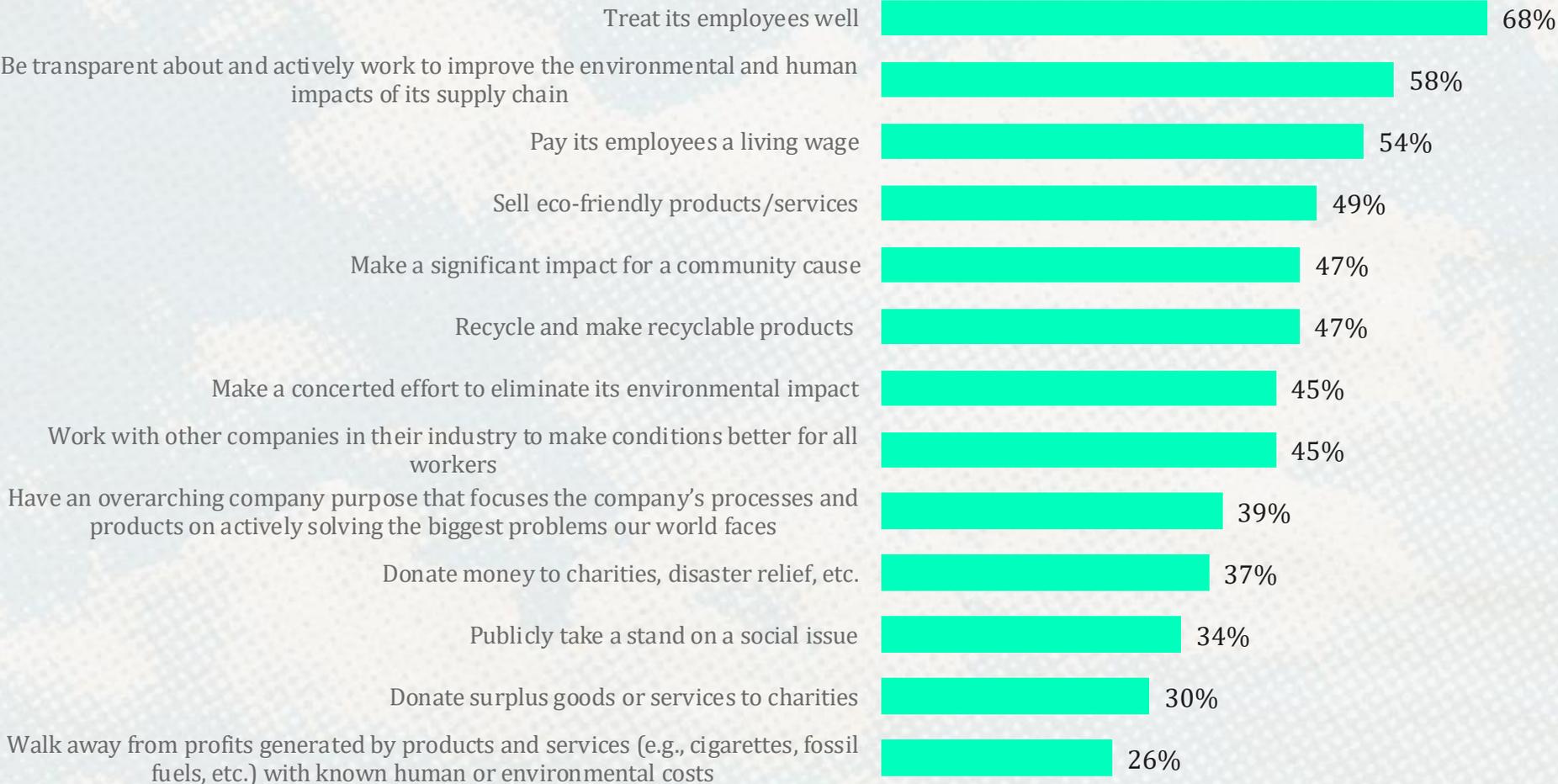
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89%	89%	88%	88%	76%	74%	74%
Brazil	India	UAE	China	Nigeria	Spain	Canada
73%	73%	71%	69%	66%	65%	
UK	Germany	Turkey	U.S.A.	Australia	Poland	

Source: Global Eco Pulse® 2024 — globally weighted by subregion

Q: How much responsibility do you think a company has for the end-of-life disposal of the products it manufactures? (n= 7,145)

We also see from consumers that a “good” company is one that participates in many ESG related activities (e.g., treats and pays its employees well, manages the impacts of its supply chain and sells eco-friendly products).



# Here you can see how these concerns rank by country ...

 USA	% chosen
Treat employees well	80%
Pay employees living wage	71%
Transparency and working to help environment + supply chain	45%

 Canada	% chosen
Treat employees well	78%
Pay employees living wage	70%
Recycle and make recyclable products	54%

 Brazil	% chosen
Treat employees well	75%
Pay employees living wage	71%
Transparency and working to help environment + supply chain	64%

 Spain	% chosen
Pay employees living wage	80%
Treat employees well	79%
Transparency and working to help environment + supply chain	54%

 Germany	% chosen
Treat employees well	76%
Pay employees living wage	67%
Sell eco-friendly products/services	49%

 Poland	% chosen
Treat employees well	73%
Pay employees living wage	71%
Recycle and make recyclable products	54%

 United Kingdom	% chosen
Treat employees well	79%
Pay employees living wage	69%
Recycle and make recyclable products	52%

... with the fundamental needs of a living wage and decent treatment leading the way.

 Nigeria	% chosen
Treat employees well	80%
Transparency and working to help environment + supply chain	75%
Make a significant impact for a community cause	63%

 China	% chosen
Treat employees well	48%
Make significant impact for a community cause	42%
Sell eco-friendly products/services	41%

 India	% chosen
Treat employees well	69%
Transparency and working to help environment + supply chain	63%
Sell eco-friendly products/services	63%

 Turkey	% chosen
Sell eco-friendly products/services	65%
Treat employees well	64%
Pay employees a living wage	62%

 Australia	% chosen
Treat employees well	76%
Pay employees living wage	70%
Recycle and make recyclable products	52%

 UAE	% chosen
Treat employees well	63%
Pay employees living wage	59%
Transparency and working to help environment + supply chain	57%

# So given that people:

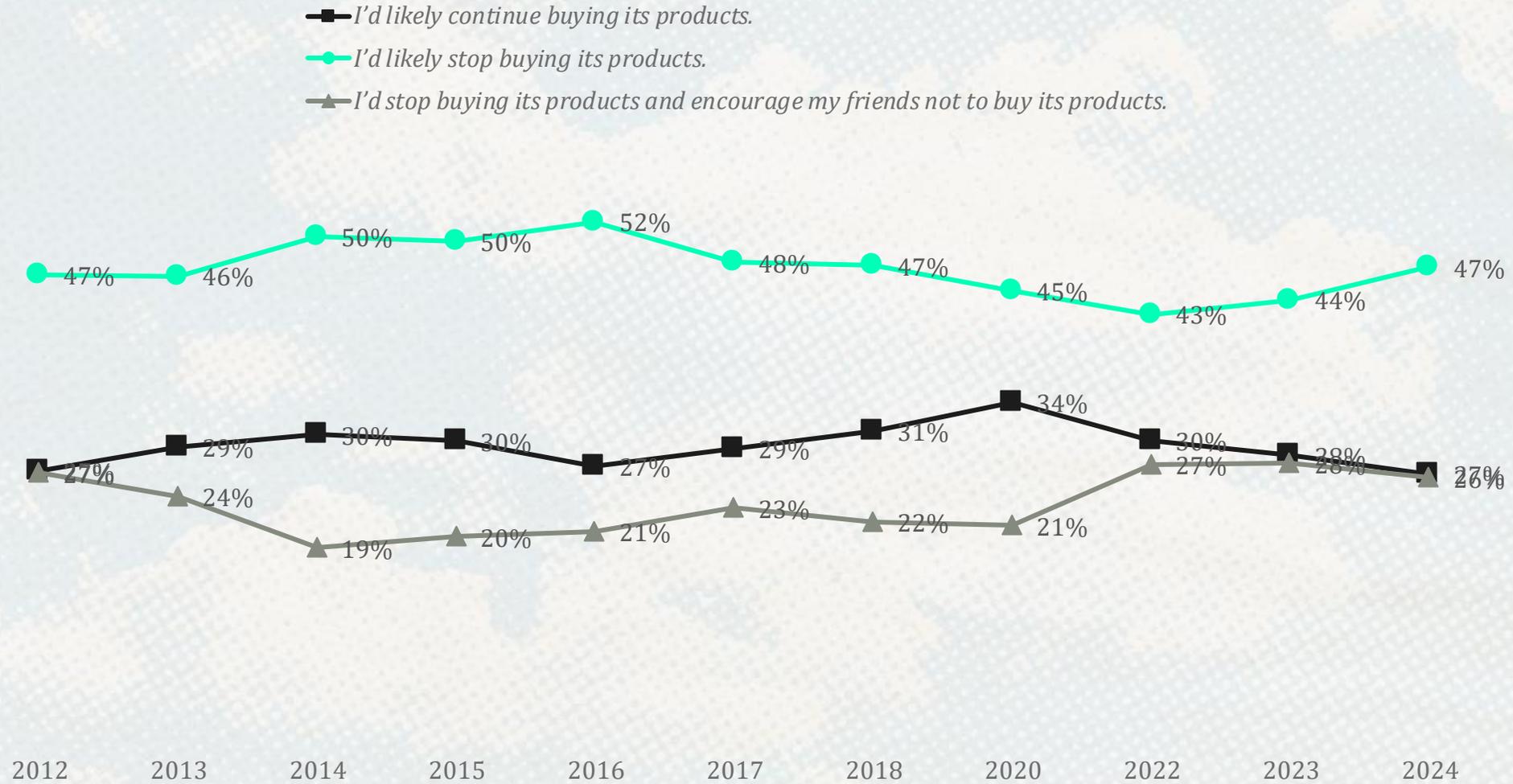
- Care about climate issues and hold companies responsible
- Want to buy from sustainable companies
- View "good" companies as ones who participate in ESG activities
- And want to know what companies are doing to solve the climate crisis ...

*Not communicating is not an option.*

What about greenwashing? How big of an effect does it have on purchase decisions?

A significant one.

We've been asking people about greenwashing for 18 years. Consistently, **almost half** would stop buying a product because of greenwashing. You can see how perceptions of greenwashing are driving purchasing actions.



Source: Global Eco Pulse® 2024 — globally weighted by subregion

Q: What would you do if you found out that the company that makes your favorite toilet paper — and has been advertising itself as environmentally responsible — had received a government fine for polluting a nearby river? (U.S.A. n=2,063)

Consumers claim they are good at identifying and understanding greenwashing.



# 69%

of consumers say they know what “greenwashing” is.



Source: Global Eco Pulse® 2024 — globally weighted by subregion

Q: Thinking about the different “green” claims that companies make about the environment, how confident are you that you can spot a greenwashing claim when you see it? (n=7,145)



# And only 200%

of consumers say they are not at all confident in or can't spot greenwashing when they see it.



Source: Global Eco Pulse® 2024 — globally weighted by subregion

Q: Thinking about the different "green" claims that companies make about the environment, how confident are you that you can spot a greenwashing claim when you see it? (n=7,145)

We put real-world, non-greenwashing claims and greenwashing claims in front of our survey participants and asked them to identify which ones were which.

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*We determined which claims could be considered greenwashing without any additional data or information by getting input from ERM's Certification Verification Services (CVS) team.*

These are the real, in-market claims we tested ...

A clothing tag that reads, "The Conscious Choice"

A clothing tag that reads, "100% Global Organic Textile Standard-certified organic cotton"

A plastic drink bottle that reads, "Produces 60% fewer carbon emissions"

A plastic drink package reads, "Supports plastic neutrality"

A snack package that reads, "Our packaging is compostable"

A snack package that reads, "Industrially compostable, with Biodegradable Products Institute commercially compostable certification"

A drink can that reads, "Our cans are made with eco-friendly materials"

A drink can that reads, "No preservatives, non-GMO"

A toothpaste product that reads, "Recycle Ready"

A toothpaste product that reads, "Recyclable in over 80% of municipal systems"

A food package that reads, "Less plastic, more ethics: 40% less plastic"

An ad for an online retailer that reads, "We offset a 100% of carbon emissions from shipping and packaging on every delivery"

A clothing tag that reads, "PFC-Free Technologies: Fluorocarbon-free water-repellent treatments"

A package that reads, "This box is now MADE WITH LESS MATERIAL. Scan to see why less material matters."

A drink bottle that reads, "100% recycled from ocean-bound plastic"

A computer package that reads, "Made with renewable bio plastics"

A drink package that reads, "5th natural 'ingredient': 100% renewable energy"

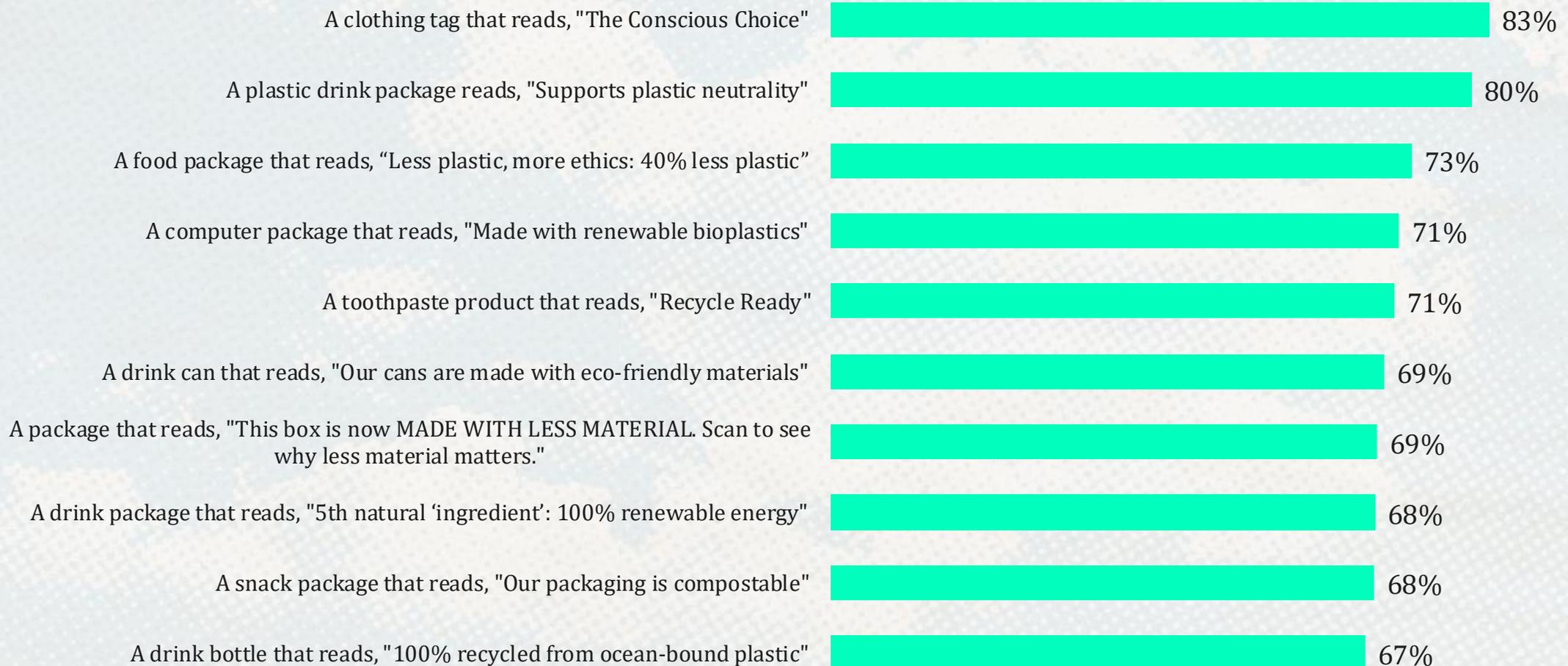
The ones with the red X were deemed as potentially greenwashing by ERM CVS; the green check marks were deemed to be okay as is.

✗	A clothing tag that reads, "The Conscious Choice"
✓	A clothing tag that reads, "100% Global Organic Textile Standard-certified organic cotton"
✓	A plastic drink bottle that reads, "Produces 60% fewer carbon emissions"
✗	A plastic drink package reads, "Supports plastic neutrality"
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A group we call “Savvy Spotters” was best at recognizing potential greenwashing claims.

But they didn’t just identify the claims that could be greenwashing; they also had opinions about the companies behind the greenwashing claims.

# Savvy Spotters responded that companies who use these greenwashing claims **would not** be considered a good company.



However, even those who aren't good at spotting greenwashing can still detect marketing B.S. and hyperbole when they see it.

We asked all consumers to tell us what makes them think a product's claim is greenwashing.

Here's what they said ...

"If you don't have the necessary information, how can you be sure?"

"This fails to state how to know if it's recyclable in yours and how this can be."

"It doesn't specify what the conscious choice is."

"How do you prove that 80% of anything was municipal?"

**"No company is 100% green."**

"It's too ambiguous."

**"Using an exaggerated statistic to sell a product."**

**"This obviously feels like trying to deceive consumers."**

**"Because most do that to seem more credible."**

**"I doubt any claim at 100%."**

"Way too much going on. Why not just say compostable?"

"Scanning for more info, seems too advertised, rather than straight to the point."

"Not very environmentally friendly product."

"Most people would be unable to industrially compost this package."

"Still a plastic bottle, counterintuitive."

"I don't really understand that clause."

"It's not clear to me what this means. I don't believe them."

And you know who is *really*  
turned off by greenwashing?

Government agencies, NGOs, consumer protection groups, and even investors.

We're seeing more and more fines and class-action lawsuits.



**Volkswagen**

"Dieselgate" cost Volkswagen

**\$35B**

in fines and settlements for installing software that recorded lower than actual GHG emissions

 **DWS**

DWS agreed to pay the SEC

**\$25M**

in penalties for greenwashing and  
anti-money laundering violations.



Kohl's and Walmart agreed to pay

**\$5.5M**

in combined penalties for using vague and misleading claims when marketing products as bamboo, when they were made from other materials.

**THE ORIGINAL**

**OAT  
LY!**



Oatly agreed to pay investors

**\$9M**

for inflating its stock price with false sustainability claims.

And those lawsuits and negative PR seep into the court of public opinion, eroding trust and brand affinity and undermining the good work being done.

So what's  
a brand  
to do?

First, you have to understand a fundamental difference between traditional advertising and sustainability communications.

In traditional advertising, implied benefits, hyperbole, and exaggeration are commonplace, and rarely questioned.



But if you take that approach with your sustainability communications (greenwashing), consumers will not only see through it — they will also be turned off by it.

And to make threading the sustainability communications needle even more difficult, you have the culture wars — mostly associated with the “S” in ESG.

A couple of years ago, a pressure campaign was waged against Bud Light and Target. Last year, it was John Deere and Tractor Supply. And then John Deere and Tractor Supply gave in to the pressure, publicly stating that they’re backing away from their DEI goals.



*Source*

# But beware: Assumptions can hurt you

The folks behind the pressure campaigns might have assumed that most people in rural America are anti-DEI and anti-ESG, and since both of these brands are tied to rural America, the companies wouldn't want to upset these consumers. Disappointingly, the companies appear to have assumed the same. But "rural" doesn't universally equal "diversity-hating" or even "climate denialism." Our data reveals:

79%

of people in rural America say **how a company treats their employees is indicative of whether or not the company is a good company.**

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60%

of people in rural America believe **climate change is real and caused by human activity.**

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69%

of people in rural America with children describe themselves as **concerned about the impacts of climate change in their kids' lifetimes.**

So what does this all mean  
for your company?

# Sustainability communications is trickier than you think:

- There are **countless nuances**, which are constantly changing.
- **Not communicating is not an option** (consumers care about sustainability and they want to hear about what companies are doing).
- **Avoid hyperbole**, or even the appearance of hyperbole, e.g., 100% claims.
- It's not enough to simply back up sustainability claims. **Using the wrong language can also get you in trouble**, and the right and wrong language is constantly evolving.
- Be careful **making assumptions about your audience's views** on ESG issues — it may not be what you think.
- **Own the sustainability and ESG narrative surrounding your brand** or risk someone else controlling it.

# Connect with ERM Shelton.

We're the nation's leading marketing communications firm dedicated to the sustainability sector.

We gather rich insights that help you make the right environmental and social purpose commitments, develop more environmentally friendly products, evolve what your brand stands for and fuel the right stories and campaigns — all so people want to buy from, work for and invest in your organization.



*Learn more at*

[sheltongrp.com](http://sheltongrp.com)