

GfK Green Gauge®  
2022 Global Report

## Environmental sustainability amid economic and social crisis

The following is a preview of the  
2022 Green Gauge report. To access  
the complete study, [contact GfK today.](#)





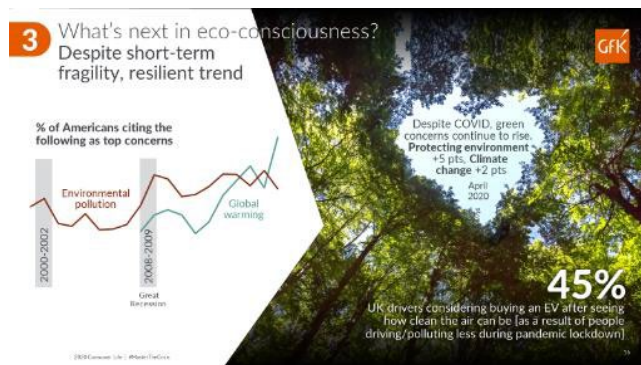
# What is Green Gauge?

How consumers and sustainability interact around the globe; better understand the “E” in ESG



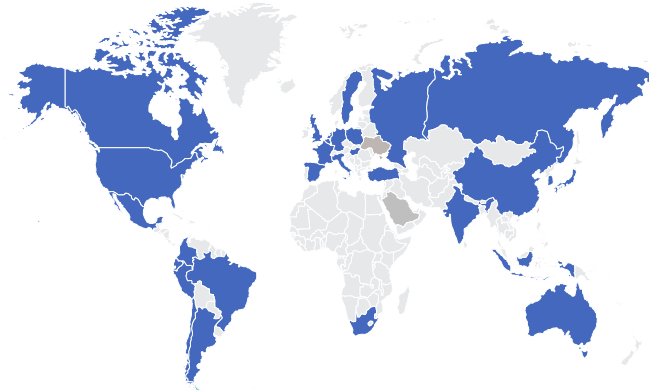
## Green Gauge Overview

GfK Green Gauge® is a multi-decade syndicated study and consumer survey that provides leading global marketers and sustainability professionals with an in-depth look into sustainability-related consumer attitudes and behaviors.



## Backed by GfK Consumer

GfK Consumer Life is the premier study of global consumer trends. By combining extensive consumer data with meticulously curated research, we provide valuable context for the landscape of sustainability.



## Segmenting the marketplace

The Green Gauge® segmentation is built with the marketer in mind. Organizations use it to target groups of consumers based on a holistic view of their sustainability perspective.





## Answering your key consumer questions

### A guide for smarter decision making

- Which consumers and markets should I target?
  - Most/least receptive to sustainability products and messaging
  
- What barriers still exist for consumers to engage with sustainability -- and what do they mean for brands?
  - Defining a purpose for your brand's actions
  
- How can environmental actions tie back to purchase decisions?
  - Determining ROI on your brand's engagement
  
- How do disruptive events (e.g. COVID-19, inflation) impact the landscape for consumer-driven sustainability?
  - Assessing long-term impact, opportunities



# 2022 Green Gauge Global Report

## Content Overview



### Current state of environmental sustainability

*Highlighting key consumer shifts among a backdrop of historic inflation and a world trying to move past COVID*



### Trust, accessibility, and the marketplace

*The market continues to grow, but rising consumer complaints might signal "Green Fatigue"*



### Green Gauge® Segmentation

*The marketers playbook for engaging consumers on environmental sustainability*





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## Green Gauge Global 2022: Executive Summary

# Concern for the environment remains high, and environmental sustainability continues to impact more people each year

2020 established a new baseline for consumer attitudes towards the environment. The pandemic was a catalyst for accelerated beliefs and behaviors regarding sustainability.

The voices of skeptics and detractors (e.g., climate change deniers) have been significantly minimized. Gen Z and Millennials continue to propel sustainability forward and redefine what it means to be an “environmentalist.”

The results from the 2022 Green Gauge Global survey show **attitudes and behaviors towards the environment are resilient** in the face of a lingering pandemic and historic inflation.

The major environmental issue of the day, climate change, is still top of mind for consumers, with 71% identifying climate change as an extremely or very serious issue (+2 points from 2021 and +4 from 2020; Figure 1).

Importantly, climate change is an issue that continues to impact more people each year. Historically, climate-related matters have invigorated teenagers and young adults. However, in 2022, those over the age of 60 saw the largest increase in identifying climate change as a serious issue (69%, +6 points since 2021), demonstrating the momentum behind sustainability.

% who say climate change is an extremely/ very serious issue

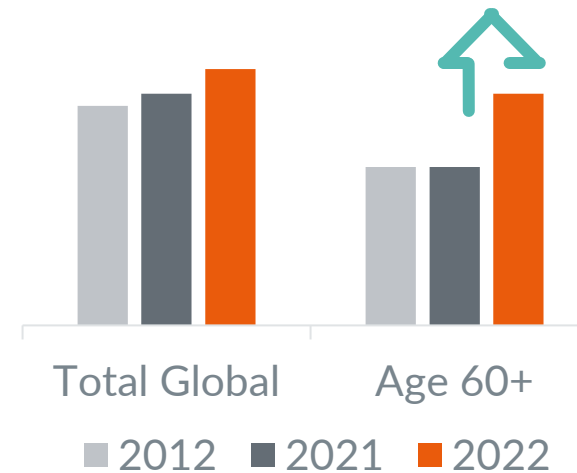
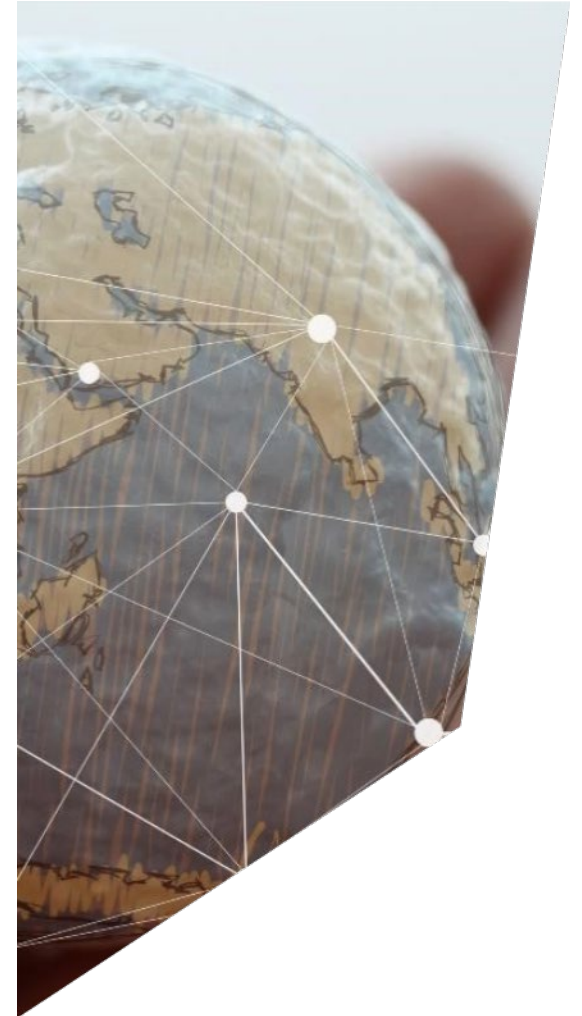


Figure 1





# Other Key Takeaways

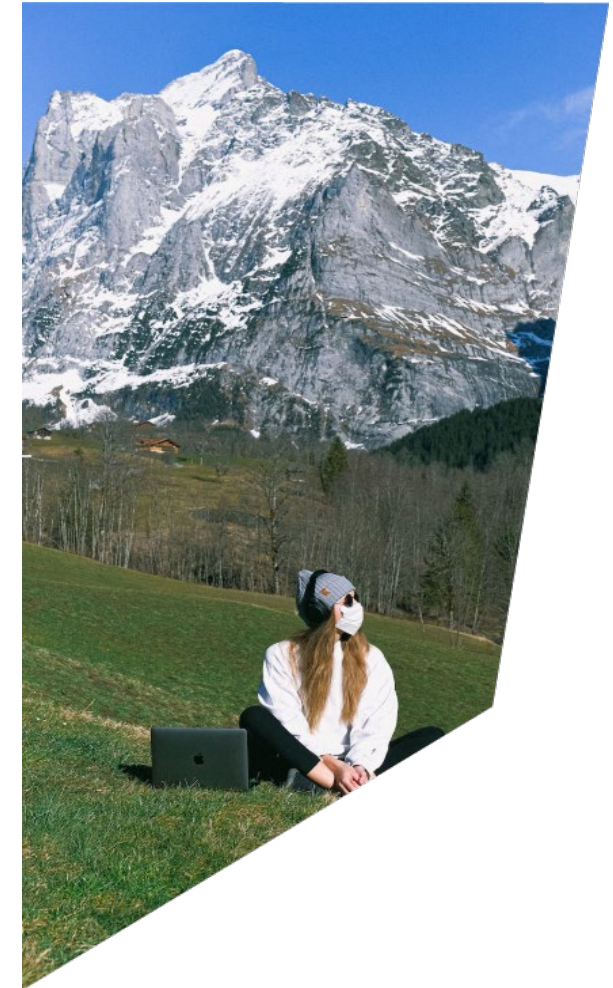
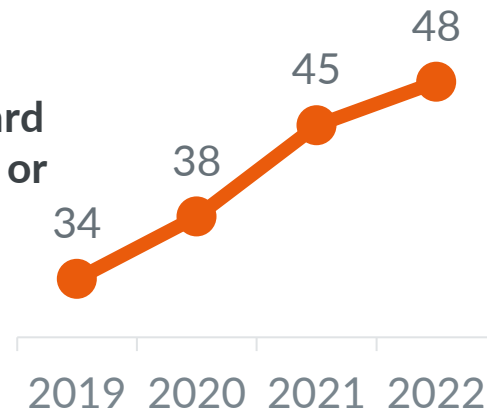
- Consumers use sustainability as a hedge against historic inflationary pressures
- Marketers should be wary of acute rises in quality and cost concerns, signaling potential fatigue with this red-hot consumer trend
- Driven by Gen Z and Millennials, the Glamour Green\* segment continues to dominate the landscape for consumer-driven sustainability
- Long term impacts of the pandemic are coming into focus and nature and natural/organic products are big winners

## Being in Tune with Nature

Fitting into nature

#27 personal value globally in 2022  
(out of 57 values tracked)  
+7 ranks from 2016

## Gardening/yard work, weekly or more often (% global)



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## Report Preview

### Green Gauge® Global Report

The following details provide a sample of data and results from the 2022 Green Gauge report.

To access the complete report,  
[contact GfK today!](#)



# Sustainability concerns remain resilient,

Even when people are preoccupied with economic, political, and social concerns – not to mention pandemics – they continue to consider the environment a high priority



## Global ranking of 24 societal concerns (2022)

- 1 Pandemics
- 2 Inflation
- 3 Money enough to live right and pay the bills
- 4 Environmental pollution
- 5 Recession and unemployment
- 6 Global climate change/Global warming
- 7 Cost of healthcare
- 8 Educational quality
- 9 Economic inequality in my country
- 10 Crime and lawlessness
- 11 Personal information getting into the wrong hands
- 12 Wrongdoing of elected government officials
- 13 The future of the retirement or pension plans
- 14 Misinformation presented as fact
- 15 Terrorism
- 16 The impact of technology on society
- 17 Gender inequality
- 18 Religious extremism/fundamentalism
- 19 Drug abuse
- 20 Relations with foreign countries
- 21 Rise of authoritarian regimes around the world
- 22 Trade restrictions impacting my country
- 23 Relations between racial and ethnic groups
- 24 Immigration

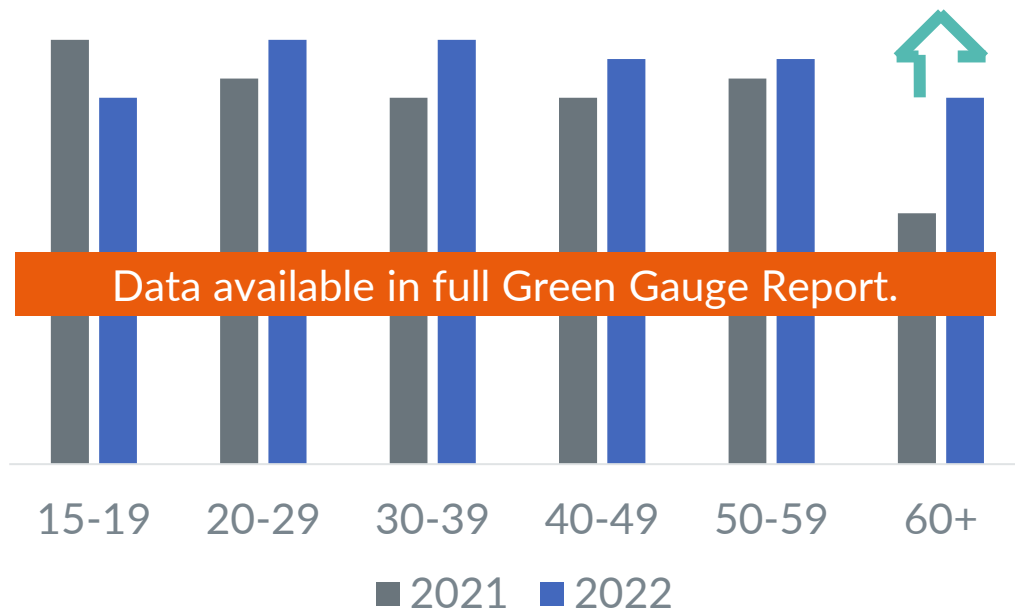
**Environmental pollution is the only concern that has remained in the global top 5 since 2015.** That is seven years of sustained concern for the environment. The only other concern that has remained in the top 5 since 2015 is having “enough money to live right and pay the bills.” Not even inflation, recession, or pandemics have remained in the top 5 during the same time period.



# Older generations catching up to younger in eco-concerns

Global consumers age 60+ see fastest rise in climate worry; sustainability continues to touch new people each year

Climate change is a serious issue (top 2), by age



## Compared to 2021, global age 60+ more likely to:

- Travel in an environmentally friendly way when possible (46% top 2, +5 pts 2021)
- Talk to others about environmental issues (30%, +4 pts)
- Do research on companies' environmental practices (20%, +6 pts)
- Volunteer for environmental issues (18%, +4 pts)

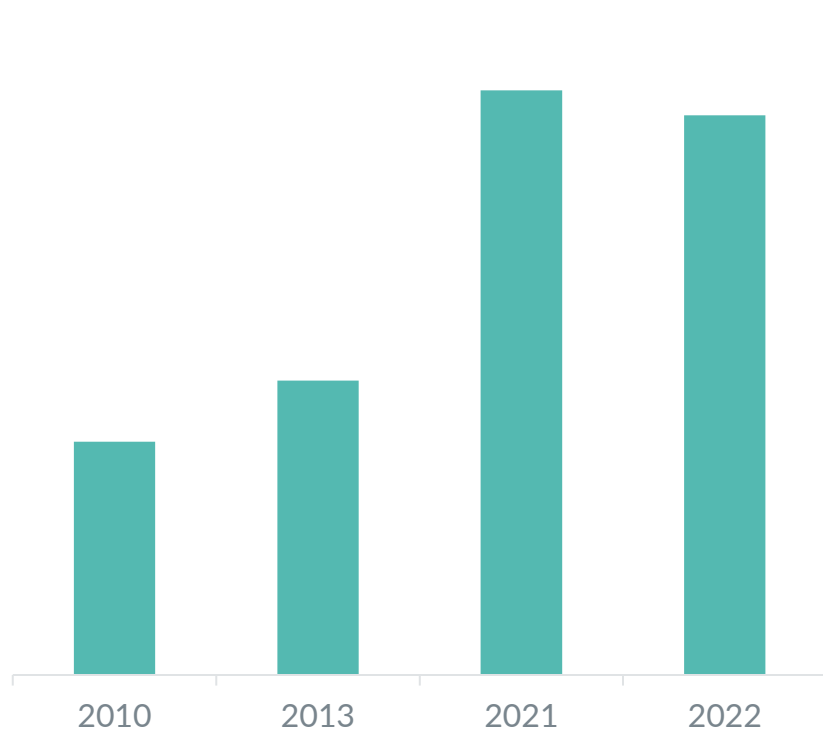




# As a consumer trend (and not just a social movement), sustainability is growing

Somewhat muted growth since last year, but the longer-term trend shows the true momentum and future potential

*% take environmental protection into account when purchasing (global, top 2)*



|                 | 2022 (%) | Change from 2021                           |
|-----------------|----------|--|
| Developing Asia | 49       | Data available in full Green Gauge Report. |
| LATAM           | 48       |  |
| Western Europe  | 39       |  |
| North America   | 33       |  |
| Developed Asia  | 20       |  |



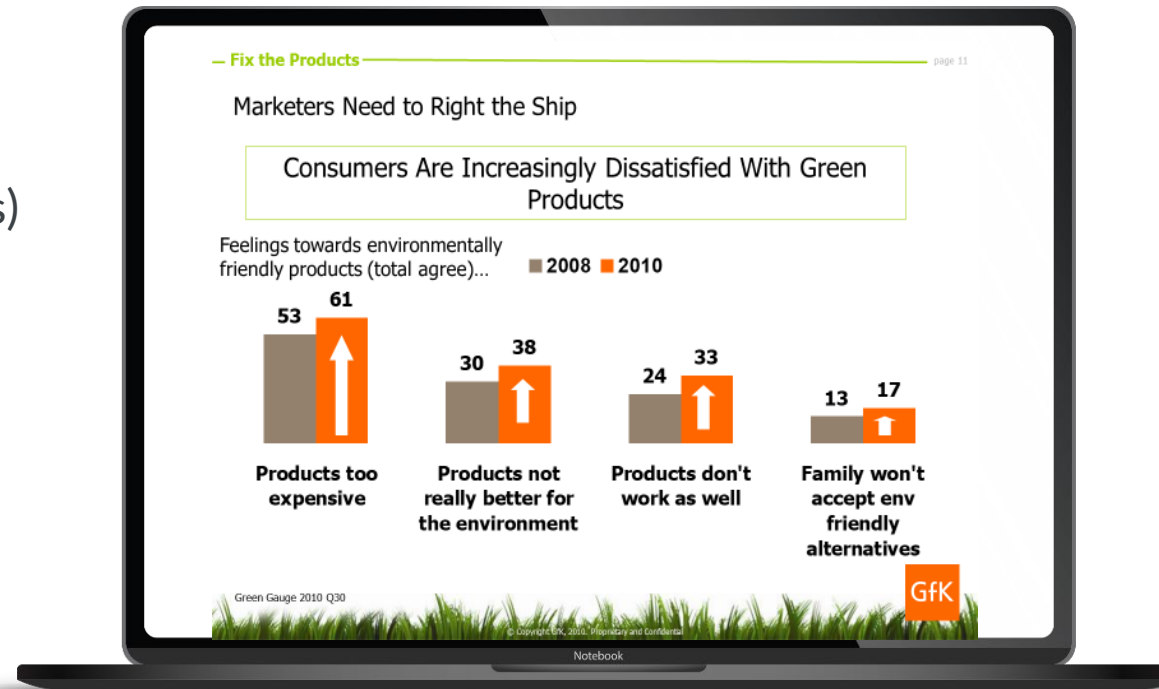
# Though there are a number of **red flags** for marketers

Perceived barriers to purchase could signal a new era of “Green-Fatigue”

**Rising barriers** to sustainable purchasing since 2021:

- **Quality** (+6 points)
- **Cost** (+4 pts)
- **Family conflicts** (+4 pts)
- **Confusion/lack of knowledge** (+4 pts)
- **Time** (+4 pts)

This has happened before:  
Learnings from Green Gauge US  
2008-2010



Green Gauge 2010  
Ad Age/NBC News:

*“Eco-fatigue: Going green no longer red hot: Green marketing, a movement so hot that not even a deep recession could kill it, is starting to show signs of consumer revolt.”*

*“In recent months, sales have begun to slow in categories such as green cleaners and grow in not-so-sustainable ones like bottled water as shoppers decide they may not be worth the tradeoff. And a **September [2010]** study showed big swings in the number of consumers who believe environmentally friendly alternatives are **too expensive, don't work as well** as other products and **aren't actually better for the environment** — all of which seem to add up to what...the GfK Green Gauge study calls **“green fatigue.”**”*





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## Green Gauge segmentation report

The marketer's playbook for engaging consumers on environmental sustainability

# Green Gauge® Segmentation

Gauging the world's eco-consciousness



The Green Gauge segmentation is built for the marketer seeking to identify **unifying themes and key distinctions** across different groups

Organizations use it to **target large groups of consumers** based on a holistic view of their sustainability perspective

The segmentation enables you to **identify which groups are the most/least receptive** to sustainability products and messaging

**Comprehensive deep-dives into each segment** let you tailor your strategies to their unique sensibilities





# ...inform the Green Gauge® segmentation



Green Gauge segments provide marketing guidance across the spectrum of sustainability attitudes, behaviors, and opportunities



The most active in environmental thought and action



Green is a badge of honor/status symbol – eager to showcase eco-friendly behaviors and purchases



Pro-environmental attitudes, but focus mostly on the “easy” behaviors



Willing, but not able... need the tools



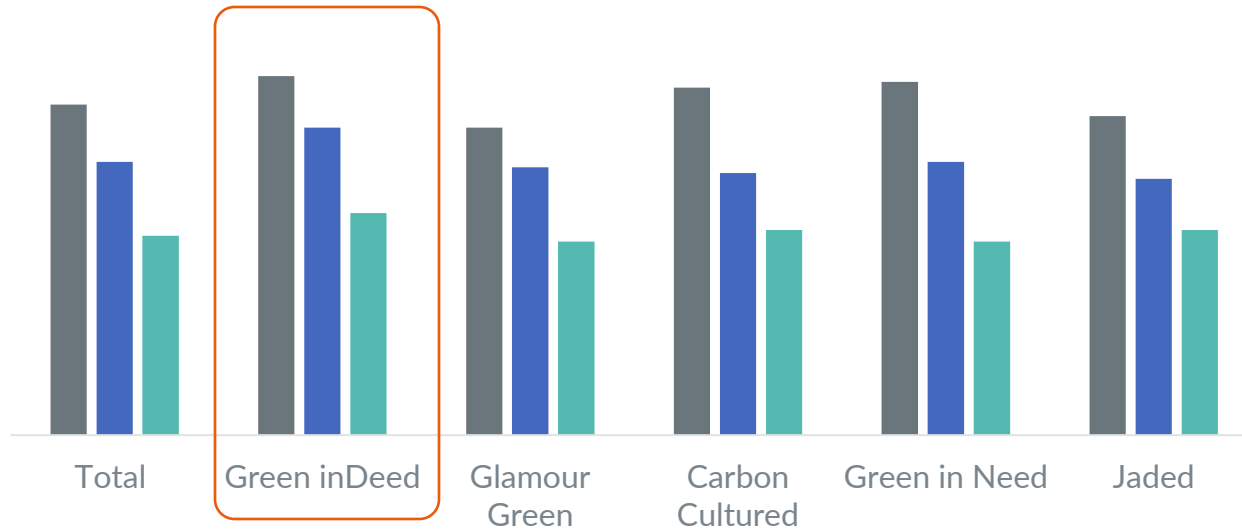
Skeptical, cynical, but still participate sometimes

# The most sustainable consumers lead on money-saving behaviors

Saving money with the environment is seen as smart, responsible consumption by Green inDeeds



## Money-saving strategies in the past year (% total global)



- Spent less for everyday necessities because of rising prices (e.g., food and clothes)
- Postponed a purchase until the product was on sale/special offer
- Switched from name brands to less expensive brands



**GREEN  
inDeed**

The most active in environmental thought and action



*of Green InDeeds* agree “I prefer to own fewer, but higher quality items” (+10 points from total global) \*Highest among all segments





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## Segment Preview

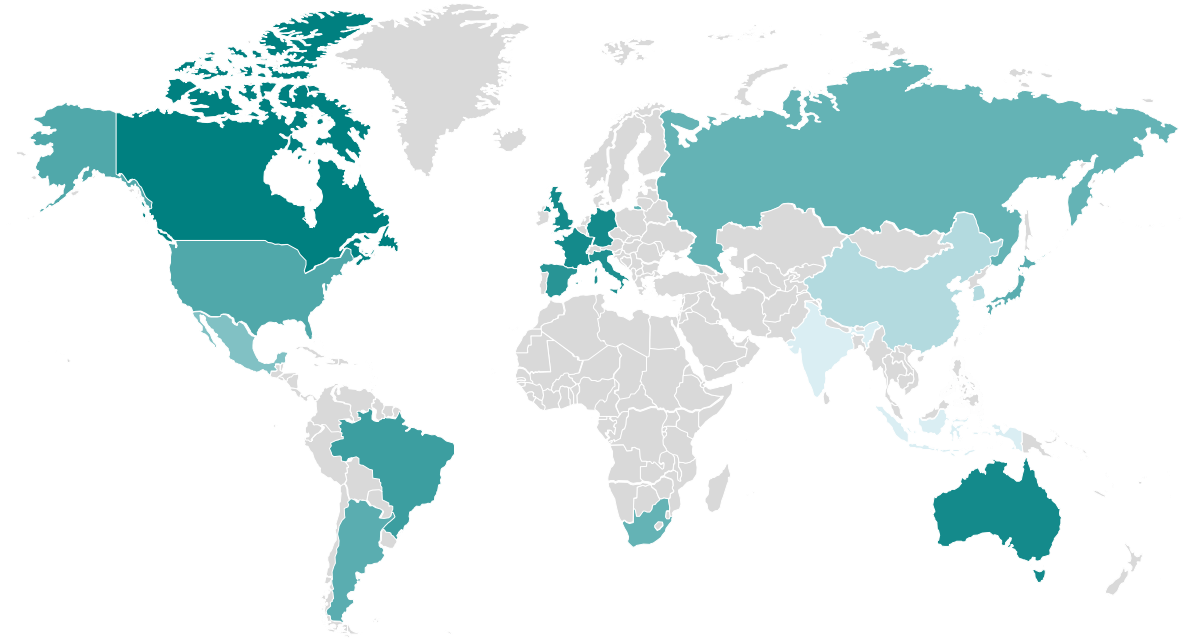
Carbon  
CULTURED

Who are the “Carbon Cultured” consumers?



I care about the environment but prefer to **focus mostly on ‘easy’ actions** I can take.

The Carbon Cultured cohort is most evident in Western Europe and Canada. As with Green InDeeds, Carbon Cultured are more likely than average to be **women**; they are also more likely to live in **suburban** areas. This group is **price-sensitive**. Attitudes towards the environment closely align with Green inDeed as well, but a focus on finances prevents further action. They largely focus on **easy sustainable actions** and place responsibility on both the individual and at the corporate level.



**Global = 11%**

**Highest in Canada (27%)**

**Lowest in India & Indonesia (5%)**

# Lifestyle

Ideologically similar to Green inDeeds

The Carbon Cultured segment finds environmental issues highly concerning, trailing shortly behind Green inDeed in the proportion that consider these issues serious, and hold similar beliefs towards the role of companies in environmental protection

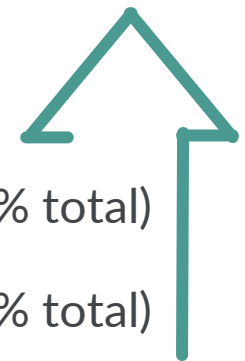


87%

of Carbon Cultured agree *“It is important that companies take environmentally responsible actions, such as using environmentally friendly materials or ingredients”*, +14 pts from total population

Environmental Pollution (89% vs. 72% total)

Global Climate Change (85% vs. 71% total)





# Actions

They focus on sustainable actions that don't require extra resources



## Easy Green Actions - % of Carbon Cultured that...

Recycle

89%



+32 points  
from total global

Conserve energy  
in the home

87%



+17 points

Conserve water  
in the home

81%



+14 points

Buy only what is needed  
to reduce wasteful  
consumption

69%



+19 points

# How to engage



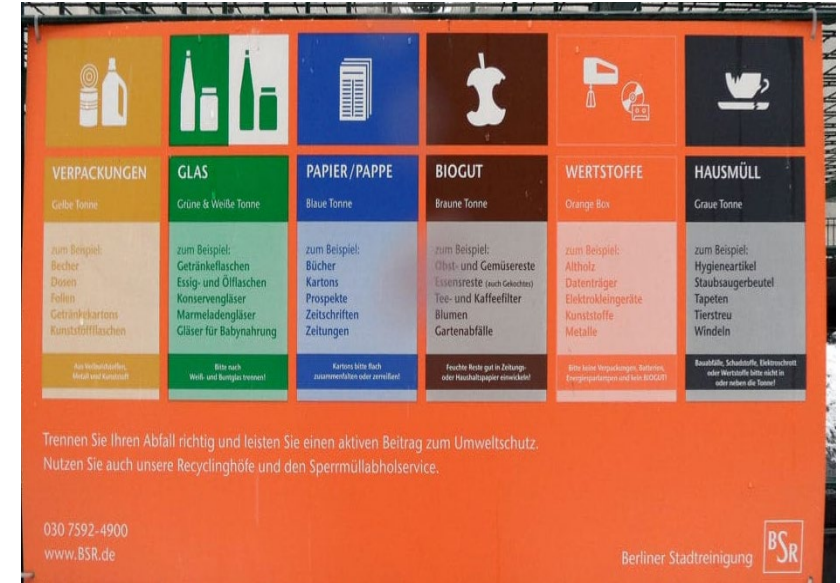
Make “being green” as simple a process as possible; **eliminate extra effort and streamline tasks** (including the purchase process)



**Highlight affordability** of sustainable products, e.g., cost per use, long-term savings potential, as well as their practicality – bells and whistles may not appeal



Don't overlook **brick & mortar retail channels** for new marketing and merchandising opportunities so people can physically experience products



“Over the last two decades, Germany has adopted a series of strategies – such as mandatory waste sorting policies and an extremely efficient deposit refund scheme – that have significantly improved its waste management and increased its recycling rates. The country also introduced a so-called ‘Energiewende’, a roadmap to the low-carbon and renewable energy transition and in shaping the public opinion on the importance of environmentally sound management of waste.” -Earth.org



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## About the Green Gauge Report

Represented markets and global + regional  
breakdowns



# Green Gauge 2022 Footprint



## 26 Markets

All Regions: Asia-Pacific, Africa, North America, South America, Western Europe and Central/Eastern Europe



## Online

Panel blend of 4-6 online and mobile providers for each market



Now celebrating its

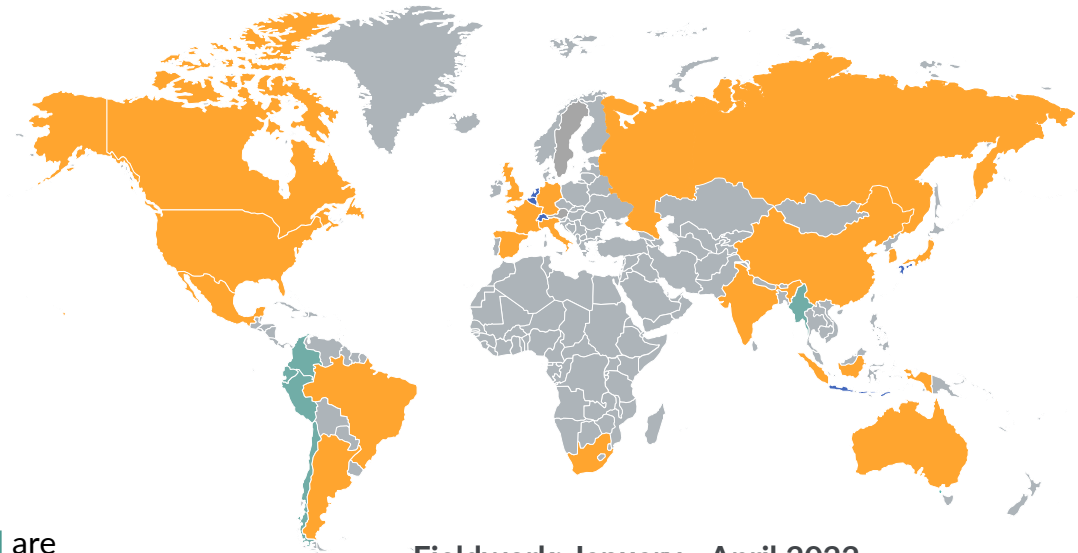
## 25th anniversary,

GfK Consumer Life Global is the most comprehensive and longest-standing consumer trend study in the world.

Sample = Between 1000 and 2000 per market

The 18 markets highlighted in **gold** represent a consistent core country set available for trending; 3 in **blue** are additional syndicated markets

- |           |           |           |              |             |
|-----------|-----------|-----------|--------------|-------------|
| Argentina | Chile*    | Germany   | Mexico       | South Korea |
| Australia | China     | India     | Netherlands  | Spain       |
| Belgium   | Colombia* | Indonesia | Peru*        | Switzerland |
| Brazil    | Ecuador*  | Italy     | Russia       | Thailand*   |
| Canada    | France    | Japan     | South Africa | UK          |
|           |           |           |              | USA         |



Fieldwork: January - April 2022

\*5 countries in **teal** are additional markets that are not part of the syndicated dataset, but are available for purchase

# New for 2022: Green Gauge Plus

Green Gauge Sustainability and Sector Deep Dive

Contact your GfK representative for reporting and pricing options



## Bonus Sector and topic coverage

In 2022, GfK Consumer Life significantly expanded its global sustainability insights coverage with a special study focused on **consumers' environmental perceptions, attitudes, and behaviors within specific product categories**

## Enhanced decision making

Marketers will benefit by understanding key triggers for environmentally motivated purchases within their sector of focus

## More trends

This new project adds to the extensive book of knowledge built over the past 20 years of Green Gauge research

## Comprehensive view of issues relevant to consumers AND brands

The research **also includes an in-depth look at other topics and issues relevant to brands, consumers, and the environment** such as the circular economy and the rise of plant-based living



# Green Gauge Plus | Sector Coverage

Green Gauge Sustainability and Sector Deep Dive

Contact your GfK representative for reporting and pricing options



## In-Depth Sector Coverage



Automotive



Major appliances



Small appliances



Home electronics



Personal electronics



Pre-packaged foods\*



Personal care/beauty product\*



Apparel/clothing



Home cleaning and care\*

## Drill down within sectors

- Overall importance of the environment in the context of other purchase drivers (e.g., price, quality, etc.)
- Environmental elements important within Sector (e.g., for appliances – energy efficiency, water efficiency, made from eco-friendly materials, eco-friendly label, etc.)
- Trusted sources of environmental information
- Willingness to pay more
- \*Packaging materials preference (for food, personal care, and home cleaning only)



Thank you for reading:  
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Global Report**

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