From Intention to Action:
Inside the Mind of the Sustainable Consumer

October 2025

Northwind Climate and Ceres Partner on a Sustainability Briefing

Northwind Climate is business intelligence for the climate economy, which conducts monthly national surveys of 2500+ US adults allowing us to continuously monitor consumer attitudes on climate and sustainability and how that impacts their purchasing decisions. Our proprietary analytics help cut through the noise, identify trends, knowledge gaps and untapped market opportunities to hone your marketing and communications strategies.

For more information, please reach out at info@northwindclimate.com.

Ceres is a nonprofit advocacy organization working to accelerate the transition to a cleaner, more just, and resilient economy. With data-driven research and expert analysis, we inspire investors and companies to act on the world's sustainability challenges and advocate for market and policy solutions. Together, our efforts transform industries, unlock new business opportunities, and foster innovation and job growth – proving that sustainability is the bottom line.

For more information, visit ceres.org.

Survey Methodology

Sample of 2,297 U.S. adults aged 18+ using web panel respondents with a quota-based recruitment procedure. Fielded using online panel from July 10, 2025 to July 17, 2025.

Weighted to population of U.S. adults aged 18+ on age, race, gender, Hispanic ethnicity, educational attainment and census region using the U.S. American Community Survey 2022 five-year estimates. The data for race were weighted based on the U.S. Decennial Survey. For more information on methodology, please visit www.northwindclimate.com.

MOE: +/- 2.1 %*

*Results for subgroups of the sample are subject to increased margins of error

TABLE 1: WEIGHTED FREQUENCY OF DEMOGRAPHICS USED FOR SAMPLE WEIGHTS

Demo	Weighted
Age	
age: 18-24	12%
age: 25-34	18%
age: 35-44	17%
age: 45-64	32%
age: 65+	21%
Race	
race: white	64%
race: black	12%
race: other	24%
Gender	
gender: female	51%
gender: male	49%
Hispanic	
hispanic: yes	12%
hispanic: no	88%
Education	
education: lessthanbachelors	68%
education: bachelors	20%
education: advanced	12%
Census Region	
census: northeast	17%
census: midwest	22%
census: south	38%
census: west	23%

Understanding behavior is about understanding psychology.

NWC's Climate Value Segmentation model uses latent class analysis to cluster consumers based on shared attitudes and behaviors toward the climate rather than making assumptions based on demographics.

CLIMATE DOERS

15%

- Highest level of climate concern
- Most apt to prioritize climate friendly purchasing
- Most financially secure
- Early adopters of new technologies
- Most racially diverse

CLIMATE DISTRESSED

27%

- High level of climate concern
- Want to see major changes from corporations
- Doing okay financially but cash gets tight
- Moderately racially diverse
- Suburban, urban

CLIMATE DETACHED

32%

- Climate is less of a priority
- Believe climate change could hurt future generations, but not this one
- Moderately racially diverse
- Suburban, urban

CLIMATE DOUBTERS

18%

- Climate change may be real, but media is exaggerating danger
- Buying climate friendly products not prioritized but open
- Mostly white
- Suburban, small town, rural

CLIMATE DENIERS

8%

- Climate change is either not real or it's a natural phenomenon
- Universally believe media is exaggerating danger
- Mostly white
- Retirees
- Suburban, small town, rural

For more information about the Climate Value Segmentation Model, please visit www.northwindclimate.com.

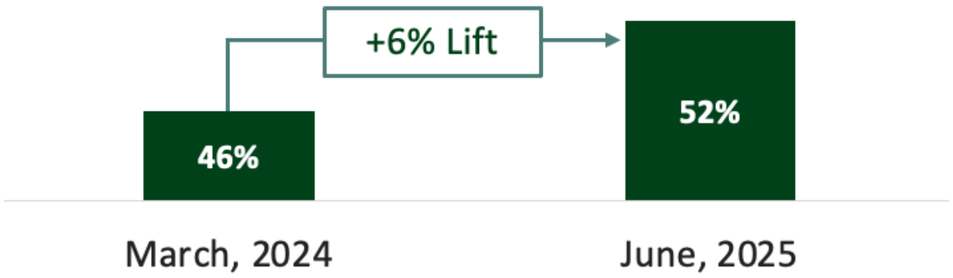
Section 1:
The State of Consumer Sustainability

Two-thirds of Americans will pay more for sustainability – even when no one's watching.

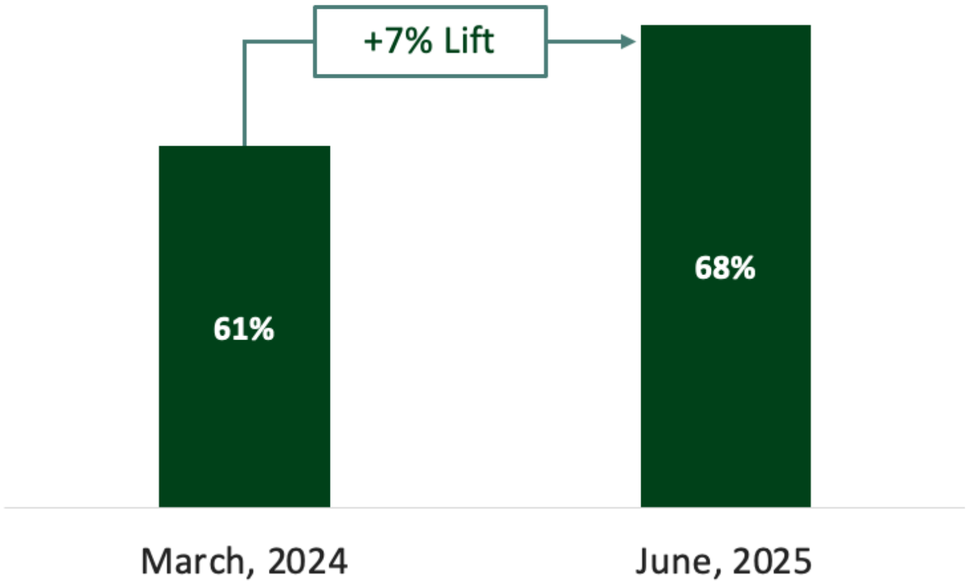
The intent is there. The opportunity is real. But brands must earn consumers' trust.

How important is: Buying environmentally friendly products?

Share of Respondents Answering "Extremely" or "Very" Important

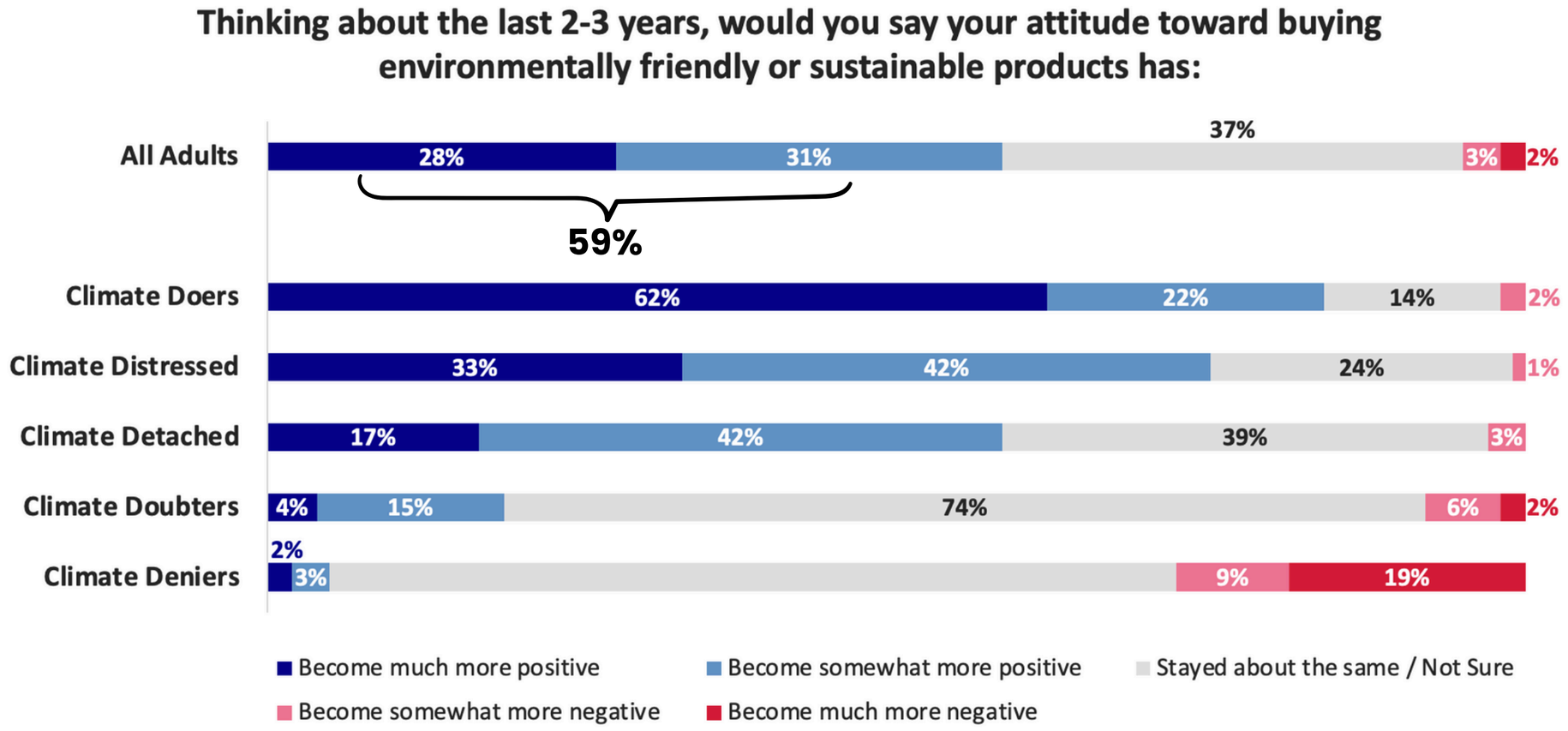


Agree/disagree: I am willing to pay a little more for things I know are produced sustainably.



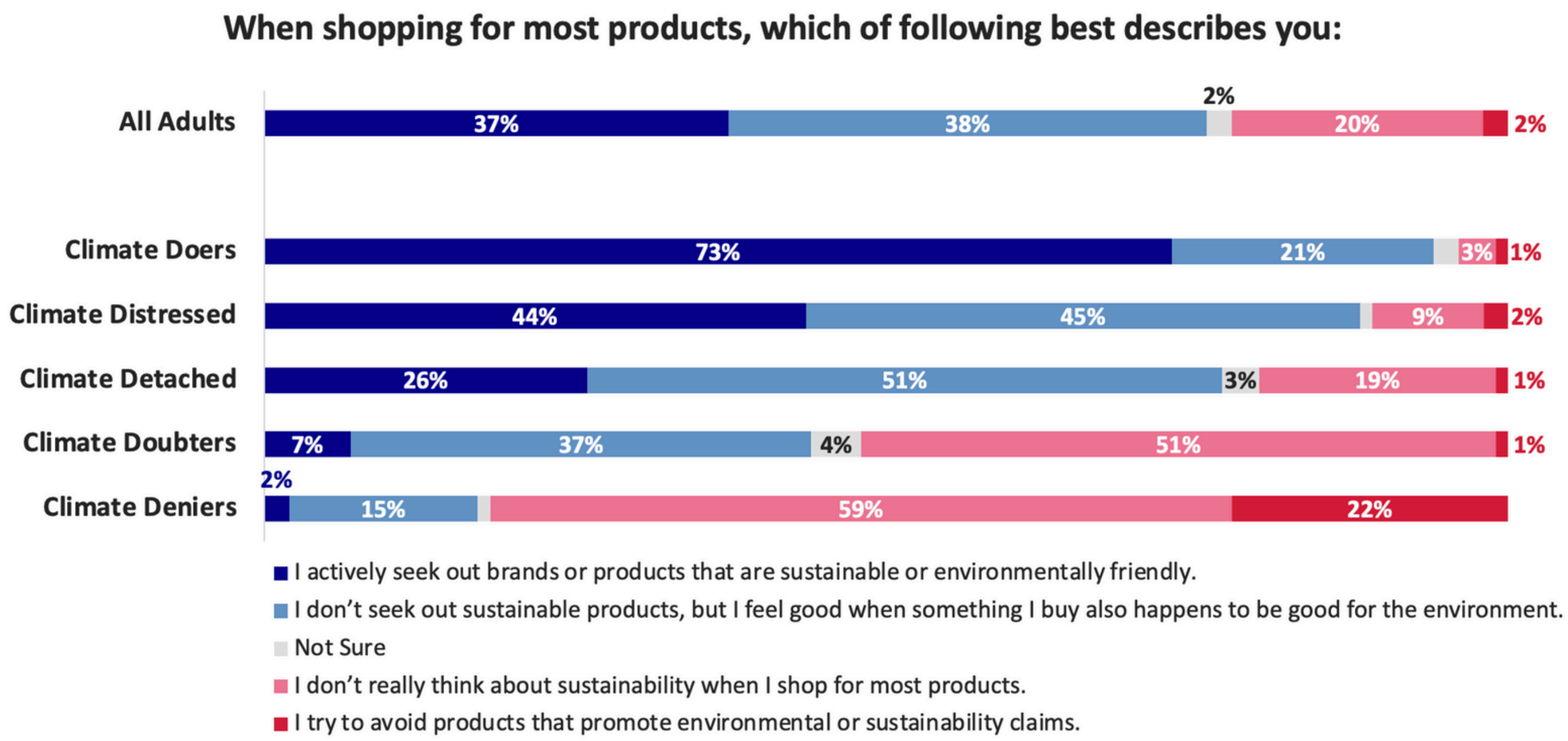
SOURCE: NORTHWIND CLIMATE RESEARCH

Most consumers say their interest in buying environmentally friendly or sustainable products has grown more positive over the past 2 to 3 years.



SOURCE: NORTHWIND CLIMATE RESEARCH JULY 2025

3 in 4 consumers actively or passively prefer sustainable products – but motivations and purchase triggers vary sharply by segment.

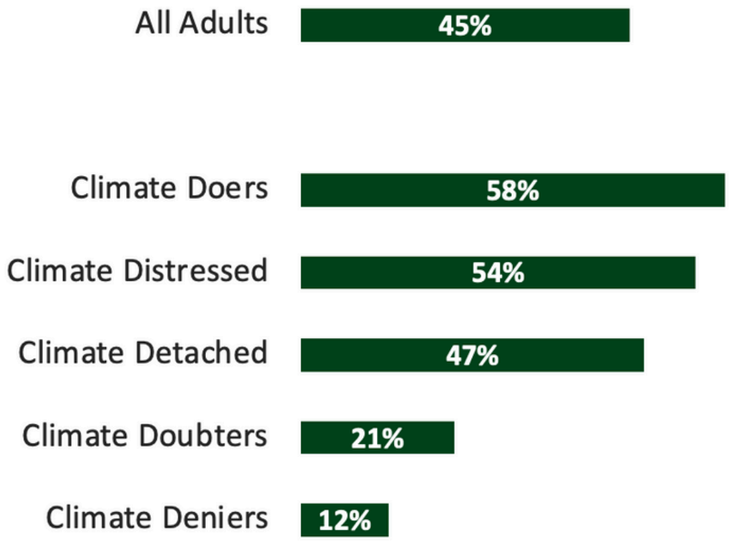


SOURCE: NORTHWIND CLIMATE RESEARCH JULY 2025

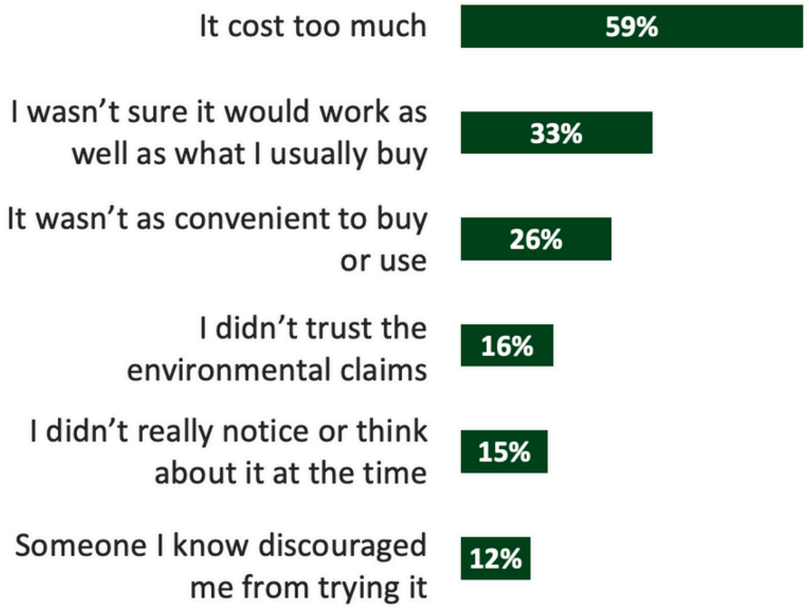
The majority of opt-outs in the aisle are due to cost, reliability and ease.

Nearly half of consumers report opting out of buying a more sustainable product, often due to cost and perceptions of quality.

Share of respondents that "have thought about choosing a more sustainable or environmentally friendly product but decided not to?"



What prevented you from trying the more sustainable product?

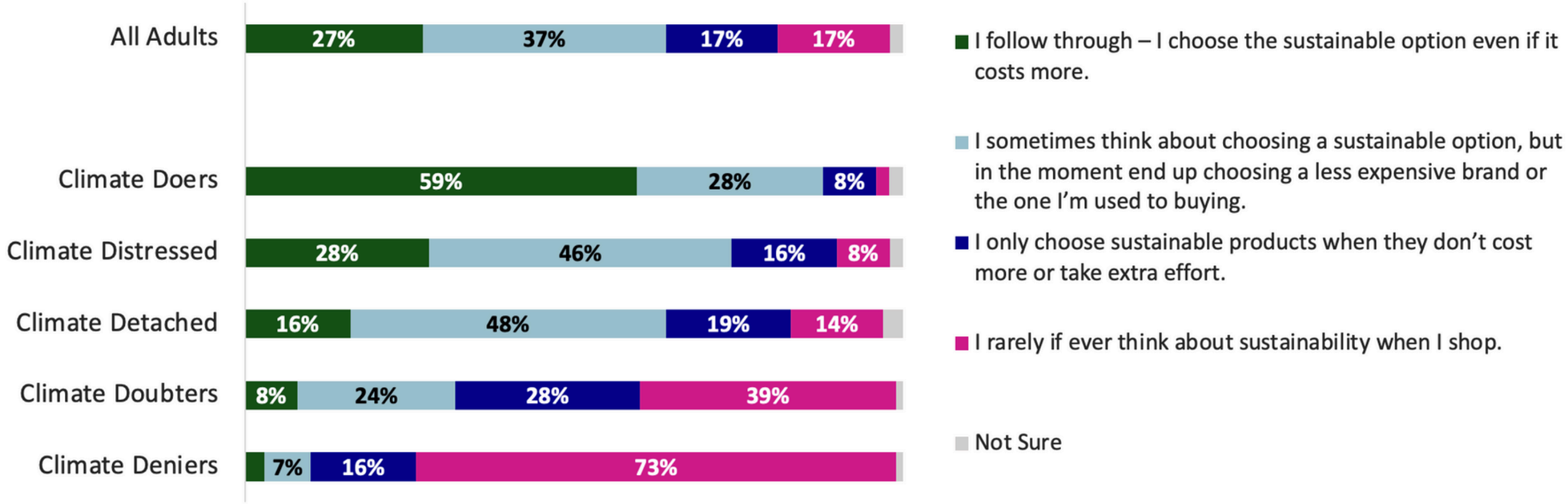


SOURCE: NORTHWIND CLIMATE RESEARCH JULY 2025

Marketing channels and communications must distinguish high-conviction targets from the rest.

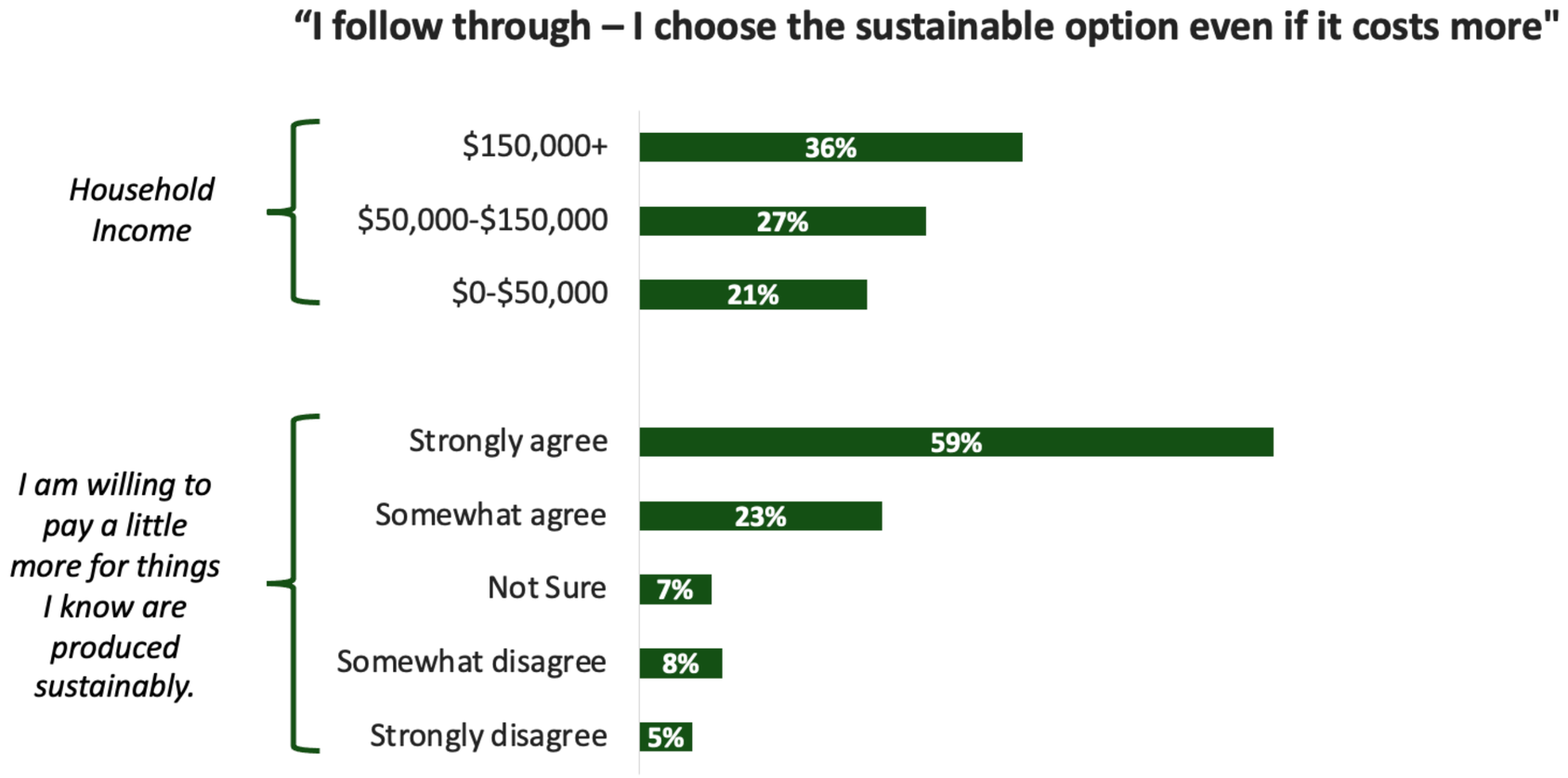
The middle majority of consumers admit to pivoting away from sustainable brands at times. Only Climate Doers say they consistently follow through.

Many consumers say in surveys that they would pay a little more for a sustainable brand or product, but then don't always end up doing so for one reason or another when they're actually in the store. Which of the following best describes you:



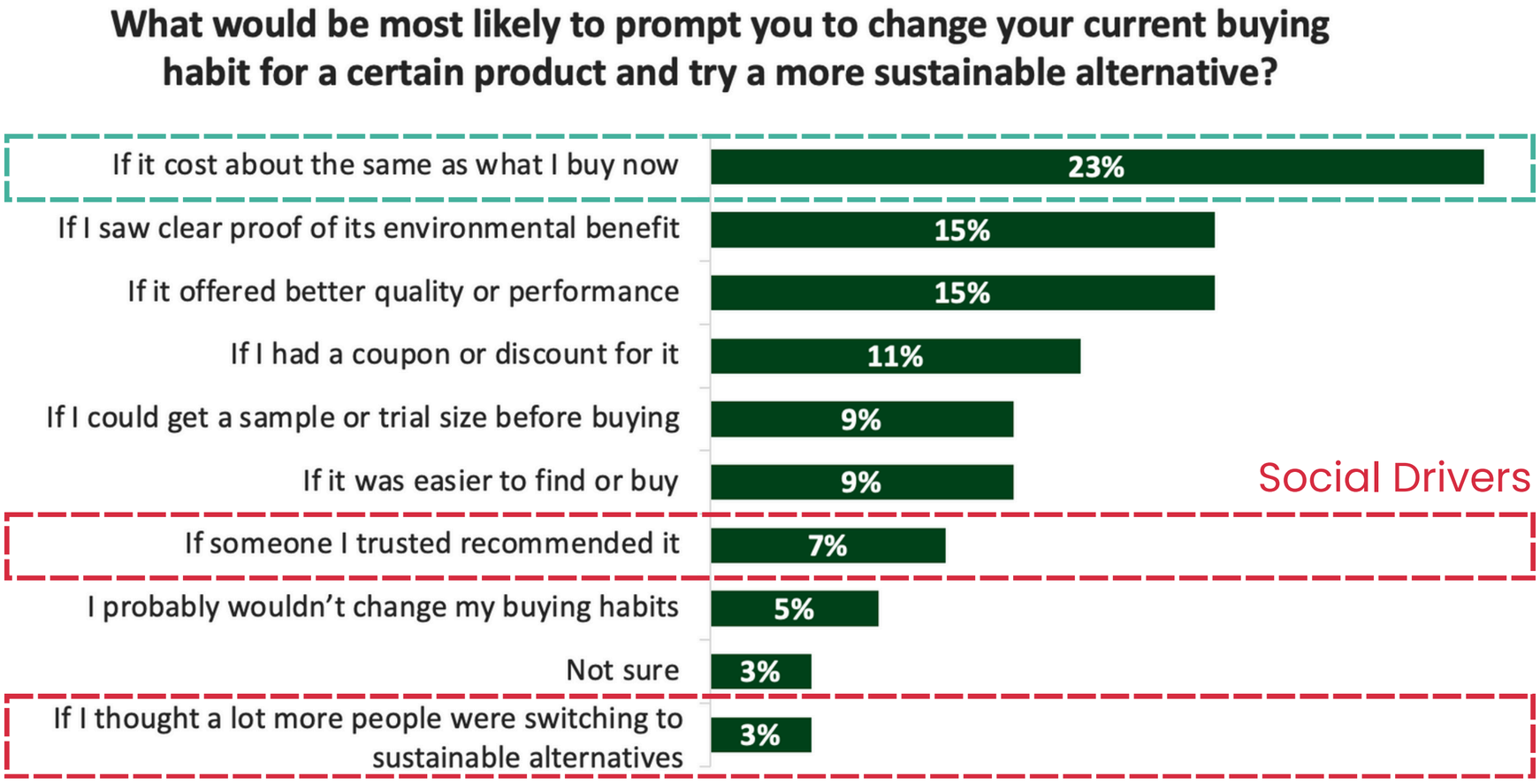
SOURCE: NORTHWIND CLIMATE RESEARCH JULY 2025

High earners & high-conviction buyers are more likely to follow through, even when sustainably-made goods cost more.



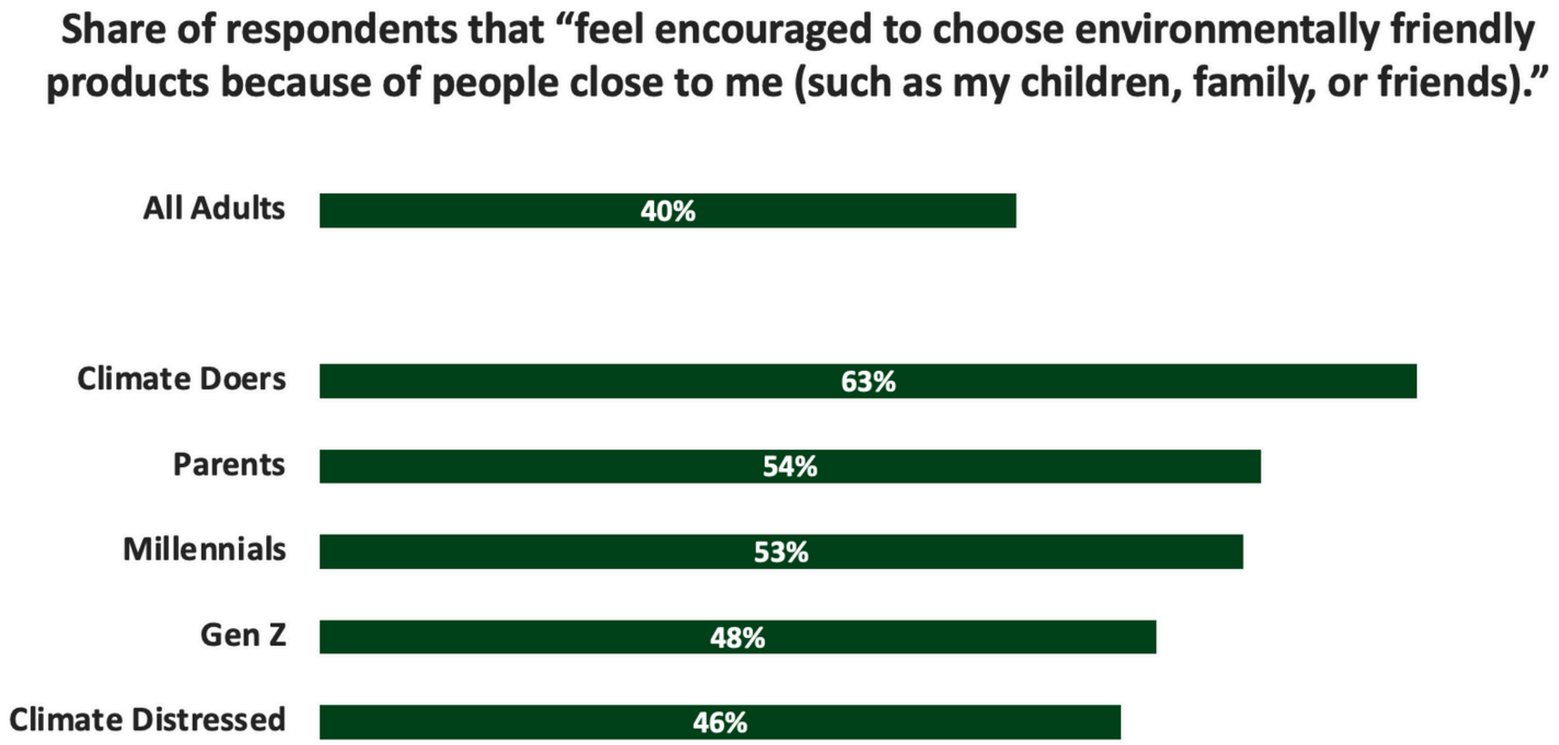
SOURCE: NORTHWIND CLIMATE RESEARCH JULY 2025

Cost parity reduces the say/do gap for environmentally friendly purchases (esp. for low-income shoppers); social drivers less effective.



SOURCE: NORTHWIND CLIMATE RESEARCH JULY 2025

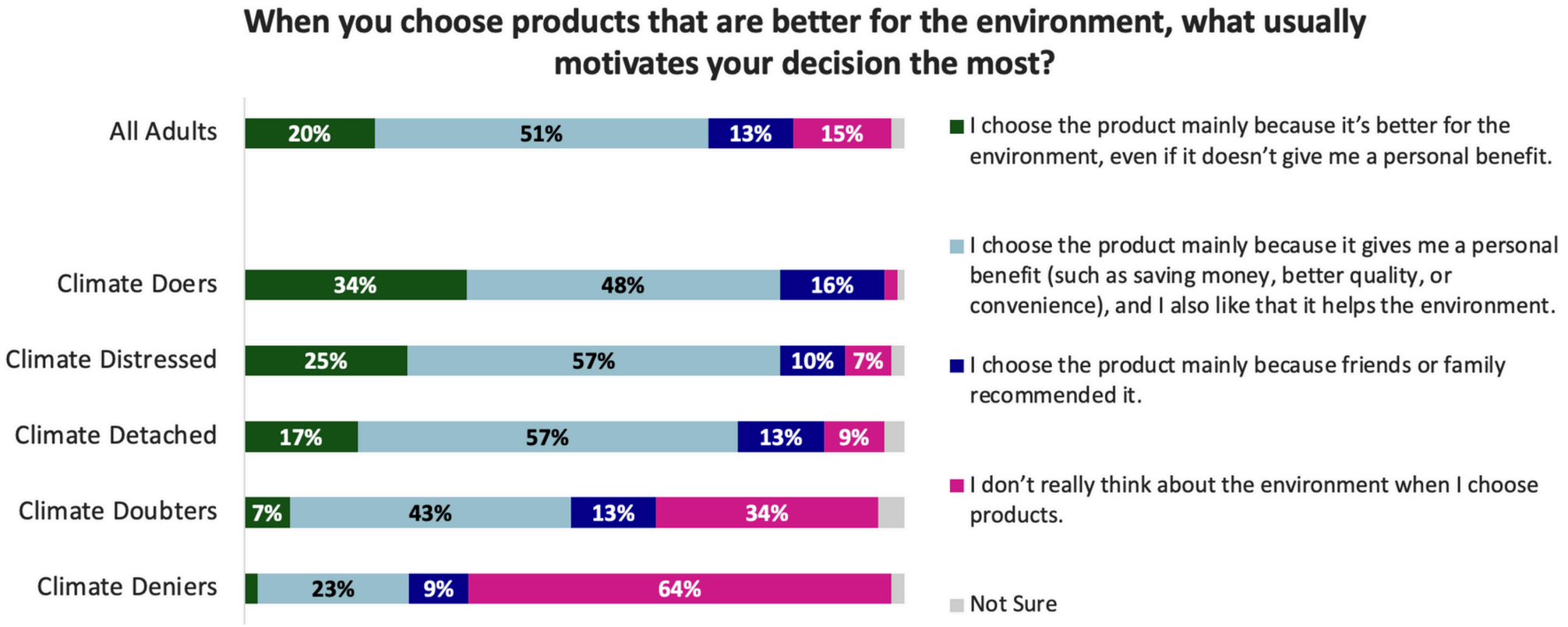
Network effects are most effective among younger consumers and Climate Doers, the most likely buyers of sustainably made goods, making retention efforts critical among this segment.



SOURCE: NORTHWIND CLIMATE RESEARCH JULY 2025

Even when consumers CHOOSE environmentally friendly products, they often do so primarily for personal benefit.

Across all segments, a majority of consumers say environmental benefits are often a secondary - not primary - reason they are choosing sustainable products.



SOURCE: NORTHWIND CLIMATE RESEARCH JULY 2025

Section 2: Messaging Trust and Public Perception

The strongest sustainability statements are concrete, practical, and consumer-focused

Sustainability communications are now a high-stakes tightrope — and most brands are falling off.

Top-Performing Northwind Climate Frames for September 2025

- "We are making products that **last longer** and **can be recycled.**"
- "We're choosing **cleaner ways** to **power our factories**."
- "We're making it **easier to recycle** our products."
- "We're building things to **last longer** and **work better**."
- "**Cutting waste saves money** that we **reinvest** in our people and communities."
- "We are using **less energy** and creating **less waste**."
- "We are **innovating** to make **sustainable products affordable**."
- "We are finding **new uses** for **old materials**."

SOURCE: NORTHWIND CLIMATE RESEARCH

Common Characteristics of a **Strong** Sustainability-Focused Frame

Concrete & Specific	Clear actions (building, recycling, durability).
Consumer/Community Benefit	Focuses on making life easier, saving money, improving products.
Practical Everyday Relevance	Recycling, product longevity, efficiency resonate with people's daily lives.
Balanced Framing	Connects sustainability with tangible business or social value (not just the planet, but also jobs, communities, savings).

SOURCE: NORTHWIND CLIMATE RESEARCH

Phrases that lean on distant goals, technical reporting or ideological alignment generate significantly less enthusiasm. Abstract, political or technical messages fall flat.

Worst-Performing Northwind Climate Frames for September 2025

- "We stand in **solidarity** with the **global climate movement**."
- "Our **sustainability goals** are validated by independent experts."
- "We have a **plan** to phase out fossil fuels from our operations."
- "We are committed to **climate justice** for marginalized communities."
- "We are **working** with **activists** to demand **systemic change**."
- "We are **aligning** with the **Paris Agreement** on climate change."
- "We **measure** and publicly report our **Scope 1, 2 and 3 emissions**."
- "Our **climate goals** are **third-party certified**."

SOURCE: NORTHWIND CLIMATE RESEARCH

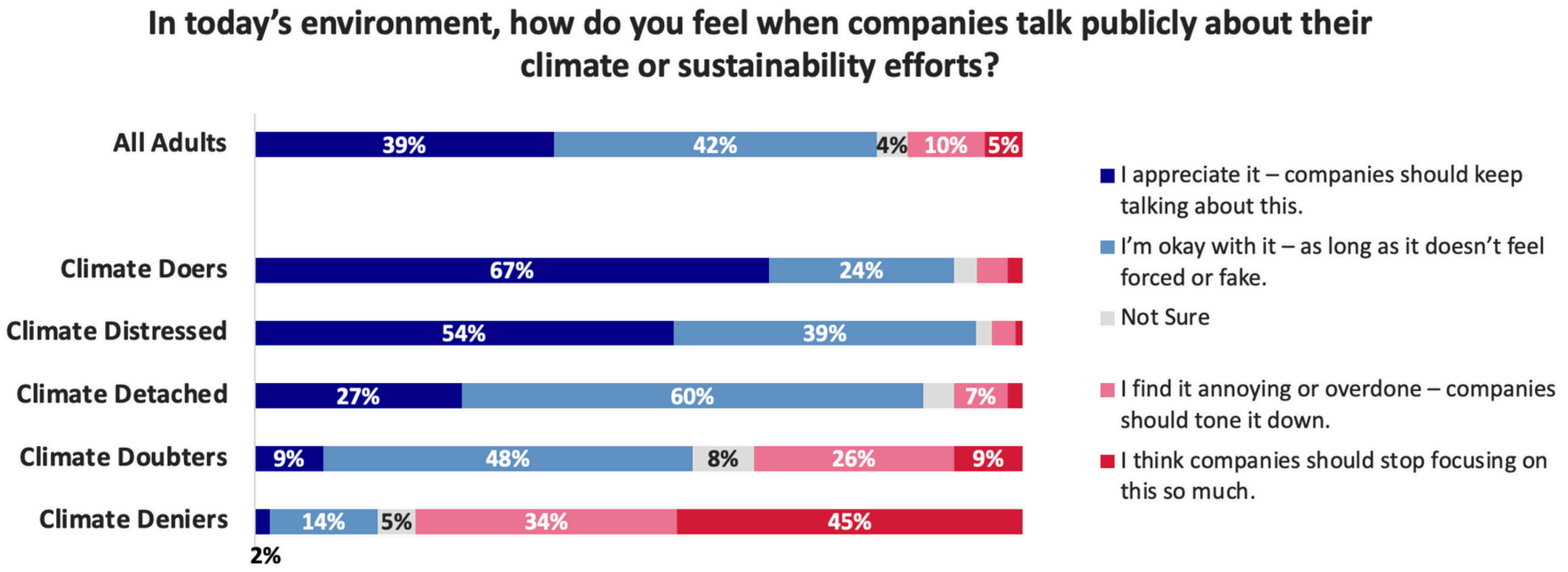
Common Characteristics of a **Weak** Sustainability-Focused Frame

Abstract & Jargon-Heavy	Terms like Paris Agreement, Scope 1/2/3 emissions, third-party certified are jargon-heavy and unfamiliar to most consumers.
Future-Oriented or Vague	"We have a plan to…" feels less credible than "We are doing…".
Company-Centric	Phrases highlight what the company believes or aligns with (e.g., solidarity) rather than consumer benefit.
Political/Activist Tone	Some statements sound like advocacy messaging, which may alienate or divide consumers.

SOURCE: NORTHWIND CLIMATE RESEARCH

But talking about sustainability is rarely a barrier for consumers — sounding forced or fake is.

Only 5% say companies should stop talking about sustainability — largely concentrated among Climate Deniers.

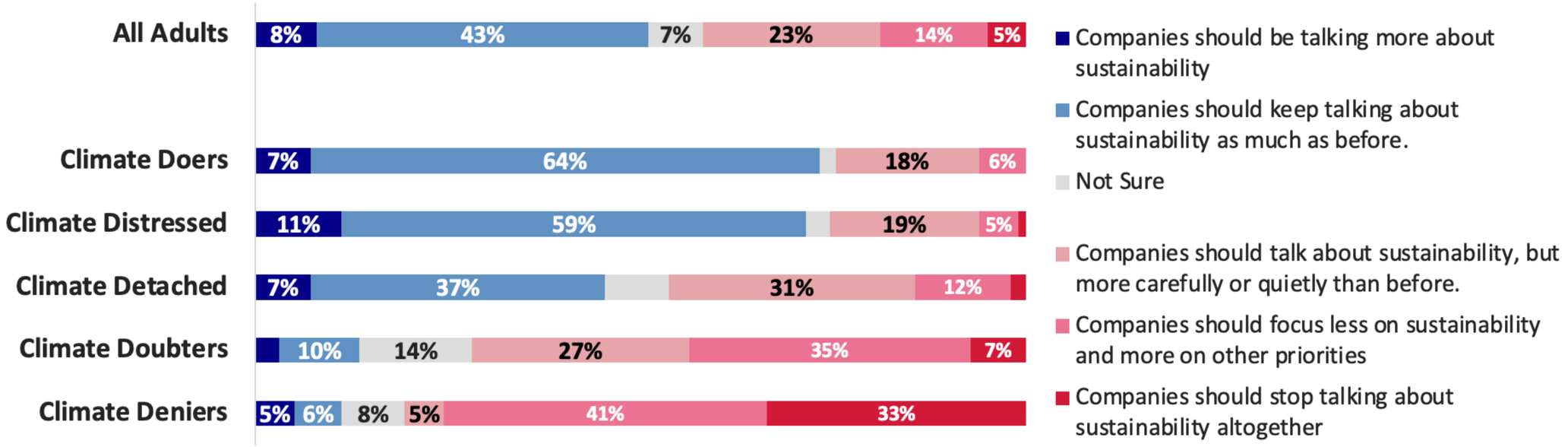


SOURCE: NORTHWIND CLIMATE RESEARCH JULY 2025

Most consumers want sustainability talked about as much as before.

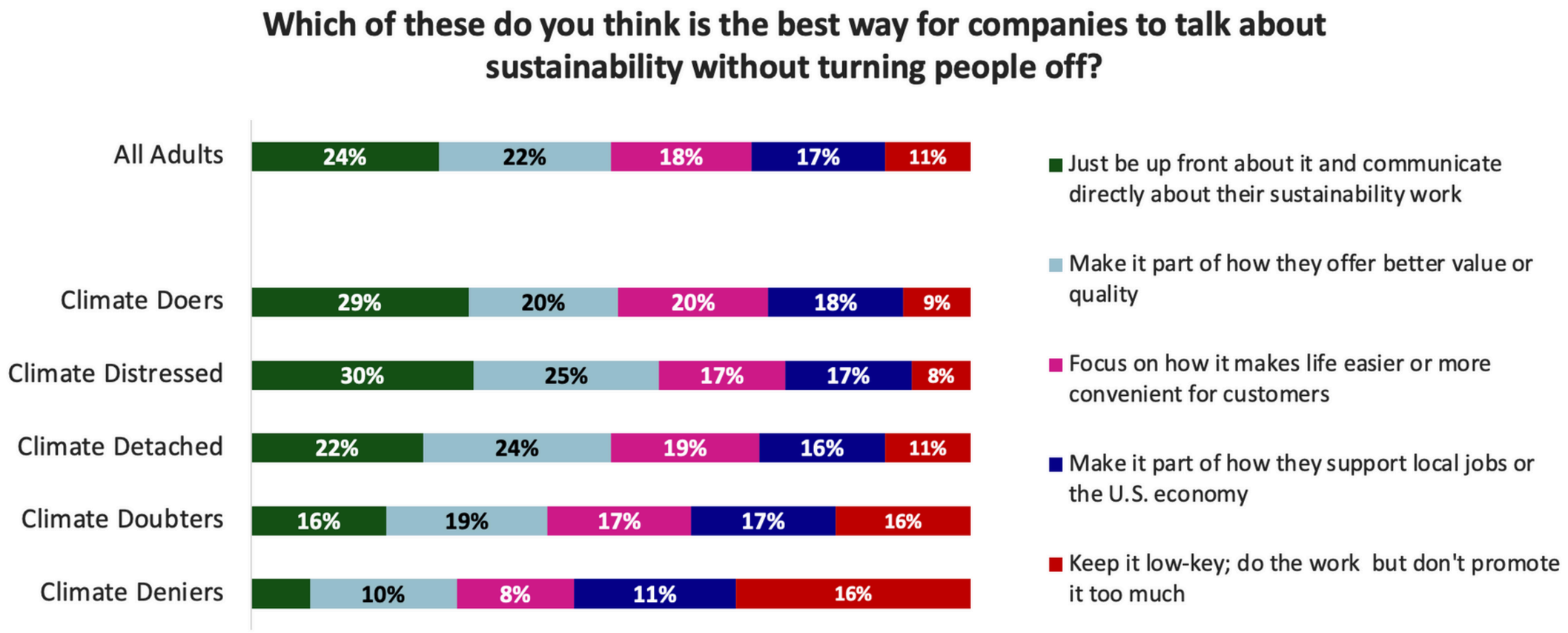
Only 7% of Climate Doers want companies to talk more about sustainability, likely due to the perception that doing so damages reputation of the climate movement or sustainably made goods.

Some companies that were talking a lot about sustainability and climate change recently have chosen to talk less about that now, thinking that most consumers don't want to hear about it anymore. Which comes closest to your view?



SOURCE: NORTHWIND CLIMATE RESEARCH JULY 2025

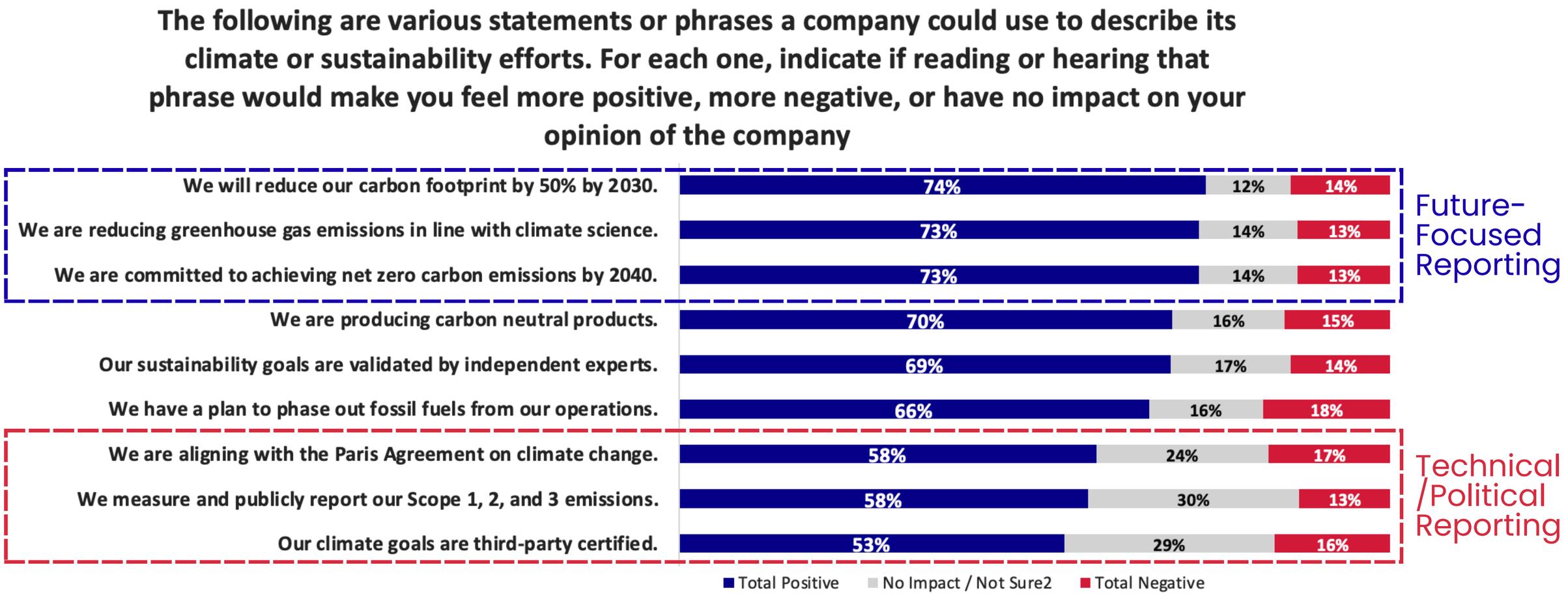
Most climate-conscious consumers recommend brands avoid tripwires and greenwashing by being direct about their sustainability efforts.



SOURCE: NORTHWIND CLIMATE RESEARCH JULY 2025

Note: Data excludes "Not Sure" and "Don't talk about sustainability at all" due to small values and visual clarity

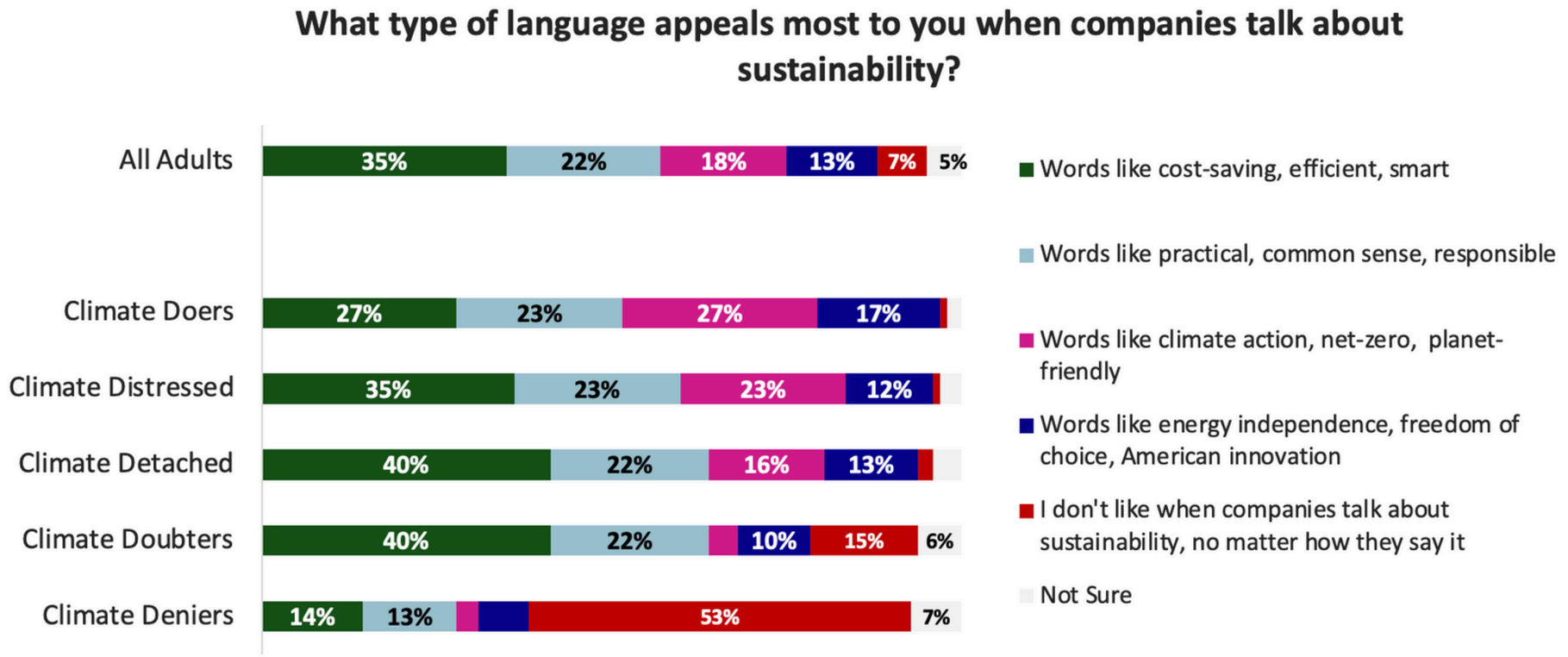
Highly technical terms spike uncertainty, and consumers apply a 'climate discount rate.' Future goals resonate stronger than current work.



SOURCE: NORTHWIND CLIMATE RESEARCH

Consumer benefits like cost and efficiency are trust-building benefits.

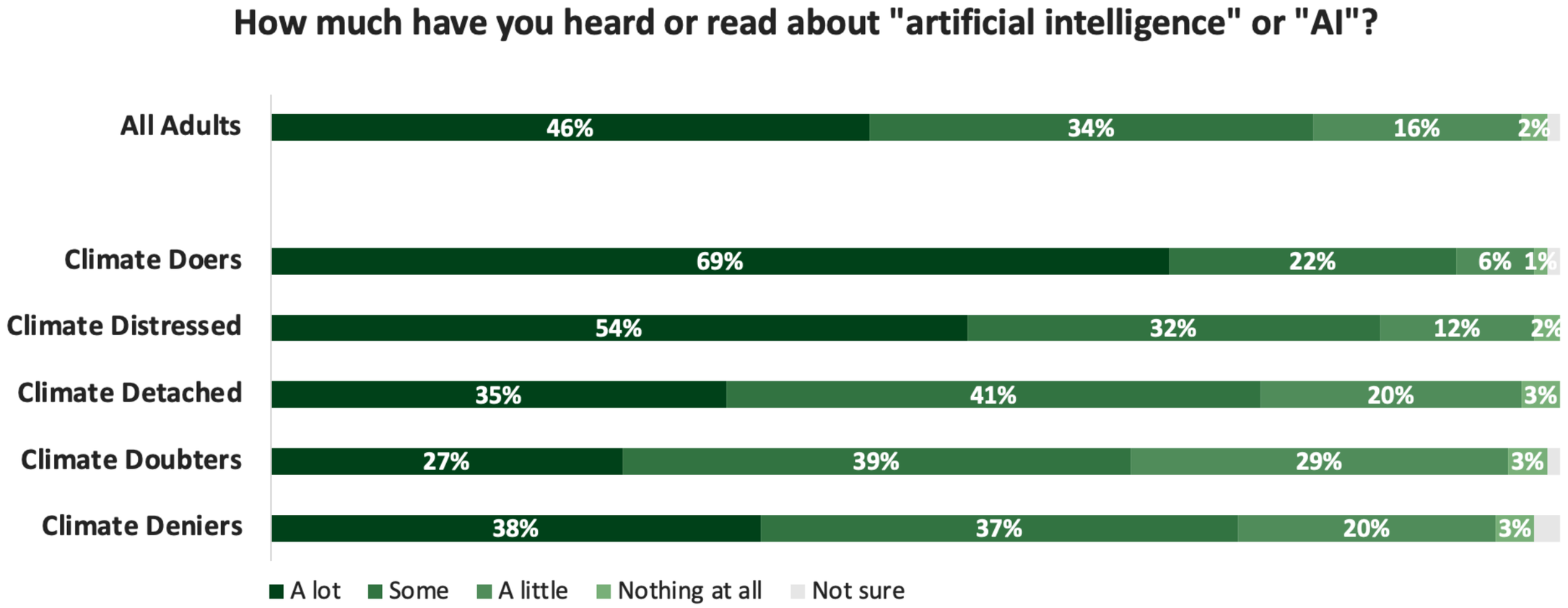
Climate-focused messages like “net-zero” work best among Doers, but the majority of other consumers rank personal benefits as the most appealing message – even for sustainably made goods.



SOURCE: NORTHWIND CLIMATE RESEARCH JULY 2025

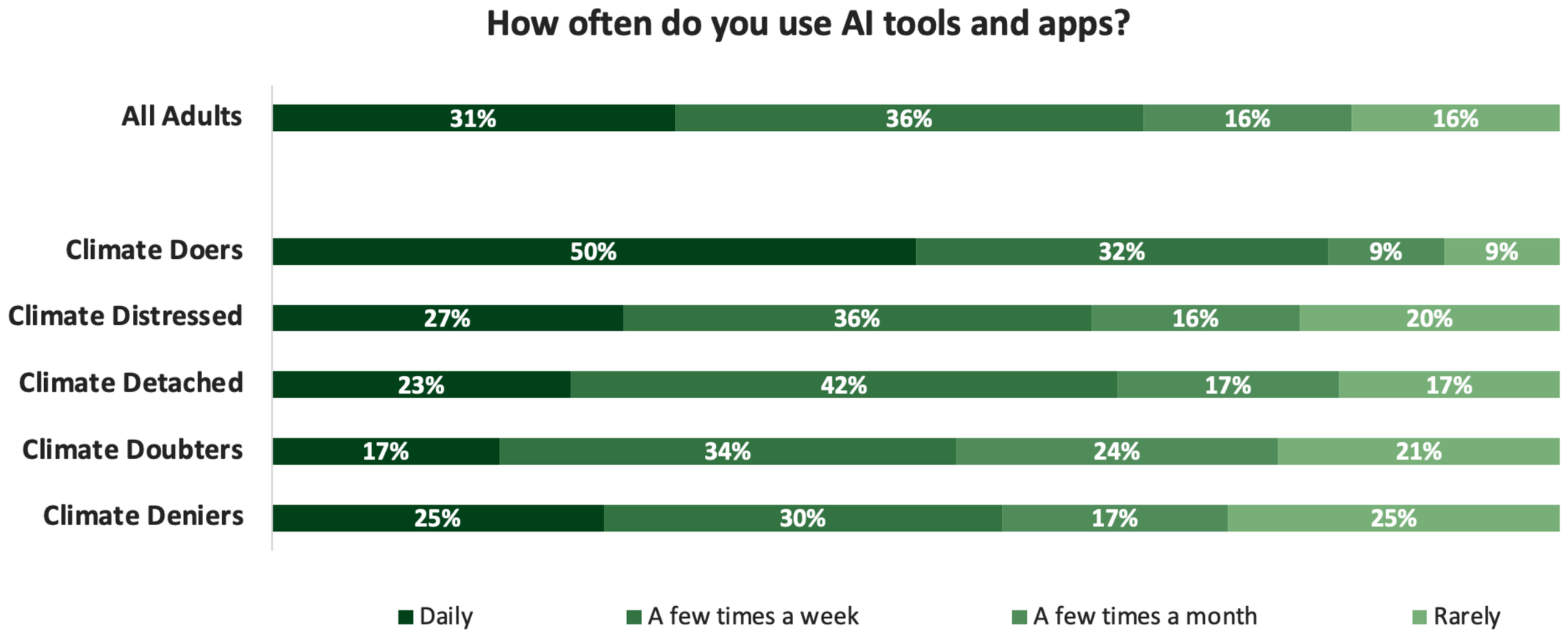
Section 3:
Spotlight on Artificial Intelligence

Doers and Distressed self-report the highest levels of AI knowledge.



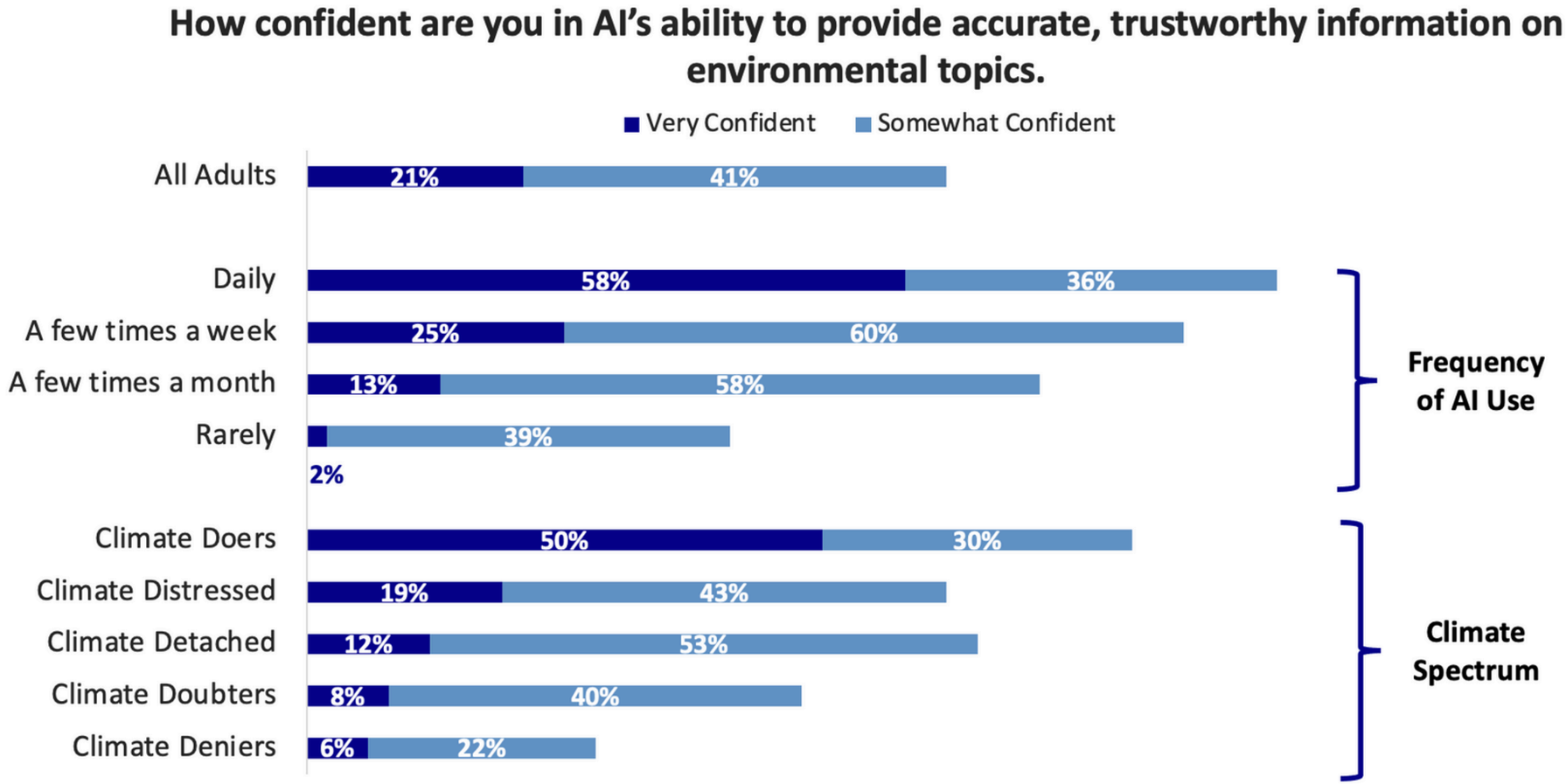
SOURCE: NORTHWIND CLIMATE RESEARCH JULY 2025

The most climate-focused consumers use AI tools most frequently.



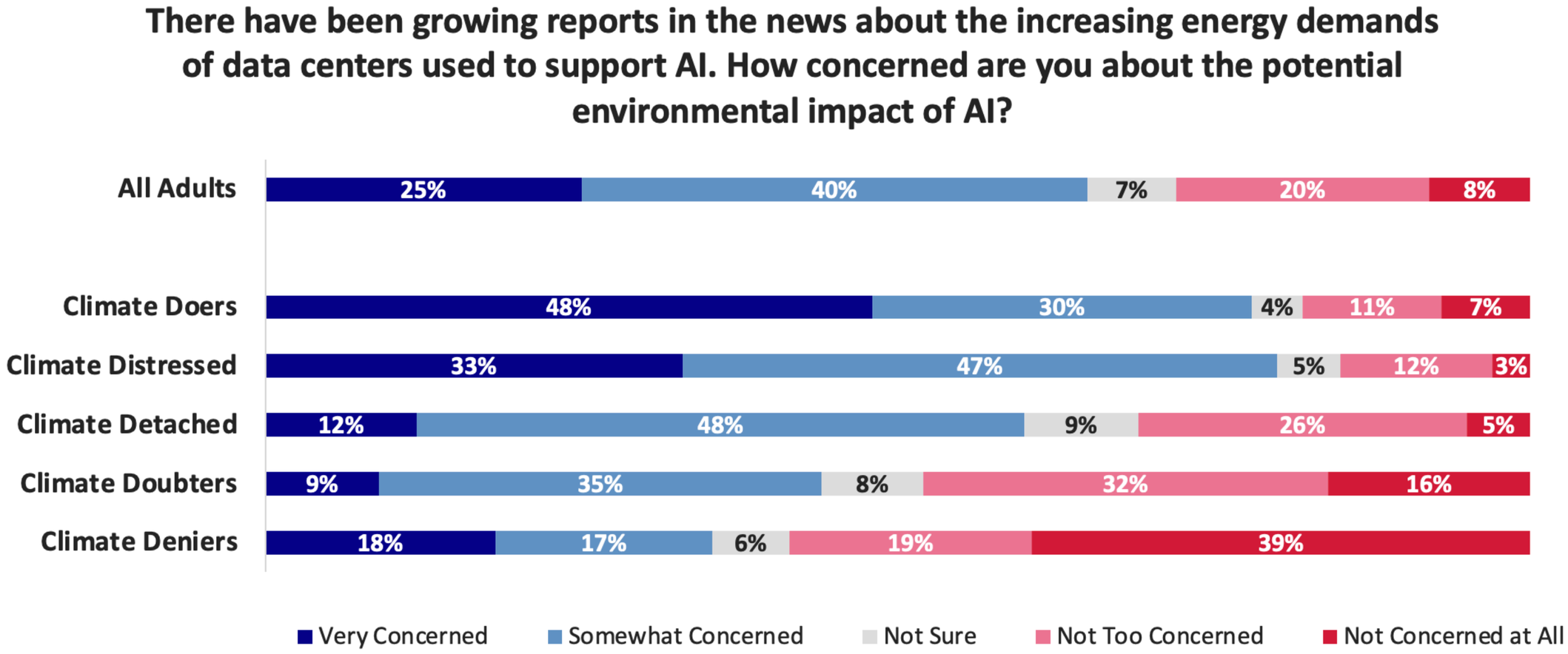
SOURCE: NORTHWIND CLIMATE RESEARCH JULY 2025

Those who use AI regularly express more confidence in AI's ability to provide accurate environmental information



SOURCE: NORTHWIND CLIMATE RESEARCH JULY 2025

Still, the majority of Americans are wary of the environmental impact of AI, with only 8% saying they're not concerned at all



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CONTACT INFORMATION

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