



IPSOS VIEWS

AVOIDING THE ACTIVIST TRAP IN ESG MARKETING

**Insights from Ipsos' ESG
segmentation continuum**

Tatyana Chappuis





Companies are still struggling to get it right: being too vocal or not vocal enough, saying things that are important, but not with the right tone, or focusing on things citizens feel aren't critical.

Introduction

A lot is being said about ESG: governments, citizens, and businesses must navigate an enormous volume of information often supported by various statistics and lengthy research reports.

The truth is, however, that companies are still struggling to get it right: being too vocal or not vocal enough, saying things that are important, but not with the right tone, or focusing on things citizens feel aren't critical.

These backlashes are almost natural in a world of tensions, where people feel they are unable to find common ground with those who do not share their opinion – even within their families. Organisations have to make important calls in this electrified public space.

In this paper, we set out why it's imperative for organisations to look beyond the loudest voices and engage the overlooked middle ground in their ESG initiatives.

Defining ESG segments

ESG matters touch people's values in different ways. In order to help organisations bridge their ESG initiatives with different groups' realities, Ipsos conducted a global segmentation study covering 15 markets. The study identified

five segments based on attitudes and behaviours across environmental, social and governance domains, with segments designed to be meaningfully similar within, yet different among each other.

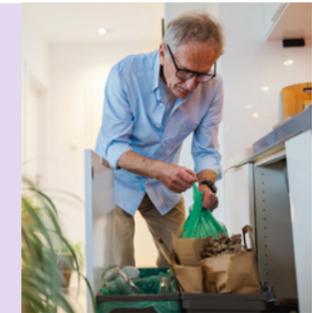


Disengaged Distancers

Overwhelmed with the demands of everyday life and financially insecure, they don't see the urgency of ESG and do very little, thinking they are not in a position to save the planet.

Passive Compliers

This group, with a low sense of ESG urgency, engages in commonly adopted routines to be good citizens, but are unlikely to go beyond.



Discerning Realists

A segment with unconventional views, this group is sceptical about the urgency of ESG and about established rules. However, they are still involved in their own way.

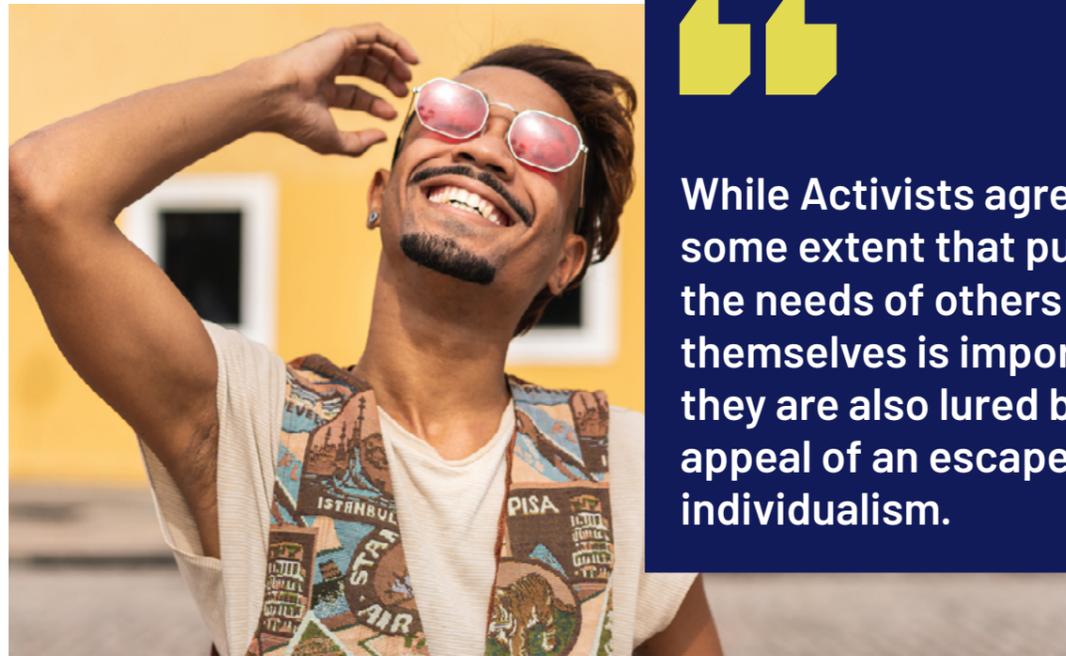
Willing Contributors

With a high awareness of ESG urgency, this segment is willing to do a lot and can afford to. But their actions are mostly conventional as they are not always ready to give up their habits.



Activists

As the most concerned segment, Activists are taking a lot of action and are boycotting companies that are not meeting their expectations.



While Activists agree to some extent that putting the needs of others before themselves is important, they are also lured by the appeal of an escape to individualism.

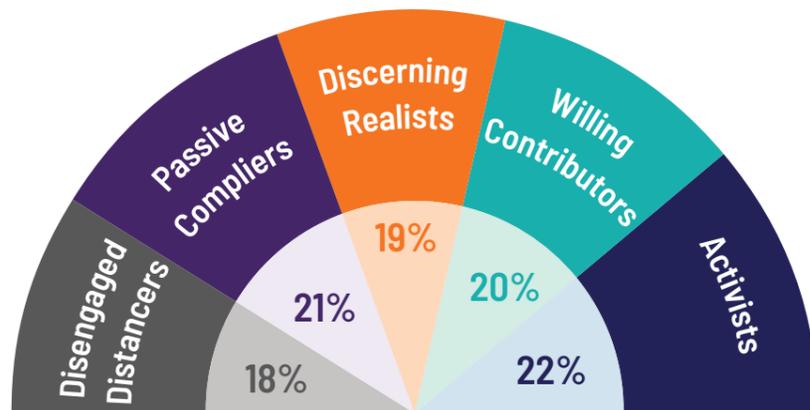
Embracing diverse ESG views

The Ipsos ESG segments can be placed on a continuum, with Disengaged Distancers on one end and Activists on the other. The extremes usually catch the most attention and trigger most conversations. In many cases, we see companies **focus their ESG activations solely on Activists**. This

includes creating sustainable products, ESG marketing messages, and the like.

While attention to Activists is important, inattention to the other ESG segments can lead to missed opportunities and failed consumer activations. Why?

Figure 1: Distribution of segments



Source: Ipsos Essentials
 Base: 10,042 adults aged 18-74 in Canada and the United States and 16-74 in Australia, Brazil, China, France, Germany, Italy, Spain, India, Japan, Mexico, South Africa, South Korea, and the United Kingdom.

Three myths about the Activist segment

Let's begin with busting some myths around ESG Activists...



MYTH 1:

All young people are Activists

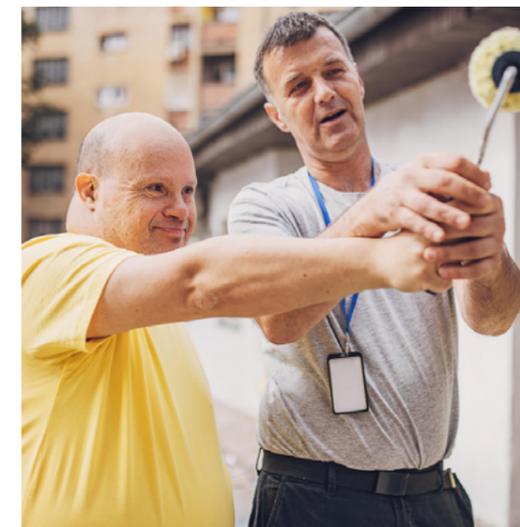
In fact, the vast majority (63%) of Activists worldwide are 35+, while younger people are most likely to be Disengaged Distancers and Discerning Realists. The implications for companies are significant: from media targeting to designing consumer facing ESG activations. (See Figure 2.)



MYTH 2:

Activists are the best target for sustainable innovation

It is true that Activists' willingness to pay for ethical and sustainable products and services is high (63% are willing), but this willingness is just as high among Discerning Realists (67%) and even higher among Willing Contributors (77%). (See Figure 3.)



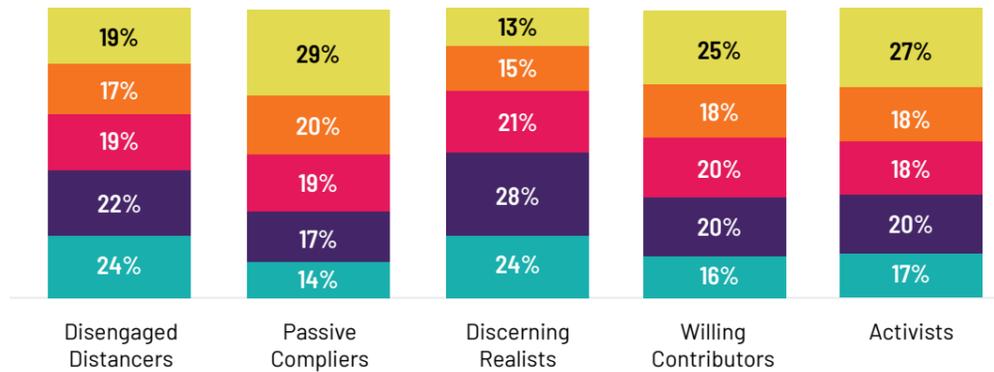
MYTH 3:

Activists are more altruistic than others

The assumption might be that Activists would be more likely to be altruistic. But Ipsos Global Trends' research indicates that this is not the case. While they agree to some extent that putting the needs of others before themselves is important, they are also lured by the appeal of an escape to individualism. (See Figure 4.)

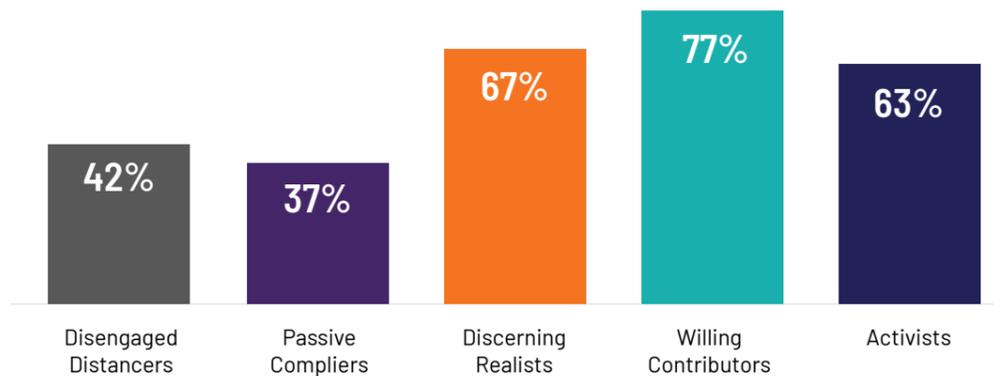
Figure 2: ESG segments by age

■ 16-24 ■ 25-34 ■ 35-44 ■ 45-54 ■ 55-74



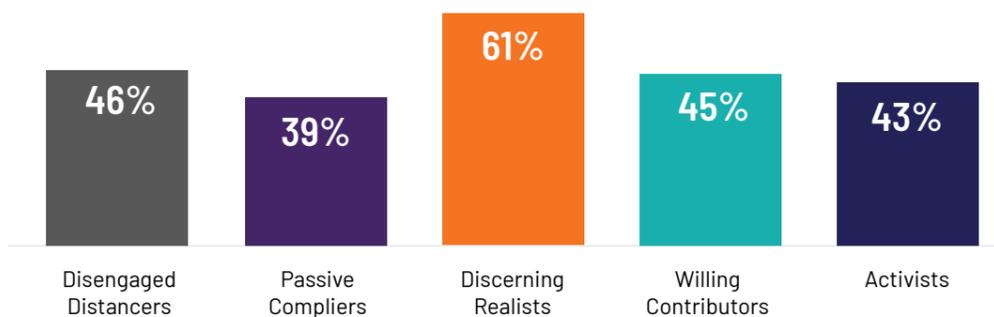
Source: Ipsos Essentials

Figure 3: "I am willing to pay more for products & services that are ethical/sustainable" % agree



Source: Ipsos Global Trends 2024

Figure 4: "It is more important to put the needs of others before my own needs" % agree



Source: Ipsos Global Trends 2024

Truths about other segments

There is a consensus about the environment

Most people agree that:



We are heading to an environmental disaster if we don't change our behaviours quickly.

Even among Disengaged Distancers, this number is as high as 62%. The difference is that more active groups have a much stronger opinion on the subject.



They are "already doing all they can to help the environment".

This sentiment is stronger among more active groups, but even those less engaged feel they are contributing. The problem is that the most widely adopted actions are not necessarily those with the biggest impact. For instance, only a third of Activists say they are living car-free.

Views on society are splintered



Segment attitudes become more diverse around the role of women, whether or not to have children, and issues of gender.

Activists, Willing Contributors and Passive Compliers are more open to new roles for women. Disengaged and Discerning Realists – who skew younger – are more anchored in traditional views.

When it comes to gender even the Activists are polarised: 29% strongly believe there are only two genders, while 25% strongly disagree.

Governance is questioned



A common sentiment among all segments is that the **government will do too little to help people**

in the years ahead. Despite this, some segments (namely Activists, Willing Contributors and Passive Compliers) **still rely on voting and elections, while others** (skewed towards young and educated Discerning Realists) **often feel there is no way forward without revolution, and put their trust in businesses and the economy more than in governments.**

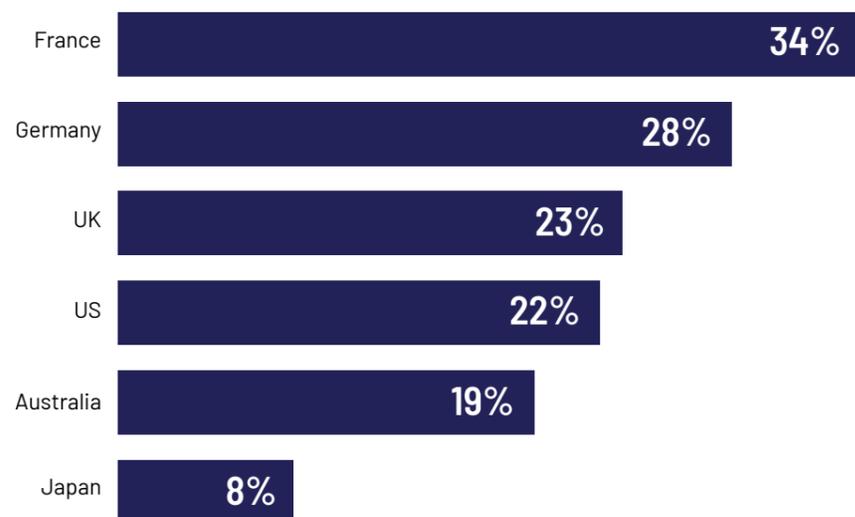


The importance of critical mass

Despite all the myths about Activists, they remain an important segment for organisations – but should not be the only group considered when it comes to planning, executing and assessing the success of ESG initiatives. Activists as a segment do not meet critical mass: the

size of the Activist segment in a country can be as high as one third (France) or as low as one tenth of the population (Japan). In order to reach a critical mass, organisations need to target other segments in addition to Activists.

Figure 5: Share of ESG activists by country



Source: Ipsos Essentials

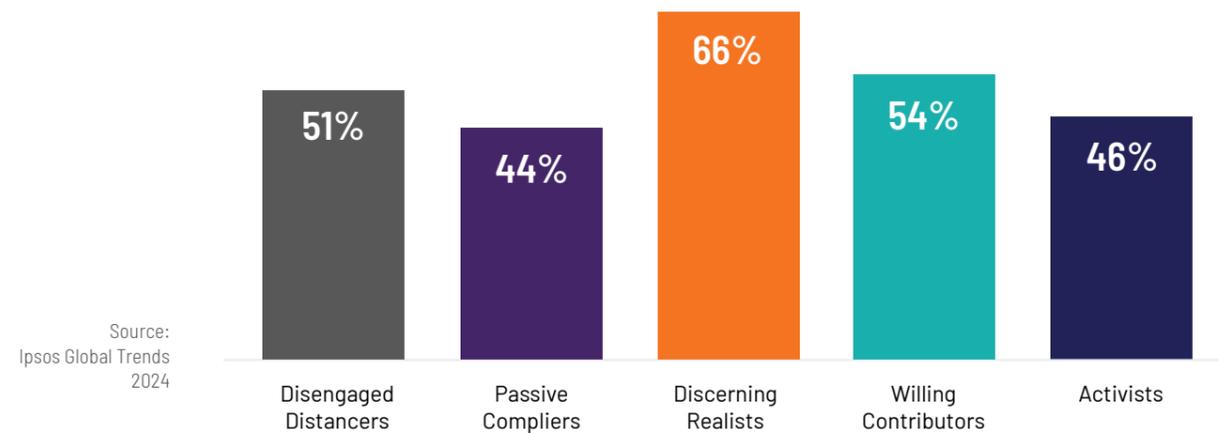
The role of Activists

While Activists are becoming **the voice of the middle** for issues such as the environmental crisis and inequality, **there are still areas that are polarising**. These include whether or not to have children and issues of gender.

For these topics, dogmas accepted by one segment and rejected by another have often been a ground for quarrels and conflicts.

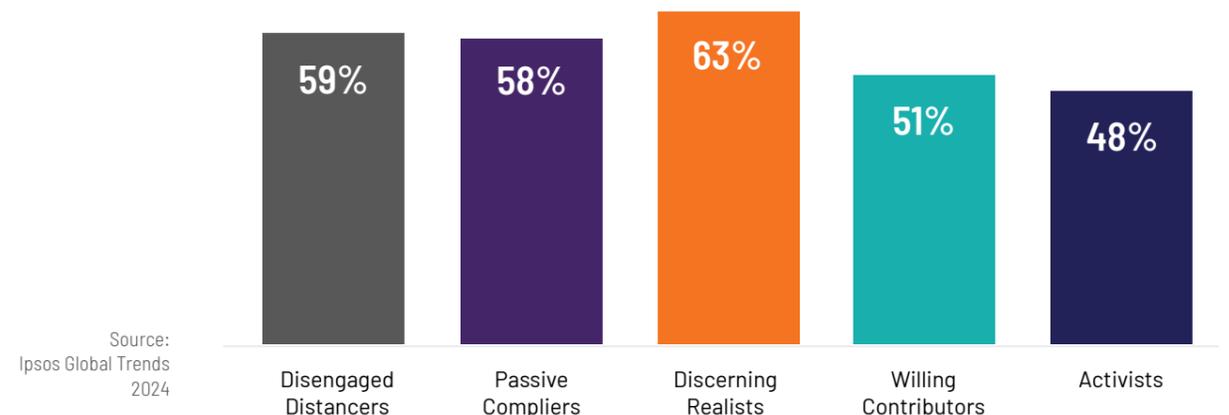
In today's society, where one in two people say that even within their own families there is more and more conflict between people who don't share the same values, brands need to decide when it's best to lean into values, and when to simply serve consumers who just want the benefits of a product – while also reconciling these seemingly opposite stances. Reconciling is not about giving up on brand values, it is about 'healing the divided' and not pushing the opposites until they collide.

Figure 6: "Most people ought to have children" % agree



Source: Ipsos Global Trends 2024

Figure 7: "There are only two genders - male and female - and not a range of gender identities" % agree



Source: Ipsos Global Trends 2024

Marketing implications

When considering an ESG strategy, organisations often focus on Activists as a potential partner, as the most engaged group. True change, however, requires working with the muddled middle as well. These groups don't necessarily have the most passion about ESG issues, but do build up a powerful force if addressed in an appealing way.

The key is to consider them in their diversity and meet them where they're at on ESG issues. Provide guidance, help them keep up with the demands of life, offer lifestyle solutions, enable them to feel they are positively contributing without making too many sacrifices.

Key takeaways

01

Expand your focus to include the broader spectrum of consumer segments, and tailor messaging. This "ESG middle ground" holds potential for a real change.

03

Acknowledge societal divisions and focus on "healing the divided" rather than exacerbating differences. Most agree on the urgency of the environmental crisis and want companies and governments to do more. Build on this consensus. Approach polarising topics where even Activists are divided, such as gender roles and family structures, carefully.

02

Recognise stereotypes around "Activists" and avoid building on myths For instance, their motivations are not solely altruistic, their willingness to pay for sustainable products is similar to other segments.

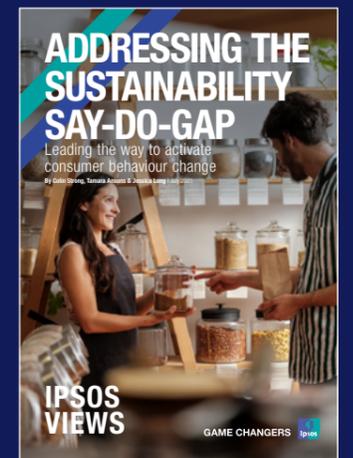
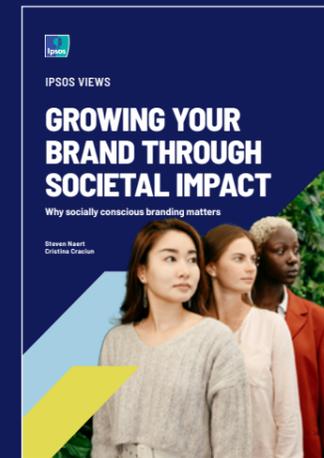
04

Rebuild trust in businesses and governments by demonstrating effective action on ESG issues in partnership. While Discerning Realists trust businesses more than governments, Activists and Passive Compliers are sceptical of business leaders' truthfulness. Transparency and collaboration are essential.

Endnotes

1 [Ipsos Global Trends 2024](#)

Further Reading



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