

THE GREEN HUSHING REPORT



How greenwashing-anxiety
is shutting up industry
and shutting down progress.

A report by
RBL Brand Agency

rbl-brandagency.com

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INTRODUCTION

Companies in the energy, transportation, and manufacturing industries are not the heroes of the public net zero narrative. However, many are making significant progress but finding it difficult to communicate in a tense communications landscape. They end up staying silent for fear of greenwashing accusations.

This is greenhushing and we wanted to understand it better.

Through qualitative interviews, online survey responses and desk-based research, we uncovered an important story:

- greenhushing is real
- it is having a negative impact on industry & society
- the root is a lack of confidence, not a lack of progress
- to improve confidence, net zero must be at the centre of an authentic brand narrative

The race to net zero will only be won through significant progress in these integral but high-output sectors. Greenhushing is threatening this. We hope the insights in this report will help you navigate greenwashing, greenhushing, and shape a brand that powers progress.

Methodology:

- Research sources:
- Online Greenhushing Survey (breakdown of respondents included below)
 - Qualitative research at the Hydrogen UK Annual Conference and the Hydrogen Energy Association Annual Conference 2024
 - Desk-based research
 - In-depth interviews with industry experts

Respondent Sector		%
Energy		30
Engineering		11
Construction		33
Manufacturing		7
Consultancy		19

Company size		%
Small (1-49 employees)		31
Medium (50-249 employees)		10
Large (250+ employees)		59



EXECUTIVE SUMMARY



Almost all of the industrial companies surveyed believe they have made real progress towards net zero goals.

However, two-thirds are afraid of greenwashing accusations and one-third actively greenhush. A small percentage are actually scaling back their net zero targets in response.

This is the “greenhushing” effect. Organisations keep quiet about progress towards net zero for fear of greenwashing accusations.





GREENHUSHING IS CAUSED BY A LACK OF CONFIDENCE NOT A LACK OF PROGRESS

Even though almost all industrial organisations are making progress towards net zero, communications professionals in these organisations have very poor confidence scores (55/100). They feel they are stepping out on a limb when speaking on behalf of the brand.

Lack of confidence has real-world consequences.

And industry's response is making the situation worse.

71%

believe the public would benefit from knowing more about the progress towards net zero.

AND YET

79%

aren't communicating their full progress towards net zero.

80%

indicated they were more concerned with the impact of greenhushing than greenwashing.

AND YET

50%

put other communication priorities above net zero and sustainability.

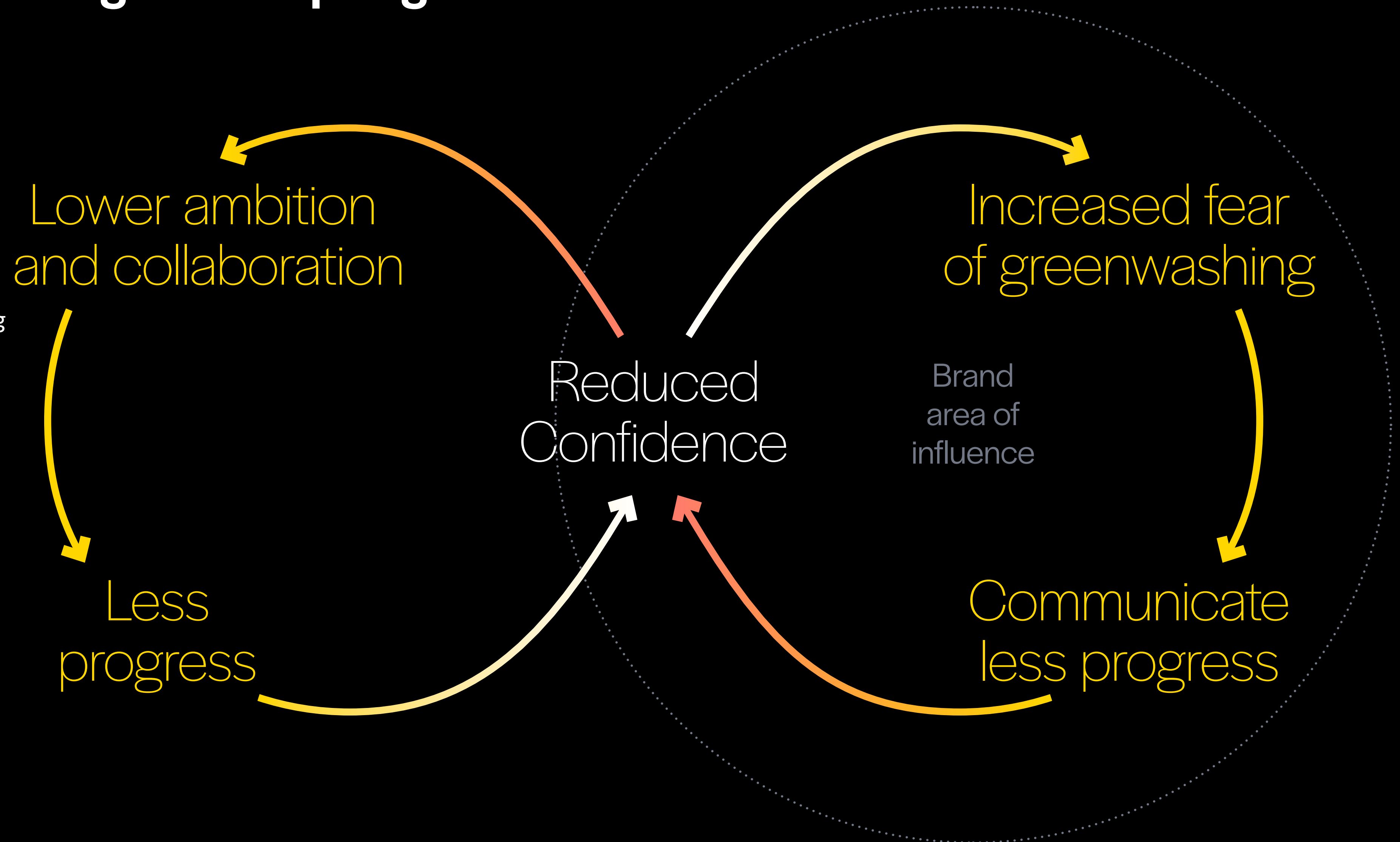




How greenhushing slows progress.

After hearing the greenhushing story many times, including how businesses are even reducing their targets as a result, we conducted research into the sentiment of marketing, communications, and sustainability professionals working for these types of organisations in the UK. This allowed us to understand the underlying dynamic and how to address it.

The key issue is confidence. Greater confidence would improve transparency, encourage collaboration and motivate progress. The companies surveyed are in the most carbon intensive industries in the UK. If they can't communicate and collaborate, they may not be able to make the breakthroughs needed to achieve net zero.



KEY INSIGHTS

Our research uncovered unexpected dynamics at the core of the greenhushing issue.

These are the key findings.

01

Greenwashing anxiety is widespread

Over two-thirds of organisations surveyed are afraid they could be accused of greenwashing.

More on page 10

02

This concern leads to greenhushing

More than a third of these organisations are keeping quiet about their sustainability progress as a result.

More on page 10

03

Greenwashing is easy to avoid

The legal guidelines on greenwashing are clear and easy to follow, so this shouldn't contribute to greenhushing.

More on page 12

04

Greenhushing reduces our chances of hitting net zero in time

Greenhushing holds back progress and can be the perfect cover for complacency.

More on page 13

05

Greenhushing makes your team an inhibitor of your brand ambitions

Greenhushing is caused by a lack of individual confidence which undermines the ambitions of the brand.

More on page 14

06

Greenhushing can be overcome by improving the confidence of your team

Individual confidence can be improved by building an authentic sustainability story into the core of the brand.

More on page 15

01 The majority of industrial companies are afraid of greenwashing (69%).

Most companies we surveyed were concerned they could be accused of greenwashing. This fear is crippling.

02 Many are keeping quiet as a result (36%).

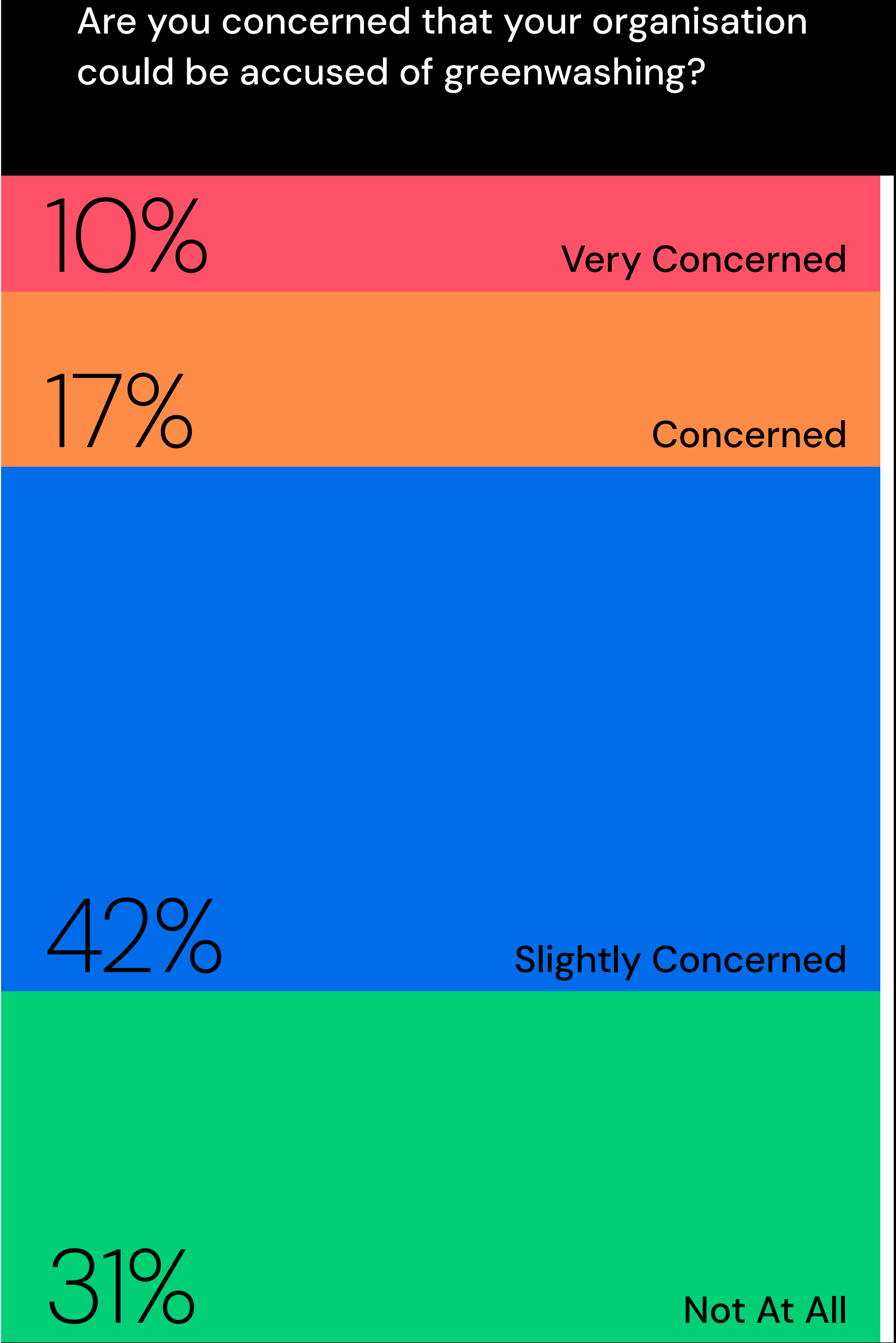
It has led over a third of them to actively communicate less of their sustainability progress. And another cohort are “mindful of what they share and don’t share”. They are self-censoring, anticipating the criticism and scrutiny of the media and potential legal implications. So, instead of communicating progress, they go quiet.

But greenwashing allegations aren’t hard to avoid.

I’m not going to name any names, but there are a couple of examples where huge multinational companies have been accused of greenwashing, possibly legitimately, because they may have over claimed, but from what I know about their sector, they are not the least active on sustainability. So they may have over-claimed, but they’ll be doing some work.

*There might be other people in that sector who are doing nothing, and therefore saying nothing, and no one’s noticing them, and no one’s picking up on it. We don’t want to create the kind of vacuum where, from a consumer perspective or a policymaker perspective, you can’t tell what’s going on. **Where people are making genuine progress they shouldn’t be afraid to communicate it.***

Gillian Daines, OCI Global, Global Head of Corporate Communications





“Greenwashing is an incredibly serious thing to be concerned about. But the Competition & Markets Authority has some really helpful guidance, and it’s common sense stuff. Like, stay in your lane. Talk about your own products, not your competitors, because you may not always have the latest information about that. You can always have the latest information about your own business.”

GILLIAN DAINES, OCI GLOBAL
GLOBAL HEAD OF CORPORATE COMMUNICATIONS,

See more of OCI’s story on page 18





03 The official greenwashing guidelines are clear and easy to follow.

Most industrial companies have made progress towards net zero. Communicating it shouldn't be a minefield, but it is. Or at least, it's perceived to be, even though 93% felt they were making real progress towards net zero.

The guidance from the Competition & Markets Authority is designed to be clear and easy to follow.

Competition & Markets Authority Green Claims Code

- Claims must be truthful and accurate
- Claims must be clear and unambiguous
- Don't omit or hide important information
- Only make fair and meaningful comparisons
- Substantiate claims with evidence
- Consider the full product lifecycle

SOURCE



Another danger comes from the media misinterpreting or misrepresenting claims or statements. This can be avoided by regularly publishing and updating an official sustainability statement on your website.

The risk of media misrepresentation decreases as more companies increase transparency. If everyone acknowledges issues that may be holding back progress, whether they are environmental, political, or technological, it prevents one company from being singled out as a poor performer, and puts the focus on the real issue.

04 Greenhushing holds back progress and is the perfect cover for complacency.

"We're all working it out as we go, except now we're doing it in the shadows and that's bad – very bad – for all of us."

LEO RAYMAN,
CEO, EDENLAB

SOURCE

The industrial companies we surveyed are the most crucial for decarbonisation, with transportation, energy, and manufacturing making up **54%** of the UK's greenhouse gas emissions in 2023. [Source: 2023 UK Greenhouse Gas Emissions]

It is critical for them to communicate and gain support for the progress they are making regardless of how incremental it may be. However, only **29%** communicate all of their progress internally. This could make employees feel their employer is not relevant, dynamic, or sustainable, and may be phased out. What happens to their job then?

Only **14%** have communicated all of their progress externally. This doesn't help to put pressure on politicians to pass necessary legislation. It leaves the narrative up to the media and legacy lobbies. It creates less excitement in investors and demand in the market. Graduates are lured away into lower impact industries.

As Gillian Daines, Head of Global Corporate Communications at OCI Globals points out, this also allows companies who really are doing nothing, and therefore saying nothing, to go undetected.

So why does it persist?

29%

communicate all their sustainability progress internally.

14%

communicate all their sustainability progress externally.

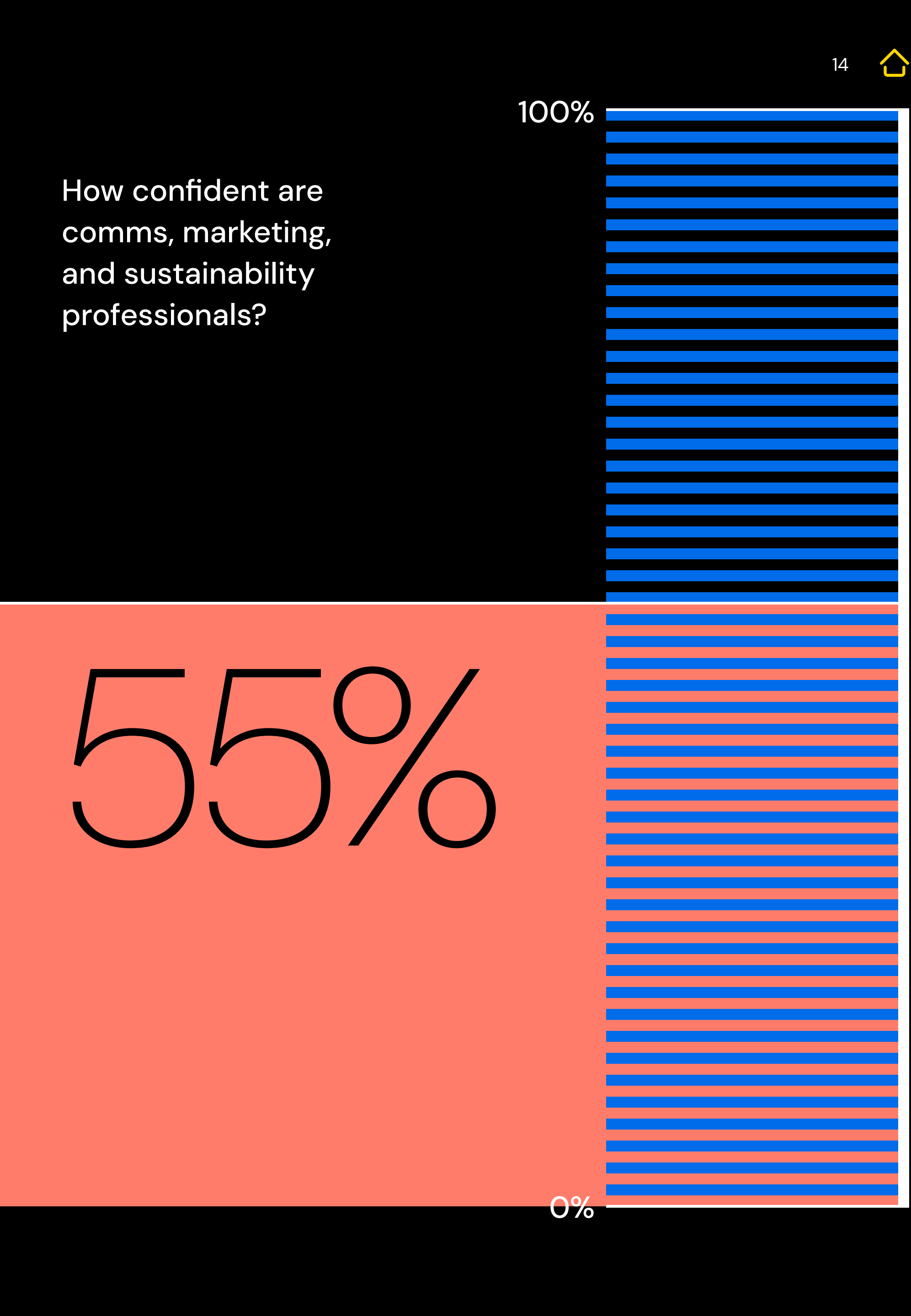
05 Greenhushing persists because of a lack of confidence, not a lack of progress.

If nearly all organisations are making progress towards net zero, why are such a large percentage also afraid of greenwashing?

More than a lack of progress, it is due to a lack of confidence. Marketing, communications, and sustainability professionals in the companies surveyed have very poor confidence scores (55/100) when it comes to communicating the progress their company is making.

It is one thing to know your company is making progress. It is another to be the spokesperson for that progress. And with so many examples of greenwashers getting lambasted, and much confusion about what counts and what doesn't, it's easy to understand the reluctance.

How could confidence be improved?





06 Companies can improve confidence by building sustainability into their brand.

Many organisations' self-perception is changing. From dirty to cleaner. Not perfect, but honest and ambitious. The challenge is to bring this vision and direction into the core of the company – the brand.

This can be accomplished by moving net zero goals and ambitions from the periphery to the core of the brand.

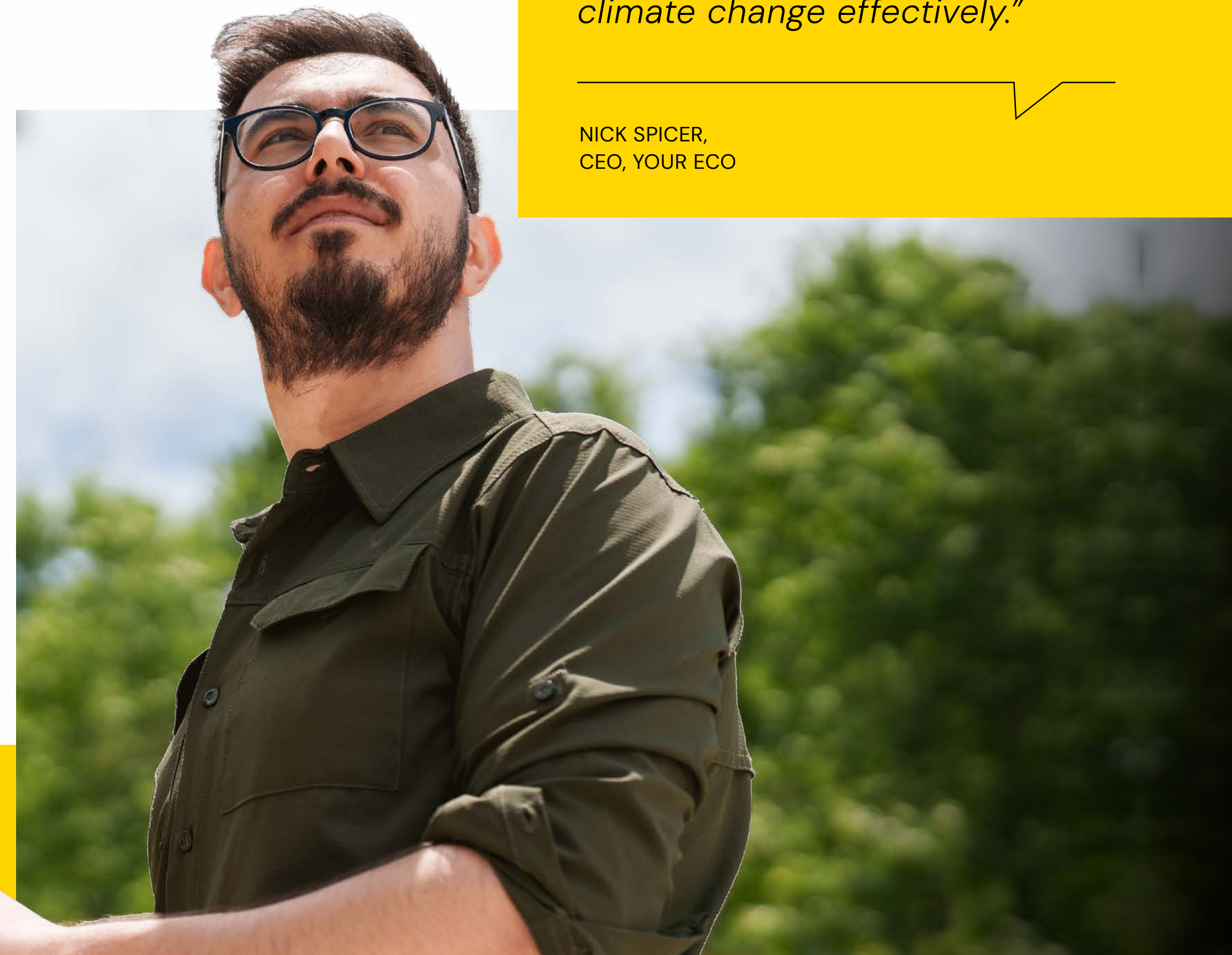
Build them into the vision, mission, and identity. The ambition may not be fully realised, but it doesn't have to be, as long as it is the direction of travel. It is critical to review your brand to make sure it is aligned with this.

By building your authentic sustainability story into the core of your brand, you increase credibility and confidence, and provide a platform to lead from.

Net zero leadership still represents a first mover advantage in many industries.

"Concerns over greenwashing and a lack of confidence hinder open communication about sustainability efforts. Addressing these challenges is crucial for fostering collaboration, achieving net zero targets, and combating climate change effectively."

NICK SPICER,
CEO, YOUR ECO



RECOMMENDATIONS



What marketing and communications leaders can do now.

Greenwashing guidance

Become familiar and comfortable with the CMA Green Claims Code. Host a workshop and Q&A with your communications and marketing team.

Sustainability statement

Create a sustainability statement that you can direct employees, press and media enquiries to. Update this every 6–12 months.

Build sustainability into the brand

Overcome a lack of confidence by building your authentic sustainability story into the core of your brand. Create a platform to lead from.

The process of building sustainability into the core of your brand.

How do you communicate your sustainability story in an honest way, that is grounded in reality, but still compelling to your stakeholder groups (e.g. employees, customers, shareholders, future employees)?

Here’s our process:



OCI GLOBAL

CASE STUDY

In our rapidly growing world, food and energy supplies are under intense threat. OCI is leading the way in fuelling and feeding the world sustainably by supporting energy intensive industries to decarbonise, making transport cleaner, harvests better and products greener.

Despite being at the forefront of the energy revolution, the brand was a sleeping giant.

We partnered with them to define a game-changing brand narrative, identity and architecture. This transformed a disparate group of business units into a unified network with a new, stronger ‘OCI Global’ brand at the core. A brand that would provide the cut-through and impact they needed, unlocking more opportunities to influence, build partnerships and add value. The identity was designed to show acceleration, progress and positive change, demonstrating agility, the dynamic skills and expertise of the team, and the confidence of a company driving change.

New photography and videography heroed the unique, status-quo-smashing teams in real-world scenarios, demonstrating how people were driving rapid progress in a traditional, change-resistant sector.

Officials from the Transform Awards commented on the project saying, “The new logo brings in a sense of momentum and future-driven focus.”

“It’s one of the things I’m most proud of actually, in terms of the outcomes, is how the brand has helped us to communicate to our own employees and indeed attract new employees because we’ve been able to communicate that sustainability goal effectively and people feel like they’re then part of something.”

GILLIAN DAINES,
GLOBAL HEAD OF CORPORATE
COMMUNICATIONS



76pp 34pp

increase in positive
sentiment on
decarbonisation

increase in positive
sentiment on
energy transition

OCI Global



NET ZERO IS A
RACE YOUR
BRAND CAN
HELP YOU WIN



You have the technology and capability to succeed, but there are further challenges. Attracting the right partners, investors, and customers. Communicating with clarity and consistency in emerging markets with evolving regulatory landscapes. Recruiting and retaining the right talent.

Unfortunately, having an incredible product or service isn't enough. Brand strategy is critical to improve confidence, engage stakeholders, and navigate the transition from "dirty" to clean(er) industry.

With a strategy behind your brand, your organisation can help us all achieve a low carbon future faster.

Brand is a bridge from where you are to where you want to be.

Here are three examples:

- The sustainable chemical and energy firm that grew share of voice from 10% to 36% as they decarbonised food, fuel, and feedstock.
- The global packaging business that put sustainability at the heart of their strategy – and \$250,000,000 worth of sales opportunities in their pipeline.
- The engineering consultancy that shifted their story to helping the world live and work more sustainably and won a wider audience and new contracts.





Many organisations
are afraid to
have a voice.

But we can't let
greenhushing
hold us back.

By finding the truth in your
brand you move beyond the
binary (green vs. not green),
and create a platform that gives
you credibility and confidence.



RBL Brand Agency is a transformational brand agency partnering with organisations that are leading the decarbonisation of industry and society. We help you discover the insights to navigate change, define the ideas to shape your story and deliver the impact to move you forward.

Our services include:

- Brand Strategy
- Brand Identity
- Brand Content
- Brand Campaigns
- Brand Communications
- Brand Management

If you'd like to build your authentic sustainability story into the core of your brand get in touch with our Growth Director, Karen Newbold.

Phone: (+44) 01926 678368

Email: karen@rblteam.com

GET IN TOUCH

APPENDIX

Reference Sources

Green Claims Code
www.greenclaims.campaign.gov.uk/

Raconteur: Sick of greenwashing?
It's greenhushing you should be alert to
www.raconteur.net/climate-crisis/sick-of-greenwashing-its-greenhushing-you-should-be-alert-to

2023 UK greenhouse gas emissions, provisional figures
www.assets.publishing.service.gov.uk/media/6604460f91a320001a82b0fd/uk-greenhouse-gas-emissions-provisional-figures-statistical-release-2023.pdf

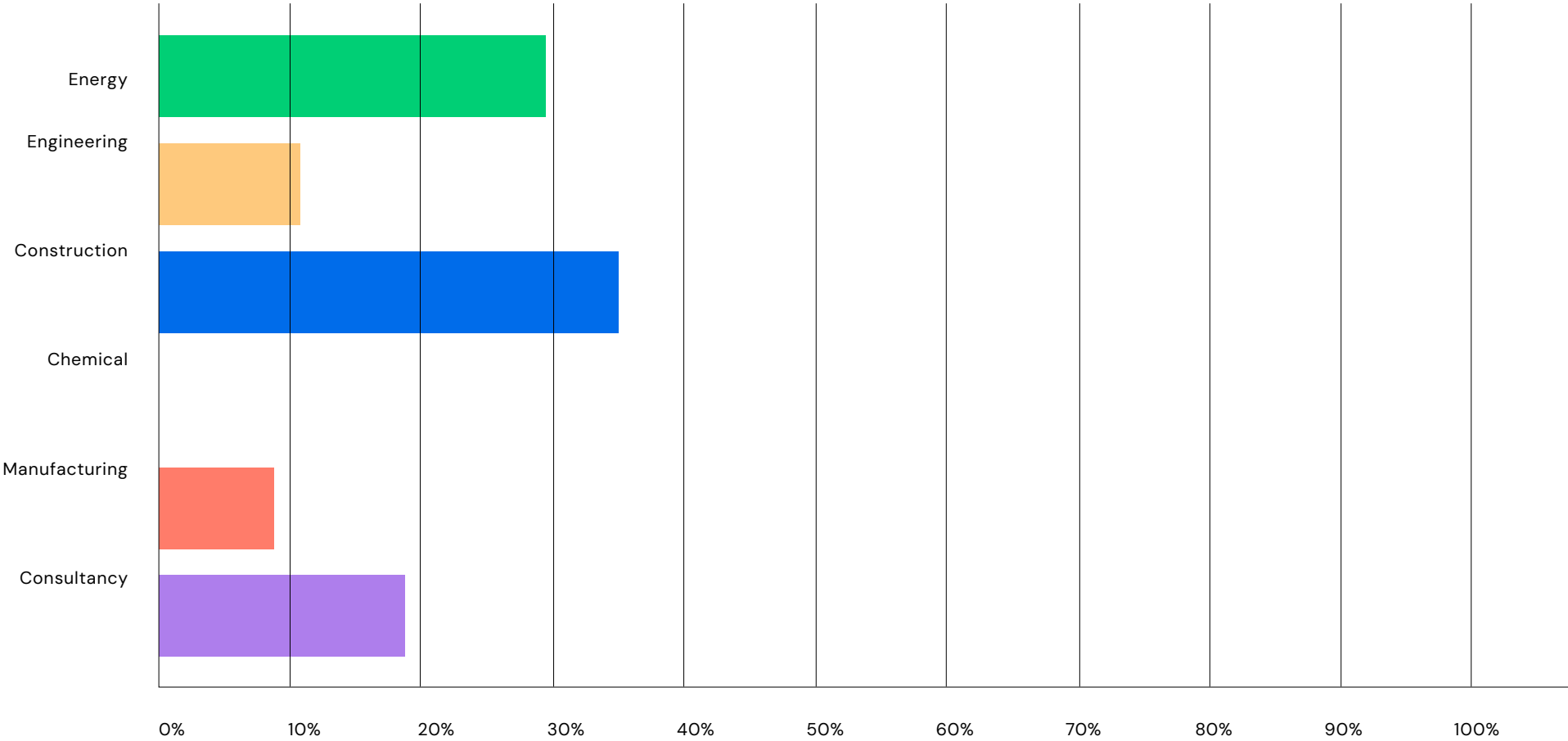
Nick Spicer, CEO, Your ECO
www.linkedin.com/in/nickspiceryoureco
www.yourecouk.com

Interview with Gillian Daines –
Head of Corporate Communications at OCI Global



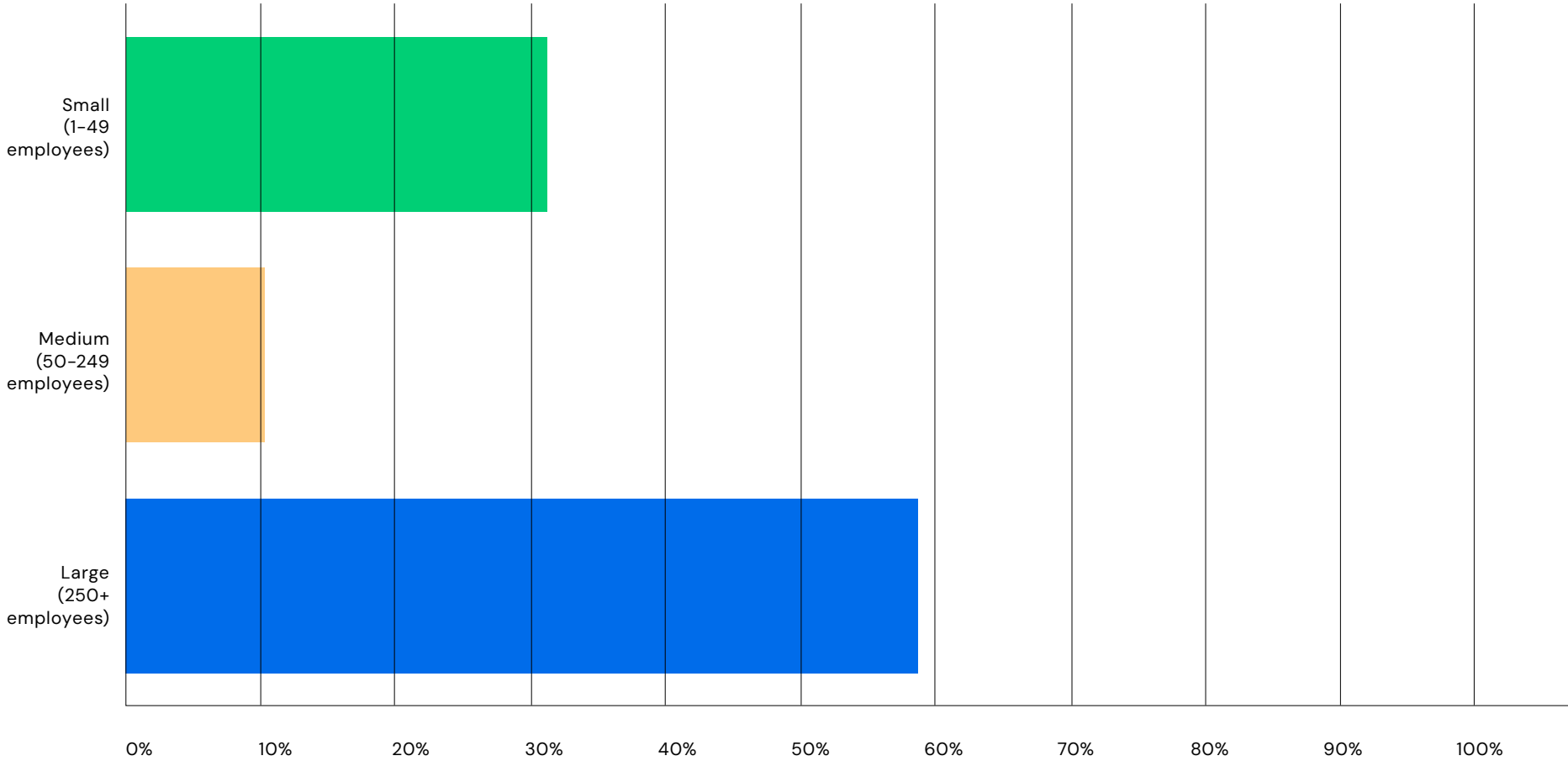
01

What type of organisation do you work for?



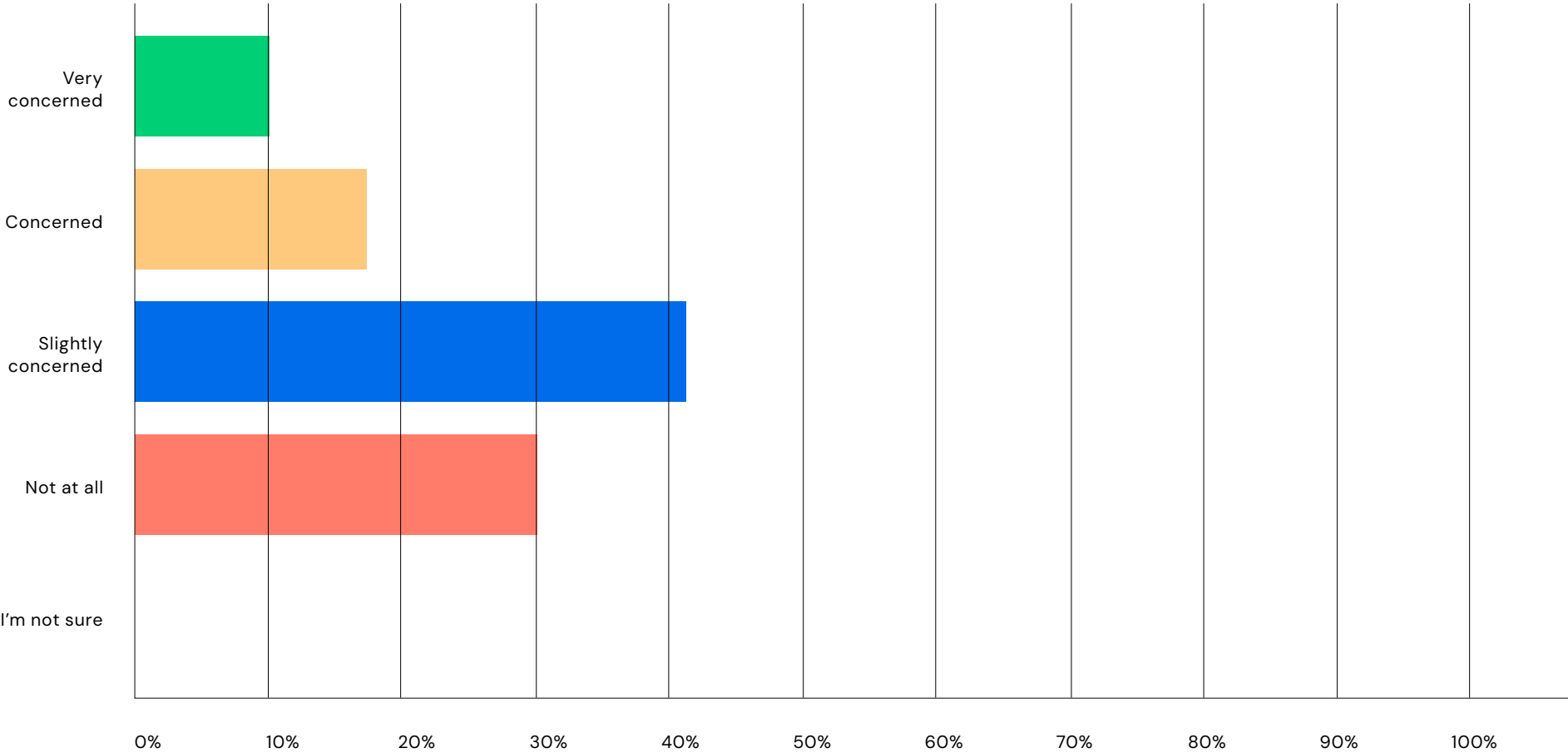
02

Organisation size



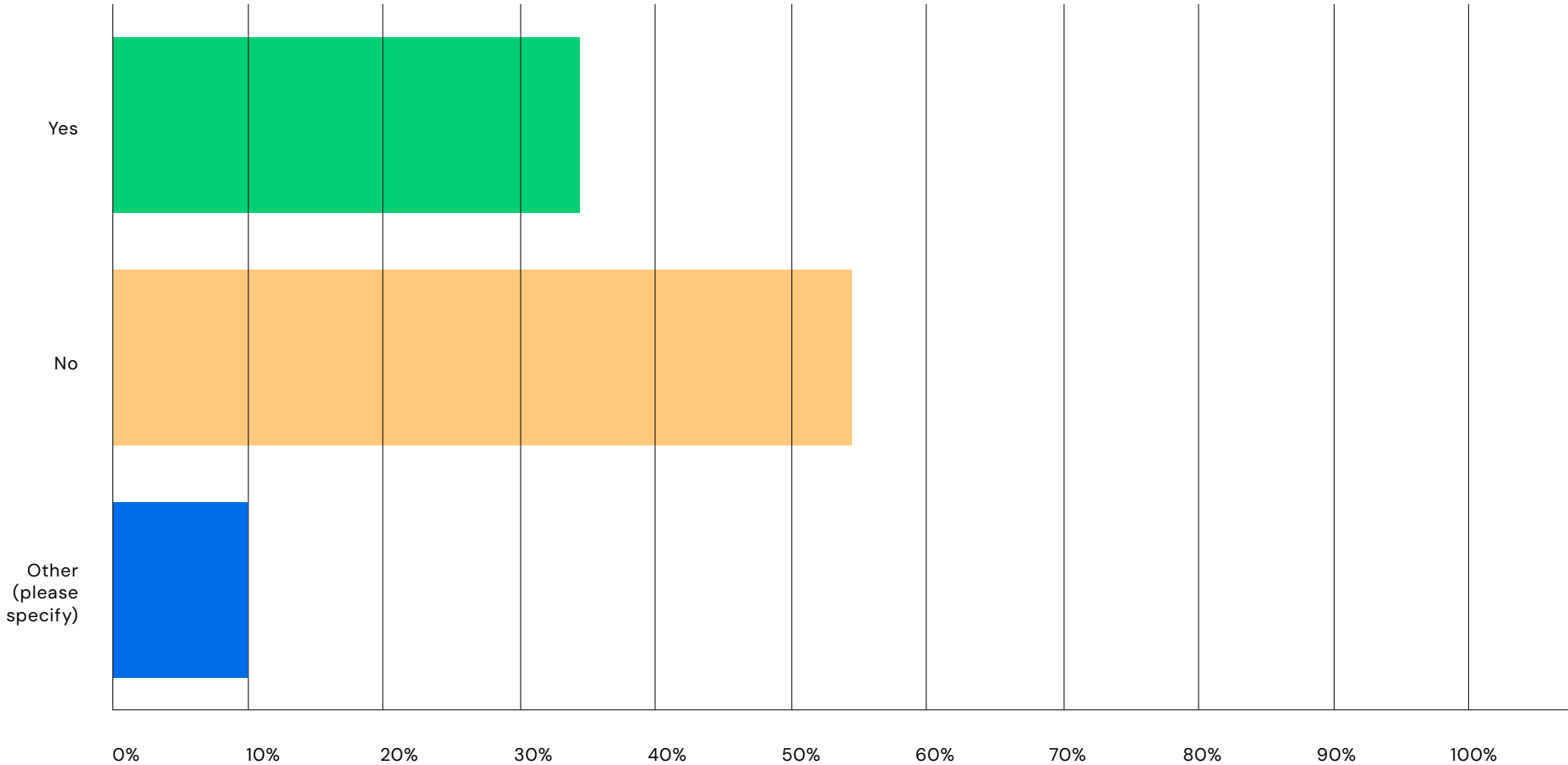
03

Are you concerned that your organisation could be accused of greenwashing?



04

Do you communicate less of your commitment or progress toward net zero targets because of this?



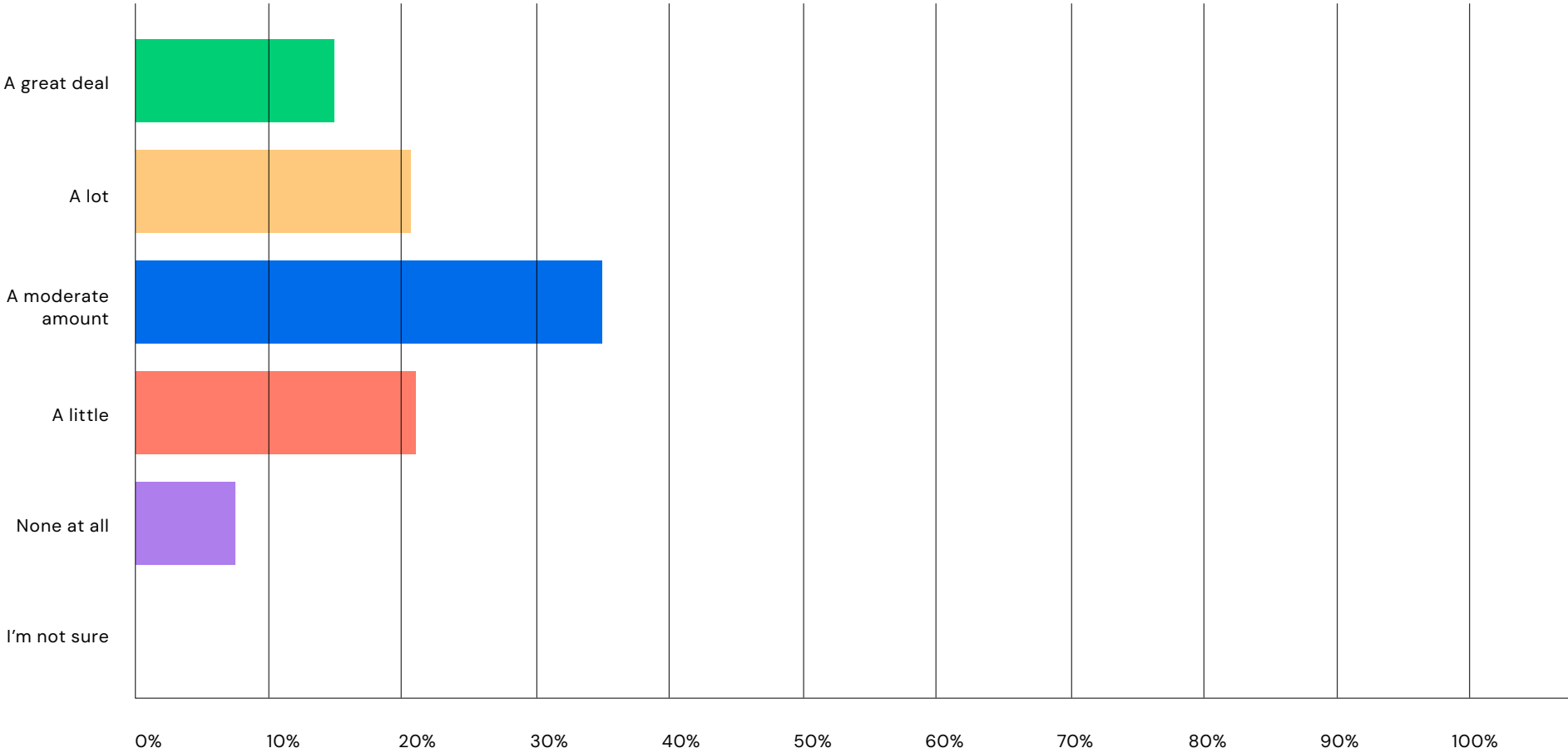
Other (please specify)

If it has relevance to the clients we work with.

More mindful of what we share and what we don't.

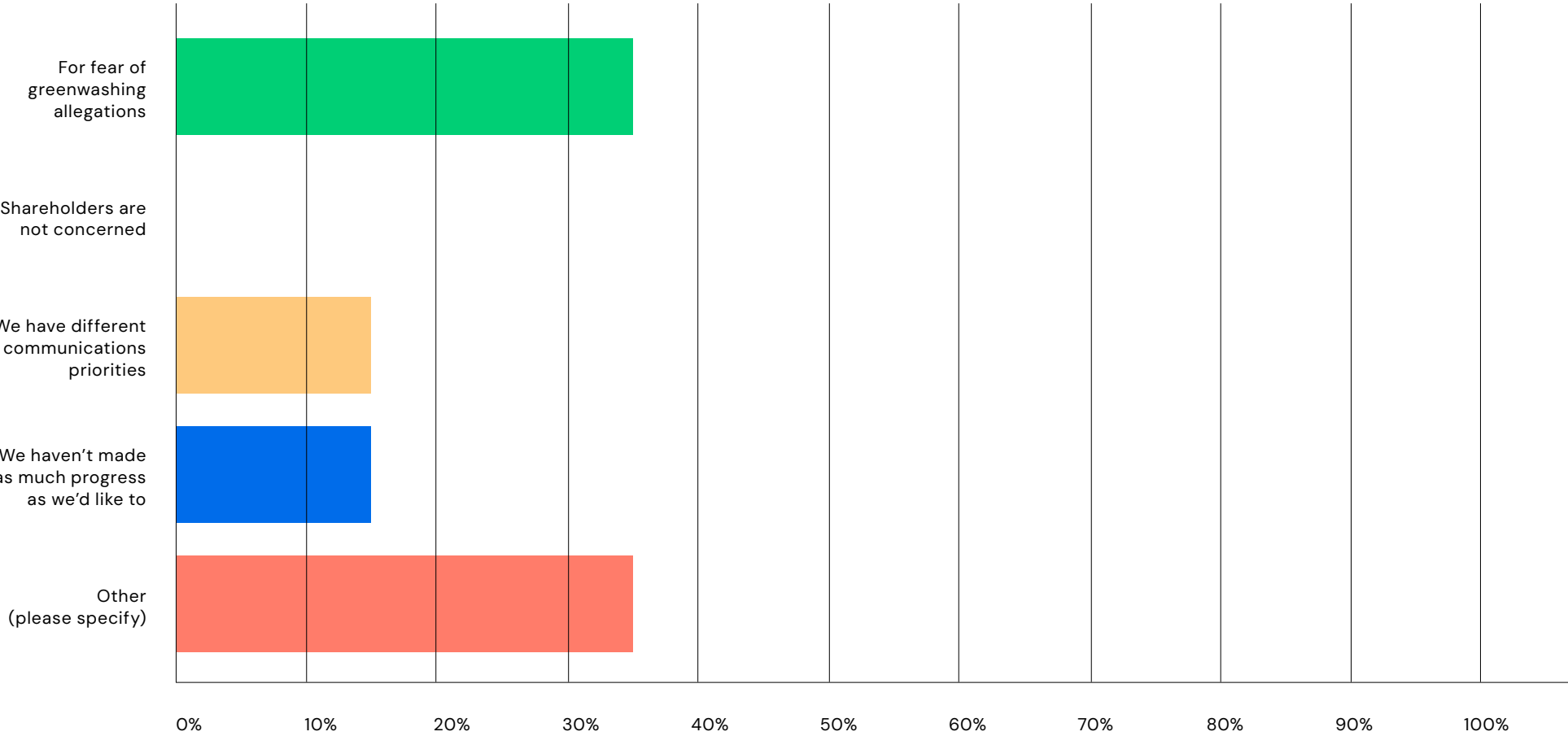
05

How much progress has your organisation made towards your net zero goals?



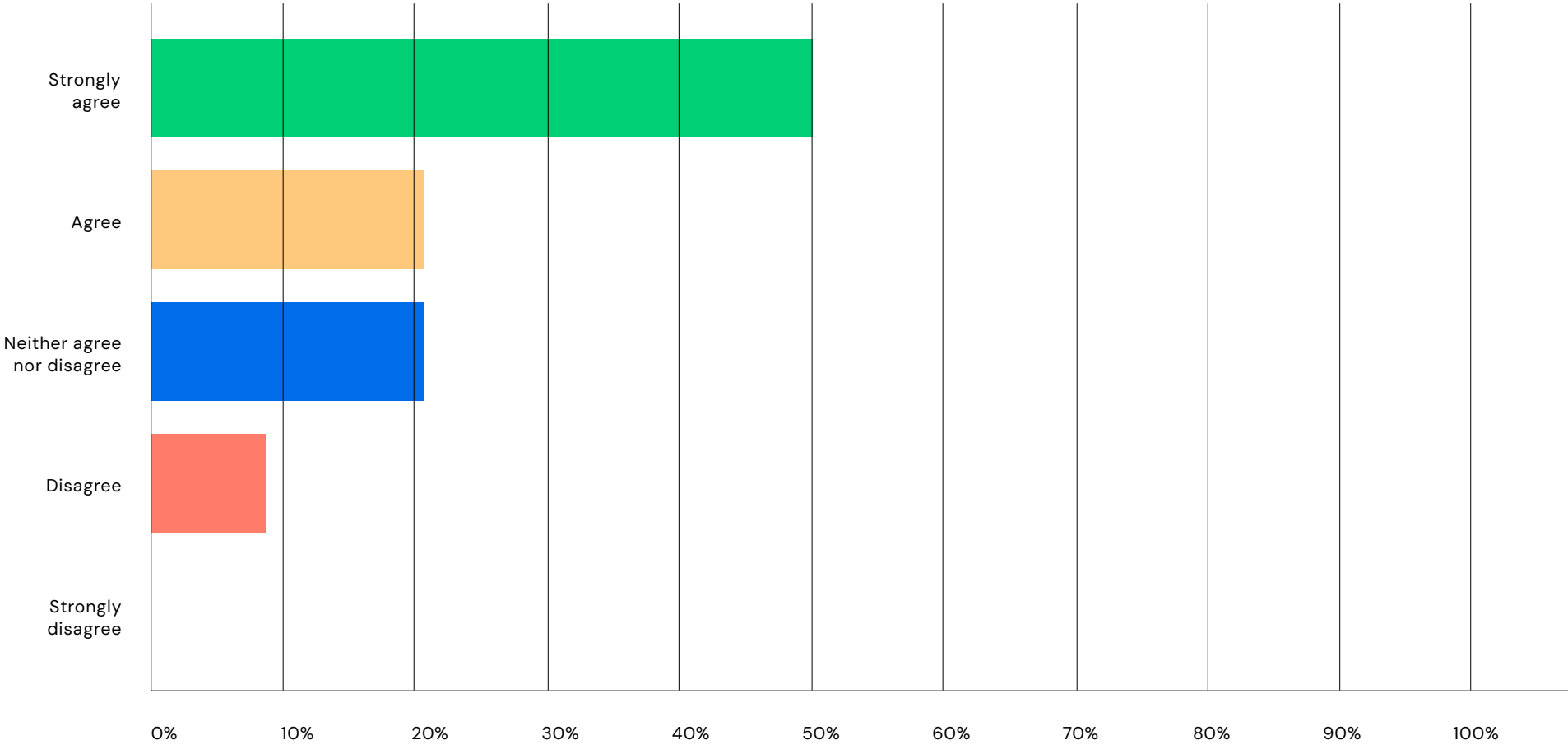
08

Why does your organisation not communicate more regarding net zero and sustainability?



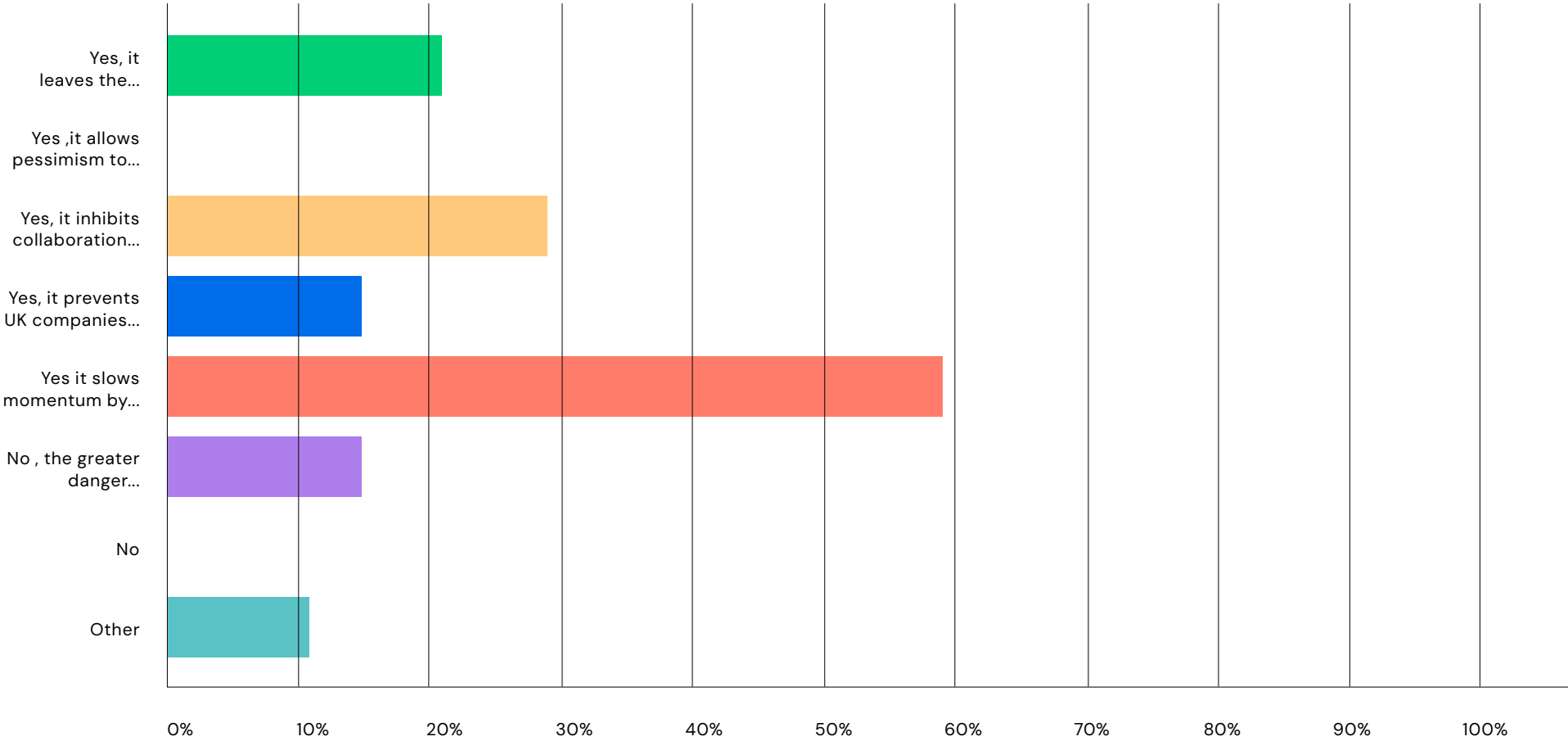
09

How strongly do you agree or disagree with this statement:
“The public would benefit from knowing more about the progress
being made towards net zero by private organisations”.



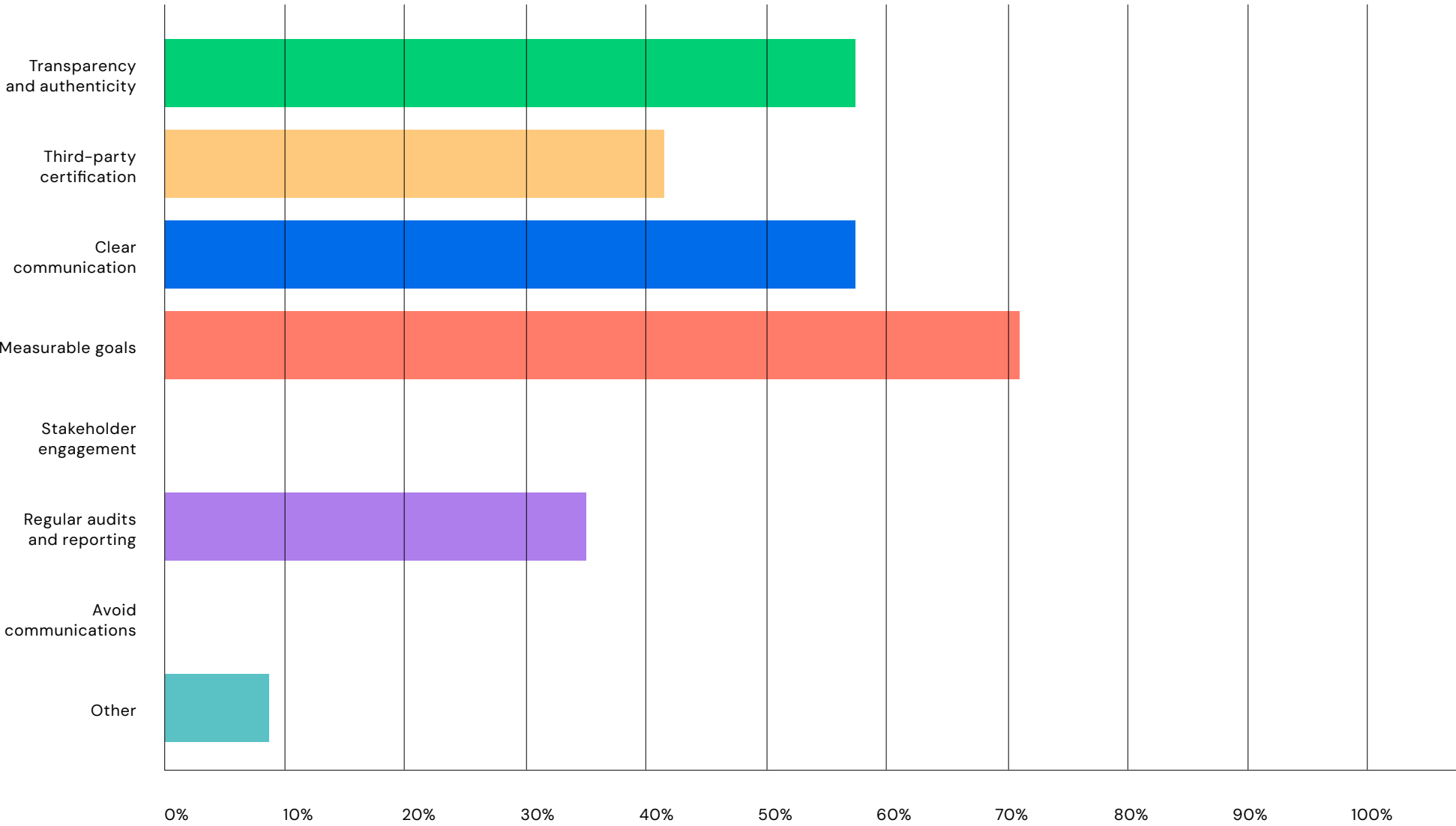
10

Does greenhushing have a negative
impact on industry and society?



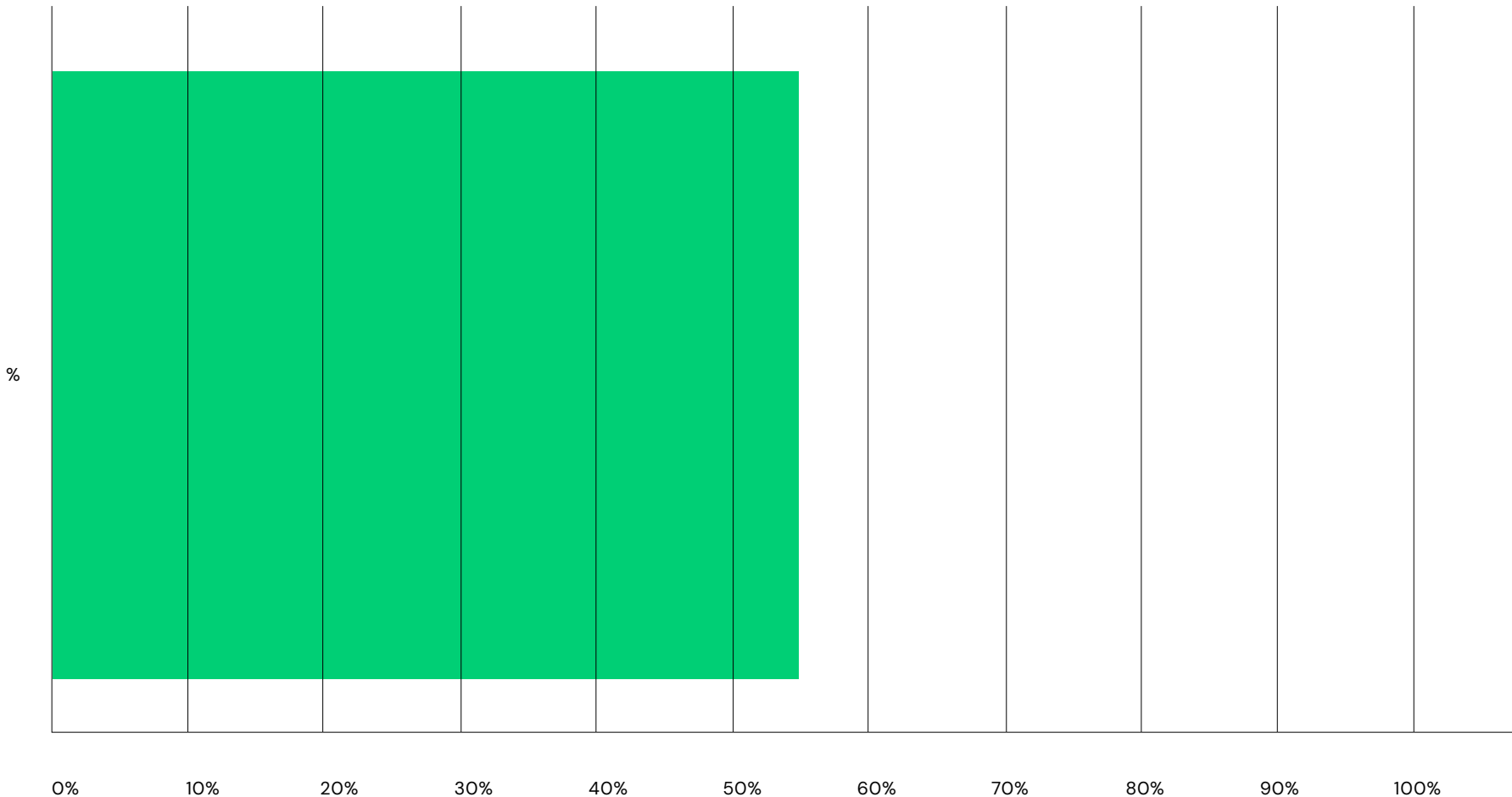
11

How do you plan on navigating this in the future?



12

How confident are you communicating on behalf of the brand regarding sustainability?



THANK YOU

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Want to build your authentic
sustainability story into
the core of your brand?

GET IN TOUCH

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