

ecopulse  
'11

*Bridging the Gap Between*

# Purchase Intent & Action

Sixty-nine percent of Americans report that they're searching for greener products (up from 60% two years ago and 63% last year). Yet only 23% of Americans consistently buy green products across multiple categories. Even though green product interest is more mainstream than ever, for most mainstream Americans there's still a sizable gap between green purchase intent and action. Eco Pulse™ 2011 provides insights on the barriers that still exist between intent and action, and suggests ways to bridge the gap to promote actual purchase behavior and sustainable habits.

## The Study

Shelton Group's fourth annual Eco Pulse™ U.S. consumer green affinity market study surveyed over 1,000 people and reveals key findings—with direct implications—for sustainability marketers.

## The Green Price Premium and Branding Conundrum

While only 19% of respondents said the current economic climate had made them cut back on green product purchasing, 71% said green products usually or always cost more than traditional products. For more price-sensitive mainstream consumers, companies will have to offer competitive pricing and consistent brand support to spur sales. In the laundry detergent category, for example, 26% of consumers are primarily driven by price, while 50% choose based on brand name. (Meaning that many interested in buying green products would prefer making those purchases from well-known brands.)

To reach beyond the Actives to attract mainstream segments, companies will have to offer competitively priced green products and invest in brand building. Right now, paying a premium for green is a penalty for good behavior and most mainstream consumers simply won't make that compromise.

## *This Just In:* Men and Women Are Different

While men and women generally didn't differ in their number of green activities or purchases, we saw a definite gender gap in the way they think about green products and the environment.

- Women were more likely than men to seek greener home cleaning, food and beverage, personal care, baby and paper products—but women were also significantly more likely than men to say they were using less disposable tableware than they have in the past (46% vs. 29%).
- Men were more likely than women to be seeking green products in the electronics and automobile categories.
- Men were also slightly more cynical than women regarding corporate motivations. One quarter of men thought companies undertake environmental initiatives to look better to the public, and almost twice as many men as women thought these initiatives were simply “to take advantage of a popular trend.”

#### Your Corporate Story Matters

Corporate reputation surged into third place in response to the question "How do you know a product is green?"

*Almost a third of Americans (31%) now consider a company's environmental record to be the best guide, behind analyzing the ingredients or other details on the package and trusting outright green claims on the label.*

This is a strong message to marketers to tell a company's sustainability story consistently and accurately.

### Insight on the Three Rs

Recycling continues to be incredibly popular, with over 60% of Americans saying they regularly recycle aluminum cans, plastic bottles and newspapers. In fact, most Americans think that recycling is the most important of the three components of sustainable living (reduce, reuse and recycle).

However, most people—even regular recyclers—are confused about the numbering system for plastics. Convenience also strongly drives recycling behavior, as households with curbside pickup recycle at a significantly higher rate than those who don't have this service.

We're also seeing interest in the other two components of sustainability—reducing and reusing.

*To nearly half of Americans, reducing consumption (28%) or reusing items (17%) is the most important way to reduce their environmental footprint. This is making an impact on many Americans' everyday lives.*

Nearly 40% say they're using fewer single-use disposable cups and paper towels, and almost 60% said that using washable ceramic plates is best (even compared to using disposables made from recycled materials). Companies who produce and sell single-use products have opportunities to assuage consumers' eco-guilt by introducing compostable products or products made from recycled or recyclable materials.

The background of the page is a close-up, vertical view of the American flag. The stars and stripes are clearly visible, with the blue field of stars on the right side and the white stripes on the left. The flag is slightly wrinkled, giving it a realistic appearance.

### Proud to Be American

We found several instances where “made/grown in the USA” is surging in popularity. Whether this is in response to American job losses or concerns over safety/health largely depends upon the category. We asked Americans what’s most important to read on a food product label, and “grown in the USA” tied for first with “100% natural” at 17%. We also saw considerable interest in “made in the USA” and “not made in China” in other categories. This message was particularly motivating for the two consumer segments that are the least green—Skeptics and Indifferents.

# *Applying* **Worldview Thinking** *to Our Segments*

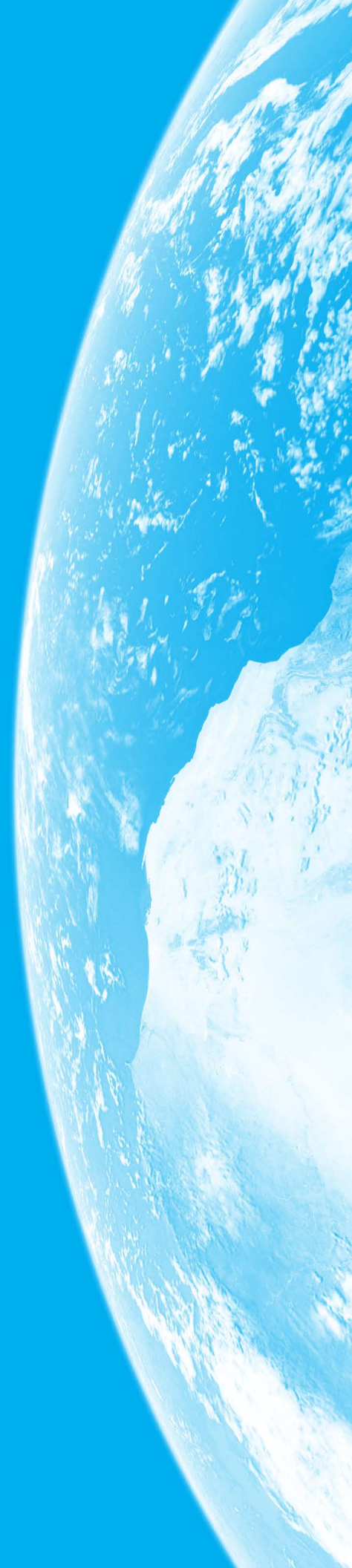
You're not simply trying to reach your target audience—you're trying to motivate them to change their behavior. That requires understanding how they think, and that's why we applied some time-tested social psychology theory to this year's Eco Pulse™ study results.

We already know that consumers fall into one of four groups, each with a distinct mindset and motivation—a pattern that shows up in our research year after year. We call them Actives, Seekers, Skeptics and Indifferents. Thinking it likely that each of our segments would primarily align with specific Gravesian worldviews, we collaborated with behavioral scientist John Marshall Roberts to use his Worldview Assessment to test our theory.

Our hypothesis proved to be true: there are primary worldviews associated with each of our proprietary segments. In other words, each of our four consumer groups—Actives, Seekers, Skeptics and Indifferents—sees the world in measurably different ways. That means that sustainability messaging must be tailored to produce desirable results.

For example, if you are addressing individualistic thinkers (Skeptics), you must answer the question “What’s in it for me?” You can motivate them by tapping into their sense of competitiveness and patriotism and making them aware that if they don’t change their behaviors, other countries will leave America behind. For humanistic thinkers (Seekers) you need to connect the purchase or behavior to the greater good and relate to their sense of community. And so on.

The major implication for marketers is that communications must become more about encouraging and fostering personal growth while tapping into a sense of purpose and community if you truly want to increase sales, brand loyalty and ROI for sustainable products.



## *Get the Full Report*

To get your full copy of Eco Pulse™ 2011 (including almost 500 pages of insightful analysis, charts, graphs, crosstabs and more), please visit [sheltongrp.com/ecopulse](http://sheltongrp.com/ecopulse).