

The Consumer Side of Sustainability

04.22.2008

Earth Day, founded by John McConnell in the 1970s “to inspire awareness of and appreciation for the Earth’s environment and its resources,” has become just another marketing event on the calendar for some companies. But not for us. Long before environmental marketing was fashionable, The Hartman Group was tracking consumer interest and involvement in sustainability. For more than 20 years now, we have been dedicated to providing actionable insights to manufacturers and retailers on consumer habits and preferences in the environmental products arena.

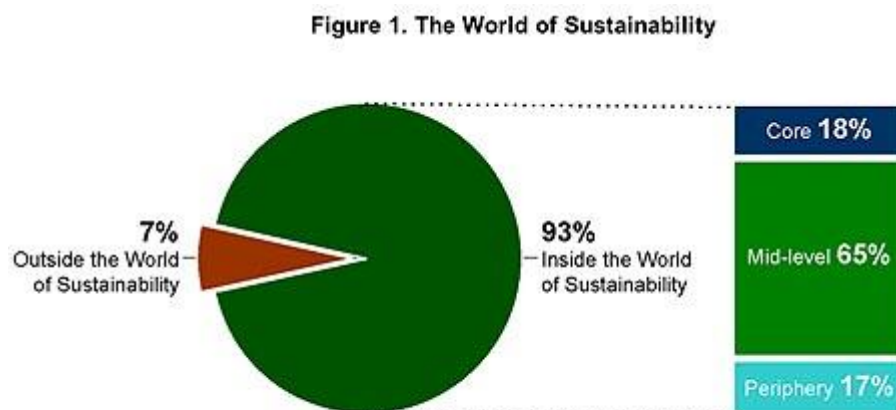
In honor of Earth Day, we thought it appropriate to present the consumer side of the complex picture of sustainability — how it relates to their everyday lives and translates into purchases. Be forewarned, sustainability’s consumer side does not necessarily match up with how the industry or media thinks, acts or talks about sustainability.

As so often occurs in popular media and trade punditry, a topic of seemingly monumental public importance is continually thrust into the limelight until the topic takes on a life of its own and thrives. Sustainability is one such headline.

Like the word “obesity,” sustainability has also become a multi-headed, industry-driven cause célèbre. Today’s media headlines are laden with news about clean technologies, “socially conscious” products, or the latest efforts to “green” retail, residential and workplace environments. As reporters fixate on these perceived tangible signs of change surrounding the topic of sustainability (products, gadgets and technologies), it is far more valuable to look at consumers and what they are up to in their daily lives that express their interest in sustainability.

Just the (Sustainability) Facts, Thanks

In our landmark 2007 study, The Hartman Report on Sustainability: Understanding the Consumer Perspective, we identified the attitudinal shift driving sustainability and defined it as a cultural phenomenon. In fact, we found that most consumers (a whopping 93%) say or do something of a conscious willingness to incorporate some aspect of sustainability in their day-to-day lives.

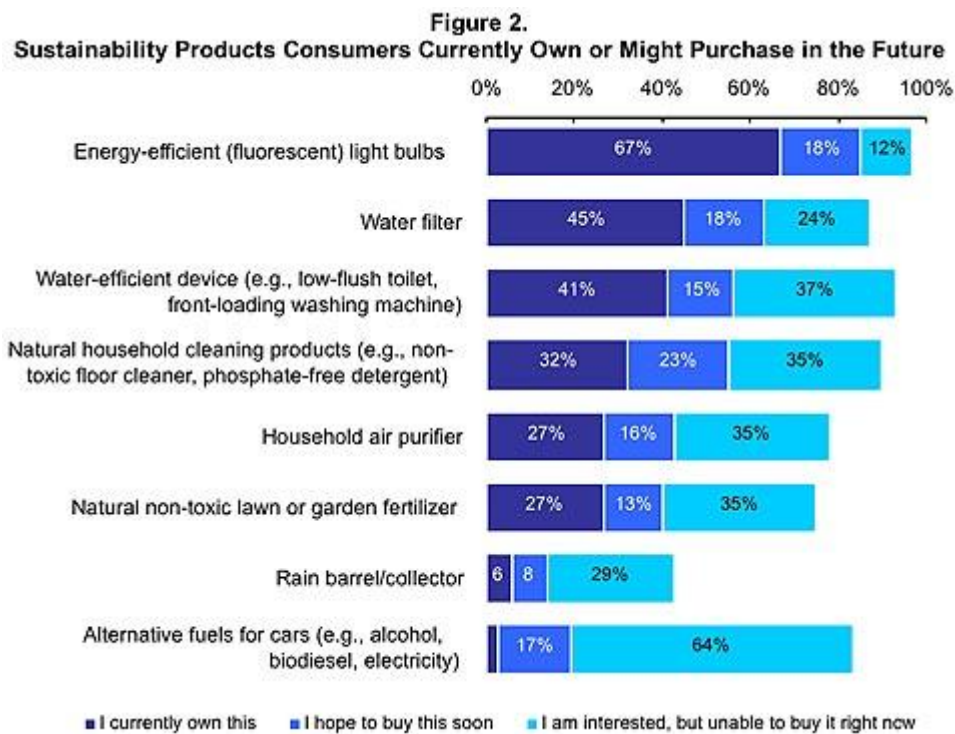


Source: The Hartman Group Report on Sustainability: Understanding the Consumer Perspective, 2007. Sustainability Survey (n=1,606).

Most consumers begin purchasing sustainable products that offer direct personal benefits, typically related to health and wellness. Food and beverages are, by far, the primary gateways to consumer participation in sustainable purchasing behaviors. We find the adoption process most often begins with products that may offer personal or familial health and wellness benefits (natural, organic and/or local food alternatives) with subsequent adoption of air and water filtration systems and simple personal care products such as sunscreen.

To measure some of their tangible involvement in the World of Sustainability (which from the consumer perspective is largely about lowering risks to themselves, their communities and the planet through various air, water and environmental pathways), we asked consumers within the World of Sustainability to describe which sustainability products they currently own or might purchase in the future. Among eight different sustainability-oriented products, three of the top five are products commonly purchased to lower risk within consumer households (Figure 2):

- Water filters: are currently owned by 45% of consumers in the World of Sustainability (with another 18% saying they hope to “buy this soon”)
- Natural household cleaning products: are currently owned by 32% of consumers in the World of Sustainability (with another 23% saying they hope to “buy this soon”)
- Household air purifiers: are currently owned by 27% of consumers in the World of Sustainability (with another 16% saying they hope to “buy this soon”)



While risk avoidance plays a foundational role in consumer interpretations of living “sustainably,” the depth and breadth of consumer understandings, practices and beliefs that surround public interpretations of sustainability underscore how the term is still in a developmental stage. When asked to rate various sustainability activities they might already be doing (or might do in the future), we see a diversity of behaviors in the top three:

- 77% of consumers within the World of Sustainability say they regularly recycle household items (and 7% say they “plan to do this soon”)
- 76% of these consumers say they turn off the faucet to conserve water while brushing their teeth (and 4% say they “plan to do this soon”)
- 73% regularly donate household items to community or non-profit outlets (and 8% say they plan to soon)

Other consumers cite that they believe sustainability is achieved through composting kitchen and yard waste (27%), while others (65%) believe it is achieved by purchasing compact fluorescent light bulbs.

Sustainability Next: Cultural Insights

Beyond numbers, our current ethnographic research shows that as individual sustainability consciousness develops, it grows from the physical body, to the household, to the community and finally to global interconnectedness - centering on the body and ranging outward to the broader environment.

Linked to this process we see a variety of behavioral influences that prompt consumers to participate in the World of Sustainability:

- Having children tends to dramatically impact understandings and increases mental and practical investments in issues of sustainability.
- Participating in outdoor recreation that centers on or around wilderness areas or undeveloped land brings face-to-face confrontation with balancing conflicting needs.
- When a cherished "way of life" shared by many people comes under siege of broader changes - that is, when a future life that was assumed as a given by the group becomes threatened (e.g., "Will I have access to clean water?", "Will I still be able to get local produce?") - questions of sustainability are likely to arise.

The Sustainability Story Continues

While the media continues to focus much of its attention to reporting on what companies, advocacy groups and policy makers are doing with regard to global warming and other environmental issues, The Hartman Group is once again going back to where the real story on sustainability matters most—with consumers.

This year, Hartman Group researchers will be back in the field alongside consumers to provide companies an updated view on where consumers are at with regard to sustainable products and practices compared to our landmark 2007 Hartman Report on Sustainability.

In 2007, we identified the attitudinal shift driving sustainability and defined it as a cultural phenomenon. In 2008, we plan to take that further by digging deeper into the impact of sustainability on consumer purchase behaviors in core product categories and provide insight into the social values and key entry points driving the trend. To make this new study meaningful and useful to your business objectives and initiatives, we would like to hear from you. Please forward your comments and thoughts on what categories or areas of interest you would like us to explore to Alison Worthington, Hartman Group Managing Director of Sustainability Practices ([email: Alison.Worthington@hartman-group.com](mailto:Alison.Worthington@hartman-group.com)).

One thing is sure to develop in this age of consumer-driven change and that is, just as industry and media headlines have their way of speaking about sustainability, consumers will have their own interpretations and understanding of the term that will have far-reaching impact on your business. Correctly interpreting these meanings will in turn determine the success of environmental products, practices and services in the marketplace.