

ecopulse™  
2015 SPECIAL REPORT



# the buzz on buzzwords

Do Americans get the sustainability jargon you're using -  
and does it make them want what you're selling?

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## introduction

When we first decided to shift our agency's focus to energy and the environment back in 2001, the green movement in American business was still young.

Back then, we had clients who didn't want to be associated with the term "green," even when their products and services were good for the environment. (Although, if we're being honest, some companies we encounter still aren't comfortable with the word.) Because green was still a fringe idea, we generally recommended that companies use caution in framing their environmental stories to avoid polarizing words or political connotations.

*But that was then, and this is now.*

It's 2015, and green is exponentially more mainstream these days. It's a selling point for many major global brands. It's plastered all over product packaging. It's the star of Super Bowl ads aimed at the American heartland. And we all know (and may be a little weary of) the lingo that goes with environmental marketing: **Green. Eco-friendly. Sustainable.** To say nothing of the jargon that relates to individual products, like **recyclable** or **low-VOC**. The words are ubiquitous these days.

**But what do Americans really think of these terms?** Are they really mainstream? Do consumers understand their meaning – and more critically, do the words conjure up positive or negative feelings? Do people associate them with increased cost? Better health? Political baggage?

**That's what this report is about.** We took the American pulse when it comes to green buzzwords to find out which ones are powerful and which ones fall short of the mark. Which ones make consumers feel warm and fuzzy and which ones leave them cold. Which ones they get and which ones they really, truly, sincerely don't. (We're looking at you, VOCs.)

As part of our annual Eco Pulse study, we tested the umbrella terms "green," "sustainable" and "eco-friendly," measuring respondents' instant reactions to the words on several different scales. We also tested knowledge and perceptions of eight terms we'd describe as green jargon – they tout a product's sustainability features and frequently appear on packaging, but they may mean more to the people who make the products than to the people who buy them.

**We asked some pointed questions, and two thousand American consumers weighed in.**

They also threw us some curveballs, as our respondents always do. Read on.

*evaluating the*

# big 3

*green, sustainable  
& eco-friendly*

We know that the concept of “green” has made a gigantic shift in the marketplace – from niche appeal to baseline expectation. But how completely has this shift registered with consumers? And how do they perceive the jargon marketers use to describe green products and initiatives?

To answer the first question, we decided to test consumer reaction to the word “green” itself, along with a direct synonym, “eco-friendly,” and a close cousin, “sustainable.” A little background:

- “Green” tends to have a political vibe, which makes sense, because it got its environmental meaning in the 1970s when it was chosen as the color of European political parties focused on ecology and social justice.
- The cheerful but vague word “eco-friendly” started popping up in the late 1980s.
- “Sustainable” is a word with deep roots in the environmental movement, particularly having to do with agriculture. But now it’s a much-hyped business buzzword as well – so much so that it was named to *Ad Age’s* “jargoniest jargon” list in 2010.

So now that these terms have evolved for 40 years, we wanted to know:

- Is “green” still a polarizing word that carries political baggage for consumers?
- Does it appeal only to those who make the environment a top priority?
- If so, is “eco-friendly” a, well, friendlier alternative, or is it too overtly environmental to have mass appeal?
- Is “sustainable” more politically neutral than the other terms?
- Could it have more heartland appeal, considering its roots in agriculture?

And for all three terms:

- Do consumers associate them with better health?
- Do they think they’re good for business – or bad?
- Do they think they’re important?
- Do they identify them as expensive?
- **Are they effective?**

We offered survey respondents a series of questions that allowed them to drag a slider bar to register their instant reactions to each word on several different scales (*positive/negative, desirable/undesirable, good for my health/bad for my health, etc.*). For example:

Now let’s play a word association game. (There are no right or wrong answers!)

What is your reaction to the word “green” when used to describe a product (or a company’s manufacturing practices)? Drag the bar to where you think the term “green” belongs on each of following scales:

Undesirable	<input type="range"/>	Desirable
Harmful to my health	<input type="range"/>	Good for my health
Inexpensive	<input type="range"/>	Expensive
Bad for business	<input type="range"/>	Good for business
Conservative	<input type="range"/>	Liberal
Unimportant	<input type="range"/>	Important
Negative	<input type="range"/>	Positive
I have no idea what it means	<input type="range"/>	I understand it

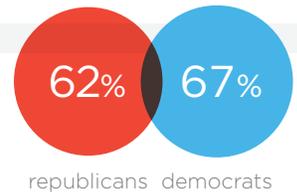
# the results

Even though we suspected "green" had become more mainstream, we were surprised to see just how well it performed.



Green was considered desirable by 65% of respondents.

Even more interesting, this result did not vary by political affiliation: 67% of Democrats thought it was desirable compared to 62% of Republicans – a statistically insignificant difference.

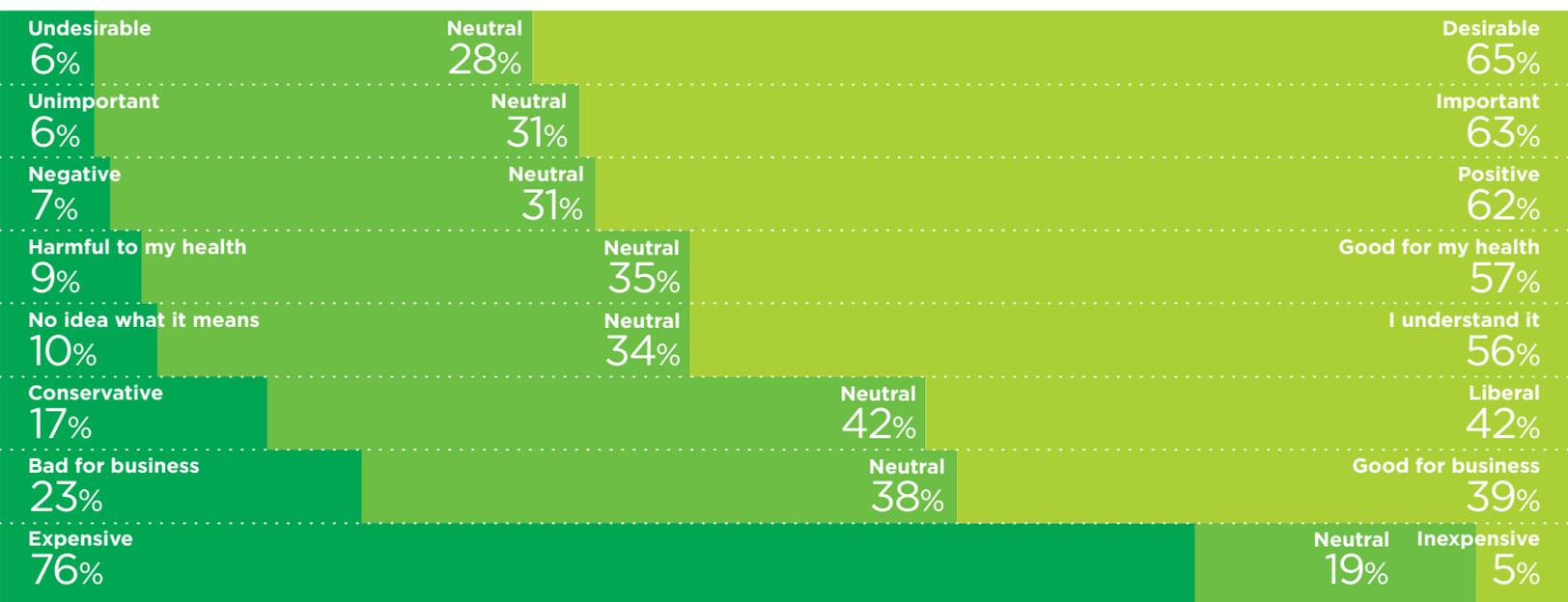


republicans democrats

**When it comes to politics, though, it did matter how the question was framed.** When the scale said *positive/negative* rather than *desirable/undesirable*, numbers dipped slightly to a 62% overall approval rating, with a 69% vs. 55% split between Democrats and Republicans. Republicans were also significantly more likely than Democrats to proclaim green *bad for business*, although in fairly unremarkable numbers given the stereotypes surrounding this concept (30% vs. 20% of Democrats).

**When we asked respondents directly what they thought the political affiliation of green was, they were more balanced than you might expect.** Although green was more likely to be considered *liberal* than *conservative* (42% vs. 17%), respondents were just as likely to view it as *neutral* (42%). And interestingly enough, Republicans were only slightly more likely than Democrats to think the word was *liberal*.

## What is your reaction to the word "green" when used to describe a product (or a company's manufacturing practices)?

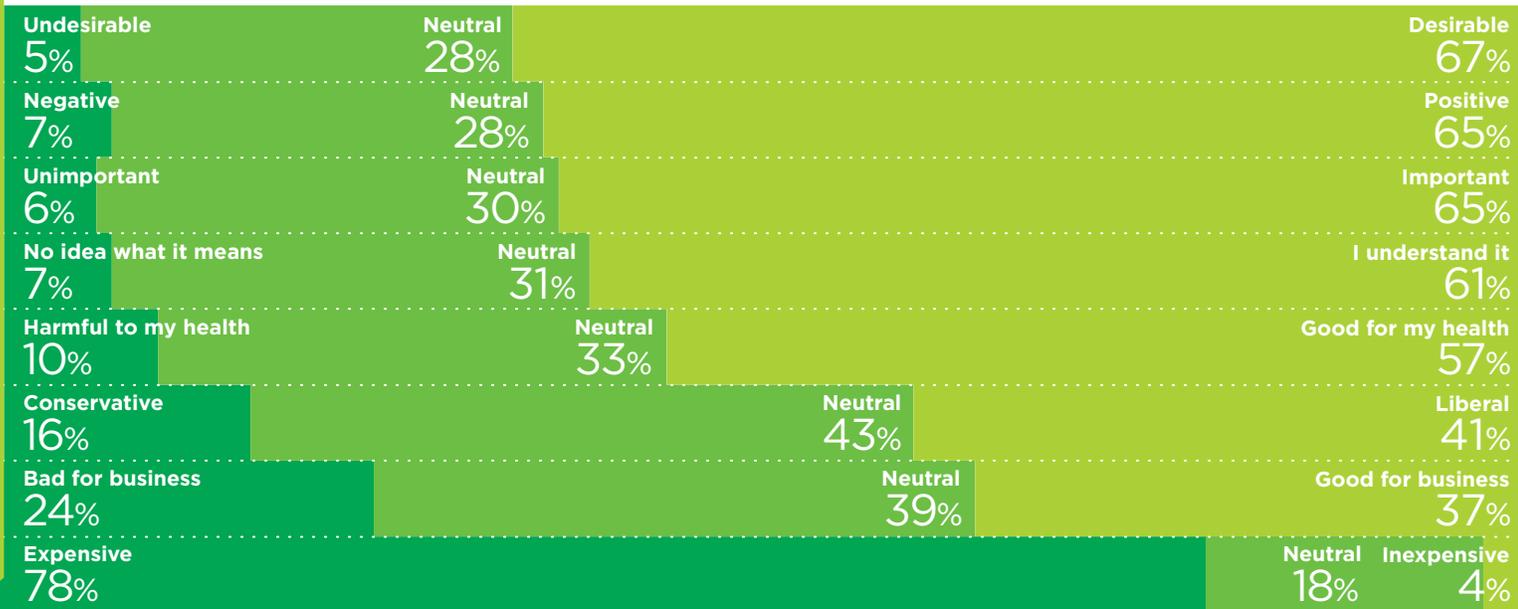


Green seems to be solidly positive in the eyes of consumers.

*The bright spot for marketers is that green has a strong association with better health; on the other hand, it has not shed its reputation for being expensive.*

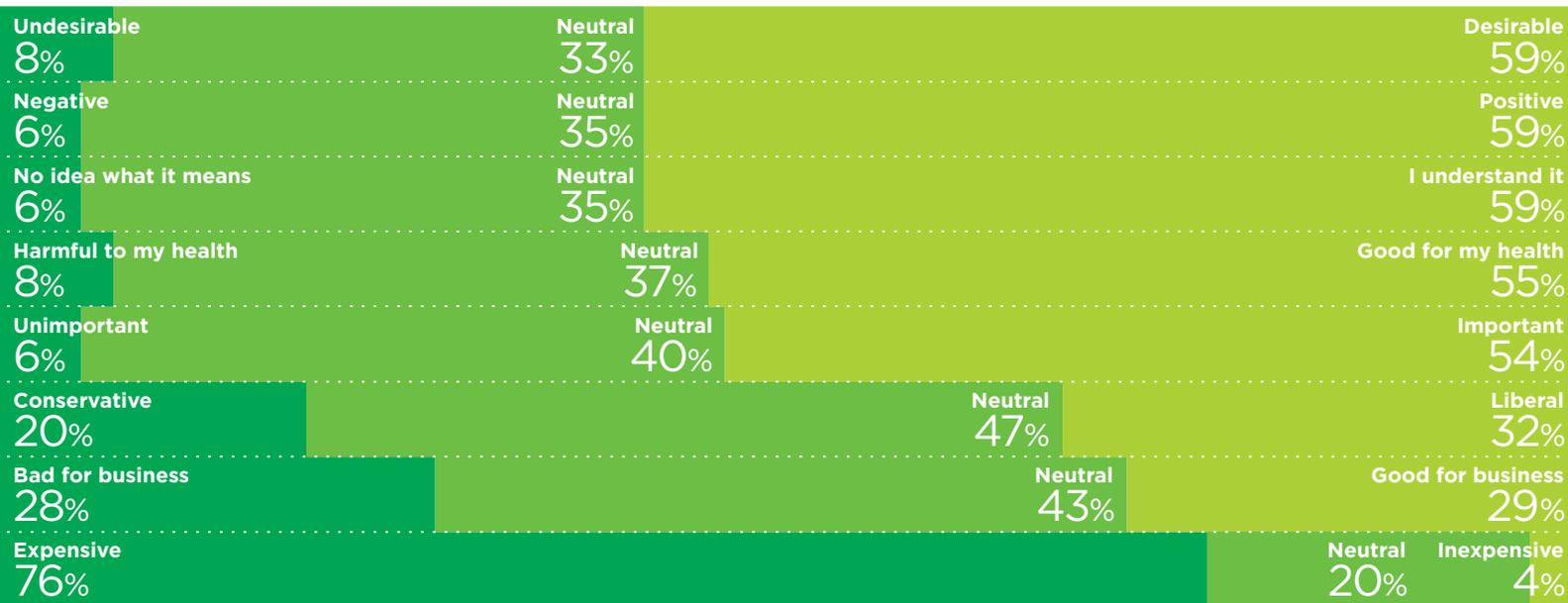
"Eco-friendly" performed slightly better than "green" in our survey, though not significantly so. More respondents thought it was *positive*, fewer thought it was *negative* and more claimed to *understand* it.

*What is your reaction to the word "eco-friendly" when used to describe a product (or a company's manufacturing practices)?*



The numbers for "sustainable" were slightly less impressive. Although it was considered more politically neutral than the other two terms – and it actually registered slightly higher *understanding* ratings than "green" – it received a less *positive* rating overall. We think this may be because it's a word with multiple meanings, and consumers generally aren't big fans of nuance. Also, the intellectual overtones of this word may be a turn-off for some respondents.

*What is your reaction to the word "sustainable" when used to describe a product (or a company's manufacturing practices)?*



Besides asking for respondents’ reactions to buzzwords, we also asked another question this year that we’ve been tracking since 2008:

*How much do you agree or disagree with the following statement: “Global warming, or climate change, is occurring, and it is primarily caused by human activity.”*

Disagree  
16%

Neutral  
22%

Agree  
62%

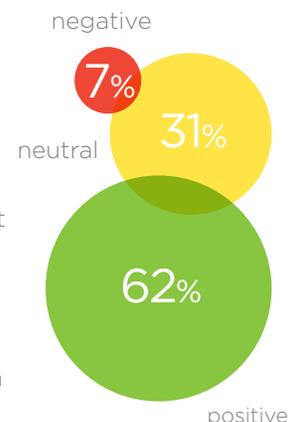
The 62% agreement rating is one of the highest we’ve ever measured in our survey. This bolsters the picture of consumers we get from our perception questions: not only are “green” and its synonyms firmly mainstream, garnering neutral to positive reactions, but public agreement on human-caused climate change has tipped solidly into the majority as well. It may be time to stop thinking about sustainability as politically charged, at least in terms of marketing.

*The language of green is the language of consumers – they get it, they know it’s important and above all, they like it.*

One caveat: if you’re trying to reach a specific subset of your customer base with these words, it’s critical to use segmentation to target the right consumers with the right messaging. The Shelton Group consumer segmentation system identifies which groups are most likely to take action or buy products – and our segments’ reactions to specific words differ significantly from each other and from the general results noted above. Turn to page 41 for more information.

### *the last holdouts*

So what about the minority who didn’t like the word “green”? That group was actually tiny, which is quite a finding in itself. Only 141 people out of 2,007 (7%) gave “green” a negative rating – the rest remained neutral (31%) or felt positive (62%). (According to our proprietary segmentation model, this group would likely fall into our “Skeptics” segment – the group that’s dubious about green products and human-caused climate change.)



In our survey, we asked a number of questions about product features and then cross-referenced those responses with how people reacted to the word “green.” And although those who responded negatively to “green” did indeed place less value on green product attributes than those who gave it a positive rating, many of them still liked some green features, such as ENERGY STAR® certification, high-pressure water-efficient showerheads, and products that were free of harmful chemicals. While this group may not embrace a green philosophy *per se*, they don’t necessarily reject green at the shelf.