

ecopulse™
2017 Special Report

United We Understand

**Words have power.
Are you choosing the ones that unify? Or the ones that divide?**

In this time of divisive rhetoric, sustainability messaging can be a unifying force. How can your company create sustainability messages that resonate with consumer values – so your brand can become a part of their identity?

TABLE OF CONTENTS

Introduction..... 3

I. Words That Unite..... 5

II. Words That Divide 9

III. Values That Motivate 13

IV. What Does It All Mean? 17

V. About Shelton Group..... 18

Everyone is talking about how divided the country is right now.

How can companies communicate with Americans about hot-button issues like the environment and sustainability in a way that inspires deeper brand connection?

That's what we set out to learn with our latest Eco Pulse™ study.

We at Shelton Group are continuously searching for the sustainability messages that resonate best with the widest range of consumers. Through this ongoing work, we developed a theory: if we look beyond the rhetoric to the values driving sustainability attitudes and beliefs, we can find some common ground and a way for your brand to resonate with all Americans on a deeper level.

Methodology

The Eco Pulse™ questionnaire was designed by Shelton Group. The study was fielded in September and October of 2017. We surveyed a total of 2,000 respondents, using members of a U.S. online panel of 7 million. The survey sample was stratified to mirror the U.S. population, using quotas for geography, age, gender, education and race; data were weighted slightly to match U.S. population distributions. Margin of error is +/- 2.2%.

Americans share some key values.

Shelton Group's historical data includes a lot of information on attitudes and behaviors, but for this topic, we added a crucial layer: the values driving those attitudes and behaviors. To do that, we went back to a trusted source, "Environmental Values in American Culture" by Willett Kempton, James S. Boster and Jennifer A. Hartley. As part of our 2017 Eco Pulse study, we tested a sampling of statements generated by Kempton's research from twenty years ago, then combined them with Shelton's long-standing Eco Pulse questions to learn how these values play out in America today.

The surprise? The values structure in this country has more common roots than the headlines would have you believe. We found three common American beliefs about the environment.

Americans believe ...

1) We all deserve a clean planet.

- 76% of respondents agree that "people have a right to clean air and water."
- 70% agree that "we have a moral duty to leave the earth in as good or better shape than we found it."
- 65% agree that "working to try to prevent environmental damage for the future is really part of being a good parent."

2) There's a big problem happening with our environment.

- 65% said they agree that global warming, or climate change, is occurring, and it is primarily caused by human activity.
- Additionally, only 14% of Americans disagree with this statement - down from 26% in 2008.

3) Everyone bears responsibility for fixing environmental problems.

- 88% agree the average person should be taking concrete steps to reduce his or her environmental impact.
- 78% said they feel at least moderately responsible to change daily purchase habits and practices to positively impact the environment.
- And since 65% said a company's environmental reputation has a moderate to very strong impact on their decisions to buy its products (or not), Americans seem to think that companies also bear responsibility.

Americans are also pretty clear that they don't think companies will do anything to protect the environment unless they are required to:

- 67% agree, "Unfortunately, a lot of companies wouldn't do anything to protect the environment unless they were forced to by law."

We've observed a shift.

These findings support what we've been learning in our Eco Pulse studies in recent years and confirm a shift we've been observing. As compared to 33% in 2013, 40% of us now say, "Buying/using eco-friendly products is an important part of my personal image." This points to sustainability becoming a stronger part of the American identity and confirms consumers are willing to do their part - while looking to companies to do their part too.

Say the Magic Words

In this report, we share words that can unify Americans and thereby help brands connect with consumers. Using words that unite can help you use sustainability to build your brand across a broader audience, ensure your message resonates and enriches your brand identity, and increase purchase consideration and loyalty.

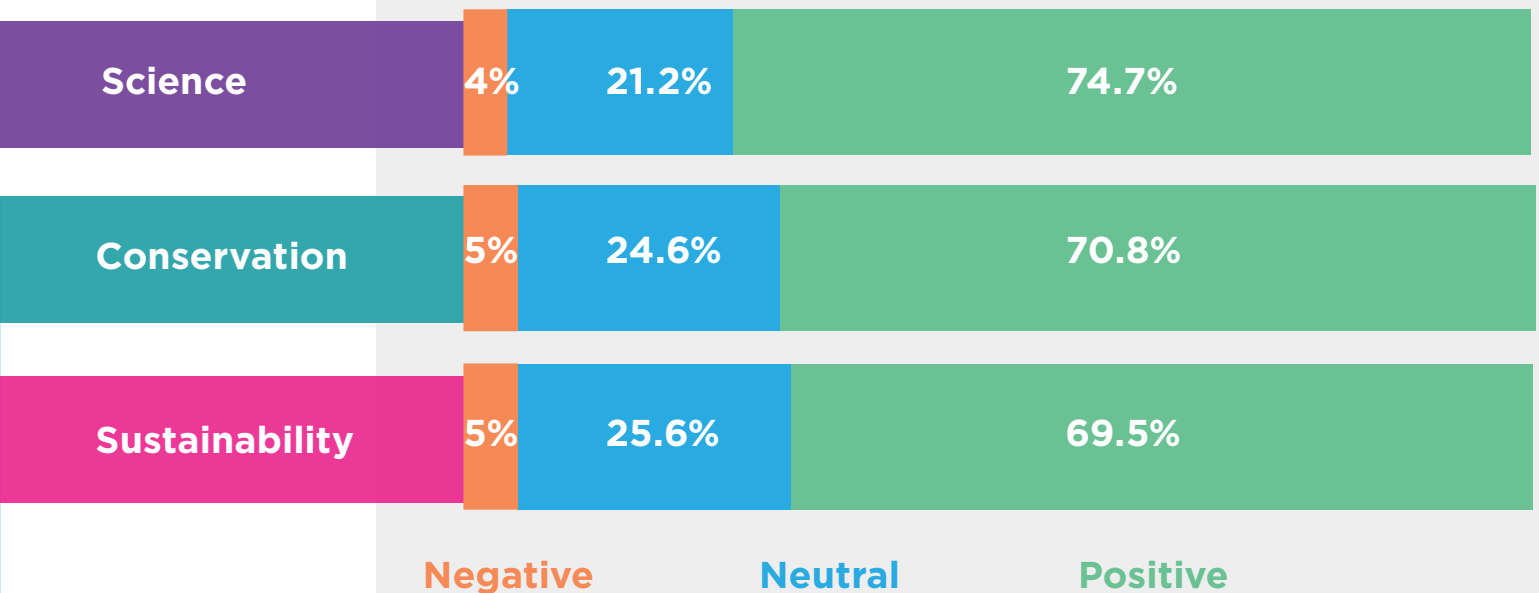
Words That Unite

Science
Conservation
Sustainability
Environmental Stewardship
Regulation
Carbon Footprint

In the current political climate, many sustainability-related terms have been taking a beating. We know from our research that **language really matters** in this area (see our 2015 Buzzwords report, for example), so we set out to get gut reactions to some overarching environmental words and phrases that are often used in sustainability communications.

We found three “unifiers” that the vast majority of Americans rated positively:

“Science,” “conservation” and “sustainability” all received not only a high number of positive scores, but a negligible number of negative scores, showing clearly how uniting these terms can be.

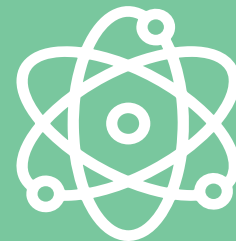


Science

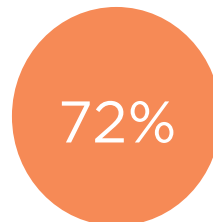
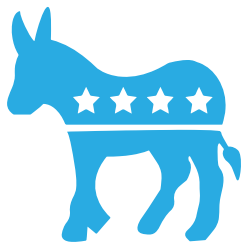
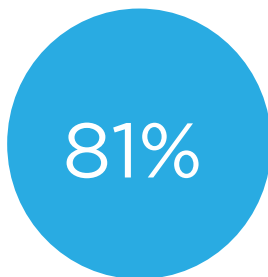
“Science” was the most well-liked word in the study.

Three-quarters (75%) of Americans feel positively (7-10 on a 10-point scale) about “science,” 21% are neutral, and only 4% feel negatively toward the word. This surprised us at first, given the surge of anti-intellectualism that swelled during the 2016 presidential election. But when we thought about it in the context of the three key beliefs Americans share about the environment, it made sense. Science is a huge part of the discussion on climate change.

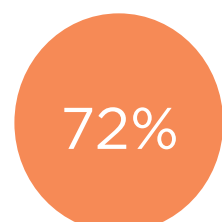
It’s how we know there’s a problem happening with our environment, and it provides hope for real solutions going forward.



Democrats are more likely to rate “science” positively than other political groups.



Republican



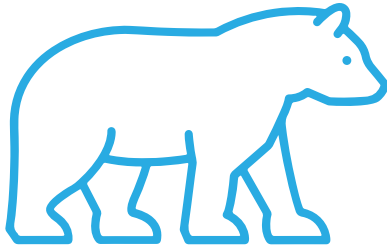
Independent

Political Affiliation

Conservation

“Conservation” came in a close second, with 71% rating it positively.

The idea of conservation is deeply rooted in the American identity, harkening back to points in history we revere as much as apple pie, such as the creation of our national parks, the formation of the EPA, and the espousal of the Boy Scouts’ “leave no trace” ideology. The positive reaction to this word ties strongly with the **belief that we all deserve a clean planet and that we should protect the earth for future generations.**



Young respondents, **Hispanics**, and those with **high school degrees or less** liked “conservation” less than their counterparts.

71%

Overall positive rating



64%

Age

18-24 year olds



64%

Ethnicity

Hispanic or Latino



66%

Education

High school or less

Sustainability

“Sustainability,” with 70% rating it positively, was the third most well-liked word.

Sustainability represents our path forward as a nation that cares for the environment, and ties into the belief that **there’s a shared responsibility for what happens next**. Indeed, sentiment for this word has improved significantly since 2015, when our Eco Pulse Buzzwords report found that 59% of Americans felt positively about “sustainability.” It shows how quickly **this word is becoming a key piece of our lexicon**.



“Sustainability” didn’t create many divides among our respondents.

The only significant difference in attitude toward this term was among those with a high school education or less.

70%

Overall positive rating



66%

Education

High school or less

Uniting words can be a starting point as you communicate with your consumers about your company's environmental commitment and your product's environmental benefits.

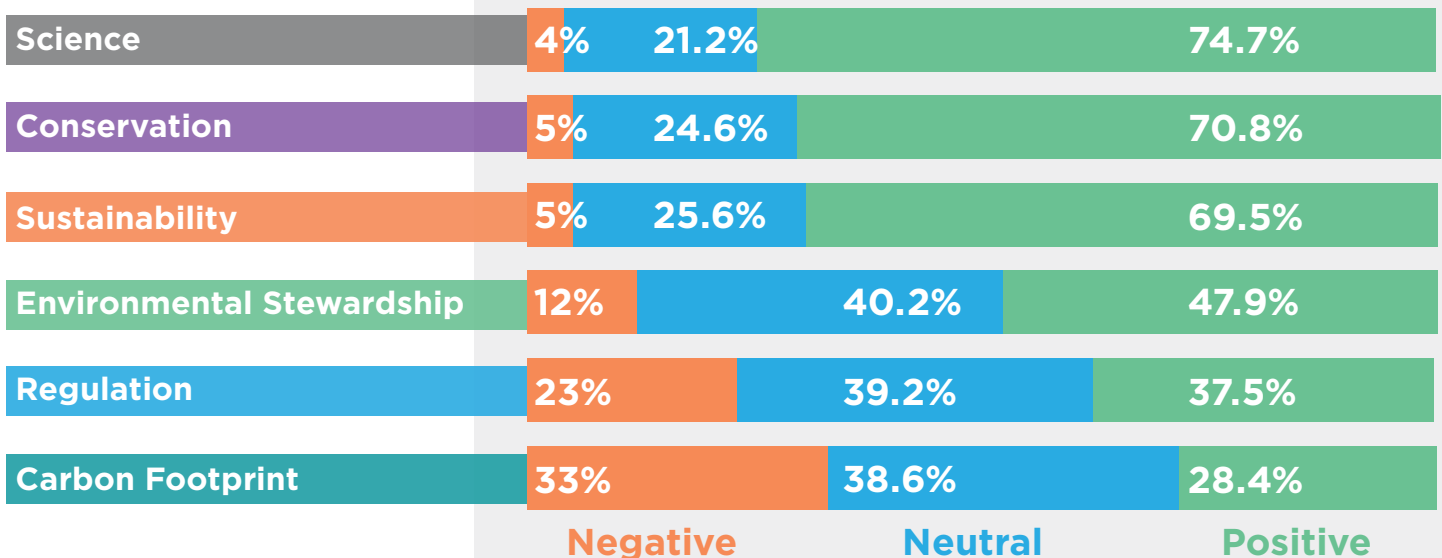
Science ... conservation ... sustainability. Not only do these ideas tie in with Americans' key shared environmental beliefs, they **cut to the core of American identity.**

But first, a word of caution: We know from our work with target groups ranging from rural farmers to urban business owners that words like "sustainability," and likely "science" and "conservation" as well, are defined uniquely by each individual, which is one reason they elicit a positive reaction. Using them is not enough. Companies need to keep their target audiences in mind, providing more depth and the appropriate context when using these words to connect with them.

Words That Divide

So why don't the other words we tested create such a positive sentiment? "Environmental stewardship," "regulation" and "carbon footprint" garnered a more mixed reaction from consumers, and we believe it's because **they're less familiar and don't tap into our broader beliefs about how the world works.** These words reference worldviews that are less archetypal in American culture.

When comparing "environmental stewardship," "regulation" and "carbon footprint" with the words that unite, it's clear that they are more divisive than unifying.



Environmental Stewardship

Less than half (48%) rated the term “environmental stewardship” positively.

Few were negative (11%), with reactions more likely to be neutral (40%). While we didn't test understanding of these words and phrases, ratings like this often reflect **a lack of certainty about meaning.**



Older respondents rated “environmental stewardship” more positively than younger respondents.

Rate “environmental stewardship” positively:

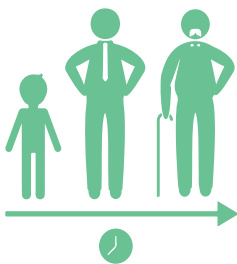
59%

Seniors

45%

Millennials

Age Cohort



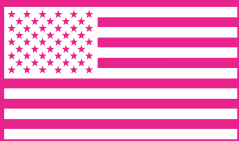
Regulation

“Regulation” was a divisive word.

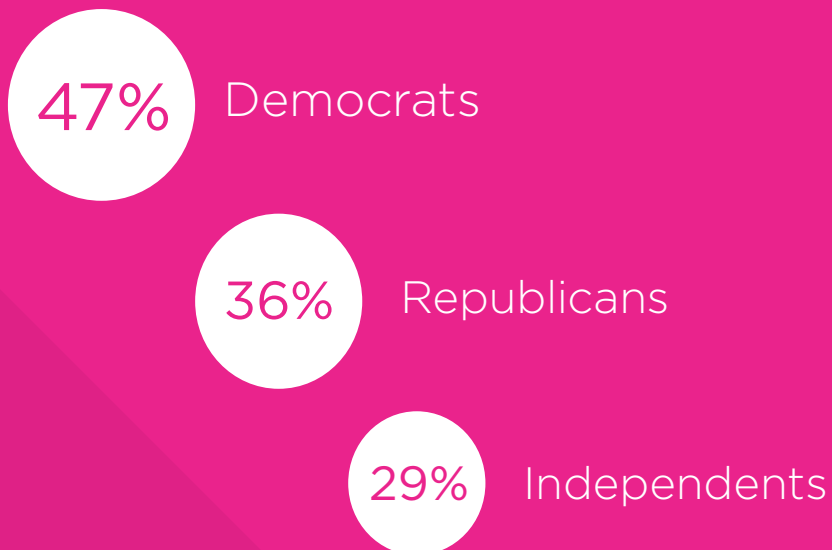


Almost 70% of Americans agreed that a lot of companies wouldn't do anything to protect the environment unless those companies were forced to by law. However, the word “regulation” is not popular. Only 38% of respondents rated it positively, with almost a quarter (23%) rating it negatively. Consumers know regulations are often necessary to effect positive change, but **don't confuse the acknowledged need for regulation with a positive feeling toward it.**

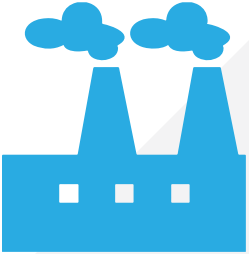
“Regulation” carries with it a good deal of political baggage, evidenced by the three major political groups' significantly different responses.



Rate “regulation” positively:



Carbon Footprint



“Carbon footprint” was the most divisive term we tested.

Only 28% rated it positively, and one-third gave it a negative score – men significantly more so than women (35% vs. 32%). This is the newest notion of those tested, having been brought into the public vocabulary in the early to mid-1990s, but **it has become ubiquitous** since then, often being shortened to “footprint” in various communications.

Views on **carbon footprint** differed by some **ethnicities**.

Rate “carbon footprint” positively:

Black/African American

46%

38%

White/Caucasian



But why do Americans feel the way they do about these words?

Knowing that the most effective words about the environment and sustainability are **tied to consumers’ key beliefs, not to specific tactics or measurable concepts**, companies can begin to speak a language that will unite, not divide. But even when you use well-liked words, you’ll need to give

consumers more context (and thereby a stronger reason to believe) than the words alone provide.

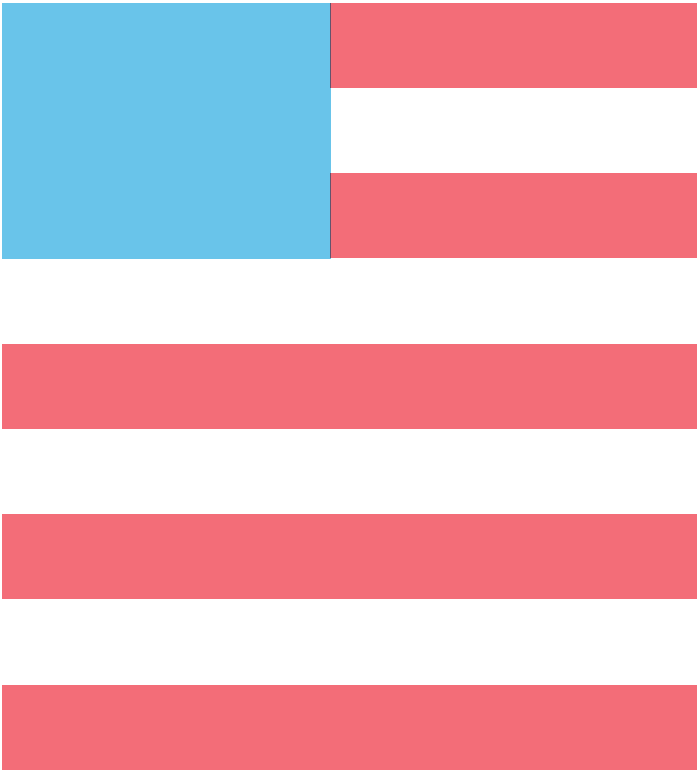
At Shelton Group, we already know a lot about attitudes and behaviors when it comes to the environment. We wanted to add a layer to that knowledge and explore the heart of the matter:

What values drive those attitudes and behaviors?

Values That Motivate

We learned that Americans value the environment (overall) more than might be expected, but their reasons for doing so vary. **These differing value sets inform the attitudes and behaviors we've typically explored in our research.**

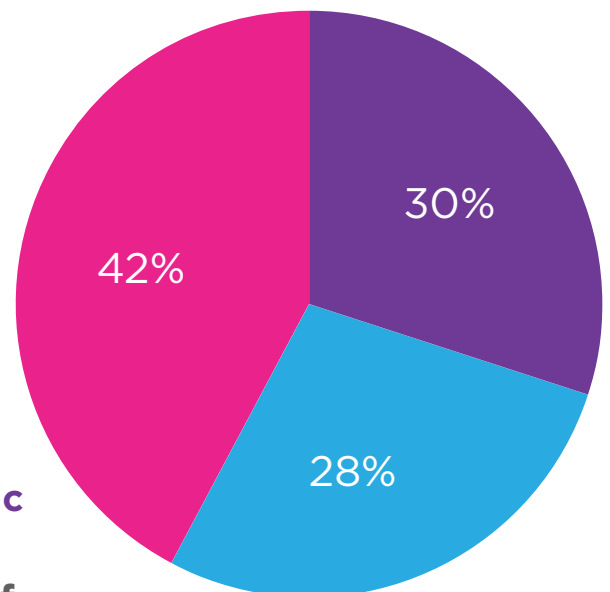
In his 1995 book, "Environmental Values in American Culture," Willett Kempton, Associate Professor of Marine Policy at the University of Delaware, along with co-authors James S. Boster and Jennifer A. Hartley, explored the cultural models that underpin American notions of nature, the environment and our place in it. Kempton's work was grounded in semi-structured interviews with a variety of Americans – members of disparate groups, from sawmill workers to members of the environmental advocacy group EarthFirst. These interviews informed the development of a series of agreement statements, which were tested in a national survey that found distinct cultural models explaining how Americans understand nature and the environment. Kempton's findings were among the first examples of truly exploring – and describing – Americans' values related to the environment.



Three Groups

We tested a number of Kempton's statements in our study and found motivations that can be categorized into three distinct groups: earth-centric, human-centric and economic-centric.

Earth-centric
Human-centric
Economic-centric



**Percentage of
Americans in Each Segment**



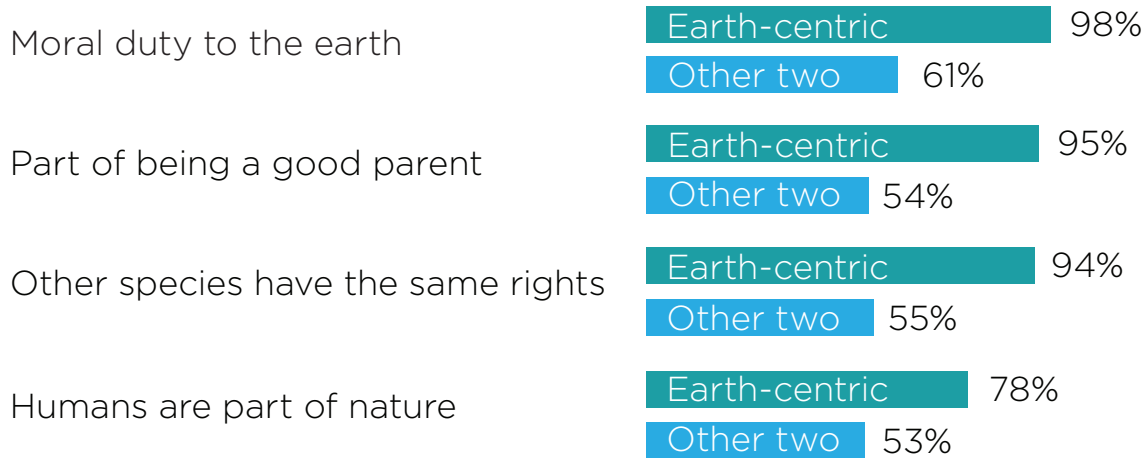
Exploring the Earth-Centric Mindset

Earth-centric people value the earth for the earth's sake – not for the value it provides humans. They are consistently pro-environmental in their attitudes across all questions in the study. When asked what concern most often drives their greener product purchases, the earth-centric were significantly more driven than other groups by natural resource conservation, climate change and animal rights. This group sees the earth, humans and other species as equally important elements that need to work together, and they feel a strong responsibility to do their part.

Defining Earth-Centric Values:

- “We have a moral duty to leave the earth in as good or better shape than we found it.”
- “Working to try to prevent environmental damage for the future is really part of being a good parent.”
- “Humans should recognize they are part of nature and shouldn't try to control or manipulate it.”
- “Other species have as much right to be on this earth as we do. Just because we are smarter than other animals doesn't make us better.”

Earth-Centric Compared to Other Segments



% Democrats

Earth-centric 48%

Other two 34%



Demographically, earth-centrics are more likely to be **Democrats**.



Exploring the Human-Centric Mindset

Human-centric respondents value the environment, but are **more likely to do so based on the benefits it provides to humans**. Human-centrics' green product purchases are more likely to be driven by human rights, personal image and waste reduction than other groups. Compared to the other two, this group tends to be much younger and less driven by religious reasons for caring for the environment (such as "God created the natural world, so it's wrong to abuse it").

Defining Human-Centric Values:

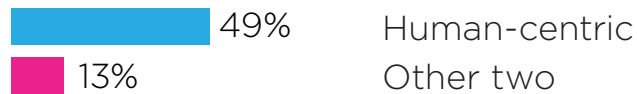
- "People's only responsibility to nature is to make it serve their own best interests."
- "If there is no economic, aesthetic or other human use for a species, then there is no reason to worry much about it becoming extinct."

The most defining demographic characteristic of the human-centric population is their youth: 51% of them are Millennials, compared to 23% of the other two groups. This propensity helps explain their distinct alignment on two other statements:

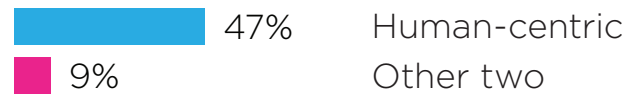
- Human-centrics are significantly less comfortable with the statement most strongly grounded in religion: "Because God created the natural world, it is wrong to abuse it." (Only 52% of human-centrics agreed with this sentiment, compared to an average of 64% for the other two groups.) This is consistent with a recent Religious Landscape study by Pew research that found that Millennials are less religious than older Americans.
- Finally, 45% of human-centrics agreed, "We should become vegetarians to reduce our environmental impact" (compared to 24% overall). This is also consistent with recent Pew research findings that vegans and vegetarians are much more likely to be under the age of thirty-nine.

Human-Centric Compared to Other Segments

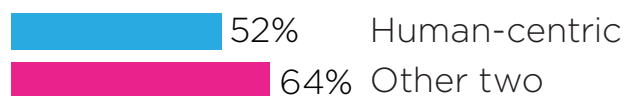
Nature should serve our interests



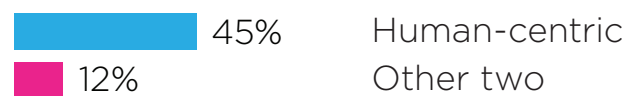
Not all extinction is a problem



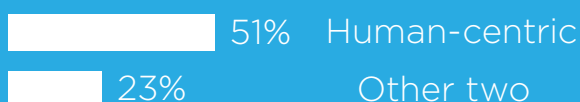
Less grounded in religion



We should become vegetarians



% Millennials



% Kids in the home



Demographically, human-centrics are **younger** and more likely to have **kids in the home** than the other two segments.



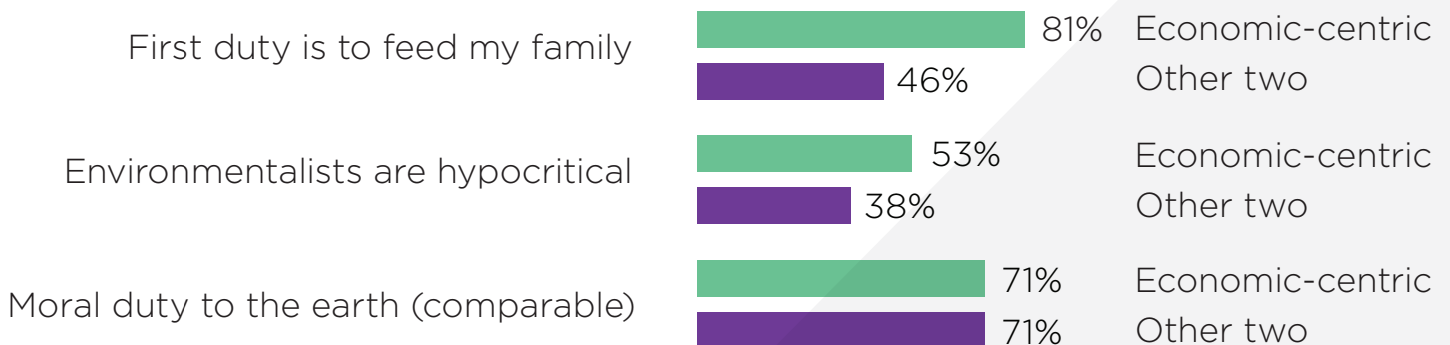
Exploring the Economic-Centric Mindset

Economic-centric respondents are much more **driven by the political and economic implications of environmental policy that might hamper job growth and their own personal income.** They exercise a certain pragmatism about environmental activities, believing strongly that their “first duty is to feed their families; the environment and anything else has to come after.” This doesn’t mean they don’t feel responsibility for the environment, however.

Economic-Centric Values:

- “My first duty is to feed my family. The environment and anything else has to come after that.”
- “Environmentalists wouldn’t be so gung-ho if it were their jobs that were threatened.”
- They do feel a strong sense of responsibility toward the environment, however, with strong agreement that “we have a moral duty to leave the earth in as good or better shape than we found it.”

Economic-Centric Compared to Other Segments

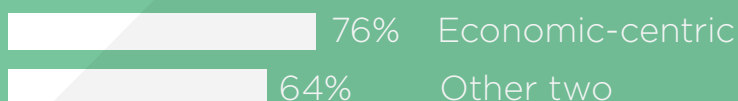


% Boomers/Seniors



Demographically, economic-centrics are **older** and more likely to be **Caucasian**.

% Caucasian



You may be thinking: This is interesting, sure, but how does it affect my brand and the way I interact with my customers and consumers?

The answer: in an era of social media, in which your one-way brand story has become a two-way brand dialogue, **your brand's interaction with your customers and consumers is a relationship.** And the key to any good relationship is aligning on values. When relating to your customers, you can pull the levers we found in this research to create a deeper, more meaningful brand relationship that includes the shared values around sustainability that are growing in importance with Americans.

First, identify the environmental values your brand embodies.

Second, understand the environmental values of your consumers; are they earth-centric, human-centric, economic-centric, or a combination?

Third, talk with your consumers about sustainability and the environment using language that will engage them, not alienate or confuse them.

Armed with these insights, marketers can shape sustainability marketing and messaging that makes a deeper connection. It's how you move beyond being just a trusted brand and **become a brand that is part of your consumers' identities.**

There's a lot more to unpack here, so get in touch to find out more about:

- How environmental values intersect with Shelton Group's long-standing consumer segments: Actives, Seekers, Skeptics and Indifferents
- How your brand can use the words that unite and the environmental values that motivate to increase the power of sustainability in your marketing
- How to leverage these insights to help increase purchase consideration and loyalty

ABOUT SHELTON GROUP

Shelton Group is the nation's leading marketing communications firm focused exclusively on energy and the environment. If you're trying to build a brand around energy responsibility and sustainability – or sell products that minimize environmental impact – we understand your marketing challenges like no one else. www.sheltongrp.com

What We Know

Energy & Renewables
Efficiency & Conservation
Corporate Sustainability
Building Products

What We Do

Strategy
Creative
Custom Research
Pulse Studies

Did you enjoy the read?

Custom branded content is a powerful sales tool, by the way. If you'd love to put a custom report like this in the hands of your marketing decision makers or sales staff, contact us to see what we can do for you, from strategy and research to writing and design.