

Introduction

The success of the sustainable movement can be measured in many ways.

- *The great strides that have been made by the green movement.
- * The explosion of green issues and how it has come into the everyday agenda for a lot of businesses
- *CSR work undertaken by many of the largest companies

And think what wonderful progress has been made.

The fact that we even have a conference dedicated to this issue is proof enough of how relevant it has become....

But then we must ask the question – relevant to whom? Rather like the Apple computer- which seems to define the zeitgeist but only has a tiny market share - the sustainable message is also punching above its weight.

When we talk about the increase in sales of Organic or Fairtrade products, we should perhaps remember the context of the overall market. Whilst the figure of £24.7 billion sales of ethical products in the UK is worth celebrating, the sales of non-ethical products still dwarfs this at £716 billion: a ratio of 29:1 leaving ethical products to account for less than 4% of the total market share.

We came into this study with the intention of discussing the virtues of Television vs Radio, or Ad Shells to Experiential, the reality, when talking to mainstream consumers was something quite different. For us there was a realisation that despite the great strides taken to be where we are today – the distance we still have to travel is alarming, and we need to pick up the pace quite considerably – one way or another...

Our focus has shifted through the course of the research to trying to understand why the mainstream audience is still so apparently unmotivated by this issue.

Fragility of communication

Our research soon exposed the degree of disinterest, confusion and distrust that still exists amongst this audience...

These terms are often viewed almost as a tax on the gullible and financially-unsavvy. But what are the reasons for this?

Brands must offer value-for-money green products because, although consumers pay lip service to 'doing their bit' for the environment, they are unwilling to spend any extra on them.

We assume that the messages of sustainability have been taken on board and accepted by the majority of consumers. But we question how far these messages are understood and what impact they have on a day-to-day level for the mainstream consumer.

The media now focus on the issue of green fatigue. However this implies a level of disengagement whereas we would argue that there is still a mass element which never engaged in the first place.

One sure sign that we might not be as far as we had hoped is seen in the misunderstanding and lack of saliency of terms such as sustainability...

From our quantitative study we discovered that 32% of our sample considered eating sensibly and exercise as ways to achieve a sustainable lifestyle, this is particularly true amongst female respondents (36%).

Obviously their interpretation of the word was perhaps more literal than we expected but it also shows that these terms are not common parlance, they have not been internalised and

understood by the mainstream public and their relevance is yet to be established.

Encouragingly the largest answer was 'recycling' at 29% but if we put that into context, this was still beaten by the combined scores of Do Nothing and Don't Know (31%). A small minority (7%) grow their own veg and 6% cycle/walk more instead of using their car.

And in the qualitative group discussions we conducted, it was very clear, very quickly that the term sustainability was totally foreign to them. The deafening silence spoke volumes as they waited expectantly for some explanation of what it was we wanted them to discuss.

At the same time they do feel bombarded by other terms and messages: green, eco, environmental – clamouring for a share of voice and conscience with all the other claims of low-fat, new and improved, longer lasting, better than ever etc. But even here their level of understanding of these sustainable terms and issues is tenuous...

Let us look at a couple of examples:

Organic

The main message that consumers have taken out of organic food is that it is better quality for them. Built into this belief is that organic is some strange elixir that seems to overcome many of today's issues. Dig beneath the surface and you soon discover consumers treating organic food as a replacement for the gym and some sort of passport to a body like Helen Mirren at 60

I'm sure the Soil Association would be pleased with the positive attitudes that are attributed to organic, but such beliefs are flimsy and easily jettisoned. There is no deep-seated understanding of how or why organic might be a better choice so unsurprisingly it is often dismissed as a lifestyle choice, easily replaceable with

alternative endorsements of quality such as provenance and seasonality....

And here consumers encounter another whole world of confusion... confronted by a host of on-pack claims... how do they decide which ethical concern is more important than the next; is organic 'better' than supporting local enterprises, does Fairtrade overrule airmiles?

How are they expected to make an informed and considered decision? Unsurprisingly, there is often an emotive aspect to their choice....

"I think it's how you feel on the day... what triggers that sense. You are bounced from one guilt to the next. One day you'll think I'll have Fairtrade, then you see the Organic and feel guilty because you think you want my kids to eat healthily' it depends how guilty you want to feel that day on each product'

We would even question whether these choices are directly about sustainability or about a more selfishly-motivated concern about quality perceptions. Having been told repeatedly by advertisers that 'we're worth it', it then takes quite a mind shift to understand that it might not just be about us... that there might be other considerations.

Fairtrade

Which is why interest in Fairtrade is an interesting barometer.

One could label it as one of the 'purer' ethical messages – it is not seen to benefit the purchaser directly (other than that warm glow you feel from doing the right thing) and is not seen as a guarantee of quality (compared to organic, local etc) so it takes a more altruistic viewpoint or a more joined up world perspective to get into the cause.

We had both proponents and detractors within our sample. For some Fairtrade was an issue that didn't affect them directly enough to justify the extra expense. The temptation to shop in Primark with £2 tops was too much for many, they were aware of the situation and the implications but felt that such decisions were justified in today's economic climate (12% of our sample said they would consider buying brands with sustainable messages if price was right).

This is backed-up by recent research conducted by TNS

“Customers concerned with the environment are not following through by purchasing environmentally friendly products, according to Information Resources Information and TNS. The research, titled 'Shades of green segmentation', highlights distinct variations in buying behaviours even among those consumers who claim to be concerned with the environment.(TNS)”

We witnessed a micro-economic protectionism being expressed in the groups – borne about largely from the recent financial downturn – resulting in Fairtrade being considered 'not their problem' and therefore being passed over with concerns far closer to home.

It's interesting to see who are the winners and losers in this new situation. Farewell Whole Foods, Hello McDonald's appears to be the takeout as we re-evaluate what constitutes value for money whilst at the same time allowing our ethical judgements to be shelved, only for the short-term obviously!

Word of mouth is a very powerful tool in this area: both as a means to positively 'convert' shoppers – there seems to be greater credibility invested in this communication channel than many of the more established media. (top response for hearing about brands from our quantitative study (20%)– particularly amongst the Under 35s)

But equally it can work as a barrier to conversion. Consumers often appear grateful for the chance to 'opt out' of making ethical decisions – choosing to quickly believe unsubstantiated reports: For example: the Fairtrade concept was dismissed as fraudulent based solely on one respondent's testimony. (Informing the rest of the group as to how the money didn't actually get back to the farmers but stopped at the co-operatives.)

Immediately this was taken as gospel – and seen as an 'proof' that we were wrong to have any trust in these marketing contrivances...

We have terms that are not recognised, terms that are not understood and then terms such as – eco and green that are added to so many different products and services that there is the danger of their value being slowly eroded...

PLUS... within this morass of misunderstanding and confusion comes individual brands that only add further to consumer mistrust...

Where consumers are looking for guidance and clarity and a single unified voice to clearly explain the relative merits of each ethical offering instead we have brands which will utilise the language of ethical marketing to push their own agenda.

So you can now enjoy Bernard Matthews dippers (Big green tick) whilst washing these down with a can of Carling (made with 100% British barley) – feeling that you have made a positive choice.

The long-haired mutt of marketing rolling in the fox muck of our ethical befuddlement...

Messages that work....

We are going to explore some of the most frequently mentioned sustainable issues that consumers identified and try to uncover how and why these have worked.

The key issues for consumers were as follows:

1. Non-factory farmed chicken
Local provenance
2. Packaging
Recycling
3. Energy reduction

Chicken Out

This was for many the most top of mind and tangible example of what they considered a change in their behaviour due to sustainable messaging and interestingly is not a marketing campaign in the traditional sense of the word.

Poor old Hugh Fearnley Whittingstall seems to have been sidelined in this campaign for the far more proletariat and accessible Jamie. (Why use three names where one will do?)

Intensive farming has been an issue for years, images of overcrowded and inhumane poultry houses have been doing the rounds for a long time – but what made it become relevant now?

The power and volume of these celebrity-fronted causes was there for us all to see. These documentaries are a new form of passive experientialism, we are witness to the harsh realities of the subject matter from the comfort of our own sitting rooms. We are exposed

to the subject in a shamelessly emotional manner, forced to connect to the situation on a personal rather than intellectual level. The fact that celebrities were attached to this campaign then gave it a media currency putting it on the top of the news agenda.

The programme works on tapping into two mainstays of the British psyche: we love an outrage and we are suckers for an emotional story. Be this X-factor contestants or chickens and pigs, the hook is the same and we are compassionate putty.

The longevity of the campaign is also instrumental to its success, it takes time for issues to take root and establish themselves in consumers' minds – the regularity of a TV series coupled with the national press keeping things top of mind work well in tandem.

But the choice of campaigner should not be underestimated. Jamie brings with him a level of trust, accessibility and independence that quite simply works. He allows us to connect with this subject, he makes up our mind for us, and provides a ready-made alternative. Yes it means spending more money – but it's on a better quality product so we're still the winner – his website even has a jargon buster guide to help consumers understand labels!

Think local

Tied into this chicken story was the issue of provenance. Our consumers were clearly turned on by messages of locality and Britishness. Images such as Gary Linekar (another accessible celebrity – there's a theme here!) trawling through the mud with British farmers.

There seemed to be a real need to connect once again with what they bought. Consumers talked about being able to see the origins of their meat, milk and eggs – using webcams above the eggs fixture to reinforce the difference between industrial and free-range

production. And if you go to Harrods – that's what you see – Clarence House Eggcam.

Personalising the sources was a constant issue for many consumers. There were frequent claims of them shunning supermarket meat products in favour of butchers. And special mention of Budgen's using a local butchers produce within their store

“I go to farm shops... you see the chickens, it makes you feel that little bit better in yourself. I'm an animal lover and to see them having a nice life and they are producing food without suffering is nice to see”

“I do like to buy organic potatoes and carrots with soil on them. I just feel happier about it - `I like scrubbing the soil off the potatoes”

“I normally buy eggs from Goad's Farm as they have a picture of a bloke on the front with his chickens in the background. You go for that one as it gives you the impression it's a small concern”

Abel and Cole were referenced as one company whose persistence in door-dropping their leaflets paid off. And here the medium reinforced the values that consumers wanted to believe in. A leaflet through the door considered in-keeping with the actions of a small local producer, run by a couple of grocers whose names appear at the bottom of the page.

“When I read the leaflet it mentioned the quality of the food and seemed a small business, a local concern with their first names – I got the impression it was a local company and felt I should support them rather than these big companies”

The cosy, small-scale impression created by companies such as Abel & Cole and Dorset Cereals as friendly cottage-industries is a significant component in their appeal. The reality of venture-

capitalists and multinational involvement might not quite fit with many of their customer perceptions

The power of locality is a useful tool to employ as it allows for a sense of personal importance and impact that consumers feel is lost when the issue is expanded out onto a global scale.

If you do your small bit locally you do get that buzz. When you start talking global scale it starts to look pathetic. What is the point? Only when its local do you start to think yes it's worth it – it makes you feel good"

This feel-good factor is a far more motivating proposition than making consumers feel that they are permanently sat on the naughty step of environmentalism

Recycling & Packaging

The next area that consumers identified was packaging, recycling and the plastic bag. Again, the old Daily Mail campaign outrage seems to have had an impact here as people recalled their campaign Banish The Bag... this benefited from a continual drip drip approach that ensured readers were confronted with the images in a concentrated but prolonged period of time until the issue sunk in.

Interestingly, M&S was a brand frequently referenced in connection with plastic bags and their charging of 5p. This appeared to be the only element of their much-vaunted Plan A (now on hold as of Monday 10th Nov) strategy that consumers had any awareness of in our groups. In fact since its launch the brand appears to have taken a step back in the Ethical Reputation Index – perhaps their all-encompassing message simply being too far-reaching and unfocused to have an impact with consumers.

If we look across the water at both Ireland and France, their industry-wide approach to reducing the number of plastic bags has been accepted as a *fait accompli*, with consumers quickly establishing to the change in behaviour required. But it took government action in Ireland and the introduction of a tax on plastic bags for this to become a reality.

Packaging has become more of an issue as recycling works its way into our daily lives. Respondents could quite happily fill up the whole group time discussing the niceties of their local council recycling policy. But the message is getting through, backed up by the weighty threat of fining offenders and reducing service, consumers are training themselves to adapt to the new policies – despite the grumbles.

In this situation packaging no longer is considered solely as an added value benefit to the product they are buying. Consumers are becoming conscious of the monetary value that packaging plays and the time it will take to remove the layers of plastic, wash out the tin or take the label off the glass. Overpackaging now has a definite time and monetary disadvantage for the end user.

So we can see how the message has been developed from plastic bags to packaging in general. We believe that the next stage will not be on where the packaging goes but where it comes from...

So whilst the story of where packaging goes is becoming a mainstream concern – we still have a long journey ahead of us to allow consumers to make educated and informed decisions.

Energy Wastage

All our respondents considered this one of the most relevant and actionable messages that they had come across (7% of our sample claim to have already reduced their utilities). The motivation for this change in behaviour appeared far more personal than a concern

for dwindling resources. The implicit tone was that these were ways to save money, and to not implement them was a clear case of having more money than sense. This is the green message for our times, energy reduction is de rigueur. The switch to energy saving light bulbs has been taken up by many consumers purely because their local electricity supplier was providing them free to their household. These are the sort of investments our respondents are willing to make – minimal effort, maximum individual return.

“I have started using Aerial now, you can get your clothes clean at a lower temperature so you’re saving money”

Coupled with this energy saving is the rise of sites such as Freecycle and ARC, primarily available to prevent landfill waste they are also a perfect barometer of our new found parsimony. If not a reflection of our concern for the environment.

So what?

So what does this tell us about communicating sustainability? Well assuming you don't have access to a documentary series and the services of St Jamie of Worthy Causes then there are some issues that will be worth keeping in mind. This is an area where the laws of marketing Darwinism operate – not all the messages will get through and only the strongest stories will survive.

1. Don't overload your message. Make it as clear and single-minded as you possibly can
2. Consider the importance of an emotional hook within the message. Create a level of personalisation and relevance that brings the issue to life
3. Create a tangible and comprehensible element to your story
4. There has to be a personal pay off for the end user and if it's not directly quantifiable then the emotional reward needs to

be there – it also helps to have a positive take-out from your message

5. Do not underestimate the power of Word of Mouth recommendation – the trust levels in this sector are shockingly low and this is one way to overcome such barriers

And finally...

So why are we really here? Is it to add a competitive advantage to our own individual enterprises or are we here with the desire to save the world...

If it's to ensure greater saliency of our green messaging then the above points, will be common sense.

But if we're really in the market for making meaningful change then perhaps we need to think of change on an industrial level. We need to realise that whilst 'choice' might be the watchword for free markets it might not be the solution that we need on an ethical level. Removing the element of choice to create a level playing field of goods and services through legislative measures might be the real solution to ensuring the relevant change in behaviours is achieved.