

GreenAware

A Future Foundation Research Programme

In an unprecedented way, the environment has become deeply locked into national, corporate and personal agendas only during the last few years. Despite growing worries about the current economic downturn, the environment remains firmly among the top of UK consumers' concerns, but the motivations, barriers and will to engage with the issues from consumers and businesses alike are becoming much more challenging.

Following from the success of our 2007 consortium, Climate Change and the role of Brands, the Future Foundation is inviting companies to take part in a new syndicated research project, GreenAware.

The new research will build on previously identified themes as well as include new/enhanced areas of focus. The key questions this programme will address include:

Understanding consumers' green choices in different areas of their lives

How do consumer choices vary between sectors (grocery, non-grocery, travel, waste, energy efficiency, finance) and how do consumers think that eco-responsibilities should be shared between themselves and companies? What are the key motivators and barriers, and what role does 'guilt' play?

Are green issues being crunched? (a year-on-year comparison)

With growing concerns over the slowing economy, will environmental concerns get credit crunched or is the UK public's attitude to the environment recession proof? Using the 2007 data as a benchmark we are able to quantify the impact of recent economic concerns on environmental choices.

Green at Work

What role does sustainability play in the work place? Are employers helping to adapt the work environment and promote green practices among employees? If so, what initiatives are they supporting (over and beyond recycling / using recycled stationery?) e.g. car-sharing schemes, work-from-home opportunities, bicycle subsidies etc? Do employees rate a company that claims to be carbon neutral more highly? Does it impact on their employment choice?

Travel and holiday choices – from mode of transport to sustainability of the accommodation

Despite consumer guilt about the impact of flying, our previous research showed that annual holiday(s) are non-negotiable to most people. Will consumers welcome schemes that tell them exactly how much their travel choices clock up their carbon footprint, from their flight emissions to knowing how much carbon they are responsible for when booking their hotel stay? The research will explore the key contradictions in consumers travel choices and investigate how increased transparency from within the travel industry itself could play a crucial role going forward.

Carbon Neutral – are we speaking the same language?

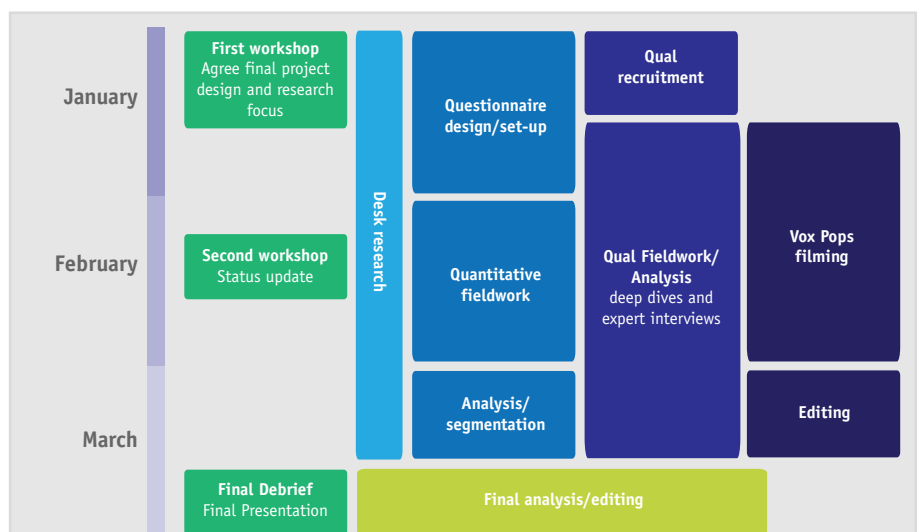
Various special interests have attempted to promote themselves by claiming to be 'carbon neutral' but how well understood is this concept by consumers and does it change (for better or worse) the way that consumers perceive a company / brand? How has awareness and understanding of green issues and 'carbon language' changed over the past 12 months?

GreenAware – a segmentation of consumers

Consumers display a variety of attitudes and behaviours to environmental issues – many of them contradictory. A segmentation built on these will enable a deeper understanding of consumer decision making and trade-offs and help to tailor messages and communication.

Is 'doing my bit' enough?

Many consumers want to do their bit for the environment and have responded well to messages that incentivise easier-to-do green lifestyle changes (e.g. recycling). But many still reserve their right to be selective about changing their habits where more personal sacrifice is required. Is this type of green 'snacking' behaviour sustainable for the longer run? How



far are consumers willing to go and can marketers play a role in helping consumers to make the right choices, e.g. by editing choice?

Green initiatives, not greenwash

Consumers are not routinely very trusting of corporate motives when it comes to the environment, but increasingly expect them to take a lead in terms of tackling climate change. How can this barrier of trust be overcome? Can brands take leadership through green initiatives and how can they avoid being perceived as greenwashers. Which brands are trusted by consumers to be responsible?

Methodology

We will start the project with a workshop to allow members to feed into the final project design and primary research focus. We will use desk research drawing on the Future Foundation's proprietary data and using the key topline figures from the previous consortium to benchmark the key issues under investigation.

The final programme will depend on the priorities of the consortium members, but will combine multiple methodologies each designed to achieve specific objectives:

An online quantitative survey

of 1,500 respondents (nationally representative). Using insight gleaned from the previous consortium, the survey will be designed to capture consumer behaviour and attitudes across the UK population in relation to sustainable consumption across different sectors from groceries to travel and financial services. The data will be coded with the Experian 'GreenAware' segmentation (a segmentation which can be applied to every household in the UK).

Qualitative household depth interviews. For further information please contact

To really get behind the ways in which consumers think about sustainability, these 'deep dive' interviews will allow a number of households to talk in depth about the adjustments they are prepared to make to their lifestyles and what barriers they are up against

Filmed on-street interviews with

consumers (vox pops). Filming a cross-section of consumers and getting views on a range of climate change issues will provide a library of engaging clips for consortium members that will add to a qualitative understanding of consumer behaviour.

Depth interviews with climate change

experts. We will be speaking to leading expert commentators to share their thoughts and their recommendations for how we should understand and influence consumer behaviour.

Clients will have the opportunity to give their input into the design of the research from the outset to ensure the project meets the objectives of individual organisations.

Costs

The fee for participating in the research programme will be £12,000 + VAT which will include access to the 2008 data in raw (SPSS and topline tables) and interpreted (Future Foundation PPT files) form, a library of vox pop clips, participation in workshop meetings and a final Power Point presentation collating all the findings from the different elements of the research. Bespoke company presentations will be charged at an additional fee.

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