
Mainstream Green

*Graceann Bennett &
Freya Williams*

The Red Papers:

Ogilvy & Mather

Mainstream Green:
Moving sustainability
from niche to normal

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6 About the Green Gap project

8 Introduction

12 Closing the
Green Gap

18 Researching the
Green Gap

20 Normal behavior is
sustainable behavior

24 The massive
Middle Green

30 The far ends of the
continuum

34 Adventures along the
green continuum

64 Turning the corner

74 12 ways we propose
to close the gap

92 Comparing the US
and China

112 Conclusion

116 Research methodology

120 Key takeaways

About the Green Gap project

The United States and China arms of OgilvyEarth collaborated on a project that aimed to help crack the code on one of marketing's thorniest problems. We choose those countries as they are the two largest consuming markets on earth. The problem, dubbed the Green Gap, describes the gap between consumers' green intentions and green actions. Plenty of research observes that it exists; we set out to understand why, and to discover ways to close it. Bridging the Green Gap is critical to corporate bottom lines and climate trend lines.

*Kunal Sinha and Michael Griffiths led the China part of this project, and their findings are presented in *Get Going with Green* — the companion piece to this work.*

Graceann Bennett and Freya Williams led the United States project.

Both teams collaborated on the comparison section that closes this volume.

Introduction

An all-star cast of green luminaries flocked to December's World Climate Summit in Cancun, Mexico: CEOs, corporate sustainability officers, clean energy consultants, Hollywood producers and even a few of us from OgilvyEarth. The very presence of such a broad spectrum of people at this event was a major coup from a climate standpoint. The pretext for the gathering was the UN climate summit COP16, the follow-up to the now-infamous COP15 (which is viewed by many as having fallen short of the "ambitious and binding" global treaty it set out to achieve). This year, the heavy hitters from the private sector were taking matters into their own hands, sending a clear signal to the UN delegates that business wants progress on climate and is ready to roll up its sleeves to collaborate on solutions.

Nestled among the more technical topics on the table (policies, procurement, new financing mechanisms) was a particularly encouraging agenda item: public engagement. It is unusual, in these rarified circles, to hear talk of creating a mass movement on everyone's lips. But this elite cadre knows that to achieve our goals we must motivate a mass green movement, shifting mainstream consumers to a more sustainable way of living. The public engagement session opened with media mogul and climate guru Ted Turner talking about how we are losing precious time and can't afford to keep failing at motivating the masses. "When will the world understand that we are right and they are wrong?" he intoned from the stage. We nodded our heads in furious agreement and in his frustration, Turner spoke for the room. The mainstream has completely confounded us when it comes to green. They have evaded every rational and emotion argument we've thrown their way. To us, it seems they're just not getting it.

But maybe Ted Turner's remark revealed our problem. Maybe we're the ones not getting it. If we are to motivate a mass green movement, perhaps those of us most committed to the green movement need to stop trying to get the masses to see things our way and instead get better at seeing things their way. To get from here to there, a radical shift in perspective is needed. So far, despite the best intentions, the discussion has largely focused on the two ends of the spectrum – the committed Greens talking to their fellow green converts or, alternatively, doing battle with the fervent Anti-Greens, who seem more determined than ever to evade conversion. What we've been missing in the process is the massive Middle, the group that offers the biggest opportunity to create the change the world so needs.

It is on the Middle that this report will focus, and more specifically on the gap between the Green Middle's intentions and their actions when it comes to sustainability. Our goal is to provide insight into the things keeping the gap open and practical, pragmatic, actionable suggestions for closing it, once and for all. We hope you'll join us.

*The mainstream has completely
confounded us when it comes to green.*

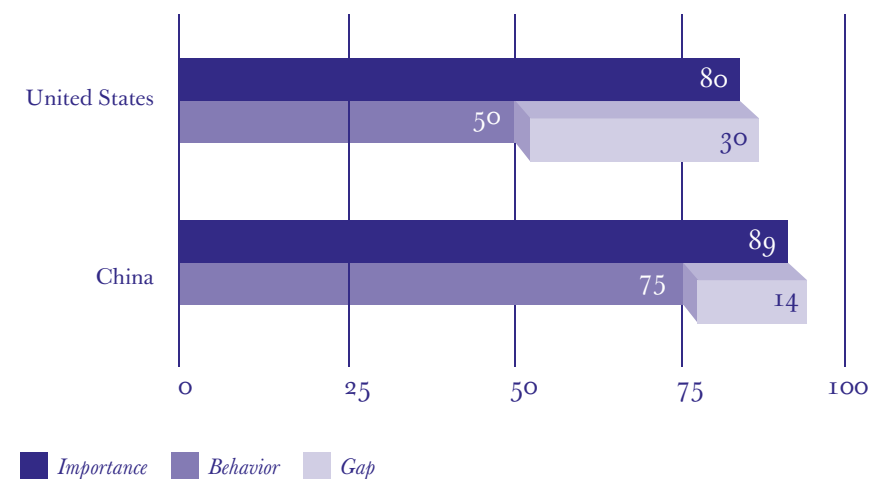
Closing the Green Gap

While we have been relatively good at getting people to believe in the importance of more sustainable behaviors, practices, and purchases, we have been unable to convert this belief fully into action. The following charts – calculated by comparing the percentage of consumers who stated that this green activity was very important or important to them to the percentage who stated they “usually do” this activity – prove the point.

US and China Green Gap: Difference of Stated Importance versus Stated Behavior

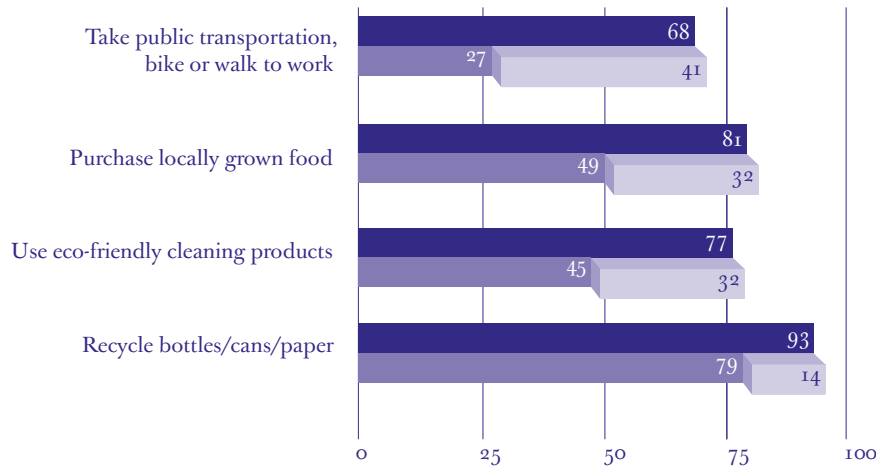
Respondents were asked to indicate the importance of certain activities in terms of their definition of living a green or sustainable lifestyle (Importance), then asked to look at the same list and indicate whether or not they usually do the activity (Behavior). The gap is derived from the difference between the two responses, explicitly showing the divide between belief and action. This data is based on the average responses from US and China, respectively, based on the following activities: Taking public transportation, walking or biking to work; purchasing locally grown food; using eco-friendly cleaning products and recycling bottles/cans/paper.

GAP BY COUNTRY

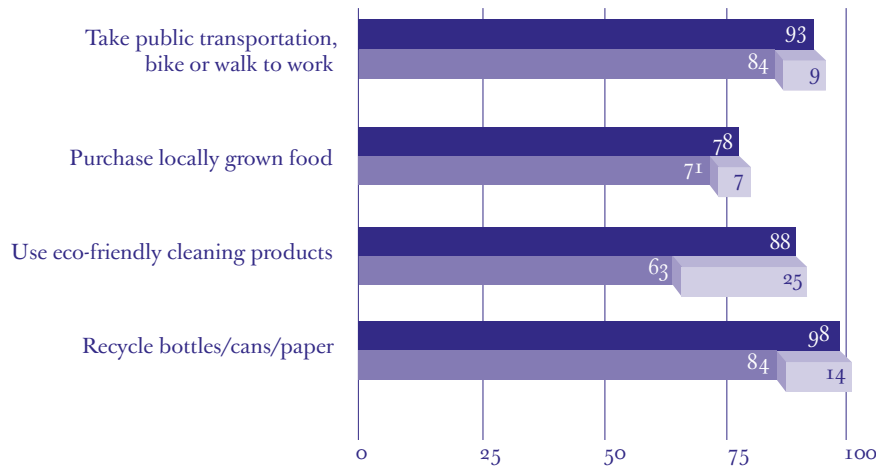


Closing the Green Gap

UNITED STATES



CHINA



■ Importance ■ Behavior ■ Gap

Many research reports have also observed this phenomenon; for example, in its 2009 Green Brands Survey, Penn Schoen Berland found that 77% of Americans say they would like to consume in a more sustainable way, but their actions do not reflect these good intentions. An opinion survey by the Energy Savings Trust found that around 80% of the public believes that climate change is a major problem and wants the government to let them know what they can do to save energy, but only 60% of the same sample is actually doing something to reduce their personal energy use. Similarly, an EcoPinon survey conducted by EcoAlign found 90% of Americans value energy efficiency but only 3% turn their PC off at night.

This gap between stated importance and behavior or action is what we at OgilvyEarth call the Green Gap. Closing the Green Gap is a necessary step if we are to create a sustainable society. While the world knows this gap exists, no one yet knows what it will take to close it. OgilvyEarth set out to find some answers.

Amidst the clear failure of governments to lead the way on climate change (or to persuade people of its importance), corporations and businesses are stepping into the leadership vacuum because they see it as a reputational and financial opportunity. They will not succeed unless they figure out how to close the Green Gap. There are two main reasons for this: firstly, the persistence of the Green Gap when it comes to purchase behavior has made it difficult for many corporations, especially those selling to mainstream consumers, to make a successful business model out of green products and services. The business opportunity will only be fully realized once we figure out how to close the Green Gap when it comes to purchase behavior. Absent that, corporations will fail to connect with their consumers, and nothing will change. On the flip side, without a business case, there is no incentive for a corporation to remain committed; indeed they would arguably be in derelict of their duty to their shareholders if they did so.

Secondly, while the direct operational footprint of a corporation itself is large and significant, it may pale in comparison to the impact of its products in consumer use. Take, for example, shampoo. In the Unilever Sustainable Living Plan, released last year, Unilever estimates that a whopping 93% of the carbon emissions over the lifecycle of a dose of the

company's shampoo in the US comes from consumer use (primarily as a result of the energy used to heat the water for the shower). While it is actively pursuing technology innovations to address this, the company says it is also looking at how it can work with consumers to change their behaviors, because "the biggest gains will come from consumers modifying their shower habits." We have seen similar efforts to this, for example laundry detergent and clothing brands encouraging consumers to wash their clothes in cold water. But Unilever has gone a step further, actually incorporating the consumer use portion of the product lifecycle into its corporate sustainability goals. This commitment is groundbreaking. Clearly, closing the Green Gap will be critically important to Unilever.

We cannot afford for corporations to fail in this endeavor. Our task, then, is to understand how to set the necessary social conditions for these businesses and corporations to succeed in their green initiatives – to understand how to propagate a mass green movement. In order to foster that understanding, OgilvyEarth conducted extensive qualitative and quantitative research in the G2 of sustainability markets – the US and China – aimed at uncovering what makes the Green Gap so persistent.

Why these two countries? First the obvious: the US and China are the two largest emitters of greenhouse gasses in the world – the first by dint of its vast consumption and the second through its massive population. But even the most casual knowledge of world events makes clear that China is on the road toward greater consumption that, unmodified, will dwarf the ecological harm done by the US at its most profligate. As the twin lodestones of the climate change crisis, the US and China represent the two realities we need to confront simultaneously – the high cost of the "Western" standard of living today set against the frightening implications of the entirely reasonable desire for growing nations to achieve that same standard. Understanding the barriers and drivers to more sustainable behaviors and purchases in these two countries provides an effective analog for the rest of the world. Sustainability gains achieved in the US and China have the greatest impact on climate change, due to the size and growth of emissions and also due to the influence that both nations wield internationally. US consumption serves as the backbone of many global corporations, while China's rise fuels visions of future growth. The

multinational corporations honest about achieving their sustainability goals are counting on mass consumer behavior change in these two markets particularly. Sure, Europe has made environmental progress – and we applaud their success – but, bluntly, the future of the world depends on the behavior of these giant, energetic, polyglot societies. And there is a final reason as well: the green action is happening here. The two nations are vying for preeminence in the green industries that will drive technological and infrastructure development over the coming century. While China has the lead in terms of public investment and commitment, there is no clear winner just yet.

We were not surprised to find two separate gaps, as befits two nations at such different points in their development.

In China, our research found a gulf between the laudatory green attitudes of the population and the available means to act on their beliefs, but it also showed the way forward for brands to open up the options for this highly motivated population. We found powerful urges to continue traditional green behaviors, but strong central government control and an absence of personal agency inhibits the continued development of individual green behaviors as the population rises. The creation of a nuanced green population segmentation, discussed at length in the China-focused companion work *Get Going with Green*, will enable marketers to activate consumers' existing green impulses. In the US, as we illustrate below, our research uncovered significant barriers inhibiting green consumer behavior and pointed out the drivers that can encourage it. The steps we must take to close these two gaps – detailed at the end of this work – are more similar than different. That is encouraging news for global corporations and brands and for all who recognize that addressing the climate crisis will require individual thinking and local action played out on a global scale.

Researching the Green Gap

We approached our research in a way that helped us triangulate to the truth. The very premise for this study is that people's stated values and intentions do not mirror their actions. Thus, we needed to come at the issue from all angles, pulling together insights from industry experts and secondary research, as well as our direct questioning and observation of consumers, all the while keeping these four major questions in mind:

Who's Green and who's not?

We segmented the population into groups from Super Greens to Green Rejecters to understand how the population breaks down with regards to issues of sustainability. What do age, geography, upbringing and other factors have to do with all of this?

What separates the doers from the mere believers and the skeptics?

We explored what drives some people to more sustainable behavior and what are the barriers holding others back from either believing or taking action.

Why does the gap exist?

In order to close the gap, we need to understand why the gap exists – what is holding the masses back from adopting a more sustainable lifestyle? How do issues of trust, efficacy, price, and knowledge factor into the gap?

What are the secrets to closing the gap?

What are some of the things that lead to the behavior change we are looking for? How can brands and marketers credibly tap into some of these insights to promote more sustainable lifestyles? Which issues can governments and legislators take on? How do social stigma and guilt factor in versus rituals and rewards? How does our desire for individuality tug at our desire for social acceptance?

*Normal behavior is
sustainable behavior*

*Our research shows us the path to closing the
Green Gap is through popularizing and normalizing
the desired behavior. Normal is sustainable.*

*Abnormal or exceptional beliefs and behaviors
will remain abnormal and exceptional and not
successfully cross over to mass adoption.*

Our research confirmed what neuroscientists and behavioral economists have shown: that attitudes and beliefs are shaped by behaviors; behaviors drive belief systems more than the other way around. We are social creatures and look to others around us to help us make decisions on how we live our lives. We may not fully understand what's best and what we really want, but we can follow what others are doing and act accordingly. And then, to make sense of our lives, we often adopt new values and beliefs that make our behaviors all make sense.

This simple shift in emphasis suggests a radical change of approach when it comes to messaging and marketing around sustainability. We have been expending a disproportionate amount of our energy and marketing dollars trying to change people's beliefs, values and attitudes. Our study indicates that we should turn this on its head and shift the emphasis to changing behavior. It suggests we embrace a simple truth about human behavior – people want to fit in and be normal. Simply put, we need to stop worrying about people's attitudes and start paying attention to shaping their behaviors.

Take smoking. Despite decades of clear public service messages about its dangers, attitudes toward cigarette consumption did not significantly change until corporations and government worked together to make smoking abnormal. Once smokers had to stand shivering outside or cluster in depressing lounges, looking like outcasts, people started to believe and to act on the idea that smoking is unusual and dangerous.

While we have a similar deluge of public information – you'd have to be under a rock to miss *An Inconvenient Truth*, Copenhagen, The Intergovernmental Panel on Climate Change and the rest of the doomsday messages flowing like trade winds across the globe – we haven't yet succeeded in making green or sustainable behaviors normal. In fact, as our research shows, we're doing far too many things to make it seem just the opposite. We believe that the green movement can build toward mass adoption – honestly, we thought we'd be there by now – but we'll never get there unless we drive the changes ourselves. The information is out there, and the public is primed. Now we need to dismantle the barriers to green behavior, reframing heedless consumption as abnormal and

anti-social and green behavior as normal and inclusive. The smart brands and marketers who can drive this positive behavior change will benefit their own bottom lines while helping the planet.

The insights our research developed will enable marketers to do the following:

- create products and services that better meet consumer needs
- change consumers' perceptions of the value of green products and inspire them to take action
- target communication more effectively
- establish their leadership on the journey to a more sustainable world

The marketing communications community knows how to do this. We popularize things; that's what we do best. But we need to embrace the simple fact that if we want green behaviors to be widespread, then we need to treat them as mass ideas with mass communications, not elite ideas with niche communications.

*The massive Middle Green:
How the US population falls
on the green divide*

In seeking to understand Americans' attitudes towards sustainability, we used our data to put the US population on a continuum of green. Our behavior may not have caught up yet, but we found that most of America is smack dab in the middle ground – not hard-core green, but neither are they completely unaware or unappreciative of issues surrounding sustainability. In fact 79% of Americans characterize themselves as “somewhere in the middle” when it comes to living a green or sustainable lifestyle. And, when we did our segmentation analysis, taking other data into account, we found 82% of Americans have good green intentions, but of those 82%, only 16% are dedicated to fulfilling these intentions, putting 66% firmly in this middle ground.

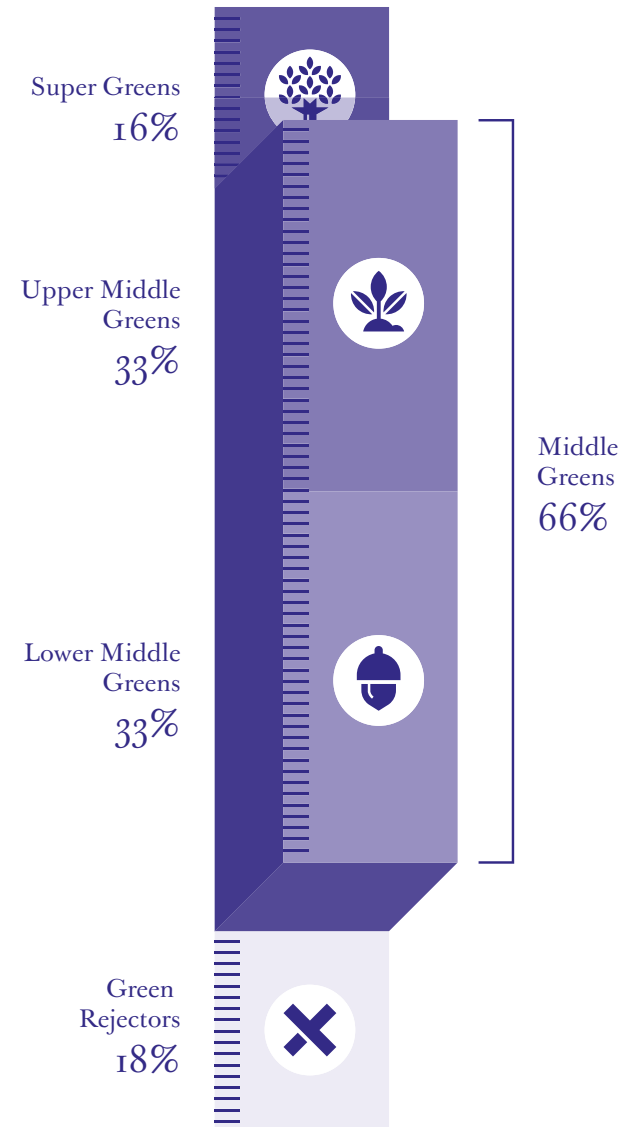
What is happening in the Middle?

Between the two extremes, you have a group that sees themselves as somewhere in the Middle in terms of how green they classify their lifestyle. This is the mainstream consumer. A deeper look reveals two different mindsets within this green Middle: the Upper Middle Greens who see the sustainability movement as more important than their Lower Middle Green counterparts, just to their left on the continuum. In some ways they are followers of the green movement, doing what they can but not leading the way for others. The importance they place on the green movement stems from a stronger belief in the existence of the problems facing the planet. Upper Middle Greens recognize that the planet is on the brink of a water and oil crisis and that the increase in freak weather incidences is caused by human behavior. Lower Middle Greens, on the other hand, see these problems as hype. Upper Middle Greens are much more likely to act upon these beliefs. They purchase eco-friendly health and cleaning supplies, reduce their meat consumption and avoid processed food. When they sidestep a sustainable behavior, Upper Middle Greens will say it's too expensive, while Lower Middle Greens flat out say they don't want to do it or don't believe in the benefits. Upper Middle Greens are much more motivated by their responsibility to preserve the planet for future generations, while Lower Middle Greens are more influenced by personal benefits. Upper Middle Greens are more likely to be Democrats and female. Lower Middle Greens, by contrast, are more likely to be male and Republicans.

The massive Middle Green

The massive Middle Green



Segments created based on survey respondents' perception of how green they are, taking into account variables such as stated behavior and attitudinal questions.



In short, two things become clear. First, despite the breathless and conflicting information in this space, those on the Upper Middle side of the continuum believe sustainability issues to be real concerns, while the Lower Middle Greens are more inclined to ascribe them to hype.

The massive Middle Green

Lower Middle Greens vs. Upper Middle Greens: Hype vs. Real

	 Lower Middle Greens	 Upper Middle Greens
<i>We are at the brink of a serious water crisis where pretty soon the world won't be able to sustain people, agriculture, and livestock.</i>	<i>Hype</i>	<i>Real</i>
<i>If we continue to use oil the way we do, we are going to run out of it in the next ten years.</i>	<i>Hype</i>	<i>Real</i>
<i>Carbon offsetting is a good policy for governments and companies to counteract the negative impact of their energy intensive lifestyles and economies.</i>	<i>Hype</i>	<i>Real</i>
<i>Most of the recent freak weather events, including tsunamis, earthquakes, unexpected hot and cold weather, and flooding, are caused by collective human behavior.</i>	<i>Hype</i>	<i>Real</i>

In another effort to understand what would help close the Green Gap with people at different points along the green continuum, we asked them to project into the future and tell us what would motivate them to take on more green or sustainable actions. We found that the further toward the Super Greens one is green, the more likely one is to claim being motivated by altruistic and future benefits. Those on the less committed side of the continuum said they were motivated by personal and immediate benefits. More specifically, the number one stated motivation for those in the more committed side of the green continuum was “To take care of the world for future generations (132 index).” By contrast, those in the less committed side said that they were motivated “To save money (159 index).” This is a perfect example of how we need to attach personal benefits to green actions in order to affect mass change, especially when speaking to those who are hardest to shift.

The far ends of the continuum

Green Rejecters: Isolation. Pessimism. Cynicism.

Green Rejecters seem to be fairly antisocial lot, and most striking among the many things characterizing this group is just how disconnected they are. They are distant from their community, indifferent to social activities, and generally lack regard for how they are viewed in the social sphere or how their actions impact others. They seem impervious to the influence of those around them who may be exhibiting greener values and behaviors. Not surprisingly, they are more likely to be single (122 index) making it less necessary for them to view themselves and their actions in the context of others or the society at large.

Along with isolation, pessimism is a key characteristic of this group. They tend to think their sustainable efforts don't amount to anything (133 index) and feel it is too difficult to get through today to have time worrying about tomorrow (117 index). They are most likely to say green options are too expensive.

The Green Rejecters are cynical about the green movement. They see it as superficial and geared for certain types of people, but not them. They use words like "wealthy" and "trendy" to describe the green movement, driving home the wedge that exists between "us" and "them." Marketing to convert them is fruitless. We need to spend our time neutralizing their impact and preventing them from distracting or influencing the more malleable middle, our green "swing voters."

Super Greens: Community-Centric. Optimistic. Idealistic.

It is a lot brighter on the Super Green side of the continuum. People in this group enjoy a positive energy fueling their lives. They understand the problems the environment faces yet remain optimistic about the future and are willing to lead the way in solving some of these issues.

At the far ends of the continuum

Q: Would you rather...



Cure cancer



Save the environment

This group sees the environment as one of the biggest threats facing the planet and the people on it, and Super Greens are the only group that places saving the environment above curing cancer.

And, as dire as they see the situation, they remain optimistic about what we as individuals and as a society can achieve. This hope and belief that things can get better, that a lot of our environmental problems are solvable, fuels a drive for change in their own lives and in our society. Our research shows a linkage between the green movement gaining momentum and the perception by Super Greens of growing power they hold to change things for the better. The Super Greens believe local and individual efforts will make the difference. They are not relying on corporations or government to solve the problem.

They see themselves as part of the solution and are committed to a green lifestyle, a promise that takes a fair bit of time to uphold. Seventy-one percent of the Super Greens in our study report spending a lot of time dedicated to living a green or sustainable lifestyle. This time is often spent forgoing convenient but unsustainable solutions in favor of buying products that better fit their personal philosophy and ideas. The Super Greens show in their behavior and attitudes that they are willing to make the sacrifices necessary to make a positive difference and to keep their beliefs and values in line with their actions. They have no Green Gap.

Adventures along the green continuum

Although attitudes and actions vary along the green continuum, Lower Middle Greens, Upper Middle Greens, and Super Greens all face a similar set of barriers on their path to a more sustainable lifestyle. The path towards sustainability is by no means clear, straightforward, or easy. It's full of obstacles, discouragement, and potholes that can stop you in your tracks and even send you backwards toward lighter shades of green.

This section maps out the adventures along the green continuum – starting with the barriers to green behavior – the gap-wideners that reinforce unsustainable behavior. But knowing what keeps the Green Gap open is key to understanding how to close it. Armed with this knowledge, we turn at the end of this section to how we can start to close the Green Gap.

Paradise lost: the curse of consciousness

Cody, a young vet tech trainee in Chicago, wanted eggs for breakfast. Finding the refrigerator empty, she strolled to her local store to pick up eggs. They only had eggs in Styrofoam boxes. Cody wrestled with herself for a while. She'd developed a keen green consciousness while living with a family in France after college ("They don't waste anything. They think of us Americans as terribly wasteful.") and among her new behaviors was avoiding Styrofoam. In the end, the lure of brunch was too strong, and she bought the eggs anyway. She paid, picked up her eggs, walked to the end of the block and stopped. Then she turned around, walked back to the store to return the eggs and argued with the storekeeper until he agreed to refund her money. "I just couldn't do it," she says, "the guilt was too much."

Cody has bitten the "green" apple, lost her innocence and gained a heightened consciousness of her behaviors and their impact on our shared eco-system. She provides a sophisticated analysis of this feeling: "Just being a human being consuming all the time, I feel guilt. I know that I don't give back as much as I take. I guess it's the same kind of thing people probably feel with original sin: 'I was born into it and I'm always going to feel guilty, I might as well do some things to try to feel less guilty.'"

And once you've lost your innocence, you can't go back. Guilt will always be there; we are all human, and nobody can be 100% environmentally responsible. Cody and others like her just move ahead and try to do the best they can. It seems the more conscious they are and the more positive behavior they exhibit, the more their eyes are opened to all the other sustainability steps they could be taking. Every day, they create an ever-longer list of things to feel guilty about, and we saw this conundrum show up clearly in both our quantitative and ethnographic research.

Nearly half of Americans claim to feel guiltier "the more they know" about how to live a sustainable lifestyle. And, the more green committed the American, the more intense the reported guilt. Super Greens feel twice as much guilt of the average American. The guilt is wide-ranging and self-propelling. First people may start talking about the occasional use of a plastic water bottle and then get going to the point where they were ready to cancel their next vacation and bulldoze over their backyard swimming pool.

Super Greens feel twice as much guilt as the average American.

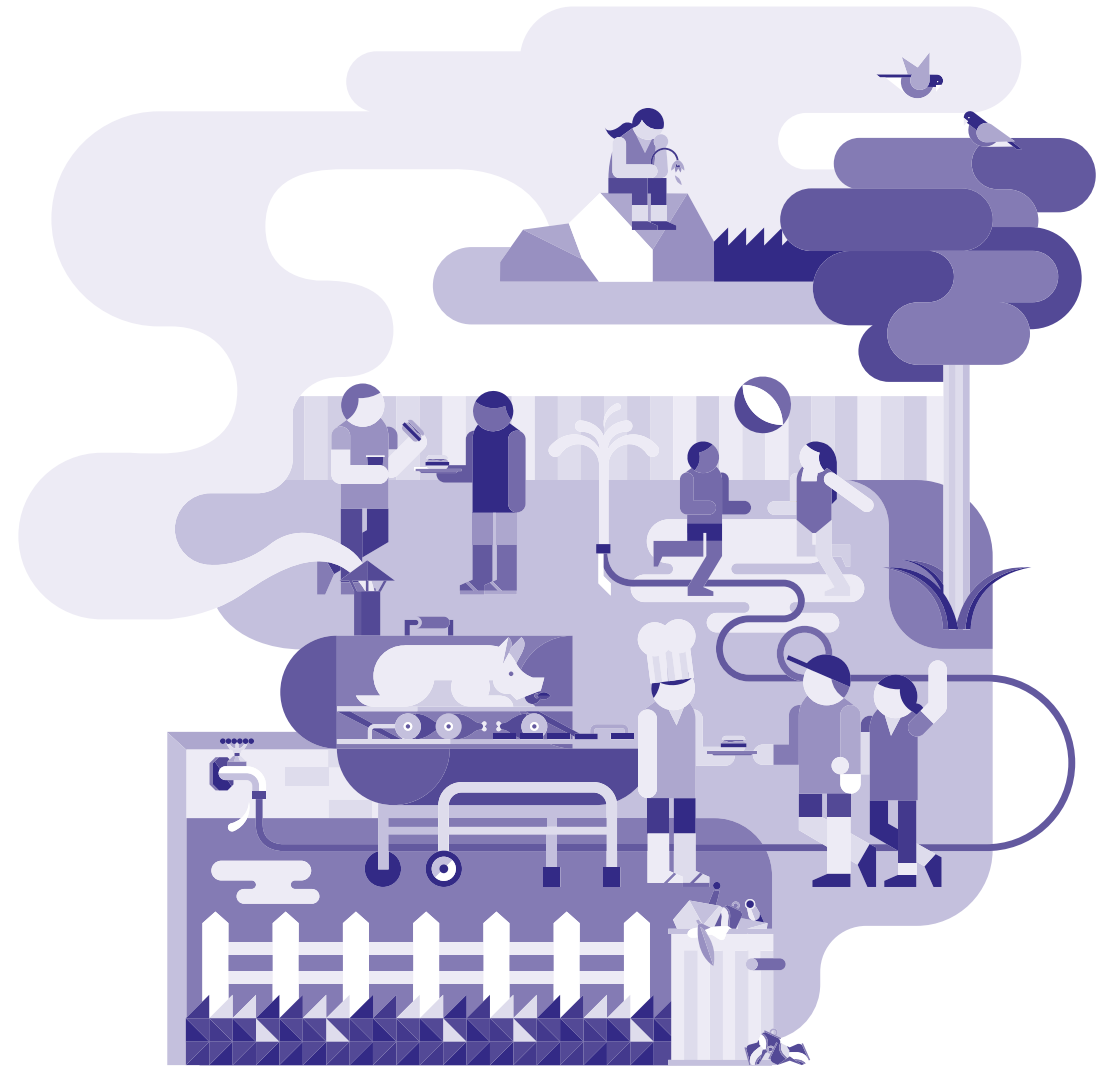
It's not easy being green

It isn't easy being green, and it should come as no surprise that this difficulty keeps America's Green Gap as wide as it is. While we knew it wasn't easy from a practical standpoint, we also found it difficult on the social level. The valiant minority that venture into the green space, actively working on changing their lifestyles and behavior, do so with a relatively high social and emotional cost. In our ethnographies, many Upper Middle Greens and Super Greens we talked to told us about how they felt ostracized from their neighbors, families, and friends, as if they joined a crazy cult or religion. They no longer felt normal and commented on feeling both marginalized and besieged by unwanted attention at parties or get-togethers.

*Adventures
along the green
continuum*

Erin in Chicago is a slight young woman and mother to an infant. Although Erin is a vegan and a committed greenie, you wouldn't know it to meet her. She's gentle and unassuming – not the self-righteous, lecturing type – and never pushes her views on others. But according to Erin, that doesn't stop other people from pushing theirs on her. She describes how she was recently invited to a non-vegan friend's house for lunch. "My neighbor was like, 'We'll have some mud for you at the barbeque!' and I was like 'Well that tastes great on twigs you know.' People are kind of assholes about it sometimes." Erin doesn't let their views stop her, but she admits she's become less outspoken; while her lifestyle used to be the cause of family feuds, nowadays she bites her tongue when her mom comments.

The vegan greenies of our society struggle to find their place and must constantly stand up for their beliefs and behaviors to the rest of society. They are the outcasts, and the ostracism that forms their daily life is a powerful inducement to shun their green ways.



“We’ll have some mud for you at the barbeque!”

Eye rolls & asides

Listen to how almost every one of our self-identifying Super Greens in our ethnographies distanced themselves and downplayed their praiseworthy sustainable behavior and you'll hear just how hard it is to be green in our society. We looked through the hours of videotape and saw an amazing pattern of eye rolls and asides preceding any discussion around the respondent's greener habits. Even in the company of a sympathetic, non-judgmental ethnographer, people were intent on diverting any of the expected scorn they felt sure would come their way. And, being human, they wanted to be accepted – to feel normal. Obviously, their green behavior made them feel manifestly “not normal.”

As you might expect, the eye rolls and asides were much less common in the San Francisco area, a place where it is a lot more normal – and therefore a lot easier – to be green. The culture, government, infrastructure, and mindset are already on the super side of the green continuum. When Darya moved to San Francisco from New York, she experienced the relative norms first hand: “When I moved out here I thought I was kind of crunchy, then I realized that I was soooo not.”

Others told us how they don't want to be seen as outsiders and distanced themselves from the holier-than-thou stigma that has affixed itself to greener behavior. Super Green herself, Susan in the Chicago area takes pains to hold others with similar beliefs at arm's length: “There's a pocket of people in this community, they're sort of 'holier than thou.' One woman never colors her hair. She is very like 'natural,' she wears Birkenstocks (laughs)...I look at her in annoyance, cause I think she's looking at me...” Similarly, Amy, a stylish young Brooklyn mom who grew up in southern Oregon, does her best to repudiate the very behavior she considers laudable: “My cousins called me a 'crunchy granola' once and I was really offended, because I am decidedly not a hippie.”

Sad though it may be, their feelings of ostracism have a basis in fact. When we asked Americans to whom they thought green products were generally marketed, half our respondents thought green products are targeted to “Crunchy Granola Hippies” or “Rich/Elitist Snobs.”

And, when we asked Americans in our quantitative survey to tell us more about why they felt this way, we found no shortage of color commentary:

“Al Gore thinks being green is for Joe Citizen, not him – he has the money to buy and sell carbon credits (a big joke). He's got no idea it isn't easy or cheap to be 'green.’”

“Buying so-called green products is expensive and hard to find. Those who do it feel 'Elitist.’”

“I really do think 'being green' these days is more of a lifestyle statement for people...I see many 'granola hippies' and 'elitist snobs' shoving their green lifestyles in people's faces and it makes them seem on the fringes of society.”

“The people I know of who are actively green either have tons of money or live a hippie lifestyle.”



Consumers believe green products are targeting somebody else, specifically the fringy hippies and not people like “them.” Even motivated consumers fear attracting the negative judgment of their peers if they go out on a limb and purchase green products; instead they embrace the comfort of conformity. So until green products and services feel normal, the Middle is unlikely to change behavior.

The costs of green

Would you pay more for a product that doesn't work? But all too often, that's exactly what consumers read into the green cues on many consumer goods. The hefty price premium eco-friendly products carry over "regular" products puts off consumers. They look at fancy packaging that also accompanies that high price and correctly deduce the elitist sensibility that says to the regular consumer, "this is for someone sophisticated, someone rich...not you." We asked Americans several questions to get at what it would take for them to make a behavior change in regard to several desired green behaviors. The number one barrier holding Americans back was money.

*Adventures
along the green
continuum*

Q: Thinking about those green behaviors or sustainable behaviors that you usually do not do, what would convince you to start?

	<i>If I had more \$</i>	<i>If I had more info</i>	<i>Nothing can convince me</i>
Purchase eco-friendly cleaning products...	36%	21%	12%
Drive a hybrid car...	37%	16%	12%

Matt in Chicago considers himself an average American when it comes to being green, but his level of eco-suspicion makes him rebel against certain green behaviors: "I'll draw the line at green getting involved with my food. Why would I pay \$3.00 more for 'cage-free' eggs? I just don't buy that they are different. When it comes to organic food, I don't even give it a shot. For all I know it tastes worse, and I just paid more. I think a lot of companies are trying to capitalize on people who are trying to be green."

What people tell us and the real reason they are not doing things is not always the same, but when price pops up over and over as the clear, number-one stated reason for not doing something, it is significant. At the very least, the perception out there is that it takes green to be green. There is a prevailing belief among the masses that they are being excluded from the green movement because they simply aren't rich or cool enough to participate. It is no wonder, then, that Whole Foods, a big distributor of eco-friendly products, carries the nickname "Whole Paycheck."

The costs are not purely financial. Consumer packaged goods companies and marketers have struggled with this issue, despite their good intentions. They have made valiant efforts to be responsible but end up wasting money and resources (theirs and the consumer's) making and promoting products that don't deliver. Experience shows how little consumers are willing to compromise for sustainability. Take for example Pepsico's recent decision to recall its ecologically superior, compostable SunChips bag. Consumers complained the bags were too noisy, but, this being the age of social media, aggravated consumers uploaded videos comparing the noise of the packet to a jet plane taking off, a roaring lawnmower, or a subway train (a jet pilot even went to the trouble to measure the decibels) and a Facebook group entitled "Sorry but I can't hear you over this SunChips bag" soon had 54,000 followers. Sales dropped 11% in just one year. Pepsico bowed to the pressure and reverted to its old bags on all but one flavor. A slightly noisier chip bag seems to be a small compromise to make, but consumers felt otherwise. Either that, or Pepsico failed to frame the benefit of the new bag correctly.

Consumers demand an acceptable level of effectiveness for products, sustainable or not. Clorox Green Works, or similar green products brought to you by brands with a heritage of performance, may play better in this space than brands that come from the eco/green space where entrenched feelings of ineffectiveness prevail. The bigger brands can borrow on their credibility and history of performance. Many consumers will assume they have too much to risk by coming out with a sub-par product, given how much their reputation has been built on

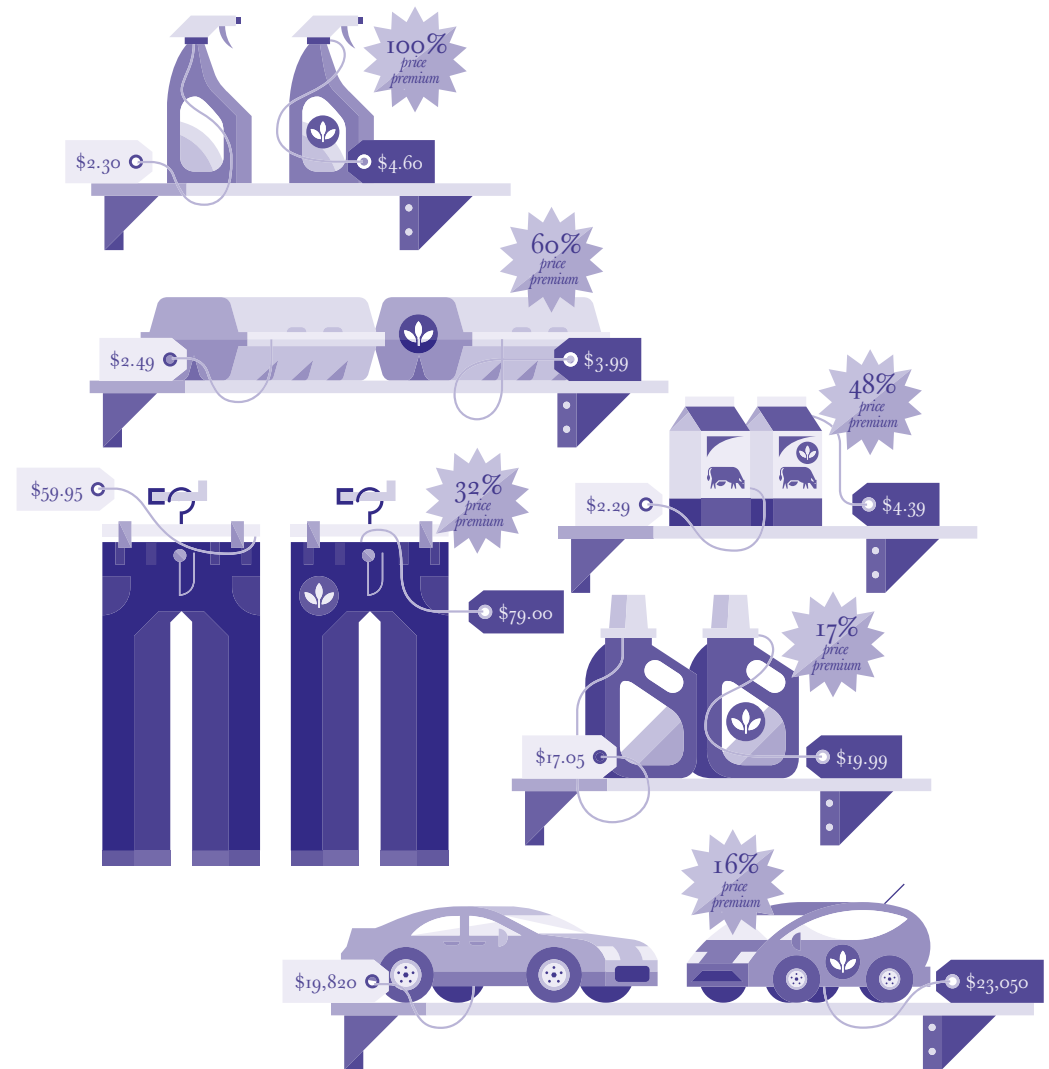
making products that work. The brands themselves also lend a measure of reassurance; Clorox is a familiar, mainstream brand and so consumers can buy it without stepping out of their comfort zone.

We tested this hypothesis and asked Americans if they would rather purchase the environmentally responsible product-line from a mainstream brand that they're familiar with (such as Clorox's Green Works) or purchase a product from a company who specializes in being green and environmentally responsible (such as Seventh Generation). Seventy-three percent of Americans opted for the known, mainstream brand. In 2010, after launching only two years prior, Clorox Green Works had almost 50% market share of natural home cleaning products and is more than twice the size of the next largest brand, beating the veteran Seventh Generation who has been around for over 20 years. And, while this news discourages the Seventh Generations and Tom's of Maineses of the world, it is good for mainstream brands that consumers trust to perform, as well as for the laudable goal of getting sustainable products into more homes.

These concerns – familiar brands or overly loud bags – seem trivial, but our research found a deeper truth, one that deserves to be respected: consumers are often weighing more serious consequences than we give them credit for. This is especially true in areas concerning children or where there are implications for someone's health or wellbeing. In these instances, alive and healthy and not-so-green is better than being dead and/or sick and virtuously green.

Take bottled water. It is often our assumption that consumers prefer bottled water to reusable bottles because they are unwilling to forego the convenience and make the extra effort. But Antoinette, a Brooklyn mother of two, offers a different insight. Antoinette is a fairly normal mom and like normal moms, she is afraid of germs – especially when it comes to her kids, whom she jokes about wanting to “put in a bubble.” It's Antoinette's fear of her kids getting sick, rather than laziness or apathy, that keeps her hooked to bottled water. As she opens her refrigerator to reveal a case full of miniature bottles of water, she defensively explains her logic: “The water for sure is an issue. I just

Conventional Brand Prices vs. Sustainable Brand Prices

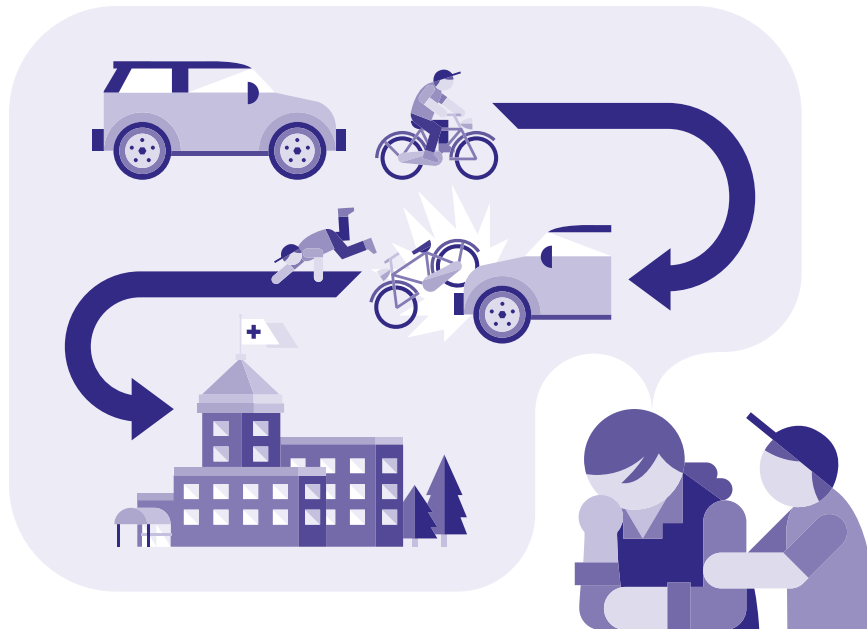


*Prices are based on average costs of conventional and sustainable products in these categories.

unloaded a half case of the pods in my refrigerator this morning. I kind of skeeve, we went to a theme park, they have water fountains and even my son touching it I, I'm like ewww. So I know the plastic is a problem but I want to keep my kid safe so I buy the pods."

It's for the same reason that Antoinette won't switch to green cleaning products. "I use Clorox in my bathroom," she says. "I can't breathe while I'm doing it, but I feel like it's cleaning. It's disinfecting. I see it! Whereas if I use something environmentally healthy it isn't as harsh, but I feel like it's not doing its job, keeping my baby safe." Clearly, when you look at it as a choice between a little bleach and your kid's health, the Clorox is going to win every time.

*Adventures
along the green
continuum*



Susan, a suburban mom outside Chicago, describes an even higher-stakes decision: "My son who is 12 has begged us to let him ride his bike to Junior High. I'm just nervous about him crossing such a large street. So even though something like that sounds appealing, safety is going to take over and I am not going to let him ride his bike." Susan lives in a typical American suburb where, as she says, "nobody walks or rides so no one is looking for pedestrians or bikes." Until that changes, Susan is unlikely to change her mind. Framed as a choice between saving a little gas or saving her son's life, you can see how no campaign extolling the virtues of biking is going to tackle Susan's barrier to green behavior.

The communication to address a consumer being a bit lazy is fundamentally different from one addressing a consumer fearing for her child's life. Understanding the fundamental barrier to green behavior is, therefore, crucial.

Marketers must find ways to allay the fears their consumers have about green behaviors. If a product has a protective benefit that's strong, tell that story explicitly. Don't underestimate the protective nature of a mother. When selling products that involve children and that could impact their health or safety, the less eco-friendly choice could win out (even to the Whole Foods-shopping, Greenpeace-member, Prius-driving consumer) if it evokes a stronger feeling of security.

Even in less emotionally laden spheres, the tradeoffs wear people down. Rosheen in Chicago, whose "uniform" is a white t-shirt and who prides herself on being a laundry expert, tells how she tried really hard for several years to make eco-friendly laundry detergent work but, in the end, reverted to her Tide because she couldn't stop her whites going yellow. So green behaviors may just be dying the slow death of a thousand cuts. Even the most dedicated can only pick themselves up and try again so many times.

Consumers don't trust green products to perform, we've seen, and they are particularly unwilling to invest in the often more expensive option for this reason. But the barrier may be lower if those products come from familiar trusted brands, creating an unexpected opportunity for trusted brands in the green space.

The irony of course is that this consumer barrier is self-defeating. In many cases, as business has realized, green products and services have the potential to be major money-savers. Examples include Energy Star appliances, compact fluorescent lightbulbs, low-flow showerheads, hybrid vehicles, and reusable beverage or food containers. These products often carry a higher sticker price, but over a lifetime of use they can pay for themselves many times over in savings on energy, water, fuel, and even grocery bills. The same is true of healthier products that ultimately increase life expectancy and lower healthcare costs. The issue is that in our instant-gratification society, where "value" has become synonymous with "cheap," lifetime savings are abstract and much less motivating than the immediate callout of the sticker price. They are also pretty invisible, showing up as they do as small increments on monthly bills, or in even more abstract and hard-to-measure notions of improved wellbeing, with no direct link back to the purchase decision made months earlier. There is a need to reclaim the notion of value, redefining it around the broader notion of lifetime value, asking consumers questions like: Are inexpensive appliances really a good value if they guzzle energy and drive up our utility bills? Are conventional cleaning products really a good value if they make our homes unhealthy? Not to mention pollute our lungs, our communities, and our planet. Is inexpensive fast food really a value if it makes our children sick? This will require a major shift in thinking but is a huge opportunity for the brands that get it right.

*Adventures
along the green
continuum*

*There is a need to reclaim the notion
of value, redefining it around the
broader notion of lifetime value.*



And when you look at the numbers, we see that women tend to lean green while men lean anti-green.

Eighty-five percent of Americans also see women as more involved than men in this movement. We found that this feminization of the green movement really holds men back when it comes to visible green behavior like using reusable grocery bags or carrying around reusable water bottles, and even driving a Prius.

While this may cause some problems in mobilizing a green movement amongst the men, it does offer up some interesting possibilities for the companies and marketers that can find a way to make green manly. Free six-pack abs for life to the marketer who figures out how to make eco-friendly equal ego-friendly. The challenge is not impossible. Some of the greenist men we talked to in our ethnographies were undeniably manly men taking on issues of sustainability as some sort of throw down from the universe: *solve this! make this work!* These men see conquering issues of sustainability in their own lives as a personal challenge, a problem to solve, and something ordinary men don't have the know-how or competence to handle.

Green is just too girly for guys. Just as Amy and other women like her don't want to be seen as hippies, guys don't want to step outside of their identity comfort zone either. Green needs to get guy friendly.

*Adventures
along the green
continuum*

Respondents were asked, “Do you think the green movement is more masculine or more feminine?”



responded feminine

responded masculine

Eco-suspicion & Eco-confusion

Much of our motivation for positive change has been unwisely based on negative message of, “What will happen if we don’t act now?” As research has shown, this doom and gloom drive by those trying hardest to mobilize positive change has the unfortunate effect of inducing paralysis and skepticism, emotions only fostered by the array of confusing and contradictory media coverage.

This has led to an epidemic of eco-suspicion and eco-confusion in those Americans who find themselves anywhere to the left of the Super Greens. And, as we stated upfront in our segmentation of Americans on the green continuum, one of the big factors separating the greens from the masses was their belief that the issues around climate change and sustainability are in fact real and not hype.

*Adventures
along the green
continuum*

Carbon footprint calculus vs. the power of one

Telling consumers that, “Each day, humanity pumps 3 million metric tons (mmt) of carbon dioxide (CO₂) into the air. Every year, the atmospheric concentration of CO₂ increases and the global thermometer rises accordingly,” as the Sierra Club recently did in its paper, “Climate Change, The Challenge of our Time,” keeps the focus squarely on the mind-boggling enormity of the problem and impedes action. It makes people feel powerless to make a tangible difference. We should heed the words of Mother Theresa: “If I look at the masses, I will never act; if I look at the one, I will.”

There’s another problem with the overheated rhetoric on climate change. The mind-blowing numbers thrown around by well-meaning climate activists have the paradoxical effect of lowering people’s motivation to act. Matthew Feinberg and Robb Willer from the Department of Sociology at UC Berkeley showed, in their November 2010 study, a negative

correlation between dire messages and belief in the issues of climate change. From their study they concluded that, “dire messages warning of the severity of global warming and its presumed dangers can backfire, paradoxically increasing skepticism about global warming by individuals’ deeply held beliefs that the world is fundamentally just. In addition, we found evidence that this dire messaging led to reduced intentions among participants to reduce their carbon footprint – an effect driven by their increased global warming skepticism.”

Even if you muster the gumption to act, how do you figure out if you are doing any good at all? Is that separate trip to the farmer’s market for local veggies better than just buying the shipped-in lettuce at the supermarket? And sure, your old SUV may be horribly inefficient, but is it better for the environment to hold onto it for a few years more or to trade in for a brand new Prius? Illinois resident Susan feels this confusion keenly: “I used to think that farmers’ markets were a good value and I don’t think it is such a good value anymore. But it does make me feel good to know that I’m helping the little farmers that have come all this way...but then I think of all the fuel they burned getting to the city and think it may not be the best choice.”

It is not easy for Americans to calculate the net impact on the planet of their actions (or lack thereof). “I can’t tell you exactly what the term ‘carbon footprint’ means. I understand the detrimental effects of leaving a carbon footprint, and I understand the ways that we need to prevent doing so. But scientifically I don’t know what that means,” says Daniel in Connecticut. He’s not alone; 82% of Americans from our survey don’t have a clue on how to calculate their carbon footprint.

People talked to us about how they don’t truly understand the cost/benefit of cloth diapers versus disposable diapers since cloth diapers require a lot of water to wash them. Others couldn’t figure out if the benefit of all their use of public transportation was wiped out due to the fact that they traveled around the globe for vacations. And others still were confounded

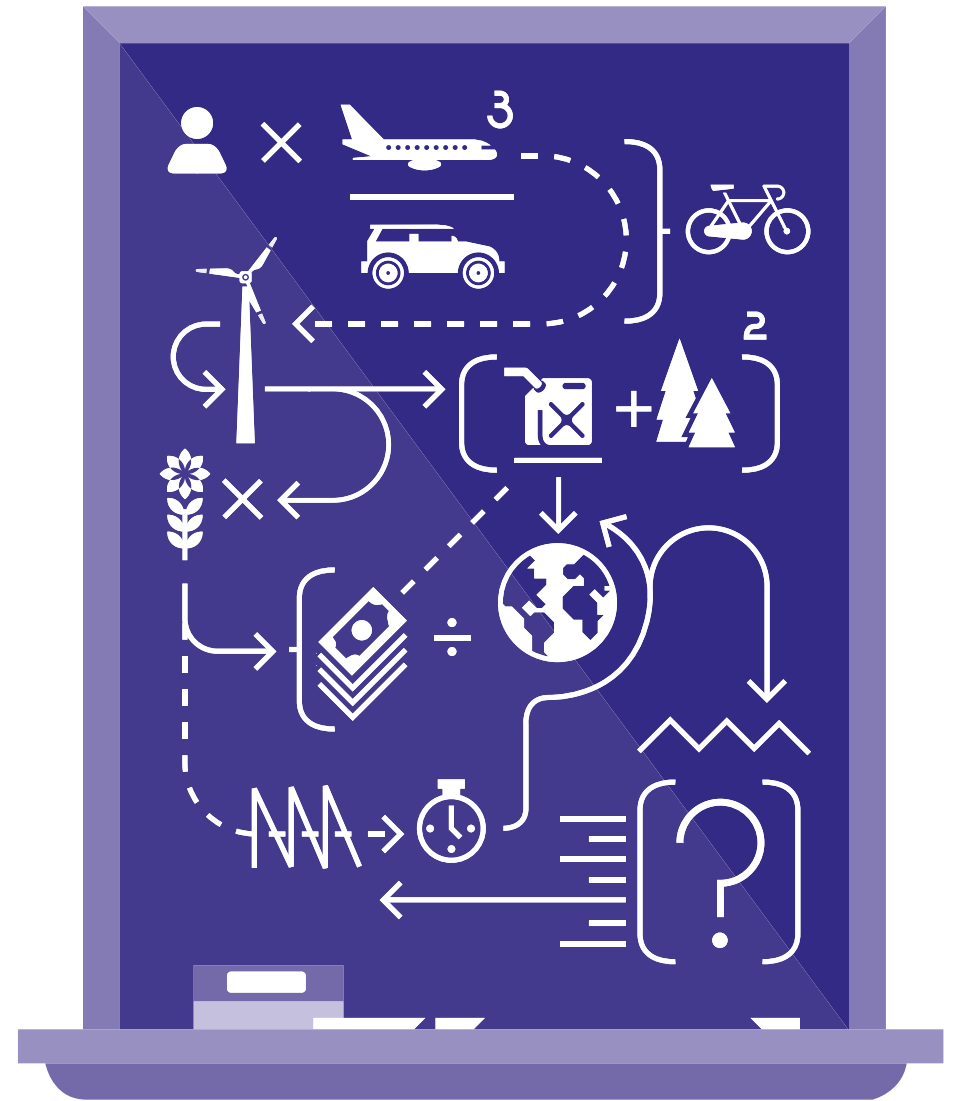
by the math that it would take to calculate the impact of their eliminating meat consumption while factoring in their long drives in their SUV to out of the way vegetarian restaurants. And the carbon footprint calculus just gets more complicated every moment another factor is added into the mix.

People like concrete ideas. They also can relate to “one” much more than “one million” or “billion.” They get things on a personal level much easier than they can wrap their heads around the hype and hyperbole often found in pro-green rhetoric.

Asking people to compute their footprint leaves them floundering in the purgatory of carbon calculus. It drives greater confusion, which leads to frustration and lack of action. Messages motivating all of us to more sustainable behavior need to adhere to another 3Ps beyond people, profit, and planet. They will be most successful if they are personal, positive, and plausible.

*Adventures
along the green
continuum*

Eighty-two percent of Americans from our survey don't have a clue how to calculate their carbon footprint.



A cure for cancer and our new 3Ps of green marketing.

Fully 70% of Americans claim they would rather cure cancer than save the environment. Cancer marketing has the new 3Ps in spades. To close the Green Gap, we should take a page out of the cancer marketing playbook.

- *Personal:* One out of every two men and one out of every three women will be diagnosed with cancer in their lifetime, translating into in a personal understanding issue on a human level for everyone in America. So the relevance factor is built in. On the contrary, the environment feels too abstract and remote compared to the immediate concerns of our everyday lives.
- *Plausible:* We've cured other diseases, so why not cancer? On the contrary, there's no analog for "curing" the environment.
- *Positive:* The messaging around curing cancer has been incredibly positive, especially around breast cancer – the pink ribbon is a modern icon of hope and optimism. Contrast this with the apocalyptic messaging of environmental doom and gloom.

We need to get out of the game of crazy calculus and cataclysmic inciting and start to motivate people with something tangible they can relate to personally – with a good dose of hope thrown in to counteract all the doom and gloom and crazy calculus.

*Fully 70% of Americans claim
they would rather cure cancer than
save the environment.*

Turning the corner

With all these barriers keeping the Green Gap propped wide open, it is hard to imagine how to begin to close it. However, through our research, we started to see a few positive drivers of consumer behavior that just might begin to shrink the gap. Amidst all the suspicion, confusion, and doubt, there are some promising trends that may help normalize green behavior.

The pleasure principle: hitting the G-spot

Often when a green behavior shift really takes hold, it does so because it taps into a preexisting condition of sorts – an element of our character that is already a source of pleasure, validation, or self-worth. To wit, many of our Super Greens play out their green commitments in ways that dovetail with other elements of their personalities: they may have been crafters, scavengers, thrift store fashionistas, inventors, Zen simplifiers, pack-rats, or neatniks, long before green ideas showed up on their radar. And then once Green arrives, it brings with it so many options to choose from, people will naturally gravitate toward ones that reinforce long-established threads of pleasure, in time finding their own G-spot to sustain the behavior over the long haul.

*Adventures
along the green
continuum*

When we talked to the ardent Super Greens, we found they were driven by much more than their altruistic do-gooder tendencies. It seems they got pleasure out of their positive actions – both those focused on the future and, to our surprise, also benefits they realized in the here and now.

Chicagoan Erin got her kicks out of finding new ways of using old produce bags, tapping into her creativity and showing off her ingenuity. When we visited her, she rooted round under her sink to bring out her stash of mesh vegetable bags. “I turn these into dish scrubbies,” she said. “I fold a bunch up and then I tie a knot.”

Similarly, Amy in Brooklyn proudly showed us her spray bottle of vinegar and water solution that she uses to clean everything, including – judging from the smile on her face – her mood.

Alan in San Francisco took the macho approach and proudly displayed his elaborate self-made eco-friendly home energy system. His creative problem-solving skills were pushed to the max, and he got immense pleasure from tinkering with new ways to save energy. For Alan, green has become a badge of manly mastery.

Susan in Chicagoland isn’t a Super Green by any stretch, yet she gets a sparkle in her eye when she takes out her Ziploc bag of plastic caps, recycled separately from the bottles. She is a diligent (and competitive) housekeeper; so finding a further refinement to standard recycling procedures –and developing the requisite sorting system to manage it – appealed instantly to her domestic ethos of orderliness and organization. Ad Council researchers have long maintained that the successful uptake of national recycling in the 1990s succeeded in part because it appealed to precisely these impulses: neatness, sorting, systematizing.

Boris in Jackson Heights, Queens derives green pleasure in a different but related way. In asking him about his green efforts, we unwittingly provided him a platform for bragging: he told us how his sister admired him and wasn’t herself able to be as mindful about the planet as he was. He glowed as he described the ways in which she and others looked up to him for his heightened level of conscientiousness.

Humans are drawn to doing things we like. This might seem like a “no, duh!” statement, but we seem to have overlooked it when it comes to inspiring green actions. Many diets don’t work because they are predicated on unpleasant deprivation, and we will go to great lengths to avoid things that cause discomfort. We’ve missed this essential truth in the messages that have gone out to consumers about sustainability. We have ignored the basic fact that deprivation is itself unsustainable. Sustaining something that is pleasurable, however, is much easier because it is something we want.

Although seemingly insignificant, daily activities of the sort Erin and Alan enjoy so much are the moments of truth for the green movement. Once people begin to experience everyday green activities in a positive way, they begin to form favorable opinions of the green movement. It becomes personal and enjoyable, and they begin to integrate it into their lives. This is the first step to closing the Green Gap.

Guilt offsets

People don't like feeling guilty, and we already know that the green movement comes with a heavy load of guilt. Guilt is no fun. It is no wonder the Catholic Church did a pretty good business in the 15th Century selling indulgences. We value the relief we get from feeling like we are netting out on the positive side of things.

In any lifestyle area where self-deprivation plays a role (or a perceived role), people will start to calculate tradeoffs. I went to the gym, so I can have this cupcake; I can buy this \$500 handbag because it's 50% off; since I subscribe to the *New York Review of Books*, it's OK if I watch *Top Model*.

It's a natural cognitive habit to set up a system of comparables and to balance credits and debits according to loose criteria of our own devising. And the good news, for those who are already making these calculations, is that we know green credits have acquired real meaning in their own personal universe of value.

This definitely goes for how we calculate our impact on the environment. Of course, as we've already seen, it is impossible to do the math. So, we all develop our own personal Kyoto Protocols to sort out our carbon footprints, with a fairly large margin of error built in so as not to make ourselves feel too guilty.

Erin started to experience the psychic relief born out of her more sustainable lifestyle choices. She and her husband recently decided to become vegan to lower their carbon footprint and improve their overall health, but they still love to travel and see the world. Now all their plane trips come with a bit less guilt than they did before they became vegan: "We still go on a plane and then I just think 'well, we've been vegan for a year so we can go on a couple plane trips.'"

Amy took it upon herself to come up with her own Kyoto treaty. Of course, this treaty can change day to day and is really a creative head game she plays with herself. "I use disposable diapers," she admits, "but I'm probably way more conscious about everything else I do."

Consumers are starting to recognize and verbalize this trade-off and are experiencing the peace of mind benefits that come with more sustainable choices. That they know the right way to do the math or justify their decisions is doubtful, but even rationalizing their green or non-green behavior is a step. It brings the dialogue of sustainability into their everyday decision process and can offset guilt, not just create it.



Part of the club

Many of the messages trying to motivate us all to be green haven't worked. We've been talking to ourselves and thinking that what motivates the converted Super Greens will be the same message and strategy that works for everyone else. The marketing approach to selling Budweiser to the masses is much different than how we would go about selling the more rarefied and niche beer Stella Artois or Guinness. So why would we sell the green movement to the Walmart shopper the same way we would appeal to Whole Foods shoppers? This may seem perplexing to the Super Greens. For them, green is a badge of honor; and feeling a little special, outside the norm, or, dare we say it, elite, hits their G-spot. That's their social norm, and they keenly desire being a part of it. (Plus we marketers and ad industry-types are fixated on making things cool, special, and different, and can have a hard time believing anybody would want to be just "normal.") Other consumers have their own social norm – their zone where they can feel they are a contributing and valued part of society. Only in a few corners of America are we starting to normalize green behavior for the mass audience.

*Adventures
along the green
continuum*

With that comes the normalizing of green behavior in the infrastructures and societies we create. In San Francisco, green is just a normal way of being. If you are not recycling, reducing your fossil fuel usage, and conserving energy, you are a social outcast. Not normal. Not accepted. It is no wonder that the people we talked to in the San Francisco area were more comfortable with a more sustainable lifestyle. It was second nature. The city's infrastructure supported it, the neighbors all reinforced it, and it has become just the way the world works. Once green behaviors were normalized, a sustainable system became, well, self-sustaining.

When we asked Americans if they wanted laws or norms, to no one's surprise, they chose norms. They don't want to be told what to do, but they do want to be told what is the normal and acceptable behavior that they should strive for. In other words, they want society to agree upon a set of cultural guidelines rather than submit to the imposition of strictures from government or some other "elitist" constituency.

Would you rather?



be given guidelines on how to live a green and sustainable life but *do it yourself*



not worry about it and have it legislated through *government rules and policies*

Generation S

As we consider how to move green from niche to normal, we need to pay attention to a group we didn't survey, but to whom we pay close attention: teens, or what we at OgilvyEarth refer to as Gen S (Generation Sustainability).

The members of Gen S are the mainstream consumers of tomorrow. They are growing up in an eco-conscious world. They were born long after Earth Day was established (1970), and began learning about environmentalism at age 3. They bring in their lunch in a reusable sack, slug their tap water out of a signature Sigg bottle, and wear their TOMS shoes proudly to a school where they learn about social entrepreneurship and sustainable agriculture. They've grown up with green superhero cartoons like Captain Planet and supermodel Gisele Bündchen's "Gisele and the Green Team." And for them, that's just normal.

According to the TRU Study, 70% of US teens cite "caring about the environment" as the top trending issue amongst their peers. They rank "helping make the world a better place" as very important to them, and there's evidence that they are more proactive about that than the generations that came before them: According to the US Census Bureau, they are almost twice as likely as the previous generation to volunteer. Moreover, unlike older members of society, their concern was gender-balanced, with only a 4% lead among females. For Gen S guys, green doesn't carry the feminine association that it does for prior generations.

Gen S doesn't just exist in the US; teens all over the world are concerned about sustainability. According to The Futures Company, 70% of teens across the world believe that "climate change is the biggest single problem facing the world today" and 93% of teens around the globe "want to preserve the world for future generations."

Just as the members of this generation are digital natives, they are green natives. An awareness of the importance of sustainability has been a part of Generation S's reality for as long as they can remember. It is more than just a social norm for them; it is an expectation they have for the things and organizations they love and buy into. Their movement into the mass consumer population may just be the tipping point needed to significantly shrink the Green Gap.

12 ways we propose on closing the gap

We have explored the Green Gap; we know that it is there, why it exists and persists, and have unlocked some insights on how to start closing it. We also know that as Generation S moves into the mainstream, these consumers will expect answers and solutions, and they will be the new normal we have to contend with. As marketers, we must anticipate our consumers' needs rather than reacting after the fact. Now is the moment to start talking to our consumers about co-creating the new green normal. We need to snap ourselves out of our often narrow-minded, clichéd, niche marketing approaches and get into populist and popular thinking that is relevant to the mass consumer. We also need to shift from an over-emphasis on changing attitudes to working on normalizing green behaviors. Essentially, we need to mainstream green.

1. *Make it normal.*

Normal is sustainable. Normal drives the popularity needed for a mass movement.

As marketers, our predominant instincts in the sustainability space have been to market green products as cool or different and to confer early adopter status on those enlightened consumers who join in, helping them stand apart from the masses. Most of those who want to go out on a green limb and self-identify as green leaders have likely already done so, but the great green middle isn't looking for things to set it apart from everyone else. It wants to fit in. When it comes to driving mass behavior change, we need to make it normal. And we now know that even the bona fide greenies want to fit in more than we had thought, so as to avoid the social stigma often associated with being an environmentally conscious consumer. Ogilvy's Rory Sutherland describes it this way,

*12 ways
we propose
on closing
the gap*

“Most people, in most fields of consumption, most of the time are Satisficers. They are simply trying to avoid making a decision that is actually bad or which might cause them to look or feel foolish. The vast bulk of money in any market at any time is in the hands of Satisficers.”

So how can brands market their sustainable product and service offerings in a way that makes them feel normal? The first principle: make people feel like everybody's doing it. In 2008 behavioral economist Robert Cialdini founded company OPOWER which set out to shift consumers to more energy-efficient behaviors based on a simple principle: “We can move people to environmentally friendly behavior by simply telling people what those around them are doing.” OPOWER adds a very simple graphic to people's utility bills that shows them how their behavior compares to others in terms of energy efficiency. The lure of the Darker is powerful: Participation rates in most energy-efficiency programs are typically less than 5%, but OPOWER's Home Energy Reporting program triggers energy-saving actions in up to 80% of targeted households.

Likewise when OgilvyEarth ran the Hopenhagen campaign to create a movement of citizens calling for action on climate at COP15, our goal was to get a huge number of citizens signed up on our site. At first, sign-ups

trickled in, much more slowly than we wanted. The counter got stuck at around 350,000 and wouldn't budge. We partnered with another group to push the number to 1 million. And suddenly sign-up hockey-sticked, and we found ourselves at 6 million, 70% of whom were mainstream citizens who had never joined a climate movement before. All our metrics showed this same hockey-stick effect. Among other factors, the larger numbers allowed the mainstream audience to feel safe in joining Hopenhagen.

It's the same psychology the state of Montana employed when seeking to bring down drunk driving rates. When they shifted from the wooly message “Don't let Montana be your last best place” to “Most of us don't drink and drive,” the incidence of drunk driving dropped by 14%. When people can see that a positive behavior is normal and that everyone is doing it, they are likely to jump on in and trust in the wisdom of the group.

2. *Make it personal*

Ask not what the consumer can do for sustainability; ask what sustainability can do for them – and then show them.

OgilvyEarth has long said that we need to shift sustainability marketing from polar bears to people. Messages that are personal resonate more deeply with people than messages that are abstract, lofty and remote – as our earlier comparison between cancer and the environment demonstrated.

Companies that can link their products to highly personal benefits are better positioned to succeed. This accounts for the success of certain sustainability product categories such as organic foods. According to the Organic Trade Association, the organic market grew 8% in 2010 while the rest of the food industry grew only 1%. Consumers understand the importance of organic food because it is something that they put into their bodies and is perceived to have direct personal benefits – improved quality and taste and greater “purity” owing to the absence of synthetic hormones and pesticides.

Consumers used to pay little heed to what was in the products they slathered on their body and hair, but as with organics, the natural beauty products category is booming today. The Natural Marketing Institute shows sales of natural and organic personal care products totaled \$10 billion in 2009, representing an 8% growth from the previous year. Seven hundred fifty-five new natural and/or organic personal care products were introduced in the US since January 2010, including natural lines from many mainstream brands. Garnier Fructis' new Pure Clean shampoo and conditioner, for example, are made with 92% biodegradable formulas and do not use silicone, paraben, or dye. Secret's Natural Mineral deodorant launched in March 2011, demonstrating that demand for natural beauty options has hit the mainstream; when consumers are prepared to take a chance on their deo, you know something has shifted.

*12 ways
we propose
on closing
the gap*

There's nothing more personally relevant than the health of a newborn baby. This same insight accounts for the phenomenal rise of the natural, organic, and eco-friendly baby products category. Once the preserve of Whole Foods and neighborhood health food stores, modern, jazzy-looking, "green" baby foods, diapers, wipes, bed linens, cribs, lotions, onesies, and toys are slowly but surely invading every corner of the most mainstream baby retailers from Babies 'R' Us to Target.

3. Create better defaults

If green is the default, people don't have to decide to be green.

Being green in a society where green is abnormal is hard, even for someone deeply rooted in the cause. Being green often means being faced with complex choices and trade-offs in what often becomes an exhausting effort to do the right thing.

But what happens if you do the hard work for people? What if you make it normal by making the better choice the default? Retailer IKEA started charging for plastic bags in 2006, eventually banning them by 2008, about the same time as China took the same action. At IKEA and in the country of China, the normal thing quickly became to bring your own reusable

bag shopping. The little English town of Modbury, population 1,533, showed the way. It had the foresight to ban plastic bags in 2007. US towns are catching on to this initiative. Telluride, Colorado has banned the use of plastic bags; Santa Monica, California passed a ban on plastic bags that will take effect September 2011; and many other cities are following suit.

Defaults can be a potent way to make sustainable behaviors normal. The Environmental Protection Agency's (EPA) Energy Star Program, Green Seal and the Forest Stewardship Council (FSC) partnered with UMB Financial, a large Midwest regional bank that defaults their customers to an Eco Reward VISA Platinum credit card. Using the card earns customers double rewards points on green purchases like Energy Star appliances and FSC certified paper. Through a default card and built-in incentives, UMB made it easy for consumers to be green. Sometimes the best thing to do in the sustainability space is to remove the burden of complex choices from our overburdened consumers. Convenience has always sold, and making green convenient is a powerful inducement.

4. Eliminate the sustainability tax

Sin tax is one thing, but consumers shouldn't have to pay a tax for their virtuous behavior.

Governments use taxes to change behavior. Since they want fewer people to smoke, they put a hefty tax on smoking. More people should own their own homes? Here's a tax break on mortgage interest paid. In Russia and other low birth rate countries, the governments encourage procreation by bestowing generous tax breaks to those willing to do their part to bring children (future taxpayers) into the world.

In the green products market, we've got the opposite incentive going on. We're taxing people's virtuous behavior. The high prices of many of the greener products on store shelves suggests that we are trying to limit or discourage more sustainable choices. More generous government subsidies for carbon-intensive coal and oil than for clean solar and wind energy offer the same impression. And, when we look at our data, Americans on the lower half of the green continuum state saving money

as the number one motivator for making more green actions and buying more sustainable products in the future. If we can shrink prices, we believe, we can shrink the Green Gap correspondingly.

In 2001, two young men launched Method, a line of stylish and eco-friendly cleaning and personal care products. At the time, the easy decision would have been to take this niche idea and sell to the small, but wealthy, population of eco-trendsetters, where they could get away with substantially marking up the price. However, they took the product mainstream to the shelves of Target. In 2006, Method ranked 7th on the INC 500 list of the fastest growing private companies in America. Method has continued to innovate and recently earned Cradle to Cradle (C2C) certification for twenty of its cleaning products, putting C2C products in many stores nationwide for the first time.

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the gap*

As the leading provider of groceries in the US, Walmart is in prime position to impact the price of healthy, sustainably produced foods. The retail giant is working to reduce the price of foods made with whole grains as well as fresh fruits and vegetables, and they are even willing to cut into their own profits to do so. While they hope that volume of sales will make up for the reduced profits, they stand by their belief that the customer should not have to sacrifice healthier or more sustainable options based on limits of affordability.

Eliminating the price barrier eliminates the notion that these products are not for normal citizens. It eviscerates the effective luxury tax placed on these products by the high price, and with that premium goes the destructive notion that only the rich or the righteous deserve these choices.

We are waiting for the first brave company to do some creative pricing in the short term to tear down the price premiums put on these greener products. Imagine this scenario: A company making laundry detergent has one eco-friendly detergent that, for now, is more expensive to manufacture than their standard laundry detergent which costs less to make but costs more to the environment. Instead of basing their shelf price on their manufacturing costs, they price their eco-friendly laundry detergent at the same price as their standard laundry detergent. Their

standard product may have to come up in price for their eco-friendly product to come down in price, but to the consumer the prices have been normalized, making the more sustainable choice easier to make. This could give the pricing experts and accountants a huge headache, but if it could be pulled off, it would signal to consumers a real commitment for driving positive behavior change and create a virtuous default option.

5. Bribe shamelessly

Gold stars, cash, kudos, treats – we all love rewards for our good behavior.

Those new to this brave new world of greener choices may find themselves launched into a maelstrom of conflicting emotions, feeling they can never do enough and burdened with the curse of consciousness that comes with the first bite into the green apple. We can lighten this burden by offering them incremental, ongoing rewards for what they do accomplish, creating a framework which rewards individuals as they move up the green continuum. Incentivize progress, not perfection. Since this is an imperfect journey we are all taking together, why not make it more enjoyable with treats along the way?

RecycleBank, for example, rewards consumers for recycling on an ongoing basis with “points” redeemable for a range of free or discounted products – from sundries to sunglasses to soda.

When designing their rewards program, they made sure not to confuse the desired behavior (greener energy use) with the reward. RecycleBank isn’t rewarding eco-friendly behavior solely with eco-friendly rewards. It is rewarding good behavior with normal things we all want and enjoy.

This kind of approach has been so successful that new entrants are rushing to attach rewards to other everyday sustainable acts like saving energy and water. Emerging platforms such as EarthAid, EcoBonus and Greenopolis all partner with businesses to put money back into consumer hands for choosing more sustainable behaviors or purchasing more sustainable products. Coupons will be a big part of this, and green may be the catalyst that gets the good old coupon reimagined. There are opportunities for

brands to weave themselves into these reward programs as incentive providers, but can they go further?

A more sophisticated rewards program, such as the Citi Forward credit card, can. This card not only rewards you each time you pay your credit card on time and stay under your credit line but also lowers your APR if you pay your credit card on time three billing periods in a row. How might we emulate smart finance in smart sustainability?

Back in the Depression, S&H Green Stamps kept customers loyal through the lines of nasty-tasting stamps that customers received along with their receipt at the checkout counter. Maybe it is time for a new Green Stamps program – a Really Green Stamps program, perhaps – to keep consumers loyal to sustainability.

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6. Punish wisely

Shame, stigma, and guilt are powerful motivators unless they are used too much.

There are ways you can shame people into good behavior, but we found rewards to be much more powerful on a regular basis. As any parent knows, sometimes you simply have to correct behavior directly. Our research shows that guilt and shame worked best on those who were the worst offenders in the green space, while for those trying their best, more guilt can push them over the edge or force them back into denial mode. Now nobody likes to feel guilty, and if you give consumers ways to offset their guilt, they will be grateful. But you still have to inculcate a sense of right and wrong. That is what happened in Washington DC in the wake of a study that forced consumers who wanted a plastic bag to ask for one in front of their fellow shoppers. In the first quarter of that study, plastic bag use dropped from 68 million to just 11 million. Once this usually private decision became public, guilt avoidance became a powerful motivator to behavior change. So bringing private sustainability decisions out into the open can help with compliance.

Sustainability can use some of the smart shaming strategies tried for other high-desire, low-compliance problems. Stivoro, a Dutch anti-smoking organization, encouraged people to blackmail themselves. Snap an incriminating photo, they advised, and give it to a buddy with instructions to post it on Facebook or in some other public sphere if you fail to live up to your goal. The founders of a new gym membership plan, Gym-Pact, figured that even social stigma wouldn't keep people working out. So they upped the financial stakes, charging you more the less you use the gym.

But marketers must be careful. Sometimes, the wrong punishment can have unintended – even opposite – consequences. For example, daycare centers have started to punish parents with fees for every minute they are late picking up their children. Studies have found, however, that this punishment makes the tardy parent less guilty about being late since they feel they are now paying for the extra time daycare is spending with their children. Paying a social price for being late (dirty looks, judgment from other parents) is more effective.

The conscience is a wonderful thing, and sometimes it is a far sterner disciplinarian than we could ever be. Stickk.com, a website engineered by Yale economists to help people achieve their goals, takes advantage of this trait. By setting up your own contract to achieve a personal goal, you commit to a self-inflicted punishment – some loss of privilege or a donation to charity – if you fail to achieve your goal.

7. Don't stop innovating. Make better stuff.

We don't like going backwards. High performing sustainable choices are key for mass adoption.

Consumers are unwilling to sacrifice performance for sustainability. And rightfully so. For some marketers, the challenge of overcoming the performance barrier, real or perceived, will come easily. Unilever's Persil Small & Mighty concentrated laundry detergent saves 35 million liters of water a year in Europe – and comes with a trusted brand name. Levi's, on the back of a legacy advertising campaign, successfully brought to

market a Water<Less jeans collection, that reduced Levi's' water usage by an average of 28% per pair – and up to 96% for some styles. Levi's spring 2011 product lines will contain more than 1.5 million pairs of jeans with the Water<Less method, thereby saving approximately 16 million liters of water. In these cases, sustainability rode through on the backs of credible brands.

But borrowing on brand credibility isn't always enough. Thanks to a long history of premium pricing for green, the bar for sustainable products is higher. It's not enough to perform just as well; products have to perform better. Companies like Nike and GE saw the performance challenge as an innovation opportunity. Sustainable materials for shoes increased comfort and performance, and an \$18 billion a year business has been made out of "ecomagination" product innovations – the size of a Fortune 150 company.

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Plus we have to think beyond what's in the bottle (or box, or bag) to the impact of our products in use to ensure we truly are problem solving, not just problem switching (some point to biofuels as an example of the latter). Unilever is seeking to do this in its formerly referenced Unilever Sustainable Living Plan. Levi's is doing it with its Eco Care label. But why are some eco-friendly laundry detergents or organic dairy products still sold in packaging the consumer can't recycle? Why aren't more home cleaning products sold in reduced-packaging refills? We need to think about the entire picture, not our self-evident piece of sustainability, to offer consumers all-round better choices. In an era when opportunities to differentiate our products and brands are increasingly hard to come by, sustainability can provide fertile ground for breakthrough innovation for those marketers brave enough to turn green into gold.

As Unilever and their sustainability initiatives around cleaning and personal care associated water usage has shown, innovation needs to go beyond the products we make. It needs to extend to inventing creative ideas that also change the way consumers use the products we make. Companies need to think about the entire picture, not just their self-evident piece of global sustainability.

8. Lose the crunch

Green marketing needs to be more mainstream hip than off-the-grid hippie.

Picture someone who is green. What do you see? A granola-eating, Birkenstock-wearing, hairy-legged hippie? Just because a product is green doesn't mean it must be packaged in burlap. We need to ditch the crunch factor of green and liberate ourselves from the stereotypes. And the best way to do it may be not to mention the "G" word at all.

Julie Gilhart, former Fashion Director for the uber-trendy Manhattan department store Barneys NY and a sustainability change-agent, describes how she couldn't understand why the first, fabulous, eco-friendly goods she brought into the store weren't selling as well as other items. She decided to try a different approach and removed all reference to "eco-friendly" from the labels. Sure enough, sales of the premium-priced garments picked up. She realized her discerning shopper had been turned off by the crunchy image and inferior quality the eco-friendly label cued. But in its absence, the benefits of the eco-friendly materials and production process spoke for themselves: softer, more luxurious fabrics for a more premium garment. Since then, eco creds are often merchandised in a more low-key way.

It may also be a question of positioning green further down the benefit hierarchy as a secondary or tertiary benefit. Method is a brand that really nails it. The founders of Method (see Eliminate the sustainability tax, earlier) didn't just set out to make green cleaning products; they set out to make better cleaning products, reassessing everything from packaging design, supply chain and fragrance to formulation and marketing. Their mission is "To create a happy, healthy home revolution." Method's groovy curved packaging and candy colors leap out at you on the shelf and demand to be proudly displayed in the home. Their communication is human and quirky, not dry and preachy. Their Smarty Dish dishwasher detergent tabs has the tagline, "Sparkling clean dishes and friendly to fishes." The result? A truly modern brand of cleaning products. Oh, and, by the way, they're much better for the environment, too.

Similarly, Chevy hits the right note in its new Volt campaign which positions the Volt as a high performing, functioning car that just happens to be sustainable. Its tagline says it all: It's more car than electric.

We call this messaging hierarchy "P.S.: We're sustainable." Communication should embrace the fact that sustainability is a deal-maker, not a deal-breaker, for the mainstream consumer.

9. Turn eco-friendly into male ego-friendly

Girly green is not a sustainable proposition for the manly man.

Carry a tote, give up your 4WD truck, wear hemp t-shirts, compost... It's true that the everyday domestic choices we need to make in favor of sustainability do not make the Nascar fan's heart race.

Marlboro famously cracked this code when it replaced "Mild May" in its ads with the now-iconic Marlboro man. This strong, silent type turned smoking filtered cigarettes from girly to guy-thing almost overnight. Sustainability could use its Marlboro Man moment.

So how can we make green macho? It can be done. A comparison between the Prius and BMW's eco-friendly car line, EfficientDynamics, is an edifying exercise. The Prius targets early adopters with its quirky shape and ads featuring kids dressed as flowers standing smiling in fields. Now, if you're targeting early adopters looking to telegraph their green credentials, this approach is perfect. But inherent in this campaign is the message that cars are bad and must be neutered. That approach will never win over more mainstream men who want their car to tell the world how manly and successful they are. And it would never have rung true from a brand like BMW.

The Prius, let's be honest, does not rev a real gearhead's engine. The Real Man turns up his nose at it. So, BMW's EfficientDynamics says, enough. It's not the car that's bad, just the old technology. It asks not "How do you make the car less bad?", but "How can you make it better?" It says, "What

if we viewed sustainability as the trigger to invent the next generation of Ultimate Driving Machines?" In other words, it approaches sustainability exactly the way BMW should.

The EfficientDynamics cars look like quintessential BMW cars, if not slightly sleeker. The ads look like, well, car ads, with glossy cars driving much too fast around precipitous, hairpin bends. Danger, speed, and status: this is eco-friendly driving for the Top Gear set. (Not to be overlooked: BMW has the eco-credentials to back up its story in spades). And it's an approach we'd do well to emulate in other categories.

Other marketers have attempted to target the testosterone. Patagonia and Cliff Bar tapped into masculine interests in their campaigns targeting surfers and snowboarders with appeals about compromised surf and snow. Hunters and fishermen got engaged on sustainability when climate change began to threaten their ability to pursue their sports. Farming and DIY brands also offer fertile ground for stories rooted in the masculine.

10. Make it tangible

Sustainability is harder to follow when you can't see the trail. Find ways to help consumers see the unseeable and calculate the crazy calculus.

The line from shopping cart to the Arctic is a long one. And if the carbon footprint calculation isn't easy even for scientists, then what should we expect from consumers at the point-of-sale? We need to simplify mental accounting and translate the murky benefits of sustainability into something immediate and concrete. DIY Kyoto, a UK startup, tried to do just that when it brought the Wattson to market. By changing color according to a home's current energy use, Wattson provides instantaneous feedback on energy use to consumers.

Automobiles are the other major source of consumer greenhouse emissions. Whether you drive 50 miles a week or 500 miles, the invisible carbon you spew out is still carbon. But when you peel away from the stoplight, that carbon is left unseen behind you – out of sight and out of mind.

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Calculating that abstract invisible isn't on the agenda for most American drivers, primarily because the consequences are far-off, indistinct, and indirect. But what if the impact of driving could be felt immediately – say, on the wallets of drivers? Currently, car insurance costs the same irrespective of mileage. But what if insurance were tied to how much you drive?

The Brookings Institution found that, nationally, driving would likely decrease by 8%; and in New York state alone, by 11.5%. Moreover, only those who drove most – one-third of drivers – would be “penalized.” The other two-thirds would be rewarded. In New York, Progressive has begun to experiment with a pay-as-you-drive insurance policy, while California and Massachusetts are taking the lead as part of major climate initiatives. By closing the feedback loop, the connection between an action – driving – and its dual impacts – on the climate and your wallet – become immediate and direct. The Prius came at it another way, giving drivers real-time, on-the-dashboard visibility into and feedback on the impact of their driving decisions on MPG, along with bar charts for feedback over time. This is reckoned to be a significant contributor to the Prius' success. Tying this to dollars saved could make the tool even more motivating. These tangible signals – financial, visible, or felt in some other way – can help consumers close the feedback loop on their purchasing decisions.

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11. Make it easy to navigate

Eco-suspicion and eco-confusion need to be addressed with truth, transparency, and a very good road map.

Unintended effects plague packaging as much as they do promotion. Buying green because it's the norm is one thing; believing in the truth behind the green – well, that's another. The plethora of labeling and certifying organizations was intended to help green-conscious consumers make better choices, but instead it has caused eco-confusion and eco-distrust. Sustainability champions have come a long way in changing attitudes and beliefs, but marketers risk diluting the value consumers place in their green products through reliance on a bankrupt batch of symbols.

Certain companies have tried to counter this impression, giving consumers the tools to make simple and still educated decisions. Timberland has attempted to measure the carbon footprint of each shoe, displaying that score on each box. The label measures the environmental impact and community impact, giving specifics such as kWh energy used. While this is a good first attempt, it does not succeed. Absent a sphere of comparison, the average consumer does not know what the measurements mean.

Retailers are starting to create a navigation system for green. Whole Foods has launched a sustainability rating program that color codes seafood, enabling shoppers to make informed decisions. Tesco recently joined forces with the Carbon Trust to apply a new label to their products designed to show the total carbon footprint of the product's journey to the shelf space. How much is 300mg of sodium? A lot? Adequate? Too little? And 3g of fiber? Enough for the day? Numbers alone, the UK's Food Standard Agency decided, are too abstract to be of use in aiding consumer's purchasing decisions. Mental accounting, the agency found, instead works better with colors. So the high-fat label became red; the medium orange; and the low green. (Saturates, sugar, and salt, too.) In food purchasing decisions, mental accounting has become as easy as referencing three colors.

12. Tap into hedonism over altruism

The green space can seem full of self-righteous killjoy moments and people. Help consumers see all the fun they can have on the green side of life.

Driving behavior change doesn't have to be complicated. Humans respond strongly to a few common motivators – most notable pleasure and fun. Volkswagen tapped into this to change people's behavior for the better. The company experimented with different ways to decrease littering and increase exercise: first, it turned a bottle deposit bin into an arcade game and drastically increased deposit rates. Throwing trash away became a stimulating activity. And by converting a staircase into musical piano keys – with each emulating a note – it increased stairway use by 66%. Fun has most definitely been on the agenda for green marketing already, but if we are to make sustainability self-sustaining, it must take center stage.

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the gap*

Making energy saving “fun” might not seem intuitive, but Energy Smackdown, an innovation of the BrainShift Foundation, found a way to inject some recreation into energy savings. Energy Smackdown pits community teams against one another to see which one can reduce energy use the most over the course of twelve months. Two households from each community are filmed for an Energy Smackdown television series.

As Americans, we're good at entertainment and competition,” Donald Kelly, executive director of the BrainShift Foundation said. “It's why on American Idol they get 40 million voters. It's the part of this culture that people really understand, and we should be harnessing it.”

Be it for yourself, for the environment, or for something entirely different, the only thing that matters is that it's change for the better. It doesn't matter why you change, how you change, only that you change. As VW says on its website, www.thefuntheory.com, as long as green is the outcome, it doesn't matter how you get there.



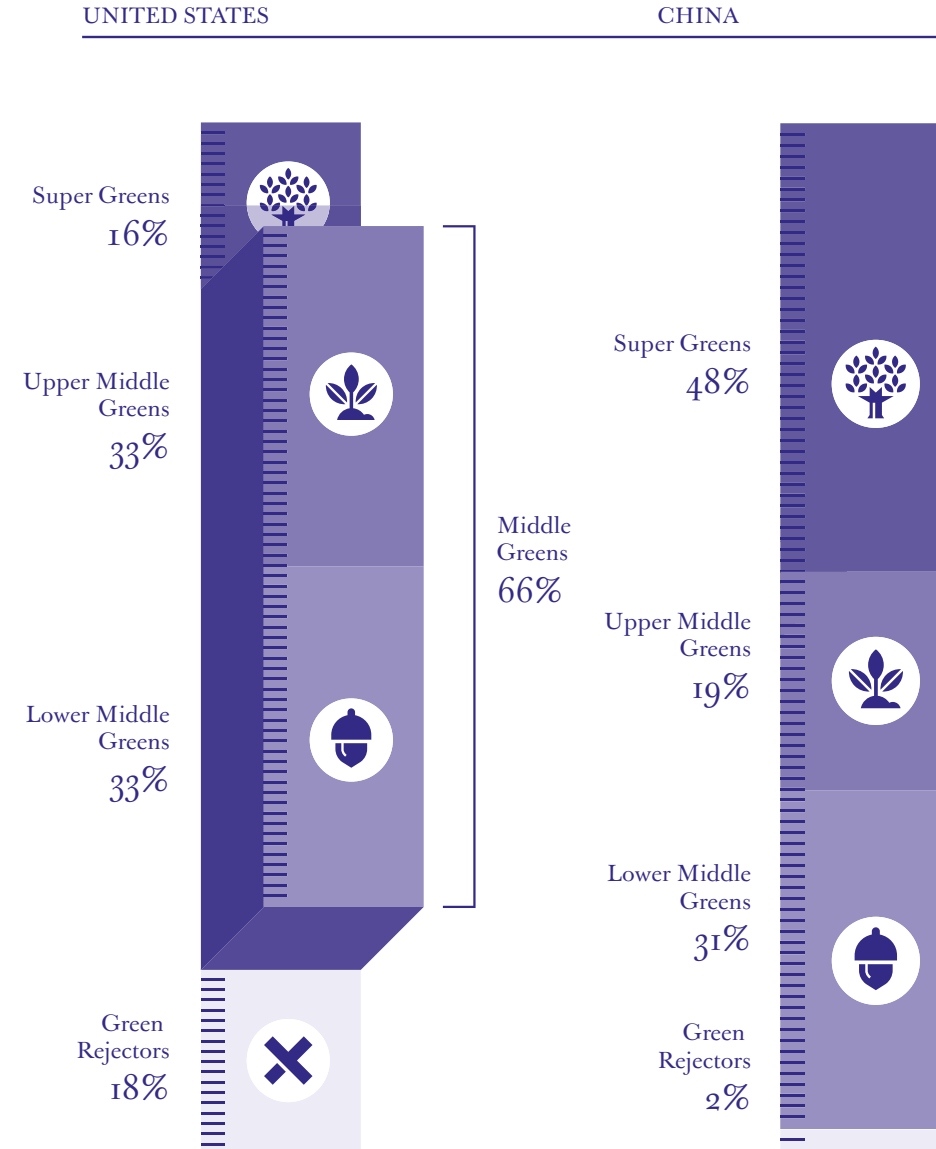
Comparing the US and China

We chose to compare the United States and China because as the G2 of sustainability markets, they are twin lodestones of green consumer behavior. As the two largest consuming populations, the actions that consumers take in these markets will have the largest implications for sustainability globally. What did we find?

The grass is greener in China

While the big story for the US is the need to motivate the great Green Middle to change their behavior, China has no such middle. Our analysis puts 48% of Chinese consumers in the Super Green segment, the largest one by far. This segment is proportionally three times larger in China than it is in the US. By contrast, the Green Rejectors – nearly one-fifth the US constituency – are barely a blip in China. The Super Greens are already the norm in Chinese society; green is the mainstream default.

Comparing the
US and China



Comparing the Green Gaps

As you'd expect, given their greener tendencies, our data show that while there is a Green Gap in China, on almost all measures the Gap is narrower, often significantly so, in China than in the US.

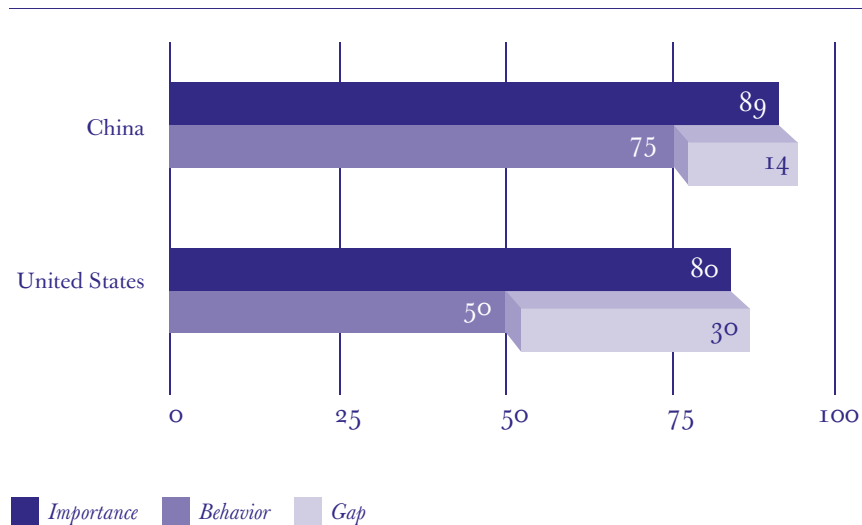
Take, for example, alternative sustainable transportation; while more than two thirds of Americans say it's important to use public transportation, walk or bike to work, less than a third of them actually do so. In China, 93% say it's important, and 84% of them follow through. That makes for gaps of 41% and 9% respectively. Similarly, while 81% of Americans says it's important to buy local food, only 49% of them do. In China the figures are 78% and 71%, a gap of only 7% to the US' 32%. Overall in China, most green behaviors are seen as more important and there's much more follow-through.

Why are the Chinese so much greener and their Green Gap narrower?

While factors like infrastructure certainly account for some of the differences, they do not account for them all. There are other factors in play.

Comparing the US and China

GAP BY COUNTRY



Why the difference? Our research points to five major reasons:

Environmental health = Human health

As we showed earlier, 70% of Americans would rather cure cancer than save the environment. We were surprised to see that in China, those proportions are completely reversed. Seventy-eight percent of Chinese consumers place saving the environment over curing cancer.

	U.S.	China
Would rather <i>cure cancer</i> than save the environment	70%	22%
Would rather <i>save the environment</i> than cure cancer	30%	78%

Why should saving the environment trump curing cancer for so many Chinese? To us in America, where we fear cancer, we've seen its ravages up close, and most of us personally know someone who has been afflicted, this is hard to fathom. And no wonder: while Americans are constantly reminded of cancer's toll on our bodies, in the US we breathe clean air and drink clean water, so the correlation between environment and health is an abstract notion. In China, it is all too tangible. Fouled rivers and sooty skies are an everyday sight for most Chinese. The harm done by tainted water isn't a fear; it's a reality that has likely befallen someone they know. The sight of smog isn't eyesore; it's a clutch felt in the chest. China is now where parts of the US were in the 70s, when you couldn't jog in LA because of the smog and the Environmental Protection Agency was easy for the government to approve. But because we no longer feel a direct environmental impact on our health, solving this remote problem gets viewed as luxury and is pushed far down on our priority list. In China, by contrast, environmental health equals human health. We know from our research and from experience that where there is a clear link between sustainability and human health, people are highly motivated. Sustainability is experienced as a matter of life and death in China today, and that's a major reason they care.

Top down prioritization

Environmental health doesn't just equate to human health in China; it is also associated with financial health and prosperity. The government is the reason behind that. Government leaders clearly understand the link between the environment and the economy, and make this case effectively for their population. Since economic development is China's number one priority, environmental action has, therefore, been brought into the limelight.

If money talks, China's leaders have sent a clear signal on sustainability. China's \$586 billion stimulus package – the largest in the world – aims to transform its economy by building green infrastructure. It recently became the world's leading investor in renewable energy technologies. And after years of increase, growth in China's energy consumption and greenhouse gas emissions is now slowing. The government's strategy for the economy has shifted from rapid (with less of an eye to collateral damage) to a more sustainable approach. As Prime Minister Wen Jia Bao stated unopposed at a state conference in February 2011, "We must not any longer sacrifice the environment for the sake of rapid growth and reckless roll-outs, as that would result in unsustainable growth featuring industrial overcapacity and intensive resource consumption." In contrast, one of the major US political parties is still adamant that climate change doesn't exist. US Senator James Inhofe memorably called global warming, "the greatest hoax ever perpetrated on the American public." And in the US, tackling climate change is positioned by many as the enemy of economic recovery. No wonder, then, that efforts to push even a modest climate bill through the US Congress have failed.

Clear leadership from the top makes the difference in China. But there's a downside: when a strong government takes up so much of the responsibility, ordinary citizens and corporations lose their sense of initiative.

Comparing the US and China

Bottom-up demand and collective action

This clear signal from the government to its people is matched in our survey by an equally clear message from the people to their leaders. With a strong government that prioritizes environmental action, it's no wonder Chinese believe so much more than Americans that the government not only has the most power to solve the environmental issue but is also obligated to do so. The chart below shows that most Chinese think the government has both the power and obligation – compared to only 20% of the US – to address climate issues. Americans think that the individual has the power, but they distribute the obligation evenly among corporations, government, and individuals.

	1. Power		2. Obligation		3. Action	
	China	U.S.	China	U.S.	China	U.S.
Government	66	20	57	35	43	12
Corporations	11	25	26	28	16	17
Individuals	24	56	18	37	41	71

Respondents were asked to choose, between the government, corporations and individuals, who has the most power, obligation and action, in terms of solving global environmental issues. Note responses are based on the corresponding questions below:

1. If you had to choose one of three, who do you believe has the most power to solve the global environmental issues?
2. If you had to choose one of three, who do you believe is obligated or "on the hook" for solving the global environmental issues?
3. If you had to choose one of three, who do you believe is doing the most to help solve the global environmental issues?

Further, the Chinese think the government and individuals are splitting the work. Even though Chinese consumers see the government and corporations as being ultimately responsible for tackling sustainability, consumers believe their individual actions amount to something. This belief is founded upon a fundamental faith in the power of collective action. If the Chinese could build The Great Wall of China by hand thousands of years ago, then surely they can solve the environmental issue today. But in the US, as is no surprise considering our political paralysis, consumers feel that individuals are doing all of the heavy lifting and that their efforts make no difference. Al Gore has said on climate action, “No change will happen unless the people demand it.” Our data suggests that in China, the people demand it whereas in the US, very few of them do.

Respondents were asked to what level they agree or disagree with the statement: I feel my green or sustainable efforts amount to nothing.

Comparing the US and China

	U.S.	China
Feel their individual efforts amount to nothing	44%	12%

Cultural reinforcement

The Chinese understanding of sustainability is driven by the importance of harmony entrenched in the philosophical legacies of Confucianism, Buddhism, and Taoism. Though slightly varied, these schools of thought all emphasize the importance of humans living in harmony with nature, and this belief in harmony and balance still remains an integral part of Chinese culture.

Similarly the Chinese tradition of Feng Shui is about the art of clearing spaces and revitalizing the energies in buildings, living and work spaces. It may also account for the differences in the homes we entered in our US and China research, with Feng Shui contributing to the emptier, neater homes we saw in China. Feng Shui is at odds with the accumulation of excess stuff. In China, leveraging such proud cultural traditions is a way the government can seek to stem the rise of Western-style overconsumption.

Not yet the land of plenty

We’ve saved perhaps the biggest reason for the narrower gap till last. If you compare the footage of the ethnographies we conducted in people’s homes in the US and China, what you quickly come to notice is this: the Green Gap itself is largely a luxury of the somewhat affluent, middle class consumer, whether in the US or China. In those Chinese homes where families cannot yet afford to waste a morsel of food, a piece of paper or a drop of water, thrift, conservation, and reuse are innate values and behaviors. Many Chinese consumers were born prior to the 1980s, during a time when China’s economy was still fragile. Raised in an environment where conservation and prudence were a necessity, not a choice, these consumers naturally developed green lifestyles. Economic circumstances have led Chinese to be green by default. In the US, the World War II generation was the last to know scarcity. Their offspring, raised in plenty, form the current majority of the American middle class, manifesting the uniquely American cultural ideal of a life without limits.

Window of opportunity

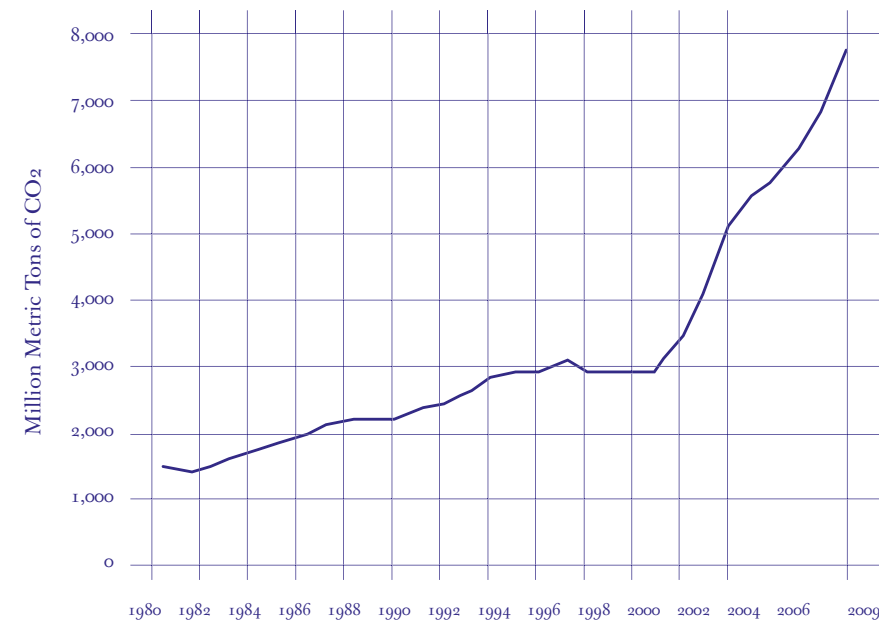
In the emerging middle class homes, where the families are consuming more like the predominant US middle-class, we saw from our ethnographies that the waste and excess begins to creep in. For the first time in the nation's history, the majority of Chinese citizens are enjoying a middle class lifestyle. Many families are buying their first car. Twenty years ago, only one in 300 urban families had an air conditioner. Now, every urban family owns one, on average. Soon, they will have two, or three, because they can afford to. As they will tell you, if homes in Japan can have two or three air conditioners, and those in the US, four or five – and some families even heated driveways – why shouldn't they? China has already overtaken the US as the world's largest auto market, and that is just the first of the consumption benchmarks to fall. More will soon follow.

Comparing the US and China

So while the Chinese population is significantly greener for now, this doesn't mean that marketers in China can rest on their laurels, nor that the need to market the sustainable option as the mainstream option is irrelevant here. As the Chinese population migrates to a middle-class lifestyle modeled on the West, marketers will need to work hard to ensure the sustainable choice continues to be the preferred and/or default choice. Otherwise, as China's economy continues to grow and its people consume more, China's currently moderate Green Gap could widen to rival the gaping chasm we see in the US.

Why does this matter so much? Because when you ladder this up to a national level, this is how growth in consumption impacts carbon emissions:

Carbon Dioxide Emissions from Consumption in China, 1980-2009



Consumption-related carbon dioxide emissions nearly tripled in China over the last ten years. That's with a relatively modest Green Gap. If we can entice Chinese consumers to retain some of their virtuous habits even as they grow into more middle-class lifestyles and can create the products, services, transportation, buildings, and cities to allow them to leapfrog our unsustainable model of consumption completely, we may just manage to keep the Green Gap from widening in China. We may succeed in uncoupling consumption growth from growth in carbon emissions.

We have a brief but critical window of opportunity to try and make that happen. We now turn our thoughts to how to do it.

*Different contexts and continents,
similar solutions*

The context and the reality of the Green Gaps in the US and China are literally worlds apart. And yet despite very different contexts, when it comes to closing the Green Gap in the US and keeping the Green Gap closed in China, our teams in both markets, working independently, came to a surprisingly similar set of solutions. These are the overlaps:

Create better choices

Whether it is offering real choices or just the illusion of choice – choices are good.

Regardless of very different systems of government, we are all drawn toward freedom and a desire to make our own choices. While we have evidence that government legislation does work in affecting behavior change through creating new rules and regulations, we are more personally motivated when we feel we are making our own choices.

When we looked at the answer to an either/or question we posed to both US and Chinese consumers about whether they would rather (1) Be given guidelines on how to live a green and sustainable lifestyle, but do it yourself; or (2) Not worry about it and have it legislated through government rules and policies, 78% of Chinese citizens and 85% of Americans chose the free agency option.

As marketers, we can tap into this desire by implementing choice architecture and offering greener options for consumers. Just as in the US, IKEA nudged the consumer by banning plastic bags, in China, Midea introduced an “Eco button” on their air conditioners which consumers could press to set their air conditioner automatically to the WWF-recommended level of 26 degrees C, making the green behavior ridiculously simply to do. Nudging consumers in the right direction is a more powerful way to create behavior change than mandating rules.

*Different
contexts and
continents,
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Reward good behavior

Treats are more motivating than punishment.

Offering the right choices is only one part of changing behavior. In order to ensure long-term behavior change, it's important to reward good behavior with tangible treats.

We saw earlier that rewards (aka bribes) work with the US consumer. The same goes for the Chinese consumer. The success of a solar heater giveaway program in rural Yunnan province bears this out. The local government gave away a free solar water heater to anyone who installed a proper toilet. Not only did this incentive improve sanitation dramatically, the site of the rooftop heaters became a status symbol – a badge of modernity that everyone wanted. In one step, this innovative program tackled energy use and sanitation without any increase in emissions. Rewards should be chosen with an eye to what people want where you live, but the principle works in both places.

Make it personal

People will always trump the planet.

Rewards work because they offer people a direct benefit. And as noted earlier, the more personal the benefit, the more motivating it becomes. Finding the relevance factor is the key to motivating people to act. This is true in both the US and China. There are few more personally galvanizing life events than the birth of a first child. No wonder then that this moment emerged as a key trigger to a re-evaluation of the sustainability of one's choices in both markets. The impact seems to ripple beyond directly relevant behavior (e.g., green diapers or wipes); Chinese informant Zhu Xin's family took to reusing scrap paper after their baby came along. Every year there are 16,030,800 births in China. That's over 16 million opportunities to drive sustainable behaviors through a relevance moment of truth. Our companion work, *Get Going with Green*, has more ideas for aligning sustainability with different Chinese consumers' personal goals. In both markets, we need to stop kidding ourselves that altruism will work. By acknowledging human nature and focusing on what's in it for me, we can motivate the mass change which will ultimately benefit the planet without ever mentioning the planet in our message.

Move forward, not backward

Sacrifice isn't a sustainable proposition.

Just as consumers in the US don't want to go backward, consumers in China don't want to give up on the still-new benefits of the middle class world. It is in our human nature to want to progress and keep things moving forward, and once we've moved forward we have a hard time going back. So we expect things like the products we use, the homes we live in, and how we get around to get better and better. When it comes to gauging issues of sustainability, we won't tolerate a backwards move in quality or lifestyle. We want products that perform well – even better than conventional products – and we don't want to pay a premium for it.

The good news is that, while many Americans associate poorer quality and performance with green goods, for the most part, the Chinese view green products with perceptions of high quality. However, in both countries consumers complain about what we call the “sustainability tax” often associated with these greener products. Both struggle to understand why they need to pay more for a product that is better for the environment.

*Different
contexts and
continents,
similar
solutions*

In order to ensure consumers continue to make sustainable choices, we need to make sure that the sustainable products out in the marketplace are high performing and cost efficient. As marketers it is our job to make sure consumers associate green with quality, affordability, and progress.

Stress social acceptance

We all want to be normal and belong.

Throughout our ethnographies in both the US and China, we found people didn't identify with the Eco Warriors, hippies, idealists, and elitists and that they instead want to align themselves with average, mainstream citizens. In both the US and China, mainstreaming green, or greenstreaming, is marketers' job #1. In the US this is tricky because most of these behaviors are decidedly not normal right now; most people aren't taking public transportation or riding their bikes to work. And labeling those actions green is only going to make them even less desirable. In China, there are many existing mainstream behaviors which are, as mentioned earlier, sustainable by default and warrant encouragement – the use of straw mats for sleeping during hot summers, riding bikes, refilling one's own water flask to name a few. However, some of these behaviors, because of their heritage, carry the stigma of being for the economically challenged. So the trick is a little different – we need to keep these mainstream behaviors going by labeling, let's say bicycle riders, as smart green adopters rather than as economically challenged. We therefore change the frame and add cachet. Since green is already much more mainstream, green is a safer place to be in China. The need to belong is a fundamental driver of human behavior, no matter where you live. Indeed, 92% of Chinese agree that “if more people acted green, they would too.”

We're all human

So why are we confident that, in spite of the striking differences between the two nations in terms of culture, government, economic development, and physical environment, large parts of the approach are the same? That, while the need in the US is to focus on closing the Green Gap and in China it is to prevent it from opening, many solutions can be shared?

All of these overlaps have one thing in common: they are all grounded in an understanding of human psychology and human nature. At the end of the day, we are all human. Cultural contexts may differ tremendously, but we are all driven by the same desires and needs. We all value freedom and choice, we all desire progress, we find pleasure in rewards, we're selfish, and we care the most about what's personal to us. These human drivers transcend time, geography, and technology, and it is our understanding of them that will enable marketers to be so successful in shaping greener, more sustainable consumer behavior.

Conclusion

We set out to uncover an explanation for the gap between consumers' stated intentions and their actions when it comes to sustainability, and to uncover a range of ways that we can begin closing the gap.

Our research identified the fundamental problem with green marketing today, and that is perhaps the most important takeaway for marketers. Namely, we have been trying to motivate mainstream consumer behavior with what is essentially niche marketing. We threw decades of knowledge of what works when marketing to mainstream consumers out the window and began speaking to them in a way that simply isn't relevant. It is as though, when it comes to green, we somehow decided consumers park human nature at the supermarket door.

We missed the point that at heart, we are all human creatures with human motivations and concerns. So we've been positioning our messages, products, and services around environmental benefits, not human benefits. This reduces our potential audience for our message from "all humans" to the subset "humans who care about the environment" – which is to say only about 20% of us. And we've been positioning these products and services as special, edgy, and different, when what the mainstream consumer really needs to know is: are they normal?

Maslow's hierarchy of needs is much over-quoted in marketing presentations, but in this case it is instructive: we've been busy telling consumers how sustainability can get them to self-actualization without helping them understand how it can meet their more basic needs of safety, love, and belonging.

Conclusion

These insights suggest that if we are to drive sustainability beyond the Super Green niche to propel a truly mainstream movement, we need to revisit our Marketing 101 textbooks and get back in touch with what we know works when marketing to the mainstream. We need to stop trying to argue consumers into agreeing that sustainability is important. Instead, we must immediately shift our attention to identifying the behaviors with the greatest potential impact and to understanding the best ways to get consumers to embrace them. Sustainability is the outcome, not the communications strategy.

Yes, in today's world consumers do care more about the companies behind the products they are buying. They do want reassurance that environmental and social damage is not being done in service of the contents of their shopping cart. And marketing around sustainability does carry its own unique, complex, and highly nuanced set of challenges. It is hard to do well and must be handled extremely carefully.

But ultimately, the mainstream consumer is still the mainstream consumer. It's time to forge a new era of sustainability marketing in which we marketers come to realize that "normal" is not a dirty word. Normal is mainstream, normal is popular and above all, normal is the key to sustainability.

Research methodology

Expert interviews

Several ideas were inspired by conversations over the past year with behavioral economists, environmental experts, and creative thinkers:

- *Marc Alt, President, Marc Alt+Partners*
- *Bill Becker, Senior Climate Policy Advisor, Natural Capitalism Solutions*
- *Aimee Christensen, Founder & Chief Executive Officer, Christensen Global Strategies*
- *Seth Farbman, Chief Marketing Officer, Gap Inc.*
- *Tom Feegel, Creator, GreenMyParents*
- *Julie Gilhart, Former Fashion Director, Barneys New York*
- *Adam Lowry, Co-Founder & Chief Greenskeeper, Method Products*
- *Todd Rogers, Founding Executive Director, The Analyst Institute*
- *Rory Sutherland, Vice Chairman, Ogilvy Group UK*
- *Andrew Winston, Author, Green to Gold and Green Recovery*
- *Ian Yolles, Chief Marketing Officer, RecycleBank*

Ethnographies

Between September 2010 and February 2011, we spent time in the homes and neighborhoods of 15 subjects across three markets: San Francisco, Chicago, and the New York Metro area. These three markets were chosen for geographic diversity and as a way to explore markets with a significant incidence of green behavior (San Francisco) in comparison to a moderate green market (NY Metro) and one that is fairly representative of the US population (Chicago).

In order to explore green systems of meaning and behavior, we sampled across a spectrum from Lower Middle Greens to Super Greens representing various lifestyles and life stages:

- Married, no kids
- Married with kids
- Single
- City dwellers
- Suburbanites

Conversational quantitative research

We talked to 1,800 Americans using MarketTools True Sample, over two phases of research September 2010 and February 2011. The sample was chosen to be representative of the US adult population based on age, gender, and geography.

Key takeaways

- There is a broad Green Gap – a gulf between consumers’ stated beliefs about sustainability and their real-world behavior in both the United States and China.
- OgilvyEarth fielded original quantitative and qualitative research in both the US and China to better understand this Green Gap and discover ways to close it.
- We focused on the US and China (the G2 of sustainability markets) because of the following reasons:
 - o *They are the world’s largest emitters of CO₂.*
 - o *They are effective analogs for sustainability behavior in the developed and rapidly developing world alike.*
 - o *Consumer behavior in these two countries has the most impact on global sustainability.*
- The US consumer market is the main focus of *Mainstream Green*. China is covered in depth by a companion work, *Get Going with Green*.
- Our research enables us to segment the US population along a green continuum which showed that two-thirds of the US population falls into a vast center class we call the Green Middle.
- It will be more effective to induce sustainability behavior changes among this population than to convert the outright Green Rejecters.
- Closing the Green Gap will require popularizing and normalizing sustainable behaviors among the Middle Greens.
- There are several barriers to green behavior in the US:
 - o *The curse of consciousness – Consumers are suffering from the loss of blissful ignorance about the impact of everyday behaviors on the planet.*
 - o *There are effective analogs for sustainability behavior in the developed and rapidly developing world alike.*
 - o *It’s not easy being green – There are significant practical and social impediments to practicing sustainable behaviors.*

o The high cost of being green — Sustainable products frequently carry a price premium and/or a performance and trustworthiness trade-off.

o Green is the new pink — The green movement has a distinctly feminine cast to it, making participations more difficult for me.

o Eco-suspicion and eco-confusion — Doom and gloom proclamations coupled with muddled, impersonal messaging, and meaningless standards leave consumers cold and confused.

- However, there are a few trends that may help normalize green behaviors:

o The pleasure principle — Once consumers experience green behaviors in a positive way, a self-reinforcing cycle of green pleasure (what we call the G-spot) takes root.

o Guilt offsets — Awareness of green behaviors engenders peace of mind in consumers, allowing them to engage in a few less sustainable practices without crushing guilt.

o Part of the club — The emerging social norms surrounding sustainable behavior allow consumers to act sustainably and still feel like a normal, mainstream part of society.

o Generation S — The teens of today are the sustainability consumers of the future, and green behaviors are already normal for them.

- We propose 12 ways that will help close the Green Gap:

o Make it normal — Normal is sustainable.

o Make it personal — Focus on what sustainability can do for consumers, not the other way around.

o Create better defaults — With better default options, people don't have to decide to be green.

o Eliminate the sustainability tax — Consumers shouldn't have to pay a higher price for virtuous behavior.

o Bribe shamelessly — Everyone loves to be rewarded for good behavior.

o Punish wisely — Used with care, shame and guilt are powerful motivators.

o Don't stop innovating — High performing sustainable options are required for mass acceptance.

o Lose the crunch — Green marketing needs to be mainstream hip, not hippie.

o Turn eco-friendly into ego-friendly — Girly green needs a manly counterpart.

o Make it tangible — Sustainability is easier to follow when the trail is visible.

o Make it easy to navigate — Truth, transparency, and a clear road map are bulwarks against consumer confusion and suspicion.

o Tap into hedonism over altruism — Show how much fun is to be had on the green side of life.

- In comparing the US and China, we found that while both countries have Green Gaps, the gap is narrower in China and the population is greener for these reasons:

o Make it normal — Normal is sustainable.

o Make it personal — Focus on what sustainability can do for consumers, not the other way around.

o Environmental health is equivalent to human health.

o China's government sends clear top-down signals on the importance of sustainability.

o China's consumers demand action and work collectively.

o Chinese cultural influences prioritize harmony with nature and deemphasize the accumulation of stuff.

o China's emerging middle class does not yet have the luxury of overconsumption.

- To keep China's Green Gap from widening, we have a brief window of opportunity in which to decouple a rising economic tide from growth in carbon emissions.
- The means we discovered to close China's Green Gap are strikingly similar to those for the US. Despite our different contexts, we have shared solutions.

About the authors

Graceann I. Bennett

*Managing Partner, Director of Strategic Planning
Ogilvy & Mather Chicago*

Graceann joined Ogilvy in 2006 to lead Chicago's strategic planning department and share leadership duties for the Ogilvy Chicago office. She leads the broader strategic community – encompassing consulting, analytics, digital strategy, and planning – across the PR, Activation, and Advertising divisions in Chicago. In addition, Graceann serves on Ogilvy's Global Planning Council. Prior to joining Ogilvy, she headed up the strategic planning departments of Leo Burnett and Arnold Worldwide. Graceann's experience extends beyond advertising, however. Before she joined the industry, Graceann did stints in a variety of industries including global marketing consulting, design, and media channel planning and research. She has lived and worked in New York, London, and Boston.

Dedicated to thought leadership throughout her career, Graceann recently conceived and led two significant consumer study initiatives. *Women in Their Digital Domain* is a proprietary study created in collaboration with Mindshare and Microsoft Advertising. It explores the digital paths that women use to seek, share, and shop. *Eyes Wide Open, Wallet Half Shut*, Graceann's other recent study, is an in-depth study she did with Communispace to explore the post-recession consumer.

Graceann is a contributing strategist in OgilvyEarth's sustainability practice where she developed the global sustainability platform for UPS and will now be applying her expertise to sustainability efforts for Unilever and other clients.

During her career, Graceann has worked in several business sectors and on many famous brands with award winning work: Dove, Volkswagen, Guinness, Pepsi, Suave, Truvía, and Wonderbra.

Graceann is a graduate of Brigham Young University and has spent time studying at the Jerusalem Center for Near Eastern Studies. She lives in downtown Chicago with her husband and three children.

Freya Williams

*Co-Founder and Head of Strategy
OgilvyEarth*

In 2007, after 10 years with Ogilvy New York, Freya saw an opportunity to create a practice dedicated to helping some of the world's biggest corporations become leaders in sustainability and sustainable branding. Today that practice has grown into a global network, with outposts in over twenty countries, helping organizations like Coca-Cola, Unilever, Siemens, DuPont and Kraft harness the opportunity in sustainability for the benefit of their businesses and the world. A strategic planner by trade, Freya leads strategy for OgilvyEarth's client engagements. She grounds her approach in the view that brands and marketing have the power to change the world and will be a critical component of achieving a sustainable society. Hers is the strategic mind behind brand initiatives and campaigns including Coca Cola's PlantBottle, Hellmann's switch to free range eggs, and the award-winning Hopenhagen campaign in support of the UN at COP15 (which recruited 6 million supporters, 70% of whom had never joined a climate movement before). Freya's mission, as those efforts showcase, is to move sustainable behaviors into the mainstream.

Freya is the author of thought leadership pieces on sustainability, including OgilvyEarth's *Greenwash to Great: a Guide to Great Green Marketing Without the Greenwash* and *2009: A Pivotal Year*. She speaks on brands and sustainability at conferences including Opportunity Green and Columbia's Responsible Business Summit. During her career, Freya has had the opportunity to work with some of the world's biggest brands including Dove, Kimberly-Clark, American Express, Goldman Sachs, and Thomson Reuters. An occasional contributor to magazines including *Glamour* and *Cosmopolitan*, Freya is a native Brit who has been in the US for ten years where she, her husband, and two children split their time between Manhattan and Milanville, PA.

*About
the
authors*

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Colophon

Authors

Graceann Bennett
Freya Williams

Contributing authors

Meghan Campbell
Rei Wang

Editor

Jeremy Katz

Ethnographic research

Alison Demos

Quantitative research

Nicole Friedman

China research

Kunal Sinha
Michael Griffiths

Creative director

Gabe Usadel

Art director

Allie Armstrong

Illustration

Always with Honor

Design

485 Brand Design, Ogilvy Chicago

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