Fonte: Euromonitor International
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Quick Pulse: Green Buying – An Exploration of "Green" Consumer Trends

To learn about local consumer perceptions and purchase decisions relating to “green” products, Passport Survey reached out to Euromonitor International's worldwide network of researchers via Quick Pulse.

INTRODUCTION TO QUICK PULSE SURVEYS

In 2011, Euromonitor International began designing, executing and analysing its own surveys in order to expand its trusted global research. This is part of a series of articles presenting the results of its Quick Pulse surveys. In Quick Pulse surveys, Passport Survey reaches out to Euromonitor's network of in-country analysts and in-house researchers around the world in order to find out more about current consumer attitudes and habits on a wide variety of topics, from economic outlook to daily activities.

“GREEN” PRODUCT FEATURES AND PURCHASING IN LOCAL CONTEXT

Overview

From beauty products to household goods and groceries, the terms “green,” “organic,” “locally sourced,” and “fair trade," have begun to populate more and more labels and ingredient lists within the last decade. As climate change, health awareness, and environmental issues gain ground, consumers are beginning to reconsider the most important factors guiding their purchasing decisions. For instance, the global organic baby food market has grown more than 5% every year for the last nine years (except during the 2008-9 recession). Tweet this stat! In addition, many consumers told Passport Survey that they are generally willing to pay more for green products, a promising sign of continued growth.

Euromonitor International reached out to in-country analysts and in-house researchers in 80+ countries across the globe to learn more about current local perceptions of "green" features and about how such features impact purchasing decisions. In December 2011, 266 analysts responded and indicated that local consumer interest in green features has not and likely will not decline. At the same time, the purchase of such green products has been restricted by availability, concerns about legitimacy, and the recent economic recession.

Summary of results

While green factors do influence many respondents' purchase decisions, they trail price and quality by a significant margin. Green products with the “natural” label hold the most appeal – in some regions, more than strong brand names. Other green labels are less important in buying decisions. At present, concerns about legitimacy in developed markets and lack of availability in developing markets negatively affect interest in green products. In addition, products with green features tend to have relatively higher prices than their non-green counterparts, and that extra cost is difficult to pay out of recession-hit household budgets. Still, analysts feel that awareness of green products has been growing and will continue to grow in all regions, though many note that awareness does not necessarily translate to interest, especially if prices remain high.

Quality and price are universally fundamental

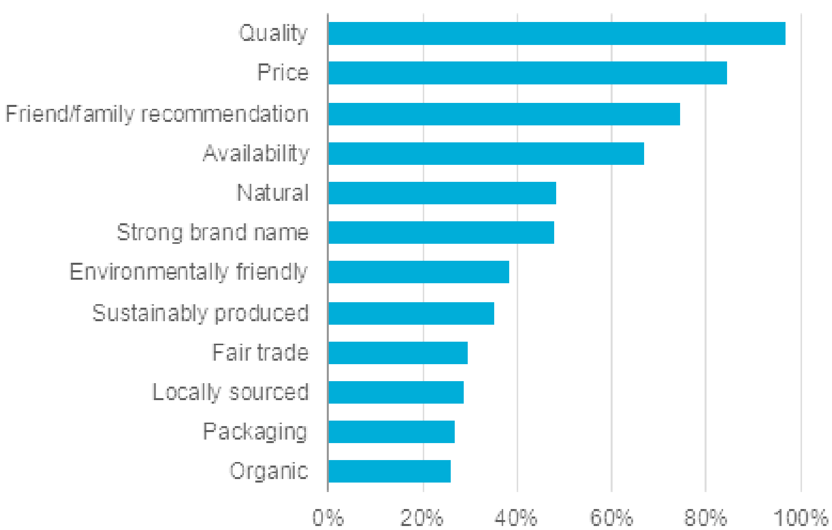
Respondents worldwide agree that quality and price are the most essential factors when buying a product; 97% think that the quality of a product is a key feature, and 85% feel just as strongly about price. While the term “natural” is an essential factor to nearly 50% of analysts, making it ostensibly as important as a strong brand presence, the survey shows that some other “green” phrases (organic, locally-sourced, fair-trade) only affect about one-third of respondents' purchasing decisions. Only 27% of analysts actively feel the packaging of a product is significant – though this figure may not account for any unconscious differentiation that happens in a store aisle.

Through write-in responses, it was clear that many respondents, mostly in North America, Latin America, and the EU, are concerned with the legitimacy of green products. As one analyst from North America said, “I have a hard time buying into the sustainability of most 'green' or organic business processes. It seems to me to be largely misappropriated and used out of context to tap into a new marketing fad among consumers.”

While there was a general consensus about the most important purchasing factors across regions, respondents in various parts of the world did weight the factors slightly differently. Respondents in North America listed quality and price as equally important factors (96%), Tweet this Stat! while expressing little interest in “natural” features (27%). Latin American analysts reported that quality is the most important factor (96%) followed by price (85%) and availability (76%), respectively. Tweet this Stat! Respondents in Europe (including Turkey) rated quality as more important than price (97% vs 80%), weighted “natural” as more important than a strong brand name (50% compared to 36%). . Analysts in Russia, India, and Central Asia also give more weight to the term “natural” (60%) than they do to a strong brand name (53%), while analysts in the Pacific Rim are more concerned with strong brand name (65%) than “natural” features (48%). Respondents in the Middle East and Africa rated price, availability, and recommendations/positive reviews from family and friends as equally the most important factors, and also paid more attention to strong brand names in their buying decisions than to “natural” traits.

Important Factors in Purchasing Decisions 2011

% who believe the listed factors are "somewhat important” or “very important” in their purchasing



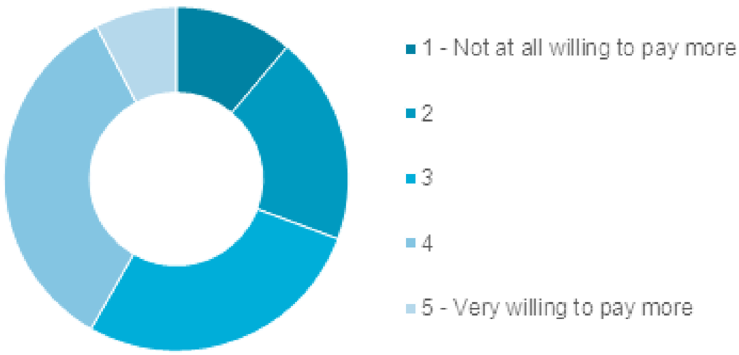
Source: Euromonitor International Analyst Survey – Quick Pulse; December 2011Scale from 1 'Not at all important' to 5 'Very important'

Is the higher price justified?

Nearly 70% of respondents across the globe said they were somewhat to very willing to spend more on a green product, compared to the same product without green features. Only 11% of respondents were not willing at all to spend more money for green features. In open-ended comments, many analysts noted that the recession heavily influences their buying decisions at the current time, and cutting costs seems more important to the average consumer than purchasing green products. Respondents would, however, buy green products if the price were not significantly higher.

In write-in responses, some respondents expressed concern that green products are not necessarily healthier or better for the environment, even though they claim to be. According to one respondent from the European Union, “It's sometimes hard to know how much of that is just marketing and how sustainable green products are in the longer term rather than just being good to someone's conscience.”

Willingness to Pay More for Green Features 2011



Source: Euromonitor International Analyst Survey – Quick Pulse; December 2011. Scale from 1 'Not at all willing to pay more' to 5 'Very willing to pay more' for a product with green features compared to similar product without such features

How the world sees "green"

While the image and penetration of green products varies by region, analysts generally believe that green products are mostly purchased by consumers who can afford them. When asked about the general attitudes regarding green products in their counties, respondents from the US, Canada, Europe, and Africa, among others, pointed out that only wealthy people purchase green products; those with less money will most likely buy cheaper and more readily available products.

In write-in responses, analysts from North America also noted that being "green" is trendy and no longer has a "hippie" connotation, especially with the upswing of popular chain organic and locally-sourced grocery stores such as Whole Foods and Trader Joe's.

Respondents from Latin America emphasized that the green trend is still generally obscure, and one noted that the language is illusive, stating, "Fair trade is a concept that's so far removed from my everyday life that I would only pay slightly more for it, whereas locally sourced products speak more to me so I feel that they're worth the extra cash." Latin American respondents did, however, recognize that the younger generation seems to be latching onto the trend.

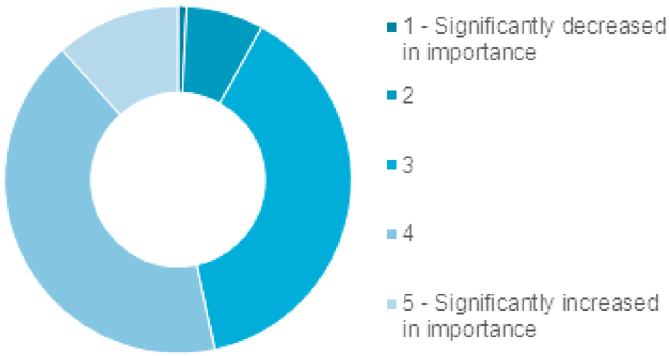
Respondents from Russia and non-EU countries stressed the lack of available green products in their region and said that the percentage of those who do seek out green products is quite limited. In open-ended responses, analysts in China recognized the organic trend, but feel it is very much still developing.

Shifting attitudes towards green products

The economic climate has fundamentally affected the way that consumers shop in recent years. Yet, 92% of respondents surveyed say that local consumers' attitudes towards green products have either stayed neutral or slightly grown in emphasis between 2009 and 2011. Tweet this Stat! In particular, more than half say that the importance of green product features has grown in the last two years among consumers in their country. Still, such increases do not translate into widespread acceptance or interest under the current pricing structure.

As one respondent from the EU said, "There is a small but growing segment that finds [green products] extremely important and tries to eat as much as possible only organic. However the majority is still sceptical toward organic products and finds them too expensive. But the awareness is growing rapidly." Respondents from Latin America, however, were adamant in stating that green products affect a very small segment of people and they did not think this attitude has changed since 2009.

Changes in local attitudes toward "green" products 2011



Source: Euromonitor International Analyst Survey – Quick Pulse; December 2011. Perceived changes in local attitudes toward "green" product features between 2009 and 2011

Looking further into the future, respondents think that due to lagging economies, any growth in the importance of green features between now and 2013 will be marginal. To this point, many respondents wrote in open-ended responses that the high price tag of green products will continue to hinder sales. Some respondents also said that interest and awareness in green products does not necessarily translate into consumer sales. On the other hand, those respondents who believe there will be an increase in positive attitude recognize the efforts (and subsequent success) of companies to reach a wide range of consumers.

The future of "green" products

While some respondents are sceptical of green product claims, very few are completely opposed to the idea of such products. Given the choice between a green product and a non-green product offered at the same price, the vast majority of respondents write that they would opt to go green. Results show that there is a loyal, if minority, following of people who opt for green products, and those consumers will continue to do so in the future. However, if green products continue to cost more than non-green products, then analysts expect most buyers of green products to be those who have extra income in this struggling economic environment.

More on the sample: our global analyst network

Quick Pulse survey results differ from other survey data cited on Passport Survey (eg findings from the Annual Study or Global Youth) and should be interpreted with some caution. Quick Pulse responses reflect the opinions and habits of several hundred of Euromonitor International's in-country analysts and in-house researchers around the world. As such, results reflect a great degree of geographic, economic, and cultural diversity among educated consumers. With response rates exceeding 70% in November, non-response bias is minimal. On the other hand, Euromonitor International's researchers do not constitute a random sample of consumers in a given country or across the globe, so their responses do not necessarily represent the opinions of a broader population of consumers. Passport Survey presents their attitudes and behaviours in order to provide starting points for potential further investigations and sparks of tactical insight.

This article is one of many content types offered for free as part of an introduction to Passport Survey, alongside articles, visual applications and executive briefing presentations.