



Section 1

TDG is ...

a market planning and research firm dedicated to keeping our clients In Front of the Curve.™ Since 2004, TDG has helped more than 250 technology leaders, media companies, and service providers to understand and manage the quantum shifts now impacting how consumers access, navigate, distribute and consume media – whenever and wherever they may be.

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Introduction

Popular focus of late has turned to 'going green' – that is, adopting environmentally-friendly, energy-conscious dispositions and actions. No doubt due in large part to the rising price of gasoline and fueled by a growing awareness among consumers about global climate issues, the public imagination has been drawn to the positive value of conserving our resources and preserving our environment.

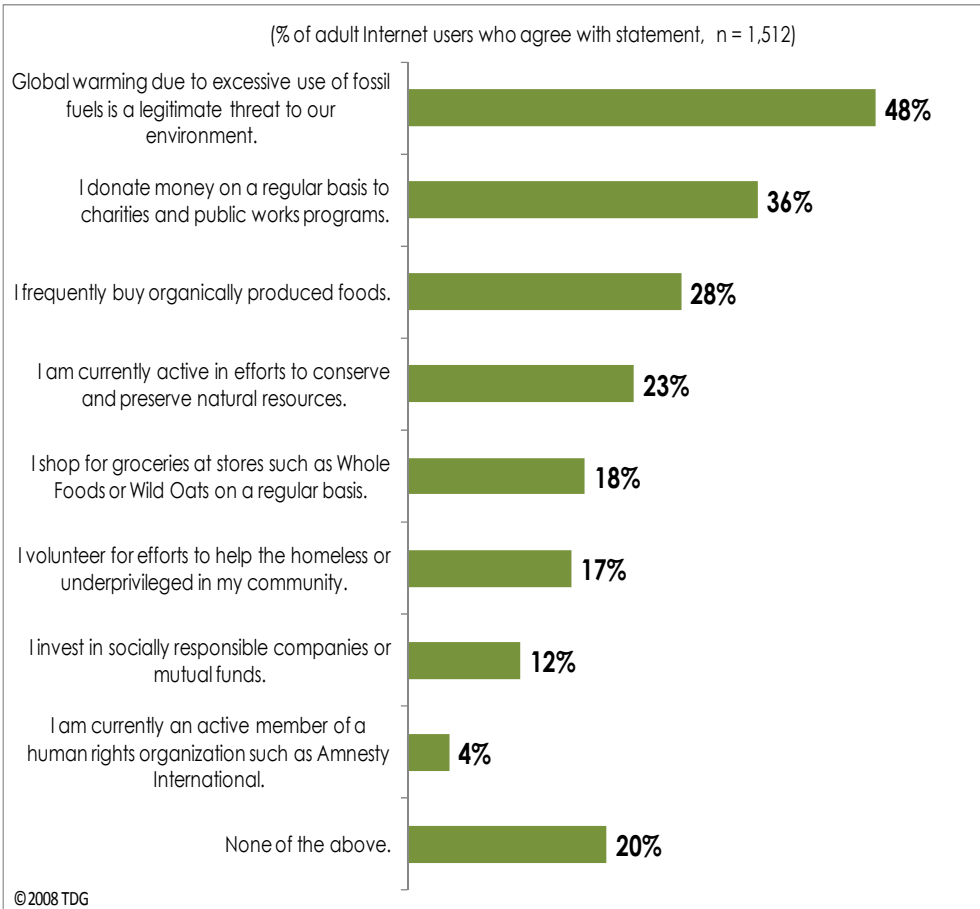
But is this 'green shift' just a passing fad? Or have American consumers truly turned the corner when it comes to adopting long-term behavioral changes that will impact reduce the impact they have on the environment? Are consumer attitudes actually giving rise to sustainable, positive, concrete action?

Earlier this year, TDG commissioned a study of 1500 internet households using all the usual criteria and standards to address these very issues. The purpose of this white paper, and the three larger reports from which it draws, is to benchmark specific aspects of eco- and energy-friendly behaviors and perceptions – in general and in terms of consumer electronic and technology purchases – so that companies can appropriately incorporate 'green' aspects into their product planning and market messaging.

Section 2

Green Leanings

Consumers were asked to identify which types of 'green' behavior and dispositions they had adopted. The figure below illustrates these statements and the percentage of respondents that agreed with the statement.



- Approximately 18% of adults regularly shop for groceries at natural foods stores such as Whole Foods or Wild Oats. Note that natural food stores are specialty grocers who sell only products that contain natural ingredients. In some cases, these products are organic; in others, they are simply “all natural.”
- Approximately 28% of consumers buy organically-produced foods frequently (whether from a natural foods store or from a regular supermarket). In terms of the overlap between these two activities, 45% of those that frequently buy organically produced foods also shop at a natural foods store on a regular basis. Conversely, 69% of those that regularly shop at a natural foods store frequently buy organic foods.
- When it comes to active membership in a human rights organization (e.g., Amnesty International), only 4% of adult consumers participate. This is not surprising given

that such organizations tend to attract younger members and even active members “fade away” as they age and move into the workforce.

- Close to one-fourth of consumers (23%) indicate they are active in efforts to conserve or preserve natural resources. This is an impressive percentage, for sure, but one which is at best ambiguous as to its meaning. This could mean they recycle their glass and plastic debris. On the other hand, it could mean they are members of an environmental group in charge of cleaning city parks on occasion.
- Close to 17% of consumers volunteer in some way to help the homeless or underprivileged in their community, efforts which could involve work through a faith-based organization such as church outreach or work in a local homeless shelter.
- More than one-third of consumers (36%) regularly donate money to charities and public works program, an impressive degree of involvement, for certain; one driven by some degree of altruism, certainly, but encouraged by American tax programs.
- As to what precisely constitutes “socially responsible,” that was left undefined. However, given the recent surge in companies targeting such investment (and mutual funds positioned as “socially responsible”), most consumers are aware of the existence of such financial instruments. Then again, only 12% of consumers say they invest in such companies or funds.
- More than one-fifth of adult consumers did not agree with any of the statements listed in this section of the survey, an amazing statement given the breadth of behavior and attitudes addressed in these statements.

Section 3

Voodoo Eco-logics

It seems as if every company, both B2B and B2C, is jumping on the environmental bandwagon. Nowhere is this more true than in the consumer PC space, with all of the major PC OEMs having announced some ‘green’ initiative for corporate policy, traditional product lines, and public messaging. Dell, for example, recently publicized the successful implementation of a carbon-neutral strategy impacting both production and disposal of its products.

In many ways, it seems as if the leading technology brands are taking the lead in globalizing 'green' messaging, much more so than other consumer product and service categories.

This reflects a top-down strategy – that is, a shift in corporate policy designed to improve specific internal operations that should in theory trickle-down to consumers via greener products and messaging. The hope, of course, is a simultaneous bottom-up percolation of green sentiment such that consumers will respond to the appropriate bottom-down messaging. But, with all due apologies to the former President Bush, does this equate to Voodoo Eco-Logic?

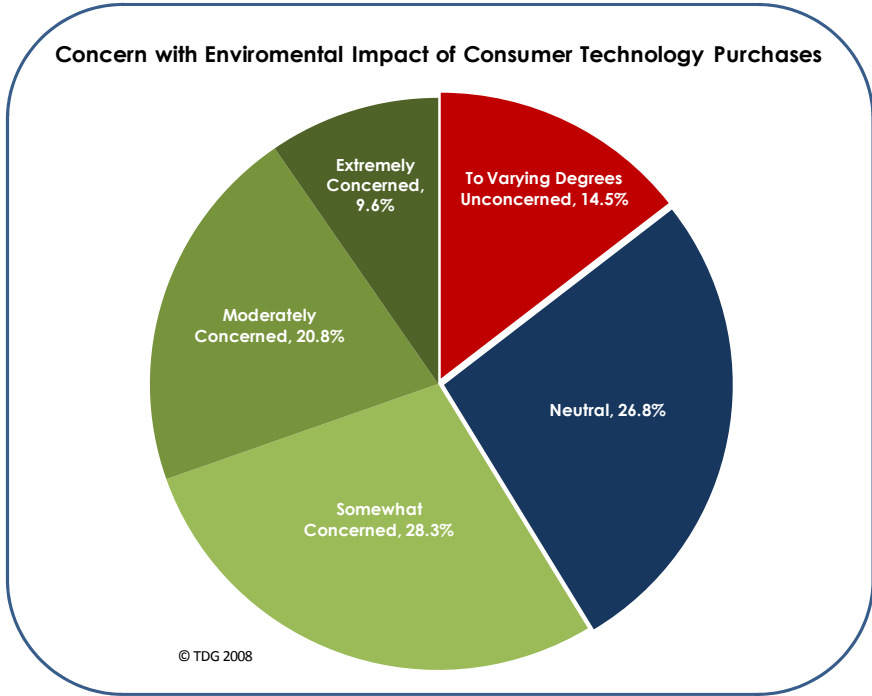
Sounds like a reasonable strategy but is premised upon widespread consumer desire to purchase greener technology products. It thus begs the question as to whether or not this is the case. TDG's primary research was conceived to answer precisely this question. One of the questions to which consumers were asked to respond included the following:

To what extent are you concerned about the environmental impact of your consumer technology purchases and usage?

Surprisingly, although the message of global warming and going green has been flooding the media for months, 27% of respondents were neutral and 15% were to varying degrees unconcerned. In other words, 42% of respondents did not express any concern regarding the environmental impact of the consumer technology purchases.

The encouraging news, of course, is that approximately 58% of respondents are concerned about this issue, with 10% being "extremely concerned" about the environmental impact of their consumer tech purchases. But does this concern 'trickle-down' into concrete behavior?

Surprisingly, although the message of global warming and going green has been flooding the media for months, 27% of respondents were neutral and 15% were to varying degrees unconcerned.



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How PC is Your PC?

About the Authors:

Michael Greeson is TDG's President and Principal Analyst. He covers a variety of topics related to consumer technologies with a particular focus on the future of the "connected consumer." He admits to being one of the ecologically incorrect, though he's trying to improve.

Sarah Crisman leads TDG's social media and media outreach efforts. She has particular interest in gaming, digital music and the Millennial broadband consumer. She also is a certified 'Greenie.'

Wendy Stockard is the Queen of Green in the TDG offices. She is frequently found giving impromptu lectures on the importance of saving the planet.

To arrange a briefing with either Michael or Sarah, please contact TDG at 469-287-8050.

In an optimal world, American consumers would do their utmost to reduce the amount of energy they use and be aware of and sensitive to the environmental impact of their activities. In the real world, however, this is not the case, especially when it comes to PC purchases, where 'green' considerations such as energy efficiency and environmental friendliness take a back seat to more traditional considerations such as functionality, brand and price.

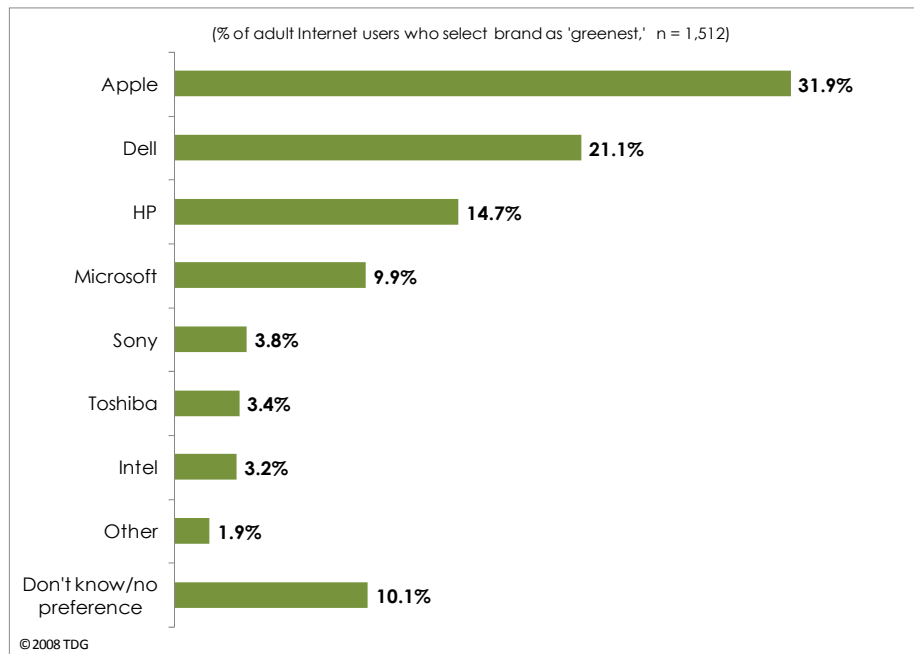
Energy efficiency, though less important than brand, price and functionality, is a relatively important consideration. However, as experience suggests, American consumers are more likely to consider the health of their checkbooks before considering the health of the planet, a fact undoubtedly due to the savings one might encounter in energy bills rather than altruistic 'green' concern.

Environmental friendliness finishes last in virtually all cases, regardless of the segment under consideration. More than four in ten consumers consider these two attributes generally to be

of high importance, but when it comes to deciding which PC to purchase, functionality, price, and brand are more important. One can argue that if and only functionally, brand, and price are the same (which is rarely the case) do energy efficiency and environmental friendliness make much difference in selecting a PC, in which cases they may serve as a tie breaker of sorts. In other words, 'green' attributes are not yet stand-alone qualities capable of spurring a purchase when parity among the traditional attributes does not exist.

Sour Stats on 'Green' Apples

TDG has long commented on the importance of the 'cool factor' when it comes to driving purchases of Apple products and services. It seems that this coolness translates equally well into 'green' perceptions.



When asked to identify which consumer technology brand consumers viewed as the most environmentally friendly, Apple topped the list.

Yet according to Greenpeace's *Guide to Green Electronics* latest quarterly evaluation of green tech companies, Apple ranks 11th

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with a score of 4.1 (on a 10-point scale) and well behind Sony, Toshiba, Dell, Acer, HP, and Panasonic.

How can consumer perception of Apple's 'greenness' vary so widely from reality? Chalk it up to effective marketing and the brand's aura of simplicity in both design and usage. Yes, aesthetics in branding and design matter when it comes to sending a pro-environment message.

Section 6 Are We All Ecologically Incorrect?

To those currently following a 'greener' lifestyle, the results of this research are somewhat disheartening, and sometimes disturbing. In compiling this data, we at TDG were forced to examine our own attitudes and behaviors. For example, at home, we try to conserve energy. We have looked for the "Energy Star" rating on new appliances. We purchase some locally-grown, organic foods. At the office, we recycle (albeit at the persistent – nay, endless – nagging of our office manager), use filtered tap water instead of individual bottles, and carpool – well, at least to lunch. What is happening in your home and office? Is your company adopting a 'green' message to target consumers when its own employees have not jumped to the good green ship? What discrepancies lie between your corporate strategy and your current lifestyle?

Let's think beyond just the green movement (and jump on the 'value of objective research' soap box). As we think about our corporate products and strategies, we must strive to remove our personal or corporate bias from the conversation. Instead, rely on the multiple voices of our consumers.

They say perception is reality. But before buying into that, consider your own perspective. At TDG, we're here to examine that perception and identify the 'reality'. Our job is to keep you In Front of the Curve.™

It's Not Easy Being Green: A TDG Report Series

[Part 1: Eco-Friendly Attitudes and Behavior among U.S. Internet Consumers](#)

[discusses](#) 30 different 'green' variables including general dispositions, technology recycling habits, and both home- and travel-related 'green' activities.

[Part 2: Importance of Energy Efficiency & Environmental Friendliness in Next PC Purchase](#)

[analyzes](#) the extent to which green behavior will impact pending PC purchase decisions and the extent to which different factors impact this behavior.

[Part 3: Consumer Perceptions of Leading Technology Brands](#)

[discusses](#) which key technology brands consumers to be most 'green'.

For more information about TDG, visit our website at www.asktdg.com.

Final Thoughts

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This TDG dBrief offers but a glimpse into the detailed data contained within TDG's 3-report series entitled, *It's Not Easy Being Green*. Each of these reports offers a 'deep dive' into different aspects of 'green' perceptions and behaviors among consumers and a set of comments and recommendations based upon the research.

In all cases, factors such as gender, age, income, education, ethnicity, tech-sophistication, and political dispositions are considered. It is within the more granular analysis that the most useful insights begin to emerge. For example:

- Interestingly, the most tech-savvy consumers are not the most concerned about the environmental impact of CE purchase and usage.
- While most consumers participate in simple forms of green behavior such as recycling household debris or replacing incandescent light bulbs, less than 5% of adults engage in more progressive green behavior (like purchasing a hybrid automobile or switching to a non fuel-based energy provider).
- There exists a strong and undeniable relationship between political affiliation and environmental perception. Specifically, the more politically conservative, the less concerned the consumer tends to be about environmental issues.

Again, these are just a few examples of the insights provided by the larger reports. We hope you take a few moments to visit our website and see for yourself how deep the research goes and how vast the data is.

At TDG, our mission is to help you locate your target audience of today, and point you towards your consumers of tomorrow. We apply our extensive research to your specific strategy. Ultimately, our success lies in helping you find yours.

For more information on TDG's new report series, *It's Not Easy Being Green* please contact sales@thediffusiongroup.com or call 469-287-8050.

About The Diffusion Group

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