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# at the source



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## Consumer Purchasing and Sustainable Consumption Edition Spring 2009

### The Focus of this Issue

This issue of *at the source* focuses on a primary research study of consumer purchasing behaviour undertaken for the Canadian Centre for Pollution Prevention (C2P2). This study was funded by the Office of Consumer Affairs of Industry Canada of the Government of Canada in 2007-2009. The researchers investigated Canadian specific purchasing behaviour patterns, and in particular, the environmental factors we consumers take into account when making purchasing decisions of household consumer products; for example, kitchen surface cleaners, transportation, household appliances, and food. The results suggest possible actions that could lead to more of us incorporating sustainable consumption (see text box on next page) in our purchasing decisions.

This issue summarizes the research study, its findings and implications, and touches on possible actions to encourage sustainable purchasing.

What does the research tell us about our purchasing behaviour? How important is the environment to us when we **consider** buying something? How important is the environment when we **actually make** a purchase? Let's find out.

### Key Findings and Implications

- Canadians express a high degree of concern about environmental issues when they consider buying things, and they recognize that their purchasing decisions have an environmental impact.
  - This finding is consistent with an observed increase in attention that environmental issues have enjoyed in the press and media.
- Despite this high degree of concern and recognition, environmental considerations are consistently weighted less heavily in actual purchase decisions than product cost, durability, and convenience.
  - This finding indicates a need for greater efforts to convince Canadians to give more weight to environmental factors in making purchasing decisions.

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- The Canadian population is evenly split on their willingness to pay more for an environmentally-friendly alternative (~50%, averaged across the three waves of data). Conversely, 50% of the population is not willing to pay anything more for an environmental alternative.
  - This finding too indicates a need for greater efforts to convince Canadians to give more weight to environmental factors in making purchasing decisions.
- When provided with a comparable product in quality (i.e., durability, ease of use, effectiveness), safety, and cost, there is a general willingness among consumers to make the environmental choice.
  - This finding indicates that greater availability of choice of environmentally-friendly products is important to consumers in order to fulfill their desire to purchase an environmentally-friendly product.
- Using a purchasing journal in Wave 2, we found that the most frequently cited barriers to choosing an environmental alternative were (in order of priority): lack of availability, price, and lower quality. Rated as less important were lack of information and convenience.
  - This finding reinforces the importance of greater availability of choice mentioned above, as well as underscoring the importance of maintaining quality and desirable price. Consumers are saying that they do not think they should have to pay more for environmentally-friendly products.
- Consumers report using a variety of cues to determine what is a sustainable product. While there is some variation across product category, point-of-purchase information consistently weighs heavily, including product labels and stickers, in-store material, and asking a salesperson. Outside sources and preparation prior to entering the store are much less common, especially for less expensive products.
  - This finding underscores the importance of the availability of easily comprehensible environmental information at the point of purchase.
- The ENERGY STAR<sup>®</sup> label is a widely recognized and trusted environmental label.
  - This finding underscores the successful marketing and education efforts of the ENERGY STAR<sup>®</sup> program in North America over the years.



## What is sustainable consumption?

Sustainable consumption (SC) means that we can continue to use or consume goods and services over time, without depleting the natural resources needed to produce these things. It is about making smart choices that meet consumer needs in less material and pollution intensive ways.

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- Over the one year period of the longitudinal study, participants purchased 110 automobiles. At the time of purchase, individuals with an intention of making an environmentally-friendly choice were successful in purchasing a vehicle with lower fuel consumption, lower carbon footprint ratings, and lower Energy Impact Scores.
  - This finding indicates that consumers wanting to buy an environmentally-friendly vehicle appear to have been able to find one they could purchase. This finding also reflects: the high fuel prices during the period of the survey, during which auto companies and dealers promoted their fuel efficient models; well known, credible and easily accessible information on vehicle fuel consumption provided by governments in Canada and the United States; and, the impact of increased communication on climate change effects in the same period.
  
- Finally, we developed a “Shades of Green” scale to segment consumers in their orientation toward green products. From this analysis, we identified three segments: Green-to-the-core, Green-on-the-outside, and Greenless. **Green-to-the-core** consumers widely recognize the environmental impact of their daily activities (24% of the sample). They are more likely to be female, older, and they consistently follow through on their intentions to make environmentally-friendly purchases. **Green-on-the-outside** consumers are generally aware of their environmental impact, but have a hard time translating this awareness into action (55% of the sample). While they espouse the importance of environmental considerations in their purchases, their actions are not consistent and they are more easily swayed by considerations of cost, product quality, and convenience. Finally, the **greenless** consumers are generally unaware of their environmental impact, and they consistently weight environmental considerations as low in their purchasing decisions (21% of the sample). They tend to be younger and male.
  - The survey results provide a basis to start systematically differentiating “green” consumers. Such an approach would provide better direction for green consumer public education and other useful actions, such as expanding and strengthening product labelling, as well as placing such information at points of purchase.

Let’s look at the study results in more detail.

## The Results

There is clear evidence that Canadians are concerned about environmental issues and that they recognize that their purchase decisions have an environmental impact. The first set of analyses examined the rated importance of environmental considerations in three different types of purchases: kitchen surface cleaners, household appliances, and transportation decisions. In examining the data across all three waves, we find support for the following three conclusions:



1. *Relevance of Environmental Considerations.* Environmental considerations are seen as more relevant for some purchases than others. In Wave 1, environmental considerations were seen as more relevant for appliances than for kitchen surface cleaners or transportation decisions. Data from Wave 2 shows that across the purchases reported within the last three months, larger purchases draw more environmental concern than smaller household purchases. And, in Wave 3, environmental considerations were influential in actual purchasing behaviours across different purchases (kitchen surface cleaners, personal transportation, and kitchen and laundry appliances).

2. *Unwillingness to Pay.* While there is a small segment of the population that is willing to pay more for an environmentally-friendly alternative, there is a sizeable percentage that is not willing to pay more for an environmentally-friendly product. The following percentages represent the people un-willing to pay more: appliances (Wave 1: 41%), transportation (Wave 1: 44%; Wave 2: 49%; Wave 3: 54%), and kitchen surface cleaners (Wave 1: 37%; Wave 2: 42%; Wave 3: 45%).
3. *Cost, Durability, and Convenience.* In Wave 1, environmental considerations generally take a backseat to purchase cost, durability, and convenience. This was seen across the three classes of purchase decisions. The pattern suggests that Canadians are interested in making environmental purchases, provided that the product is comparable in quality, similarly priced, and clearly identified either through the label or by a sales person. This is clearly seen in the data presented in Wave 2. Respondents who reported environmental concern in their purchasing decision purchased more energy efficient cars than those who reported lower environmental concern in their purchasing decision.

We'll look more closely at the results from each of the three types of purchases: kitchen surface cleaners, personal transportation, and kitchen and laundry appliances. But first, a look at the study itself.



## The Research Study

The primary research study, “Sustainable Consumption” was conducted by a project team led by C2P2, and funded by Industry Canada’s Office of Consumer Affairs in 2007-2009. Following a literature review, the researchers conducted a one year longitudinal study of three survey waves (questionnaires) with the same group of respondents to better understand the purchasing behaviour patterns of Canadians. For the surveys, 1036 respondents, selected from the Harris/Decima on-line panel, were drawn from across Canada. The sample of respondents was consistent with the current demographics described in the most recent Canadian census data. Eighty seven percent of the surveys were completed in English and 13% were completed in French.

The first survey wave sought information on the way in which individuals think about environmental issues, and then, on how their thinking relates to major classes of purchasing decisions—kitchen surface cleaners, transportation, and appliances.

The second survey wave tracked the purchasing behaviour of Canadians over time, to better understand the factors that influence these behaviours. The longitudinal design of the study allowed for comparisons of the *stated* importance in purchasing decisions and subsequent actual purchases. Again, questions dealt with three major classes of goods—kitchen surface cleaners, transportation, and appliances. In addition, the researchers reported data from a “Purchase Journal” incorporated into the second survey. Lastly, they provided statistical comparisons of the stated importance of environmental concerns in the first survey, and the actual purchases reported in the in the second survey.

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The third survey wave continued to track the purchasing behaviour of Canadians over time and factors associated with this behaviour. In addition, researchers collected the make and model of appliance purchases in order to further understand the actual purchasing behaviours of consumers. Using different analytical techniques, researchers examined changes over time and further examined the process by which Canadians select environmentally-friendly products.

In reporting the findings, the researchers specifically addressed the following six questions:

1. What are the consumer values related to Sustainable Consumption and purchasing?
2. To what extent do consumers incorporate sustainability issues in their purchasing decisions?
3. How do consumers determine what is a sustainable product?
4. What are the barriers to sustainable purchasing behaviour?
5. What is the correlation between purchase intent and purchase behaviour with SC products and services?
6. How can consumers be segmented based on their values, attitudes, or behaviours regarding SC?



Because this study looked at the purchasing behaviour of Canadians over time, it allows us to better understand the factors that influence these behaviours. Rather than simply asking consumers why they purchased a certain product, the researchers investigated the purchasing process, from contemplation through purchase.

Now, let's look more closely at the three types of purchases: kitchen surface cleaners, personal transportation, and kitchen and laundry appliances.



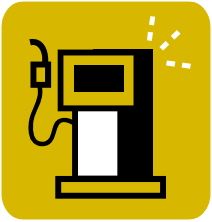
### **Kitchen Surface Cleaners**

Across all three waves of this study, 63% of Canadian consumers said they wanted a kitchen surface cleaner that is effective in removing food particles and spills. They want something that takes into account their health and is safe to use (51%), while not requiring any extra time and effort (55%). Less important considerations are environmental concern, cost, and perception by friends and neighbours.

When asked about their decision regarding which kitchen surface cleaner to use most often, Canadian consumers think environmental concern is important in their decision, but not as important as effectiveness, health and safety, time and effort, and sometimes cost.

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*Kitchen Surface Cleaners cont'd...*



While some Canadian consumers (41%) are willing to pay extra for environmentally-friendly alternatives for their kitchen surface cleaners, most are not. Yet, interestingly, Canadian consumers are equally split on how much they agree that environmental impact is a priority over immediate needs: 50% agree, and 50% disagree.

## Personal Transportation



Similar results were found for decisions about personal transportation. Across all three waves of this study, Canadian consumers (58%) said that the extent to which the vehicle was easy to drive, as well as cost (54%), were top priorities in their decision to purchase a car. They also want a vehicle that takes into account their comfort (52%), and health and safety (51%). Less important considerations are environmental concern (21%), government incentives (9%), and perception by friends and neighbours (2%).



Canadian consumers think environmental concern is important in their decision to purchase a new car, but not as important as its ease to drive, cost, comfort and health and safety. And, while some Canadian consumers (49%) are willing to pay extra for environmentally-friendly alternatives for their personal transportation, most are not. When personal transportation is being discussed, only 43% of Canadian consumers agree that they would prefer to give priority to environmental impact over personal benefits or needs.



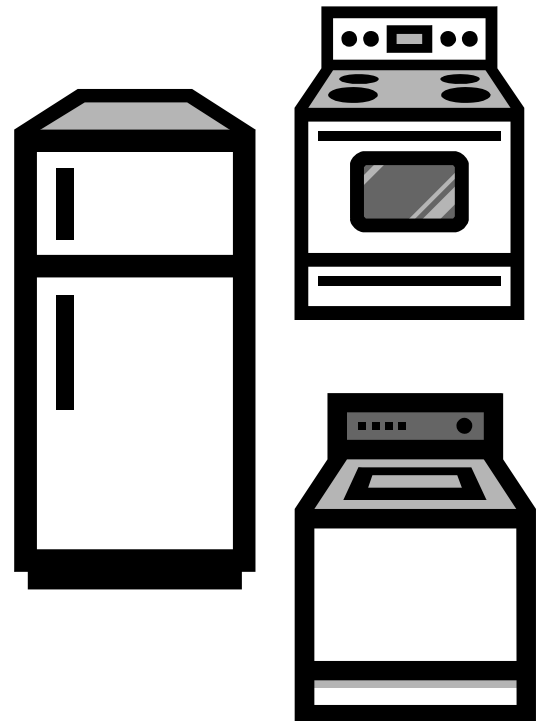
A personal automobile was the primary mode of transportation for 74% of Canadians, with public transportation (train and bus) the primary mode for 12%, bicycle for 2%, scooter or motorcycle for 1%, walking for 9%, and carpooling for 2%. The most cited reasons for the modes were: personal automobile – to save time and effort; public transportation – reduce costs; walking – personal health benefits; bicycle – personal health benefits; carpooling – reduce costs; and, scooter / motorcycle – to save time and effort.

## Major Kitchen and Laundry Appliances

Across all three waves of this study, 87 % of Canadian consumers said that durability, cost (63%), and environmental concern (55%) were important in their decision to purchase kitchen and laundry appliances. Less important considerations are time and effort (49%), health and safety (46%), and perception by friends and neighbours (>1%).

Canadian consumers think environmental concern is important, but not as important as durability and cost. While some Canadian consumers (44%) are willing to pay extra for environmentally-friendly alternatives for their kitchen and laundry appliances, most (56%) are not. Yet when kitchen and laundry appliances are being discussed, most Canadian consumers (90%) agree that products with and ENERGY STAR<sup>®</sup> label are less damaging to the environment.

Now let's see what answers the researchers got to their six questions.



## Q1: What are the consumer values related to SC and purchasing?

An important aspect in understanding SC is the way in which individuals orient themselves to their family and friends, the community, and the natural environment. Scores were on a graphical seven point scale. Respondents felt most connected to their family and friends (4.46), followed by nature (3.83), and then with their community (2.63). While scores are generally low, it is worth noting the particularly low degree of connection that Canadians feel to their communities.



Another important aspect of SC is the way in which individuals think about environmental issues. In looking at the responses provided by Canadian consumers, most Canadians believe that the environment should be given priority over: economic growth and creating jobs, increased taxes, increased cost of living, and personal benefits and lifestyle (see table below).

| How individuals think about environmental issues.  | % Agreed |
|--|----------|
| Q: Environment should be given priority over economic growth and creating jobs   | 65%      |
| even if it increases taxes   | 58%      |
| even if it increases cost of living  | 54%      |
| Q: Economic growth should be given priority, even if the environment suffers   | 14%      |
| Q: long-term social well-being should be given priority, even if it reduces personal benefits and lifestyle  | 66%      |
| Q: Government regulations and laws directed at companies should be given priority to solve our environmental problems over campaigns designed to get Canadians to change their purchase or usage behaviours (such as, 'reduce, re-use, and recycle') | 74%      |

When asked how often they consider the environmental impact of their actions in their daily lives, 49.5% of Canadian consumers report moderate consideration.

There was a strong relationship between rated environmental concerns in purchasing decisions and consideration of environmental impact across product categories. That is, people who report a general level of consideration for environmental impact also weight environment more heavily in their subsequent purchases. The reported correlations are time-lagged, with general consideration of impact at Wave 1 predicting environmental consideration at Wave 2 and 3. The strength of the correlations indicates a general stability in environmental considerations and a tendency for individuals with environmental values to follow through in their purchases.

Taken together, these results suggest that Canadian consumers hold moderate environmental values toward SC and purchasing. And when making a purchase, the degree to which Canadians consider the environmental impact of their actions in their daily routine correlates positively with their purchasing decisions.

## Q2: To what extent do consumers incorporate sustainability issues in purchasing decisions?

Canadian consumers incorporate sustainability issues in their purchasing decisions, as long as their immediate personal desires are met. For instance, when looking at factors that consumers report as important in various purchasing behaviours (kitchen surface cleaners, personal transportation, and kitchen and laundry appliances) personal considerations are reported as more important than environmental impact. For kitchen surface cleaners, 63% said effectiveness was important, 55% time and effort, and 51% health and safety. For personal transportation, 58% said ease of driving was important, 54% cost, and 51% health and safety. For kitchen and laundry appliances, 87% said durability was important, 63% cost, and 55% environmental concern. Environmental concern shows up as the third purchase decision factor, behind durability and cost, for purchase decisions of kitchen and laundry appliances.

## Q 3: How do consumers determine what is a sustainable product?

Canadian consumers use a variety of cues to determine what a sustainable product is, and these cues vary by type of product. When determining if a kitchen surface cleaner is a sustainable product, respondents reported reading the product label or sticker. Whereas when purchasing a vehicle, respondents reported reading the newspaper or a magazine article.

When asked if purchasing a product based on the ENERGY STAR<sup>®</sup> label reduces damage to the environment, on average 90% of respondents agreed. Note that the percentage is based on the average response across all three waves of data collected.

Taken together, the results suggest that kitchen surface cleaners are most likely to benefit from additional labelling. Personal transportation, and kitchen and laundry appliances are most likely to benefit from green marketing, with respondents recognizing that the ENERGY STAR<sup>®</sup> label is effective in reducing damage to the environment.

Based on the Wave 2 Purchasing Journals kept by respondents and their purchase of 13 common household items, the items that were given the highest environmental consideration were light bulbs. Also rated highly were lawn weed treatment, and laundry detergent. Surprisingly, items that were rated lower in consideration included fresh fruit and produce, paper products, bottled water, and batteries.

## Q4: What are the barriers to sustainable purchasing behaviour?

The number one barrier to sustainable purchasing behaviour reported in this sample was cost. While there is a small segment of the population that is willing to pay more for an environmentally-friendly alternative, there is a sizeable percentage that is not willing to pay *anything more* for an environmental product. For kitchen surface cleaners, 41% said they were not willing to pay anything more, for personal transportation, 49%, and for kitchen and laundry appliances, 41%.

When examining the barriers to sustainable purchasing behaviour, we can also draw from the information provided by respondents when asked what, other than lower price, would encourage them to switch to an environmentally-friendly product. For kitchen surface cleaners, 'effective,

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...Question 4 cont'd

good alternative cleaner that may be better than other cleaners' would encourage them. For personal transportation, 'fuel consumption / savings / fuel efficiency, and comfort' would encourage consumers. For kitchen and laundry appliances, 'effectiveness and durability' would encourage them to buy an environmentally-friendly product.

From the above responses, we can see that offering products that meet the needs of consumers is necessary for sustainable purchasing behaviours. When sustainable products that meet consumers' needs are not available, consumers will choose a non-sustainable product. However, if their needs are met, it seems Canadian consumers will choose the sustainable product.

### **Q5: What is the correlation between purchase intent and purchase behaviour with SC products and services?**

The data show a strong correlation between Canadian consumers' intentions to purchase environmentally-friendly products and services, and reported importance of environmental impact at the time of purchase. When looking at the importance of environmental concerns in deciding what kitchen surface cleaners to use most often, correlations between the reported importance of Wave 1, and the average intention to purchase

environmentally-friendly products and services at Wave 2 and 3 were examined. There was a significant correlation of intentions from Wave 1 to Waves 2 and 3.

This relationship is also seen when looking at the purchasing decisions for personal transportation. The data show that importance of environmental concerns at Wave 1 correlate strongly with deciding what transportation to purchase at Wave 2 and 3.

These results show that consumer purchase intent (at Wave 1) was strongly correlated with the reported consideration of environment at the time of purchase (Wave 2 and 3). However, the above analysis only focuses on reported intentions and may not reflect the actual item purchased. That is, the consumer may report giving serious consideration to environmental impacts but purchase a very inefficient appliance.

To examine this issue, researchers analysed the actual purchases and how these purchases are related to the stated importance of environmental concern. That is, researchers examined the relationship between a consumer's stated importance of environmental considerations with outside rating of the environmental impact of the product they purchased. The focus was on the 110 automobile purchases made by survey participants—a product for which there are environmental ratings (ratings of environmental impact scale, carbon footprint, and fuel consumption—L/100 km). From these analyses, we find that consumers are generally accurate in their reporting of environmental consideration at the time of purchase. That is, automobiles with a higher Environmental Impact Score, carbon footprint, and more L/100 km, were more common among consumers who reported low levels of environmental considerations in their purchase. However, it seems that Canadian consumers tend to over-state the importance of environmental concern when asked about their future intent to purchase their primary transportation. Taken together, these results suggest that Canadian consumers, who at the time of purchase have the intent to purchase an

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...Question 5 cont'd

environmentally-friendly vehicle, usually make suitable choices. While it is unclear if this purchasing behaviour is specific to personal transportation purchases, there is a relationship between their intent to purchase sustainable products and services, and their intent at the time of purchase with other products (kitchen surface cleaners, and kitchen and laundry appliances). This relationship suggests that if an individual intends to purchase a more sustainable product at the time of purchase, they are generally effective in making a sustainable choice.

### **Q6: How can consumers be segmented based on their values, attitudes, or behaviours regarding SC?**

One way Canadian consumers can be segmented is by creating profiles based on the degree to which they value nature, and the degree to which they consider the environmental impact of their daily actions. To explore this issue, researchers computed a composite score based on the respondent's reported degree to which they consider the impact of their daily actions on the environment, along with their reported connectedness with nature. Respondents were asked, "In your daily routine, how often do you consider the environmental impact of your actions?" and, "How connected are you with nature? Please indicate which of the pictures below best describes your relationship with the natural environment." There were seven pictures, starting with one of two side-by-side circles 'Self' and 'Nature', then five progressively overlapping circles, and ending with one circle containing 'Self Nature'.

From the data collected, researchers identified profiles of Canadian consumers, and their values, attitudes, and behaviours regarding sustainable consumption. From the composite score, three important segments or profiles were identified: Green-to-the-core, Green-on-the-outside, and Greenless.

*Green-to-the-core:* Canadian consumers who are 'Green-to-the-core' consider the impact that their daily actions have on the environment. In addition, they believe that they are part of nature.

*Green-on-the-outside:* Canadian consumers who are 'Green-on-the-outside' give moderate consideration to the impact of their daily actions on the environment. Yet, they report a moderate level of connectedness with nature. In addition, this group may endorse a high level of consideration for environmental impact, but may not see themselves as connected with nature, or vice versa.

*Greenless:* Canadian consumers who are 'Greenless' do not consider the impact of their daily actions on the environment. In addition, they believe that they are separate from nature, endorsing a low level of connectedness.

In looking at these profiles statistically, we can begin to see how these groups are different based on their value, attitudes, and behaviours. Canadian consumers who endorse some greenness (Green-to-the-core, and Green-on-the-outside) have a higher proportion of females; whereas Canadian consumers who endorse being 'Greenless' have a higher proportion of males. There is a significant difference in age by 'Degree of Green'. Canadian consumers who endorse being 'Green-to-the-core' are significantly older than Consumers classified as 'Green-on-the-outside' and 'Greenless'. There were no age differences between Canadian consumers who endorse being 'Green-on-the-outside' and 'Greenless'.

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Question 6 cont'd...

Interestingly, when looking at the stated importance of environmental concern in purchase decisions, we find that there are significant differences in reported importance and the endorsed Degree of Green. Overall, Canadian consumers classified as 'Green-to-the-core' also think that environmental concern is important in their purchasing decisions. Canadian consumers with a 'Green-on-the-outside' profile report that environmental considerations are important in their purchasing decisions, but to a lesser degree than consumers classified as 'Green-to-the-core', yet, still more than those classified as 'Greenless'. All differences are statistically different. Canadian consumers who endorse a higher Degree of Green (Green-to-the-core) also place more importance on environmental concern in their purchasing decisions.

When looking at the differences in the importance of environmental concern at the time of personal transportation purchases, there are significant differences in the importance across the Degree of Green groups. Those Canadians who hold a lower Degree of Green (Greenless) think environmental concern is only moderately important in their purchasing decisions to buy a car. This view differs significantly from the Green-to-the-core and Green-on-the-outside groups, who report that environmental concern in their purchasing of personal transportation is very important.

While Canadian consumers who endorse a high Degree of Green say that environmental concern is important in their purchasing decisions, their actual purchasing of personal transportation often falls short. There were no significant differences between Canadian consumers who endorsed a high Degree of Green when compared to those who endorsed a low Degree of Green in the Environmental Impact Score, the fuel consumption (L/100 km), or the carbon footprint of their purchased vehicles.

In light of the study results, are there things we might do to encourage sustainable consumption?



## Actions to Encourage Sustainable Consumption

Most Canadian consumers believe that the environment should be given priority over: economic growth and creating jobs, increased taxes, increased cost of living, and personal benefits and lifestyle. It appears that Canadians would support action in the form of stronger laws and regulations directed at companies to solve our environmental problems, and Canadians appear prepared to pay for environmental protection, in terms of increased taxes and cost of living.

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...Actions cont'd

On these matters, there is room for action by Federal, Provincial and local governments, possibilities include, packaging requirements, and extended producer responsibility. When buying a kitchen surface cleaner, Canadian consumers read the label or sticker for environmental information. They recognize that products with the ENERGY STAR<sup>®</sup> label reduce damage to the environment. These results suggest that kitchen surface cleaners are most likely to benefit from additional labelling. Other products also would likely benefit from comprehensible and comparable labelling (encouraged or required), which better indicates their environmental friendliness based on product life-cycle. The effect of such labelling could be maximized if it was administered by an impartial agency.

The main barrier to sustainable purchasing behaviour reported in this study was cost. But consumers are encouraged to switch to environmentally-friendly products by such factors as, effectiveness, fuel efficiency, and durability. To encourage sustainable consumption, actions by producers and governments might include, cash incentives (e.g. discount coupons, tax rebates, grants) to lower cost, more fuel efficient vehicles and possibly a requirement for them, more durable products, and improved warranties regarding effectiveness and durability, especially for appliances.

Canadian consumers who endorse being 'Green-to-the-core' are significantly older than consumers classified as 'Green-on-the-outside' and 'Greenless'. Those who endorse being 'Greenless' have a higher proportion of males. These findings suggest action by governments, NGOs and school boards, targeting younger people, especially males, to increase their awareness of environmental concerns and the importance of environmentally-friendly products and sustainable consumption.

Now that we know more about our purchasing behaviour, we can all try to 'green it up', and keep it green.

### Additional Information

The full report *Sustainable Consumption: How can we Encourage Consumers to Purchase Sustainably?* is available at the following link:

<http://www.c2p2online.com/documents/Final%20Report,%20Sustainable%20Consumption.pdf>

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