

This presentation premiered at WaterSmart Innovations

watersmartinnovations.com



Why consumers don't care about wasting water. And what we can do about it.

Water Smart Innovations Conference
10/5/17

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Gain a sustainable advantage

We create a market advantage for organizations who create a sustainable, responsible future.



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Americans care about the environment...

64%

believe in climate change

52%

feel anxious about it

n=2,025



90%

think the average person should be taking concrete steps to reduce his/her environmental impact.

76%

feel at least moderately responsible for changing daily purchase habits and practices to positively impact the environment.

(up from 71% in 2015)

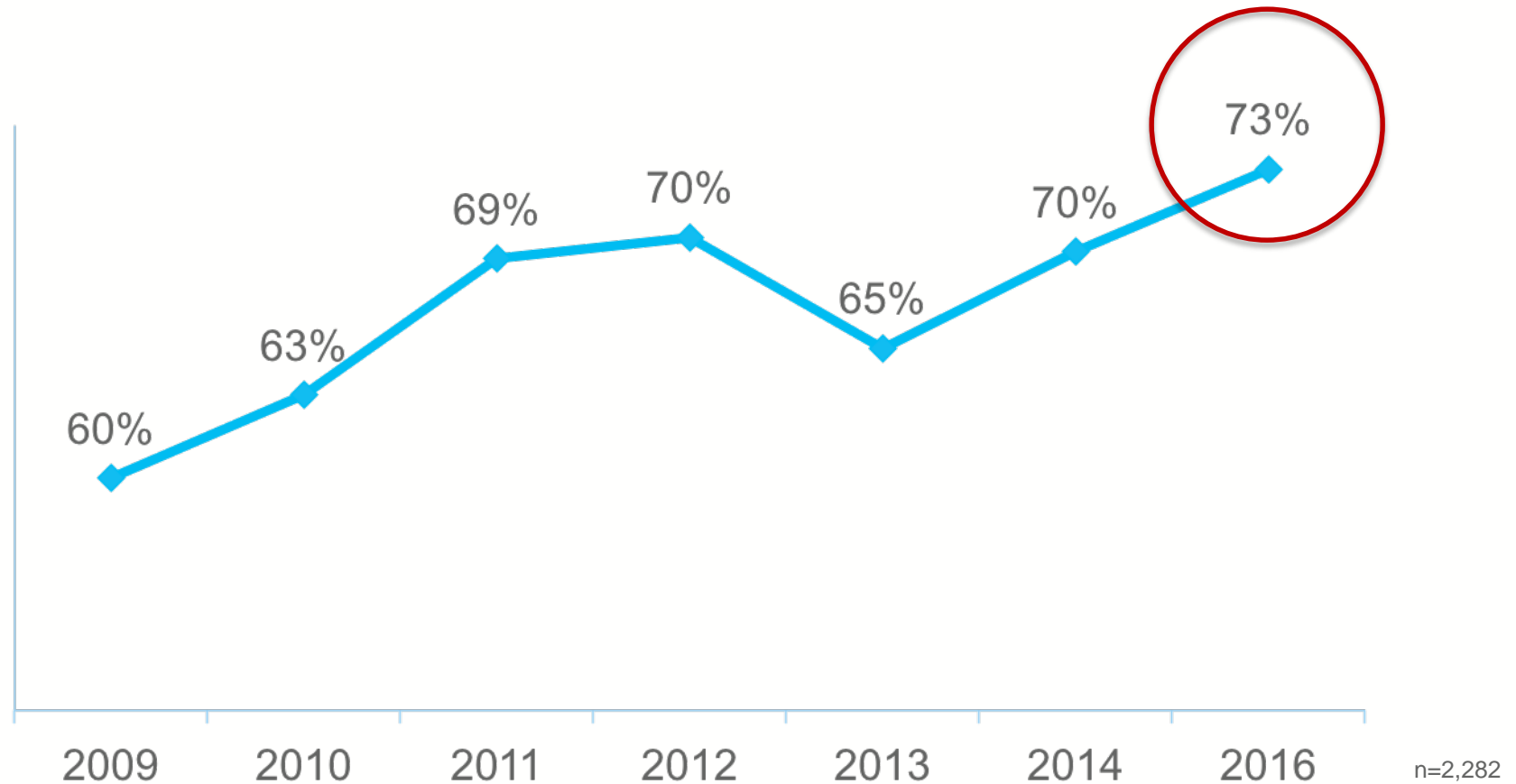
n=2,282

Q1 – Do you think the average person should be taking concrete steps to reduce his or her environmental impact?

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Almost three-quarters said they're searching for greener products (the highest % in 8 years).



Q6 – Are you searching for greener (more energy-efficient, natural, sustainable, etc.) products these days?

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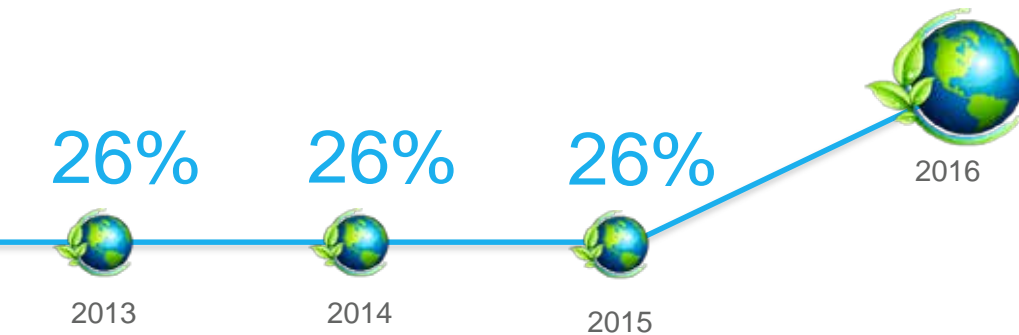
85%

say they've purchased greener options
in at least one of 17 product categories

n=2,029

45% → 51%
of Millennials

say buying/using eco-friendly products is an important part of their personal image



The average number of green activities has gradually increased:

2014: 11

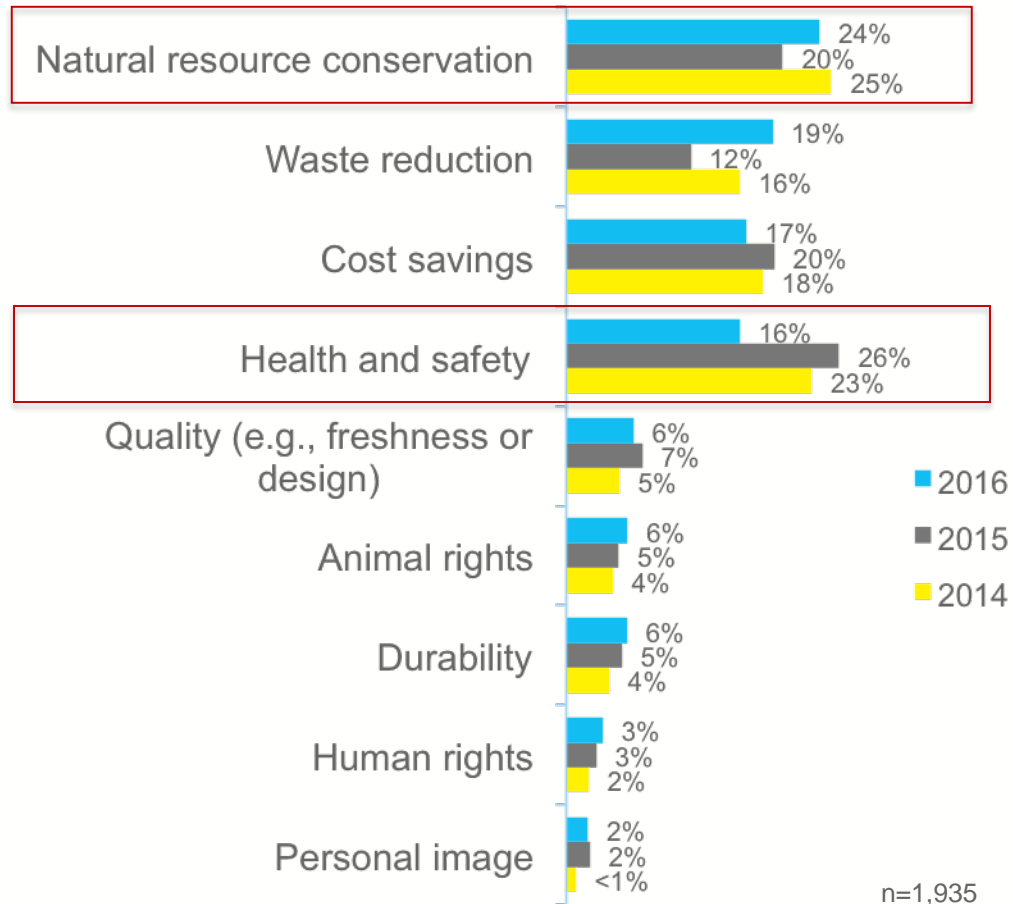
2015: 11.5

2016: 13

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Concern for natural resources and concerns over health and safety are the strongest drivers.



Q8 – Which concern most often drives your greener product purchases?

74%

say a company's environmental
reputation impacts product purchase
decisions

n=2,029

And ... when your business is water-related, you should be known for water conservation.

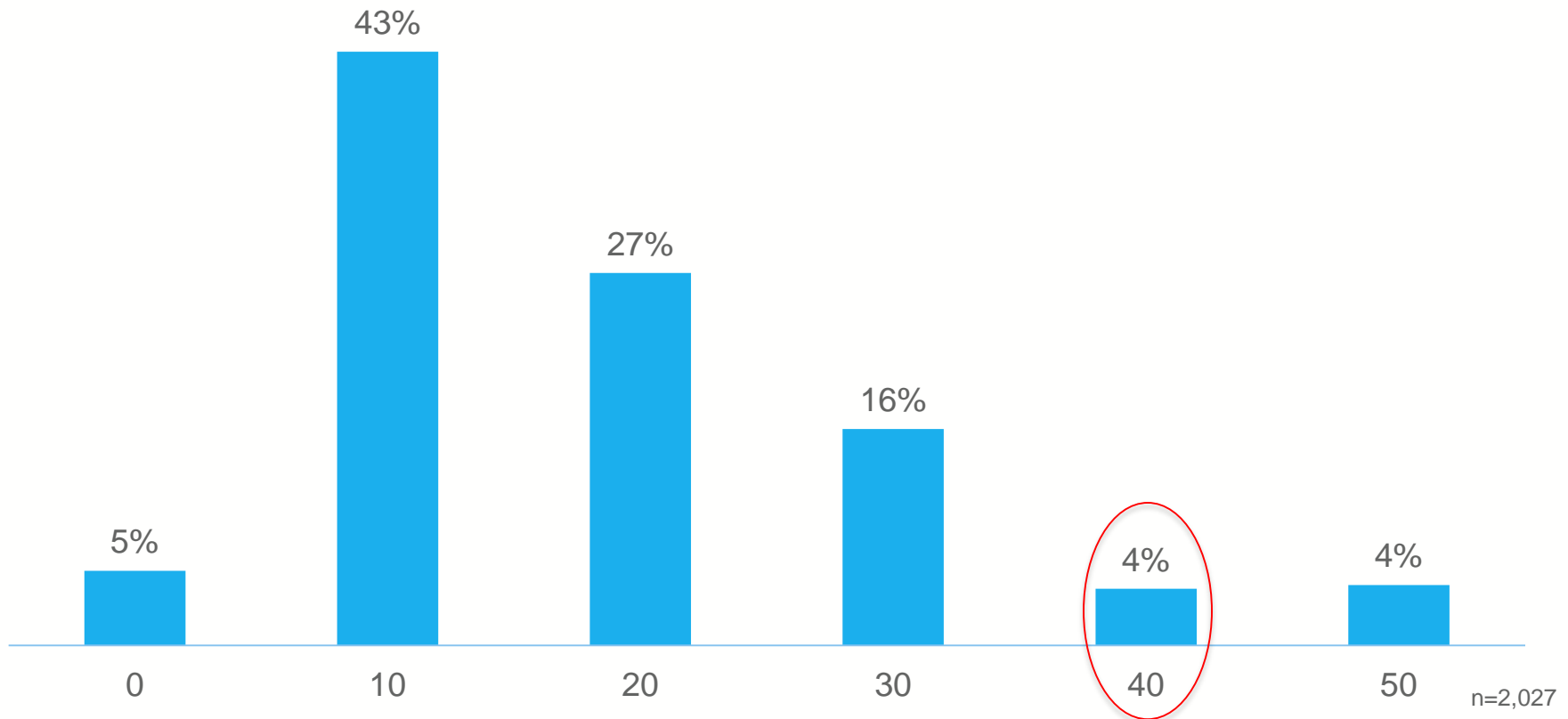
- “*Company Z is one of the world’s leading manufacturers of sinks, tubs and toilets. Which activities would you most like to see Company Z undertake?*”
 - ***Capture and reuse 90% of the water it uses during manufacturing – 62%***
- “*Company Y is a global beverage brand that sells a billion servings of soda every day. Which activities would you most like to see Company Y undertake?*”
 - ***Replace 90% of the water it uses by providing clean drinking water to communities – 66%***



But there's a big disconnect when it comes to
personal actions re: water

Let's start with the broader context

Americans underestimate the issue of water scarcity in the U.S.

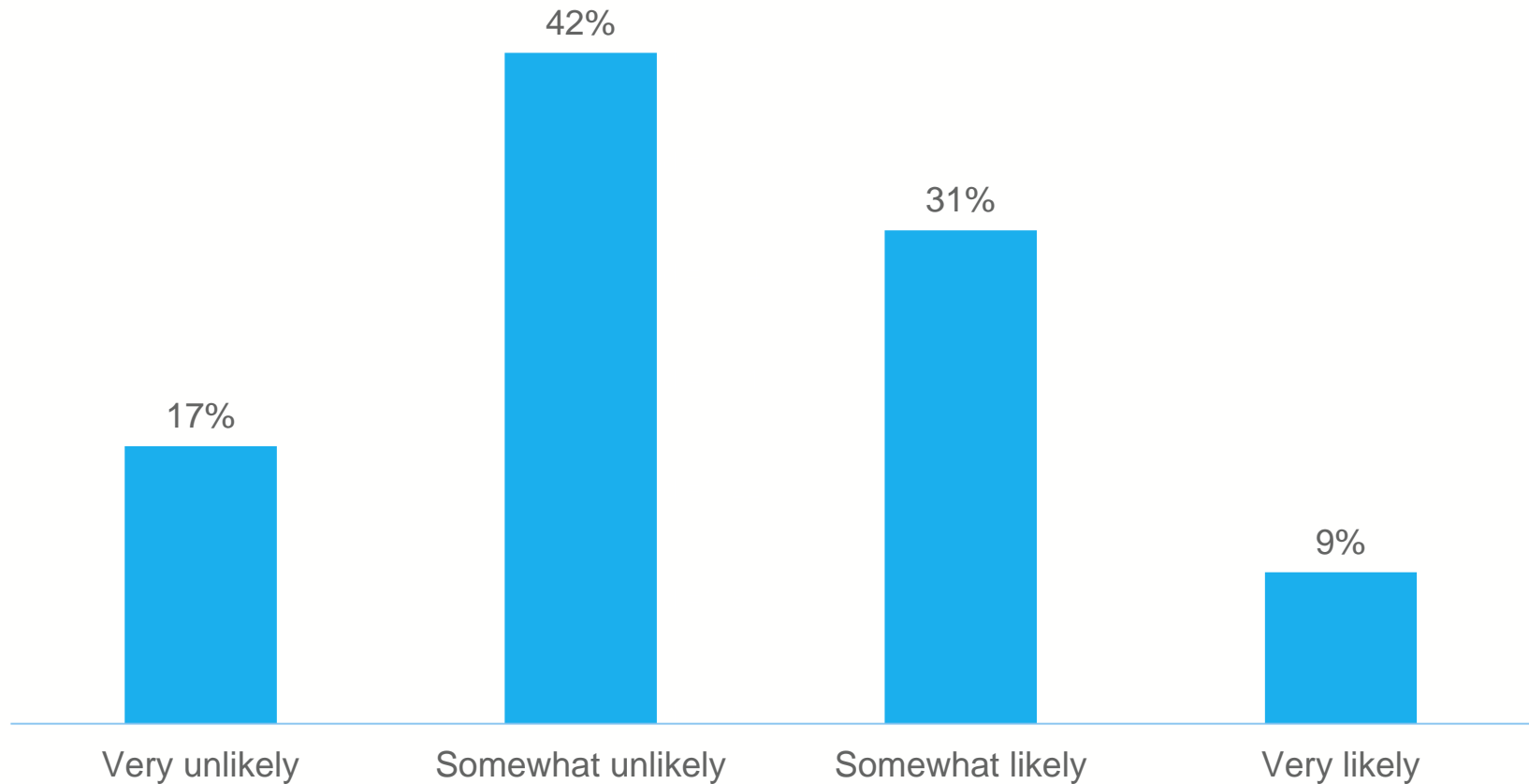


Q49a – How many American states do you think are likely to experience some kind of water shortage within the next 10 years?

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Most think a severe water issue is unlikely in the U.S. or Canada.



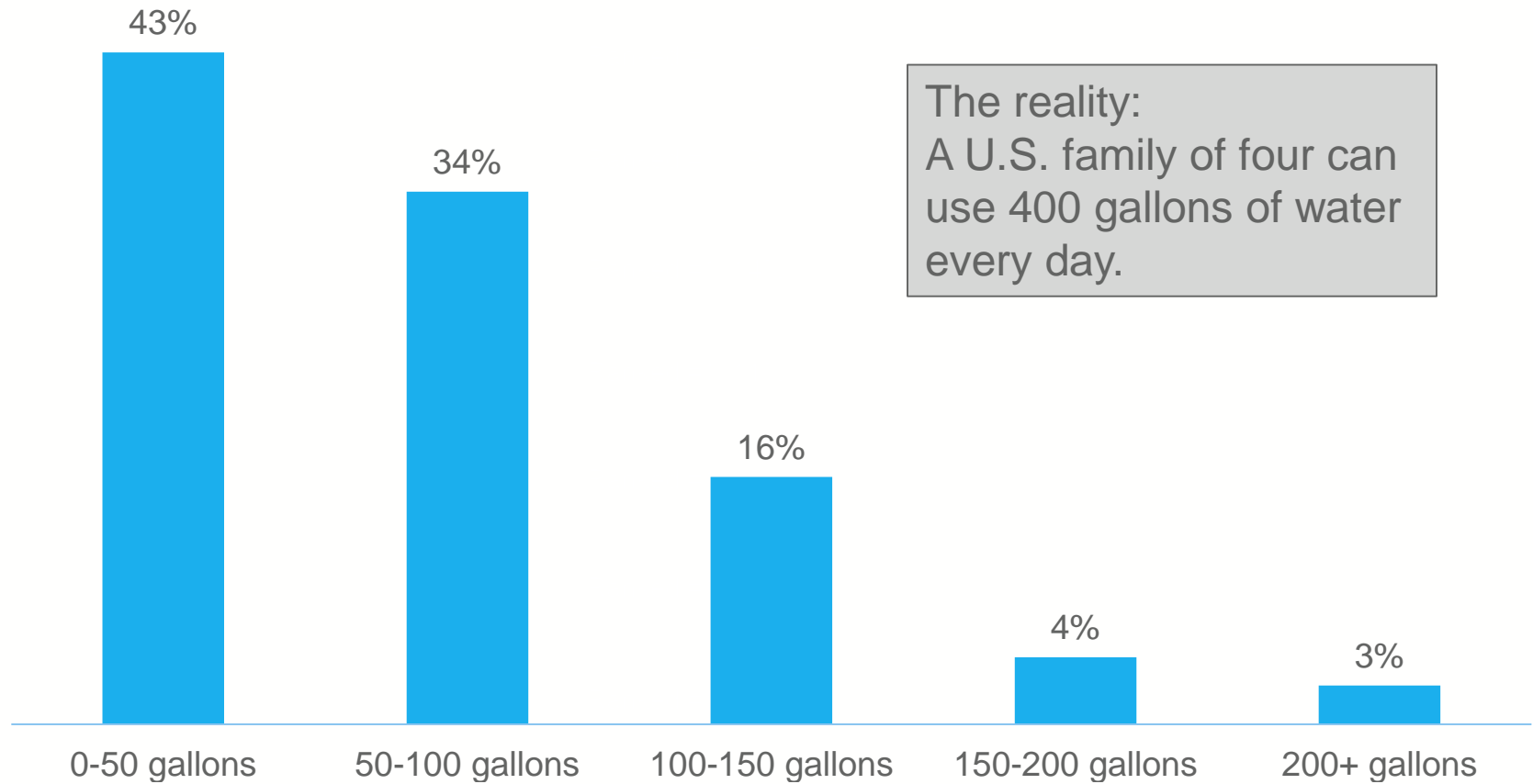
n=2,282

Q48 – In 2015, Sao Paulo, Brazil, experienced a severe drought. Residents were told they could only have full access to clean drinking water two days per week, with restricted access the rest of the week. How likely do you think it is that a similar situation could happen in a city in the U.S./Canada?

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The vast majority underestimate their household water use.



The reality:
A U.S. family of four can use 400 gallons of water every day.

n=2,282

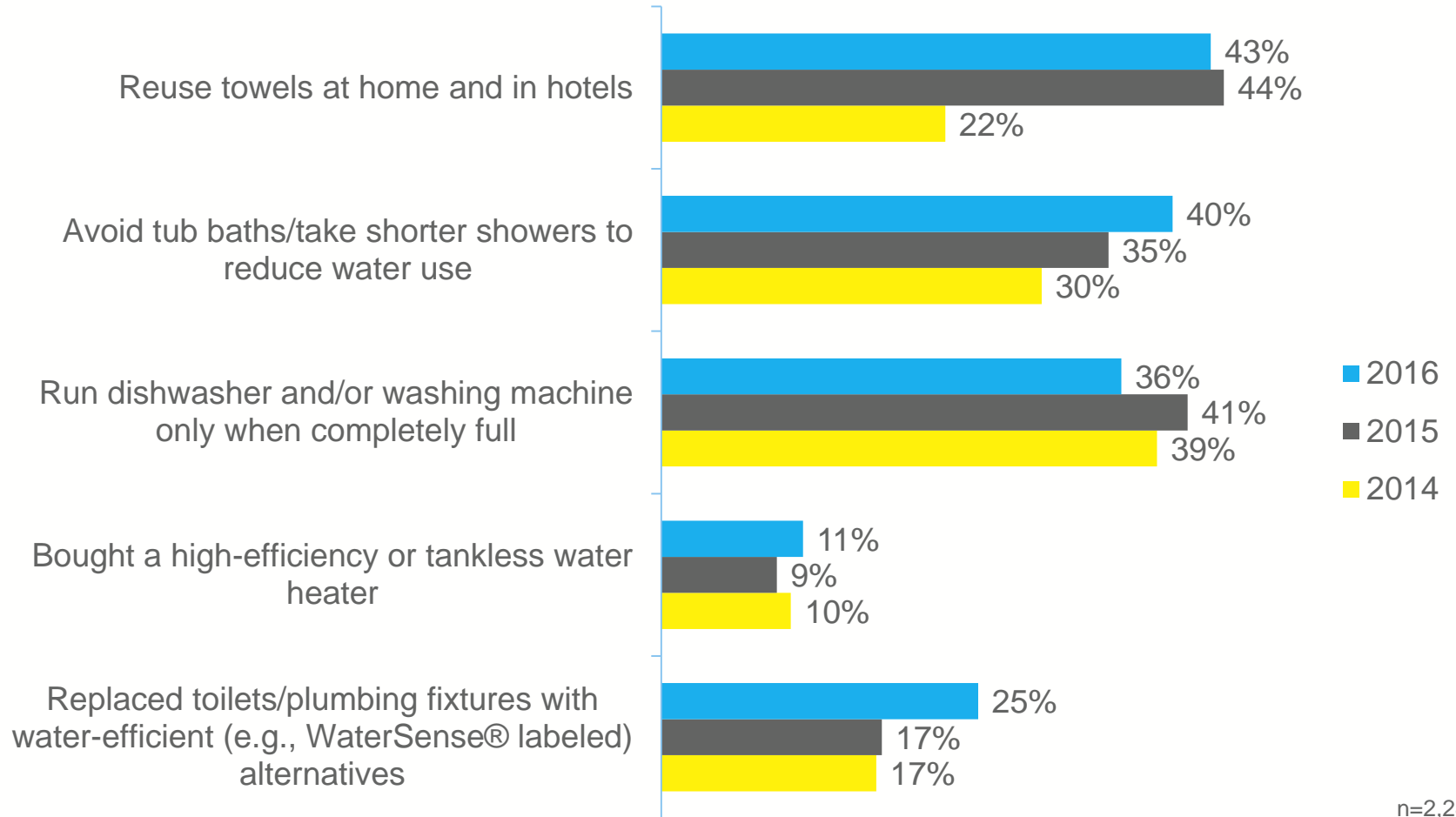
Q28 – On average, how many gallons of water do you think your household uses a day (while bathing/showering, cooking, washing clothes, watering the lawn, etc.)? (Please offer your best guess if you don't know.)

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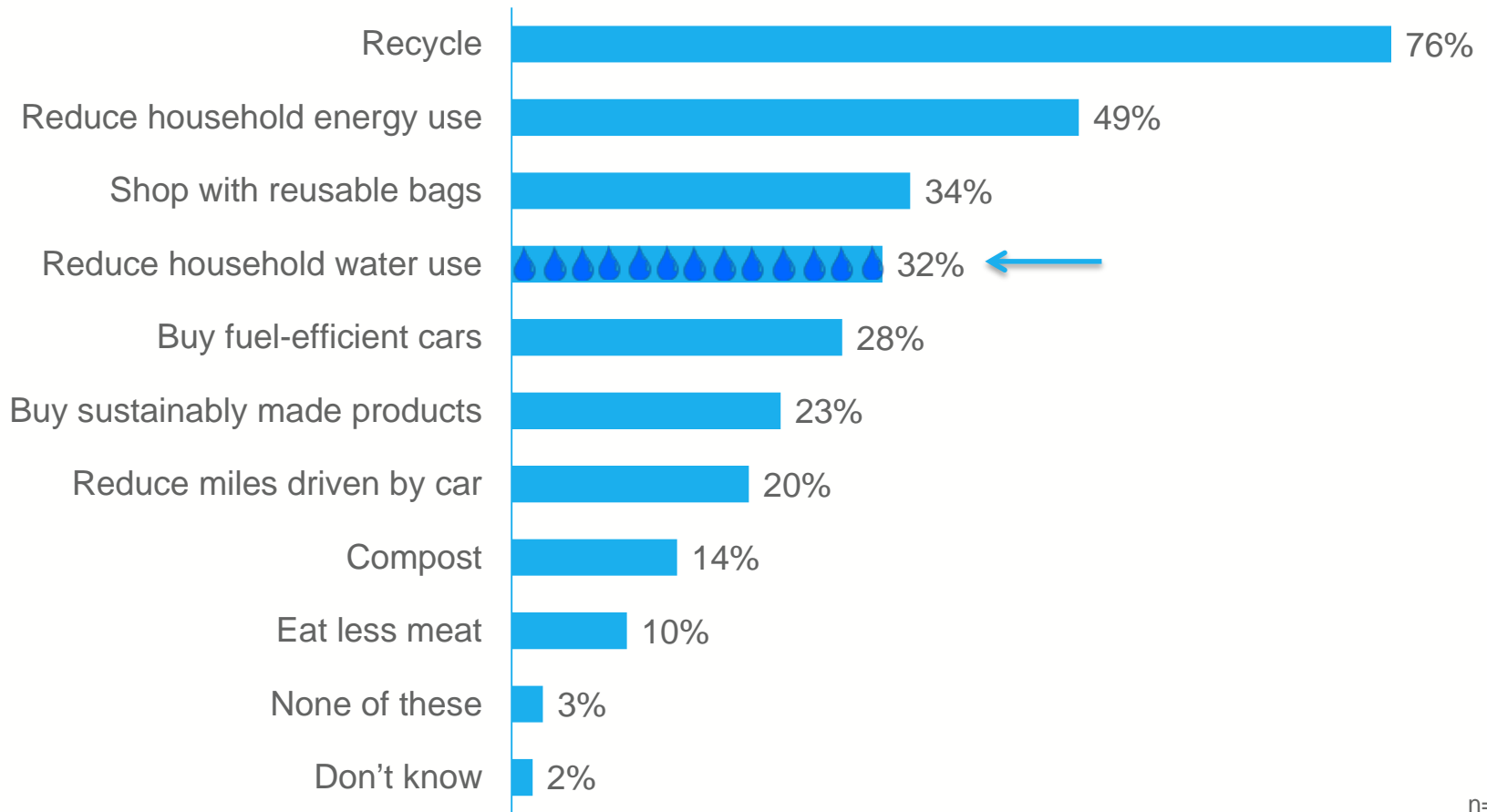
They're not doing much to conserve water.

Less than half have adopted water conservation behaviors. Water-related home improvements lag far behind energy ones.



Water Conservation Activities

Less than one-third prioritize water conservation to reduce their environmental impact.



n=2,282

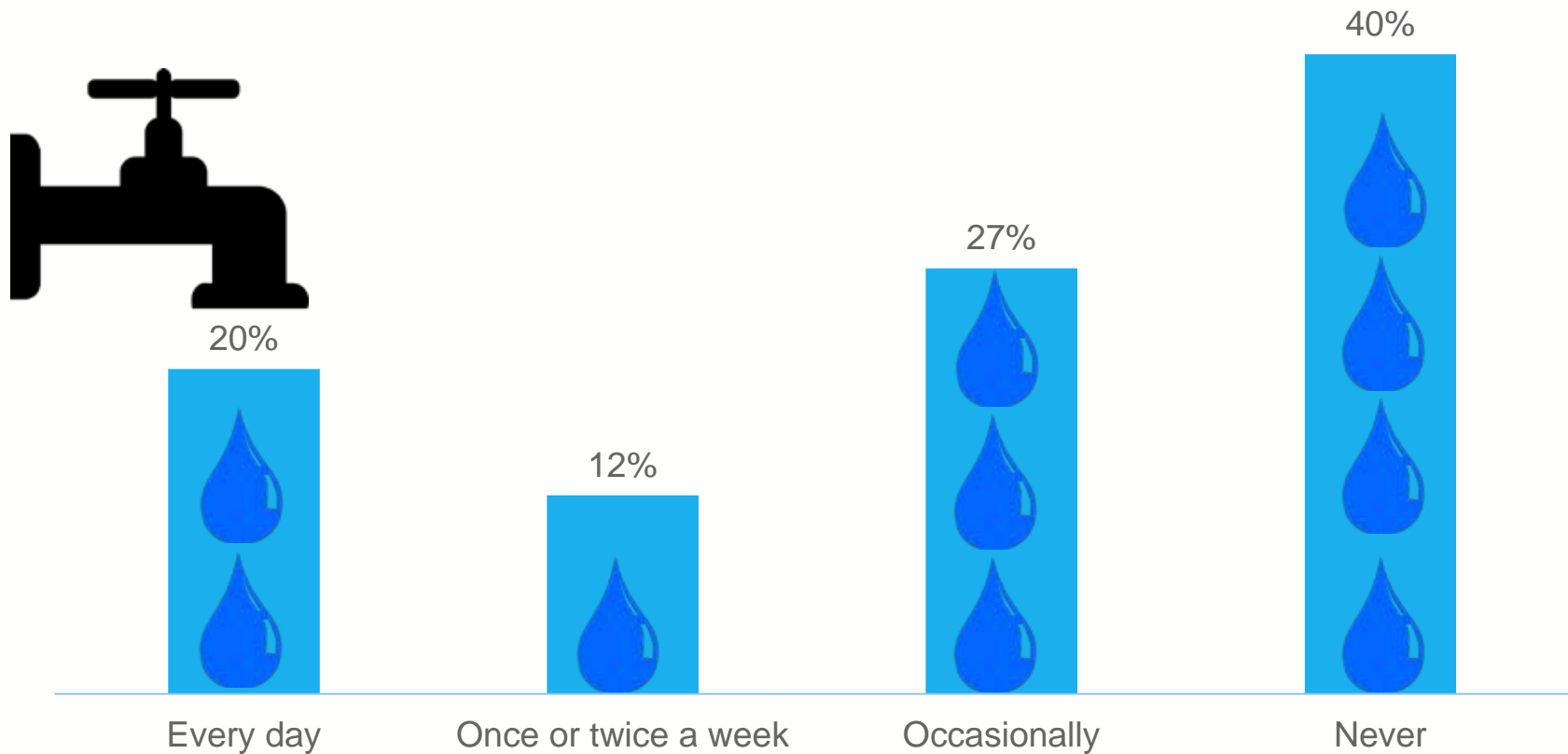
Q3 – Choose the three most important things you should do if you want to minimize your environmental impact.

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When pressed, most know there is more they could be doing.

60% acknowledge wasting water, at least occasionally.



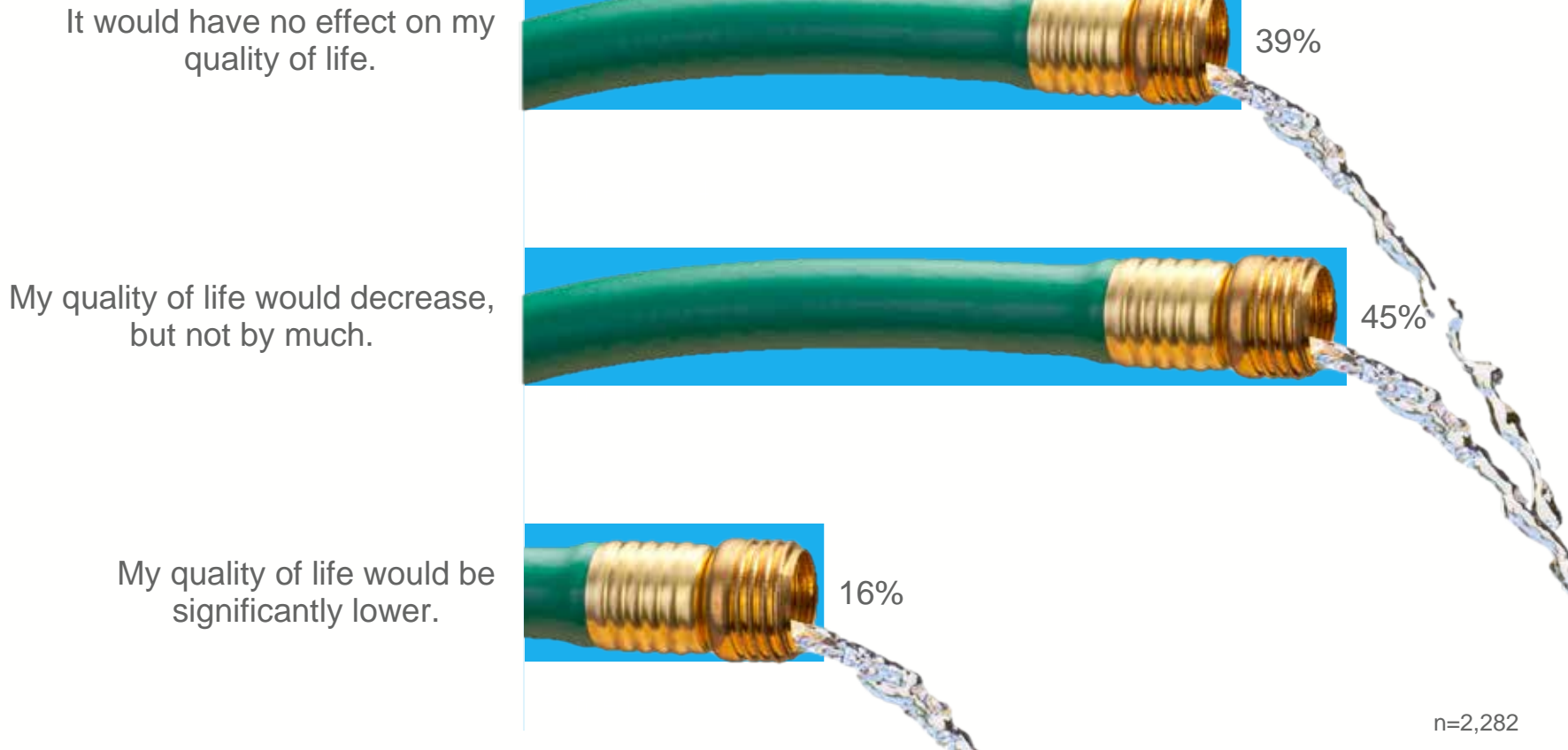
n=2,282

Q38 – How often do you let the water run while you brush your teeth (instead of turning it off while you brush)? Choose the answer that most closely reflects your habits.

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Most agree that cutting water use wouldn't really negatively affect them.



n=2,282

Q46 – How would cutting your water use by a third affect the quality of your life?
Choose the answer that most closely reflects your opinion.

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47% said they need more information, while 30% don't believe they should have to conserve.

■ Disagree

■ Neither agree nor disagree

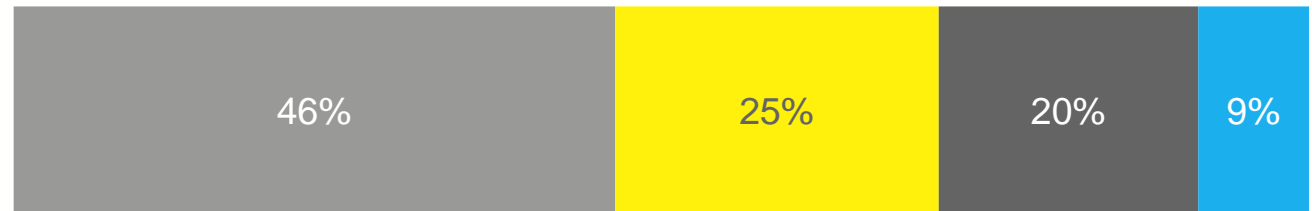
■ Agree

■ Strongly agree

I'm interested in saving water, but need ideas as to how.



I should be able to use as much water as I want, as long as I pay for it.



n=2,282

Q37 – Please indicate your agreement or disagreement with the following statements

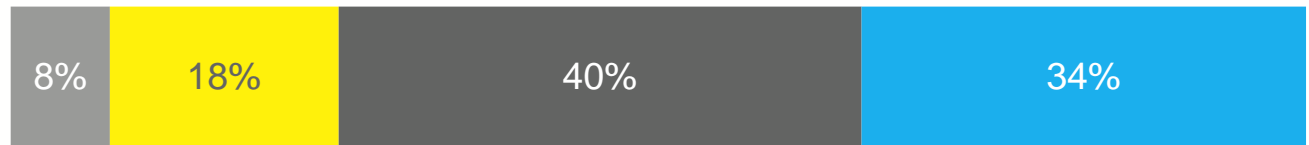
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Almost 75% acknowledged they *should* reduce consumption in a time of scarcity; 63% claimed that they'd like to cut back all the time.

■ Disagree ■ Neither agree nor disagree ■ Agree ■ Strongly agree

I should reduce my water use when my area is experiencing a lack of rainfall.



I'd like to cut back on the amount of water I use all the time.



It's unethical for Americans to use as much water as they want when other countries have shortages.



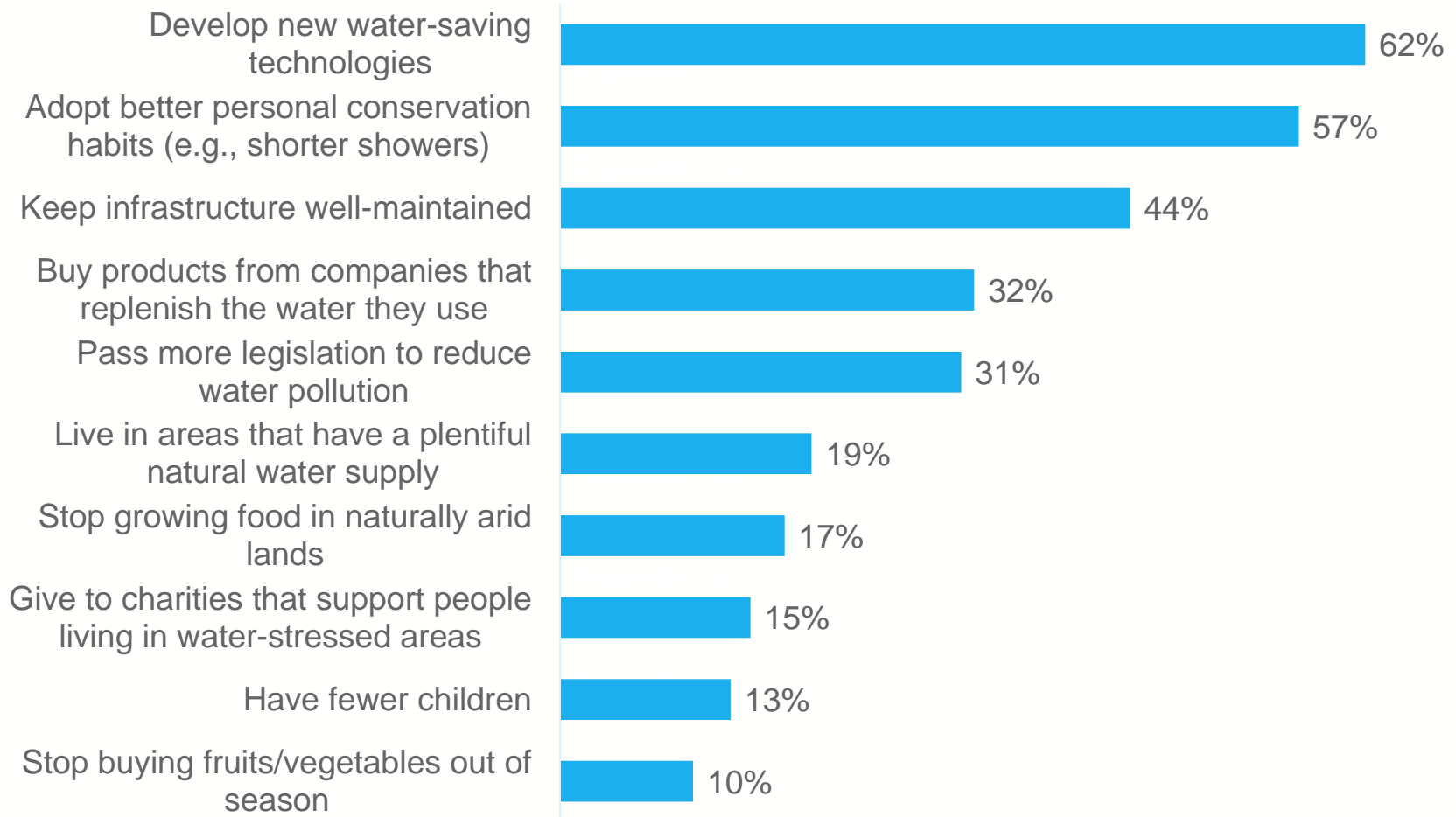
n=2,282

Q37 – Please indicate your agreement or disagreement with the following statements. (2 of 2)

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But it's telling that the #1 suggestion is to develop new water-saving technologies.



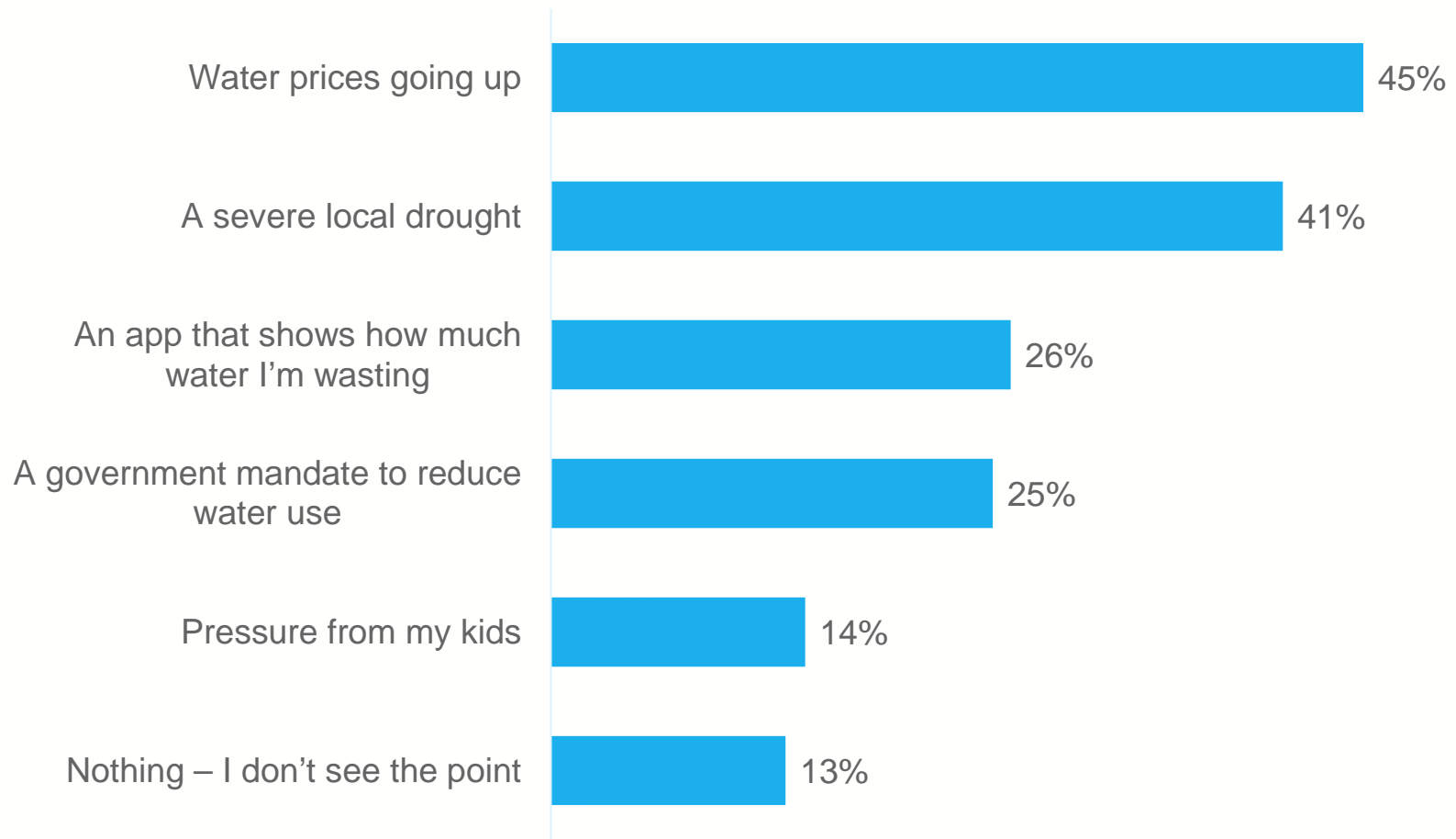
n=2,282

Q53 – What is the most important thing we can do to prevent water shortages?
Choose your top three answers.

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For most, it would take a price increase or extreme scarcity to spur lasting behavior change.



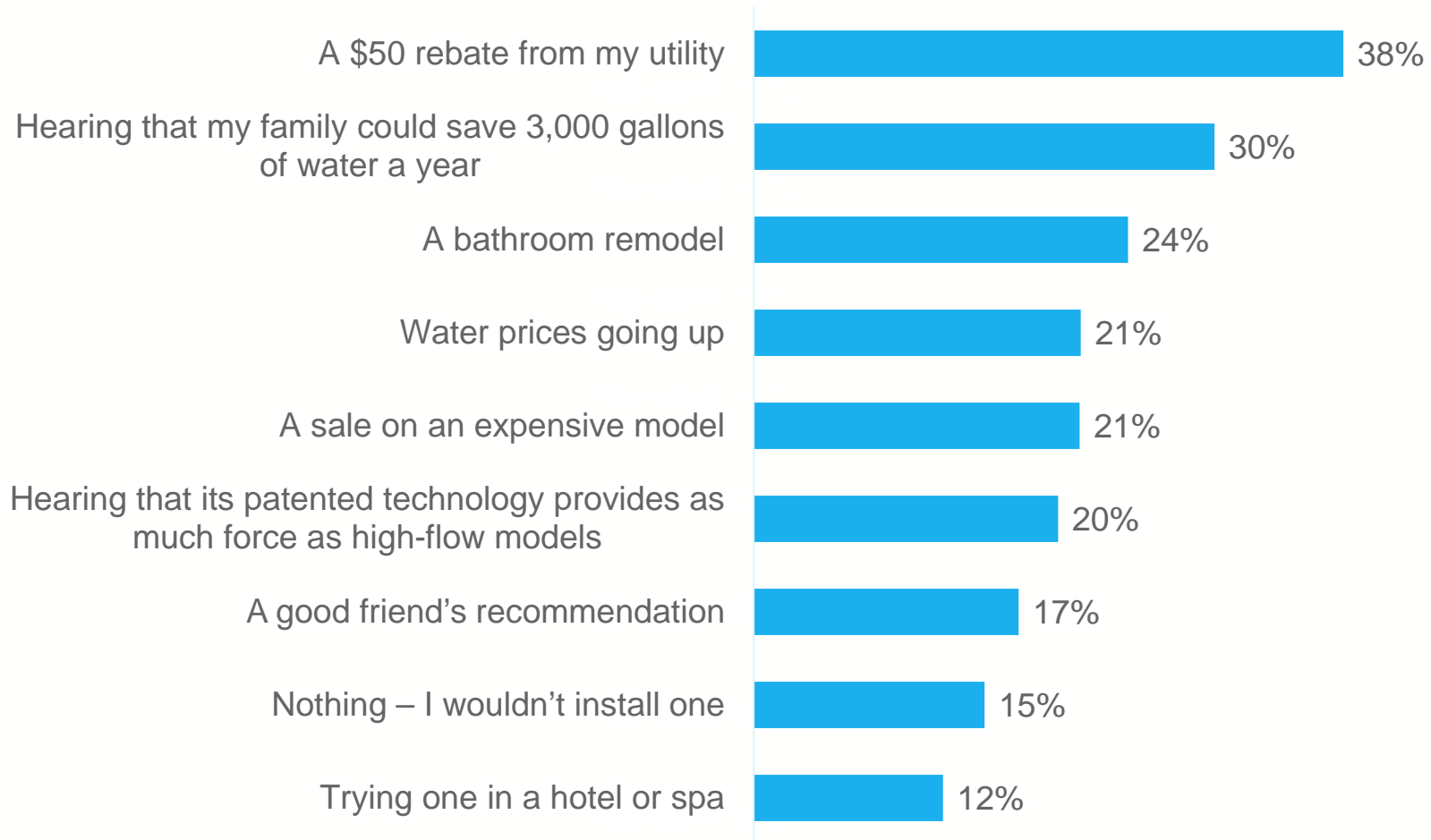
n=1,363

Q39 – Which of these things might influence you to turn off the water while you brush your teeth? (Check all that apply.)

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There are plenty of opportunities for influence.



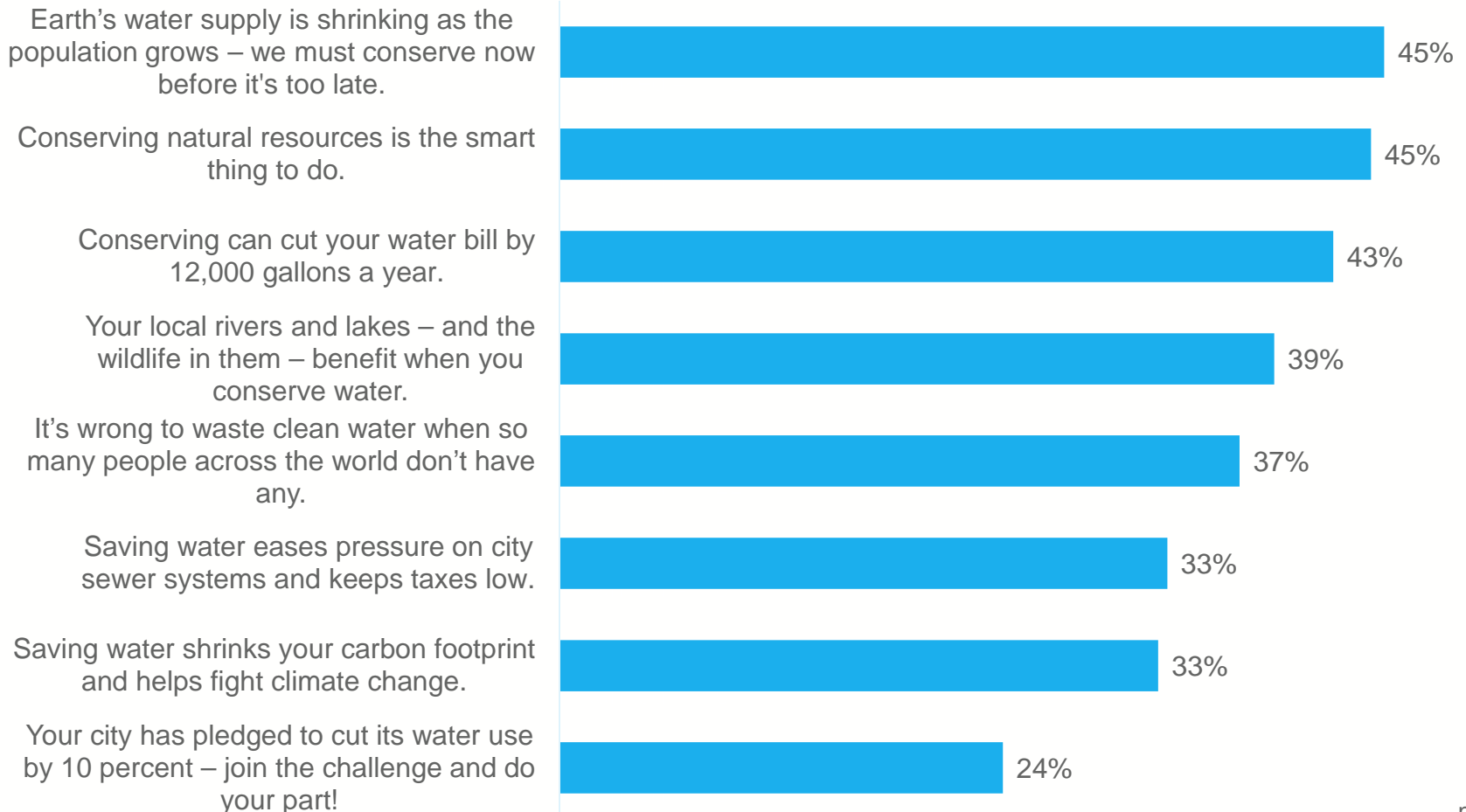
n=1,639

Q33 – Which of these things might influence you to install a water-efficient showerhead? (Check all that apply.)

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Both a “serious wake-up” and a pragmatic message might help.



n=2,282

Q52 – Assuming all of the following statements are true, which is most likely to convince you to reduce your water use? Choose the three statements that appeal to you most.

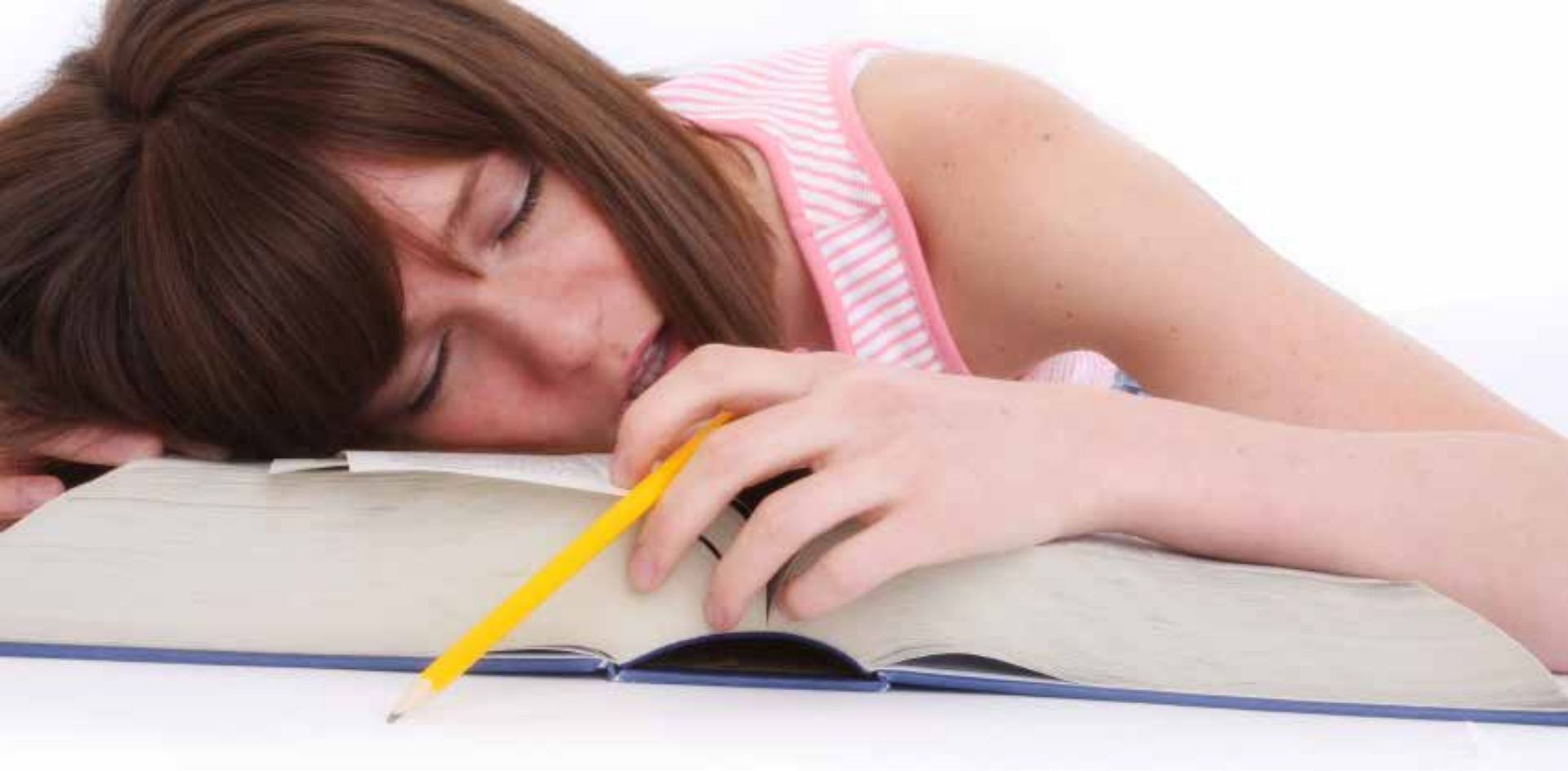
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There's a huge opportunity here for manufacturers.

- They WANT to cut their water consumption, they WANT to know what to do and they WANT technology to do the heavy lifting.
- Give them a permission slip to not change their behaviors by making water conservation happen automatically and with zero loss of comfort when they buy plumbing fixtures.
- Help consumers feel great about what they've accomplished when they buy water conserving products -- give them bragging rights.

And if you're not in the manufacturing
business and need to drive behavior
change...



Remember that you can't educate
someone into changing their behavior

Gain a sustainable advantage

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Pure information campaigns
simply don't work.





We are feeling machines that think, not
the other way around

You must wake people up to their automatic behaviors so they can make a conscious choice



Give your audience simple,
prescriptive action steps to take



A quick example



121 markets • 290 stations • 432 million ad impressions

The equivalent of a \$6 million ad buy

42 million impressions from editorial coverage

**29% who saw it said it
moved them to change
their water usage habits.**

Discussion

Thank you!

Suzanne Shelton

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