

# WHAT THE FUTURE: WASTE

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GAME CHANGERS





# Will we waste the chance to cut down our consumption?

The average American produces almost a ton of waste each year, making the U.S. the highest per capita producer of garbage in the world, according to an annual ranking from Slovakian waste management firm Sensoneo.

That much trash makes even Sesame Street's Oscar grouchier. The good news is we traditionally have recycled a lot more than other nations. The bad news is that China's 2017 policy to stop accepting recycling from the U.S. has made a financially tough industry even tougher — although not impossible.

Waste isn't the only environmental problem we face. Pollution of our air, water and soil and the myriad impacts of climate change are massive global issues. But waste is one issue that market research is particularly well-suited to help address.

As you'll read in this issue, research helps develop innovative new packaging that reduces waste from all sorts of products, from toothpaste to food. Research helps us understand what will drive consumer adoption of less polluting energy technologies like battery-operated electric vehicles and homes. Research helps get into the mindset of those who worry about wasting the precious commodity of time, and who want to reduce waste not just by consuming better, but by consuming less.

**“Think about how ‘farm-to-table’ made supply chain sexy for the food industry.”**

And the need for better, less wasteful products and services couldn't be more urgent. Here and in the markets your brands serve, the amount of waste produced is growing and will continue to be a crisis unless strong action is taken now.

Consumers, distrustful of many other institutions, are looking at companies and brands to help provide solutions to the world's challenges. Thankfully, solving these problems doesn't necessarily have to come with steep tradeoffs in product features and benefits or cost. Food packaging can be less wasteful, while also protecting food and helping extend its shelf life. Consumer packaged goods can use different materials and create truly recyclable packaging for nearly anything. Consumers don't want brands to do this just for the brand's sake. They want brands to enable their own efforts to be less wasteful.

Research can also guide brands in how to communicate all this good work to the customer in a way that feels authentic — even when you're talking about not-so-glamorous business disciplines like procurement and supply chain management. Think about how “farm-to-table” made supply chain sexy for the food industry. It can be done. Really.

This issue of **What the Future** is all about these possibilities and how, ahem, not to waste them.

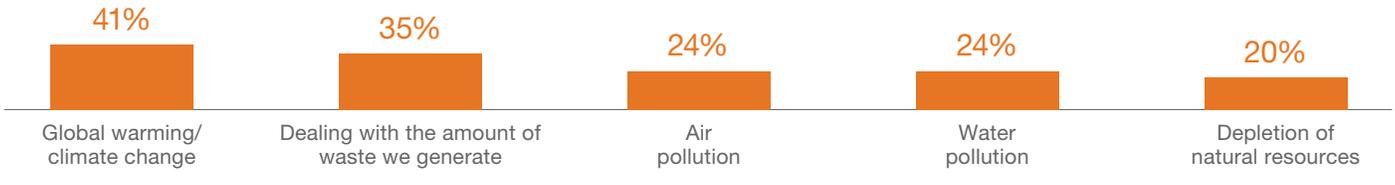
***Matt Carmichael** is editor of **What the Future** and vice president of editorial strategy at Ipsos in North America.*

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# Americans generate 4.5 pounds of waste per person per day, nearly three times the global average...

...and waste is a top environmental issue for people

Q. In your view, what are the three most important environmental issues facing the U.S. today?



## There's a belief/action gap in people's desire for sustainable brands

Q. To what extent do you agree or disagree with the following statements?

Purchasing sustainable brands or products makes a difference for our environment



I feel better when I buy sustainable brands or products



I have purchased brands/products specifically because of their sustainability practices



I have avoided brands because I disagreed with their sustainability practices



I have researched brands to ensure they do what they say they will when it comes to sustainability



Legend: Strongly agree (dark blue), Somewhat agree (medium blue), Neither agree nor disagree (grey), Somewhat disagree (light orange), Strongly disagree (dark orange), Don't know (light grey)

## But they want brands to take responsibility ...

Q. To what extent do you agree or disagree with the following statements? (Net agree)

66%

Companies have a moral obligation to use sustainable packaging

65%

Companies should be responsible for paying for the cost of recycling their products, instead of consumers or cities

65%

Companies should not use single-use plastics in their products

62%

Companies should use new materials to make their products only if recycled materials are not available

## ... and they will reward brands that do

I have purchased brands/products specifically because of their sustainability practices



(Sources: Environmental Protection Agency, 2017; Ipsos Global Advisor Earth Day 2020 survey conducted Feb. 21-Mar. 6, 2020, among 1,000 U.S. adults ages 18-74; Ipsos survey conducted Sept. 29-30, 2020, among 1,115 U.S. adults.)

**The Big Question:**  
How can we stop drowning in our own garbage?

# Question:

## Must brands lead the way to a more sustainable world?



**Ann Tracy**

**Chief sustainability officer, Colgate-Palmolive Company**

As the chief sustainability officer for a global consumer products company, Ann Tracy is acutely aware of the world's waste crisis.

“During this pandemic it’s been just glaringly obvious how much waste we generate because our habits and behaviors have changed,” she says. “It’s a huge issue.” When she thinks **What the Future**, she believes that brands are in a unique position to lead consumers and industry to more sustainable practices.

# 60%

of adults 18-34 are willing to pay more for sustainable brands.

(Source: Ipsos survey conducted Sept. 29-30, 2020, among 1,115 U.S. adults.)



**“Everybody plays a role, like R&D, so when they go to pick an ingredient, they’re not just going to pick the lowest-cost, most-effective ingredient. They’re going to pick the lowest-cost, most-effective, sustainable ingredient.”**

**Kate MacArthur: To what extent does or should a company or brand drive its sustainability response and to what extent should consumers be pushing for change?**

Ann Tracy: It comes from both sides. I’ll speak from the perspective of a consumer products company. Consumers want to do the right thing. They’re not sure what to do. So, they want their brands to help them live healthier and more sustainably.

**MacArthur: How much responsibility does a brand have to push for sustainability, whether or not consumers have an interest in it?**

Tracy: Especially now in the pandemic, people’s priorities have shifted to hygiene. In some cases, if you talk about plastic, that is reversed a little bit in terms of people not wanting to use plastic, because [now] they perceive plastic to be a hygienic barrier for a lot of the products they buy. You can’t always count on the consumer telling you what they want or need. So I do think brands have a responsibility. We as a sector must contribute and use the power of our brands, frankly, to work together to tackle some of these issues. So, we recognize the role we play.

**MacArthur: What should companies versus the government do to deal with our plastic waste issue now and into the future?**

Tracy: We all want to drive toward a circular economy and to use more recycled content. However, the economics today do not work. The price of oil is at its lowest ever. Therefore, virgin plastic is relatively inexpensive. And the recycling infrastructure isn’t where it needs to be to be able to satisfy the demand for that recycled content that the companies need. It’s going to take more than just companies saying, “We’re going to do this.” There also needs to be policy incentives to help us get to a circular economy.

**MacArthur: What kind of policy making?**

Tracy: One example is something called “extended producer responsibility.” Some people call it a “plastic tax.” It’s actually a fee that is levied to companies based on the amount of plastic that they use by weight. Europe has been doing this for a very long time. Canada has adopted this in a pretty big way. And there are several states talking about it now.

**MacArthur: How much influence can one company have to not only make change, but also be accountable for sustainability goals across the industry?**

Tracy: No one company can do it alone. Focus is an important part of this, so that you can channel your resources. When it comes to some of the climate-related targets, including plastic and water, the next decade is about going beyond our own supply chain. It’s engaging suppliers and ensuring that they’re contributing to the whole value chain to the reduction of greenhouse gas emissions and water wastage.

**MacArthur: Our survey showed that more than any other demographic, parents with kids at home have the most awareness and engagement on their favorite brands’ sustainability activities.**

Tracy: That tells me that their kids at home are telling them to stop wasting things. It’s good to see that people are doing their homework and trying to understand what they can do or how they can integrate being more sustainable into their purchases into what products they use every day. And that’s very insightful and important. It gets back to the concept of the triple bottom line, which is about people, profit and planet.

**“Consumers want to do the right thing. They’re not sure what to do. So, they want their brands to help them live healthier and more sustainably.”**

**MacArthur: How does something as unsexy as toothpaste packaging become so important and critical to Colgate-Palmolive’s future success story?**

Tracy: We sell 8 billion tubes every year. We are actually the world’s largest producer of toothpaste tubes. We make our own tubes. So if anybody was going to try to tackle the issue of making a toothpaste tube that was not recyclable into a recyclable tube, it was us. Although it may not seem sexy, it’s been a fundamentally critical project for many employees that was five years in the making.

**MacArthur: So much of sustainability isn’t consumer-facing. How do brands make it relevant and meaningful to consumers so that they care about it?**

Tracy: That’s the million-dollar question. The most important thing is that your program is authentic and that it’s built on a foundation of accomplishments. It’s about building trust in the brands. A lot of it’s about storytelling. But how do you tell that simply and effectively to consumers so that they know what you as a company stand for, and that’s, frankly, not easy.

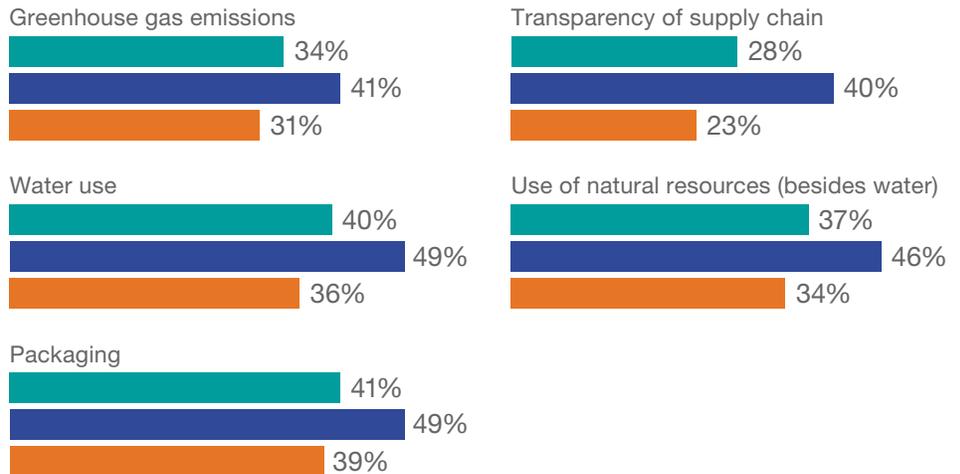
**MacArthur: Looking to the future, how much does this become an activity versus something that’s just baked right into the everyday business of a brand or a company?**

Tracy: That is our nirvana. Everybody plays a role, like R&D, so when they go to pick an ingredient, they’re not just going to pick the lowest-cost, most-effective ingredient. They’re going to pick the lowest-cost, most-effective, sustainable ingredient. Everybody has to start taking it into account in their daily job activities.

*Kate MacArthur is a senior writer at Ipsos.*

## Parents with kids at home are most engaged about sustainability ...

Q. How familiar are you of the following environmental impact policies for your favorite brand? (Net familiar)



## ... and they are aligning their purchases with their beliefs

Q. To what extent do you agree or disagree with the following statements? (Net agree)



(Source: Ipsos survey conducted Sept. 29-30, 2020, among 1,115 U.S. adults.)

# Where brands should focus for sustainability



**Sustainability is vital for the long-term health of businesses. Consumers expect brands to play a role in moving society toward a more sustainable future. One way for brands to accomplish this is to help close the gap between what people say and what they do.**

Granted, for many companies, the question is how. Ipsos research shows that consumers have weak or undifferentiated opinions about companies' sustainability practices. They want companies to have solid policies, but don't follow closely what companies actually do.

Part of that is likely due to consumers not understanding the broader scope of sustainability, which often takes place out of sight, such as in supply chain improvements. But it also reflects that businesses may be trying to communicate

too much. There are too many labels, initiatives and words that fail to connect with consumers. In short, businesses need to focus.

By honing in on specific benefits to amplify, brands can move consumers from a vague concept of sustainability toward greater appreciation, understanding and action.

To determine this focus, businesses can ask themselves the following questions to identify the sweet spot between their brand impact, brand values, consumers' attitudes and behavior — and the ability to execute on the plan.

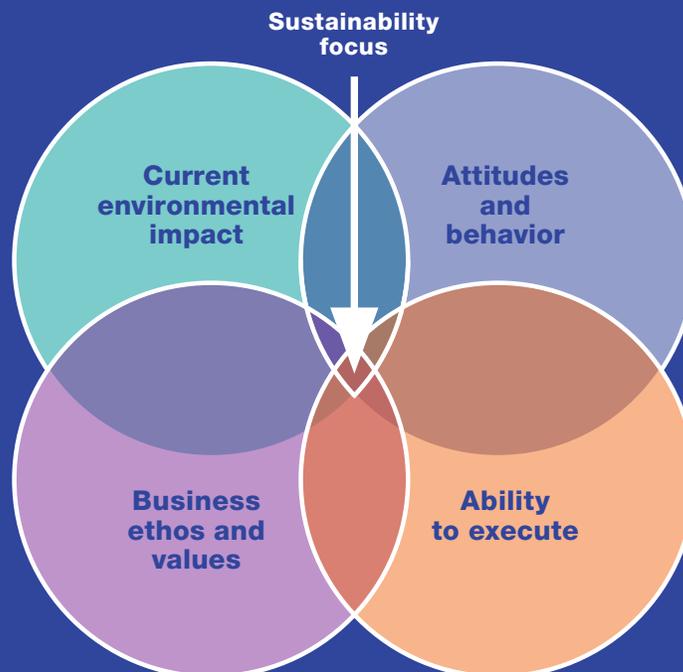
By using this lens, businesses can identify which sustainability actions and messages can be most effective.

**Natalie Lacey** is chief operating officer of Global Affairs at Ipsos.

## Finding your sustainability focus

**Current environmental impact:** What is the current impact your "business as usual" model is having on the environment?

**Business ethos and values:** What value does your business bring to the world? Allowing "guilt-free" consumption in the indulgence category could be a strategic angle to pursue. Don't try to be all things to all people.



**Attitudes and behavior:** What is truly important to your target buyer, and what are they likely to act upon? For example, how do customers feel empowered or powerless to do their part? What do they understand about concepts like "circularity" and "betterment" and their benefits?

**Ability to execute:** When deciding the actions you should and can most feasibly take when implementing a new strategy, emphasis should be on initiatives that your business is able to commit to in the long term.

# Question:

# Can we guilt our way into wasting less food?



**Kris Malkoski**

**CEO-Food Business,  
Newell Brands**

**Kris Malkoski joined Newell Brands in February 2020 to lead its Food Business unit, which includes such food storage and preservation brands as Rubbermaid, FoodSaver and Ball.**

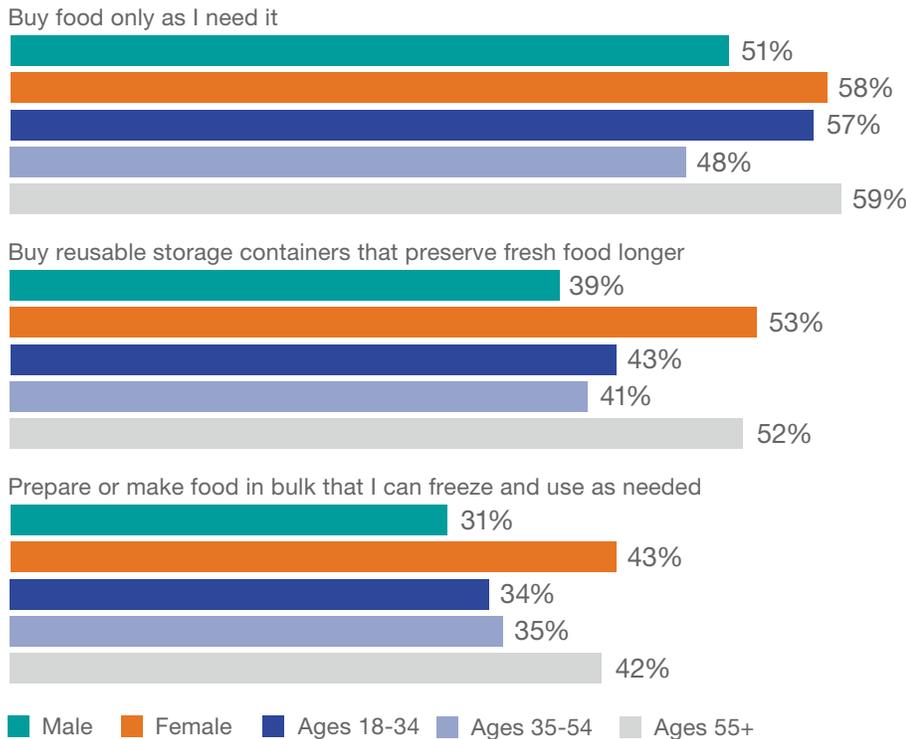
This role draws from her career as a brand builder — and as a girl growing up on a farm, where she grew and preserved food. “I was canning when I was 5 years old,” she says. When she thinks **What the Future**, she believes brands can empower people to waste less food.

**Kate MacArthur: Can we guilt our way into wasting less?**

Kris Malkoski: I hate to think that guilt is the right thing, because it’s a negative emotion. I think the best way to help people reduce waste is to make them aware, and then, empowered and accomplished to reduce waste by having easy, low-cost solutions like canning, vacuum sealing or just keeping produce fresh longer.

## Older and female Americans are focused on wasting less at home

Q. In what ways do you try to personally limit the amount of food waste you create? (Net agree)



(Source: Ipsos survey conducted Sept. 29-30, 2020, among 1,115 U.S. adults.)

### MacArthur: One idea to reduce waste is preventing it from the get-go. How do we do that?

Malkoski: I do think a big part of it is education and awareness, but then it's also simple tools. One of the things that we think about as we look at product development is how do we help that consumer better utilize and manage their food? And then we've focused on embedding our technology with a silver shield antimicrobial. It's actually launching as we speak, and it provides antimicrobial protection, 24/7, which helps resist bacteria growth in containers where you're storing leftovers.

### MacArthur: And poor planning is a significant factor.

Malkoski: Where I really see the future of food management going, which includes the planning piece, is that you make sure people don't forget what they've preserved and packed away. One of the things that I'm exploring with my team right now is how to create smart containers and smart packaging so that we can remind you if

you haven't planned appropriately. And remind you perhaps via an app on your smartphone, that the shelf life is starting to get toward its end-state or that freezer burn is around the corner, so that you can be reminded of what you already have and use it in time so that it hasn't spoiled or incurred freezer burn.

### MacArthur: I like the way that you frame it as being about food management. Maybe that's part of the cultural shift we need to make.

Malkoski: Yeah, when you're really busy and you have kids and you have so many things going on in your household, it is harder to plan. So if you can't get people thinking about the front end of the food management cycle, give them support on the back end so that they don't have to feel guilty that they bought too much or there was a meal they couldn't make that day because something happened in their life.

### MacArthur: One cultural shift we are seeing is a rebirth of old school food practices that had been forgotten.

# 34%

of U.S. adults are worried about the amount of waste their household is generating today.

# 18%

of urban dwellers bring reusable or returnable containers to restaurants for takeout.

(Source: Ipsos survey conducted Sept. 29-30, 2020, among 1,115 U.S. adults.)

Malkoski: This year, largely driven by the coronavirus, I've seen new household utilization of canning and vacuum sealing increase by about 50%. It's fascinating to me because it's being driven by younger people. They understand this idea of keeping the flavor in food and keeping food fresher, longer. The exciting thing is the feedback we get on social media. People are saying, "Look what I achieved!" and proudly showing their first jar of canned peaches or rhubarb jelly. I do think there is a rebirth and a resurgence here of people really caring about naturalness, caring about freshness, and then feeling that personal satisfaction and reward of being able to make something that lasts longer out of it.

### MacArthur: How could that help us get to less packaging in the future, including for restaurants?

Malkoski: We put pressure on the food industry. I mean that seriously. That's how we will see a real movement to walk away from throwaway plastics toward packaging that you can use and reuse.

**“The best way to help people reduce waste is to make them aware, and then, empowered and accomplished to reduce waste by having easy, low-cost solutions.”**

If companies feel the pressure from youth—and sustainability and reusability is a big area for them—corporations are going to have to address it.

Next year, we are launching reusable bags on Rubbermaid. They are dishwasher-safe and will last at least 120 times versus a throwaway disposable bag. The other thing that Rubbermaid did last fall is partner with TerraCycle. TerraCycle will take all these products back and figure out how to recycle them.

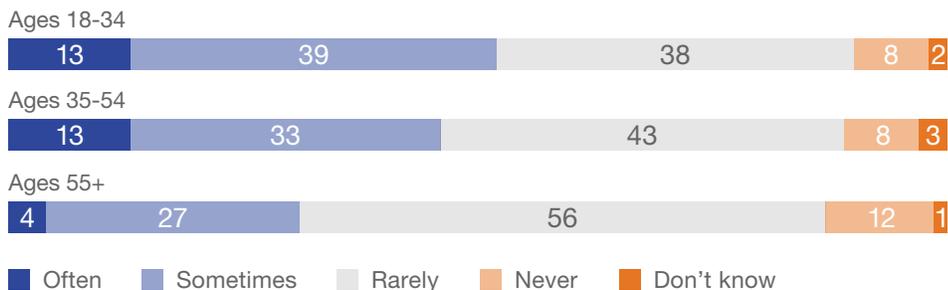
**MacArthur: Do you see the idea of zero-waste packaging, whether for soap or special coatings on produce, growing to mass scale?**

Malkoski: Well, I don't know that everyone's going to be thrilled with a technology sprayed onto their produce, per se. But just as we never used to recycle beer cans or aluminum pop cans, I think we can create habits and practices where people bring their own storage containers to grocery stores to fill them, which is one form of zero-waste packaging. People are starting to move on the continuum. We have a long way to go, but I think we can get much better.

**Kate MacArthur** is a senior writer at Ipsos.

## Younger adults waste more food despite being more environmentally conscious

Q. How often, if at all, do you throw away food that you bought but didn't prepare or eat before it expired or went bad?



(Source: Ipsos survey conducted Sept. 29-30, 2020, among 1,115 U.S. adults.)

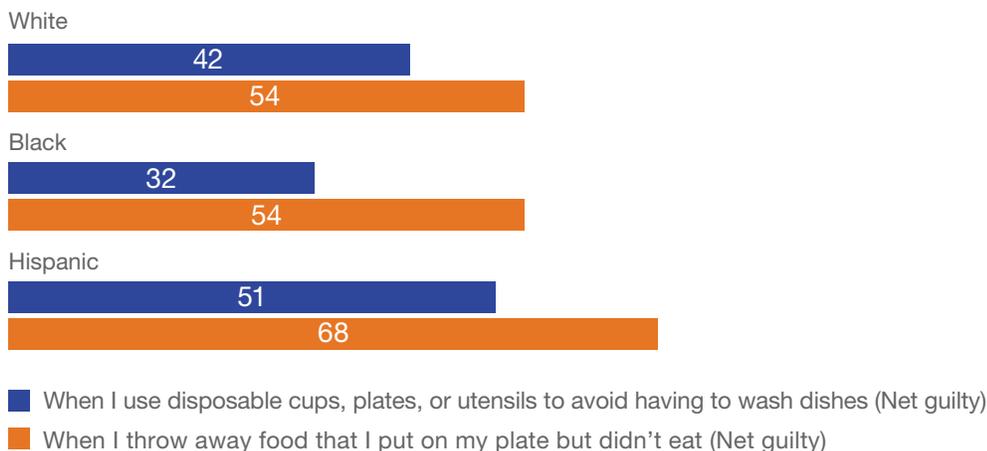
## People feel most guilty about throwing out fresh food

Q. Please describe how you feel in the following situations:



## Guilt varies for some behaviors by racial group

Q. Please describe how you feel in the following situations:



(Source: Ipsos survey conducted Sept. 29-30, 2020, among 1,115 U.S. adults.)



# Eight ways brands are redirecting COVID-19 waste awareness **to boost sustainable practices**

**At the start of the COVID-19 pandemic, people traded their concerns about packaging waste for hygiene and safety. As stores and communities went into lockdowns, shoppers turned to online ordering and delivery or pickup for essentials and food with the hope that the pandemic would be short-lived.**

But as the pandemic stretched past six months, about a third of Americans again worried about waste. Now, they want brands to innovate out of this problem, especially with solutions related to food safety and packaging, according to a recent Ipsos Coronavirus Consumer Tracker. Nearly two-thirds of those polled said they want the brands they buy to make it easy to recycle or reuse the packaging of their products.

This work will drive a renewed focus on future sustainability that consumers are demanding and then rewarding brands that lead the way. Here are eight ways companies are already making changes:

- Many corporations and brands are creating new sustainability goals for 2030 and beyond, and the United Nations has updated its Sustainable Development Goals (SDGs) to serve as a framework for global COVID-19 recovery.
- PepsiCo announced its plan to join a consortium of global consumer goods companies to pilot branded paper bottles in 2021.

- In the U.S., Starbucks began trialing a new recyclable, compostable cup.
- Domino's is using a communications strategy to educate customers that they can safely recycle cardboard pizza boxes — even with grease on them.
- As nearly half of people surveyed by Ipsos say they'd prefer to be asked if they need extras like plastic silverware or napkins, local restaurants can actively make the choice for these "extras" to save money and limit their environmental impact.
- With growing demand for and usage of online ordering and home delivery, reusable container services like Loop can attract new food and beverage brands to drive reusable packaging.
- Materials developers can make cost-effective compostable or biodegradable materials available to local restaurants pivoting through quarantines to sell meal kits, pantry staples and carryout cocktails.
- Brands can take inspiration from TikTok trends like kids biting into apple juice containers to create truly edible packaging.

Not only can brands continue to help bring the U.S. together in unique and safe ways, they can also lead society toward a more sustainable future.

**Ashley Ericksen** is a vice president in Ipsos' Innovation service line.

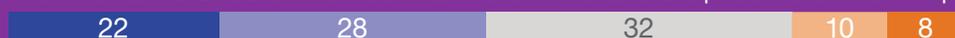
## Most consumers want brands to help them waste less

Q. For each of the statements below, indicate your level of agreement.

As the pandemic persists, I hope restaurants can find less wasteful packaging for take-out and delivery



I wish restaurants that delivered food would ask if I need items like plastic silverware or napkins, rather than automatically providing them



I miss the ability to use items like reusable bags at the grocery store or a reusable cup at the coffee shop

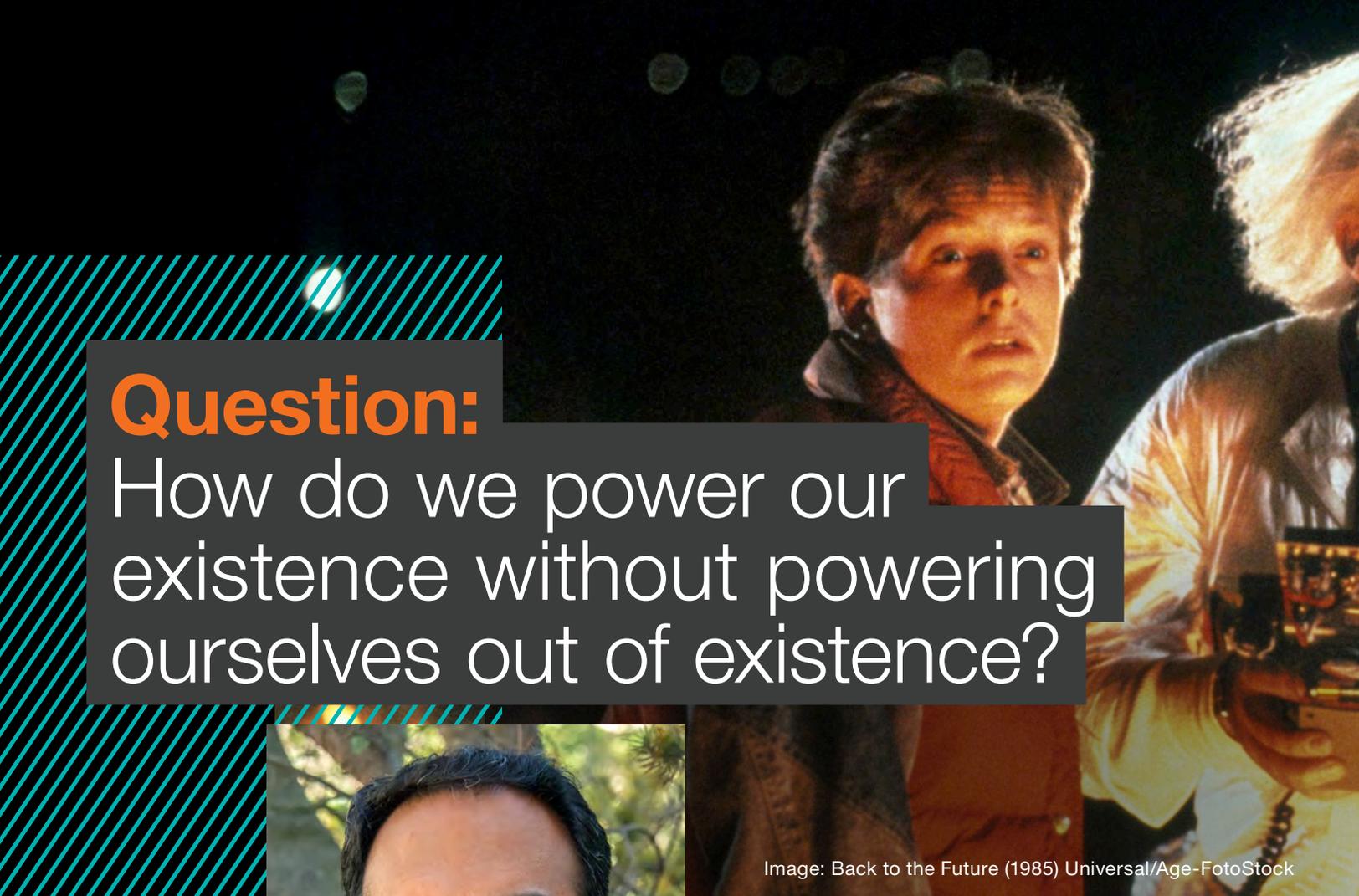


If an item has more packaging, it usually means it has a higher price



■ Strongly agree 
 ■ Somewhat agree 
 ■ Neither agree nor disagree 
 ■ Somewhat disagree 
 ■ Strongly disagree

(Source: Ipsos Coronavirus Consumer Tracker conducted Aug. 4-5, 2020, among 1,111 U.S. adults.)



## Question:

How do we power our existence without powering ourselves out of existence?



**Venkat Srinivasan**

**Director, Argonne Collaborative Center for Energy Storage Science (ACCESS)**

Image: Back to the Future (1985) Universal/Age-FotoStock

To Argonne National Laboratory scientist Venkat Srinivasan, batteries are the single-most important technological revolution of our time.

He began studying batteries more than two decades ago and now leads one of the nation's top energy storage research labs. When he thinks **What the Future**, he sees batteries as the key to power all our stuff, with less environmental waste.

**62%**

of Americans intending to buy a new vehicle say they will pay extra for environmentally friendly products.

(Source: Ipsos Mobility Navigator Study conducted September 2020, among 766 U.S. new vehicle owners ages 18-74 who intend to buy in the next 18 months.)



## Most Americans want to reduce their energy footprint

Q. To what extent do you agree or disagree with the following statements?

I wish my home used less energy due to costs



If I could afford to, I would switch energy sources to lessen the environmental impact



I wish my home used less energy due to the environmental impacts



I feel too dependent on things that require electrical power



I am comfortable with the amount of energy my home uses



I have researched how to use less electricity/power in my home



I am interested in living "off the grid"



■ Strongly agree   
 ■ Somewhat agree   
 ■ Neither agree nor disagree  
■ Somewhat disagree   
 ■ Strongly disagree   
 ■ Don't know

(Source: Ipsos survey conducted Sept. 29-30, 2020, among 1,115 U.S. adults.)

### Kate MacArthur: Is there some other energy source that could replace wasteful coal and petroleum but power our cars and homes with the same efficiency?

Venkat Srinivasan: For an electric car, I believe that batteries will reach a stage where you will not compromise on any of the metrics you have today. But electricity generation is a different story. Batteries don't generate electricity. Batteries store electricity. So, when it comes to powering the electric grid — our homes, our buildings, our industries — it's becoming clear that renewables like solar and wind energy, and nuclear maybe, are going to add more and more of a mix. In all of that, ensuring that things are resilient will involve energy stored somewhere. In that case, energy storage becomes an enabling technology.

### MacArthur: Affordability is the big question about batteries. What compromises do we have to make sure everyone has access?

Srinivasan: Batteries are all about compromises. Let's take an electric car, a simple one. You don't want it to be a 50-mile electric car. You want it to be 300 miles. You want it to charge fast. You want it to cost as much as a gasoline car would cost. You want it to last a long time. You want it to be safe. You want to be able to park it in the Chicago winter for 24 hours, come back and start the car. You want to be able to use it in Arizona without any problems, right? Hopefully, you want to make sure that the materials are coming from some sort of a renewable source. And you want to make sure it's recyclable. Guess what? All of these are very difficult metrics to meet simultaneously.

### MacArthur: And that's just cars.

Srinivasan: Every person who has used a cell phone knows this, right? I mean, the battery gets better, but the cell phone makers add more features. They're going to add automation to our cars, which is going to suck more power, which means

our batteries may not last as long. And there's going to be the push and pull of the technologies. Same for the grid, right? There is a reason why not all of us have already been talking about buying a battery for our homes. That's because it remains sort of expensive.

### MacArthur: These alternative energy programs are largely available to the wealthy. What will it take to make them available to everybody?

Srinivasan: I used to live in California for many years. When I saw solar really have an inflection in California was when leasing became the reality. I think that's what we need for home energy storage to take off. But it'll take longer for it to make sense for places like where we live [in Illinois] where electricity is cheaper.

### MacArthur: We know that battery components are not environmentally benign. How do we make decisions about their various tradeoffs and be less wasteful?

# “We want a battery that will last 100 years. We really want a complete, holistic relook.”

Srinivasan: We want a battery that will last 100 years. We really want a complete, holistic relook – to use materials in batteries that are easily available and sustainable. So, eliminate stuff that is hard to either pull from the ground or that’s coming from places we don’t want it to come from, or that’s not going to power all of the things that we want to power. We want something you can use for however many years you can, decades and maybe multiple decades before you have to start thinking about throwing them away. Then we want to make sure that we never throw the materials away, but we bring them back to life through recycling.

### MacArthur: What about for smaller batteries?

Srinivasan: Collection of batteries is a super important problem, especially because of all the small devices that have batteries in them. I’m looking at my table, and I have five devices with batteries in them, and that’s just my table. It will come down to a business plan. You need to have an economic recycling technology in place so that businesses start to develop around this. I believe that that’s really the most important thing that we need to be thinking about.

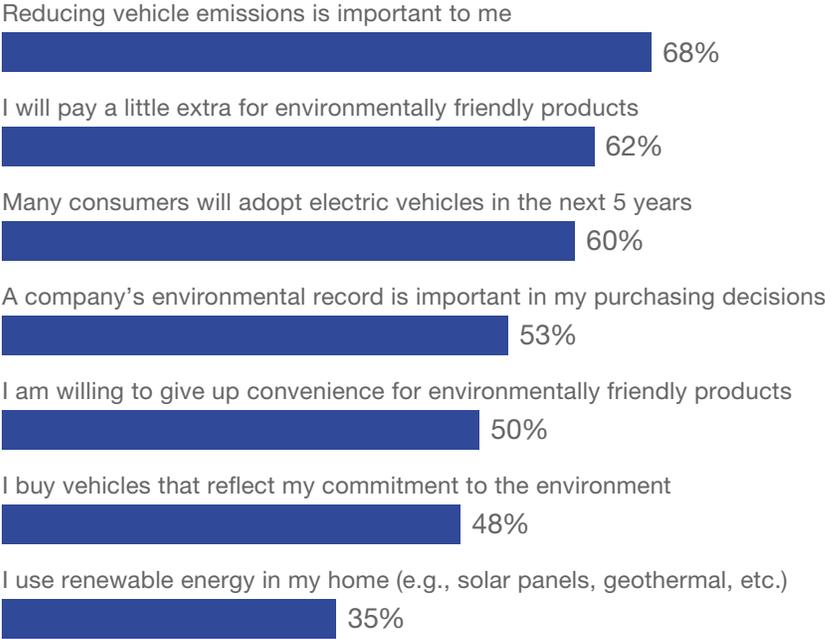
### MacArthur: Are there examples of how to make battery recycling work, where companies are doing their share, and consumers are doing theirs?

Srinivasan: Apple has started to take back their old phones. And depending upon the age of the device, they give you either some amount of money, or they say there’s no money associated with it, but just send it back to be recycled responsibly. And that’s because there are two things to it: One, if I am a company of that stature or following, you don’t want to have a reputation that you’re not thinking about what happens to these devices at end of life. So that is a huge incentive. And maybe part of the consumer’s job is to make sure that we tell them, “Hey, that’s an important part of how we view you, and therefore I’m expecting you to do your part.”

*Kate MacArthur is a senior writer at Ipsos.*

## American car shoppers are open to more environmentally friendly energy sources

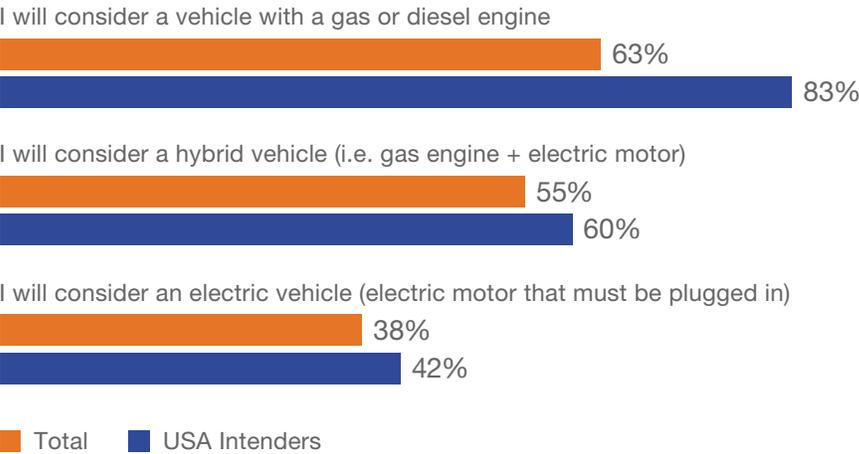
Q. How much do you agree or disagree with the following statements? (Net agree)



(Source: Ipsos Mobility Navigator Study conducted September 2020, among 766 U.S. new vehicle owners ages 18-74 who intend to buy in the next 18 months.)

## But they’re still more dependent on gas than their global peers

Q. Thinking about the next vehicle you might purchase/lease, please indicate your level of agreement with each of the following statements. (Net agree)



(Source: Ipsos Mobility Navigator Study conducted September 2020, among 22,003 new vehicle owners ages 18-74 in 11 nations, including 766 U.S. new vehicle owners who intend to buy in the next 18 months.)

# How to gauge the most effective messages for **electric-curious vehicle shoppers**

**Most people agree climate change is the result of human activity, and that they need to reduce waste and pollution. A key contributor to that pollution is gas vehicles. An alternative is electric vehicles, but consumers don't want to compromise when they consider new electric vehicles.**

Currently, there is a very low proportion of electric vehicles in the market, so clearly something isn't connecting for shoppers so far. But there are behavioral science principles that auto marketers can leverage to activate the rational and emotional motivations behind consumers' vehicle-buying decision processes.

Regulatory Fit Theory (RFT) tells us that shoppers are motivated by promotion (gain) or prevention (lose) attitudes. Consumers who have a promotion mindset are driven by making the world a better place, where those with a prevention mindset are about avoiding paying more for gas. Knowing these mindsets can help marketers match the most effective messages to consumers' motivations.

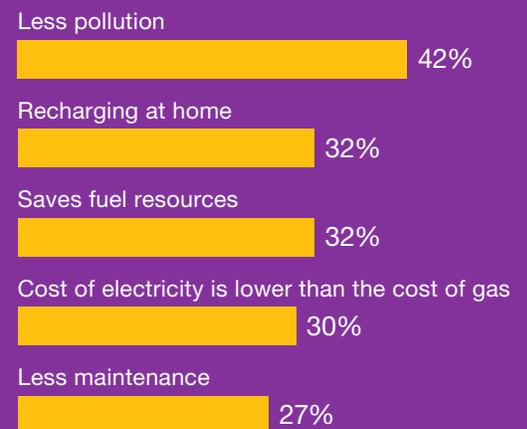
For example, research from the recent Ipsos Mobility Navigator shows underlying interest from auto shoppers to buy an electric vehicle. Reducing pollution tops the five benefits that survey participants selected as most likely to boost their interest in battery electric vehicles (BEVs).

While these are shoppers' stated, logical benefits of buying electric, what are the motivations that trigger them into buying? In other words, what do automakers need to focus on to get consumers to even consider buying a battery electric vehicle?

The Ipsos Mobility Navigator results show that many consumers agree that electric vehicles' key benefits are very rational, including improving the environment, saving gas and reducing overall operational cost. However, these logical reasons aren't enough to appeal to the masses.

## Environment tops motivators for shoppers considering electric vehicles

Q. Please select up to 5 benefits that would be most likely to increase your BEV purchase consideration. (Total agree)



(Source: Ipsos Mobility Navigator survey conducted Aug. 25-Sept. 7, 2020, among 22,003 new vehicle owners in 11 countries.)

Appealing to shoppers' emotional reasons in addition to the rational ones will drive further shopper consideration. This includes benefits such as the convenience of public express lanes, attractive styling, advanced technology and even the raw performance that battery electric acceleration provides.

By focusing on underlying emotional benefits, vehicle marketers can better align their messages to the most powerful motivational triggers that shift shoppers from considerers to buyers.

**John Kiser** is a senior vice president in Ipsos' U.S. Automotive & Mobility service line.

# Question: Can we waste less stuff by wasting less time?



**James H. Gilmore**

**Consultant and co-author,  
“The Experience Economy”**

One thing people hate to waste is time. That’s a foundation of what has come to be called “the experience economy,” a term that came from the book by Jim Gilmore and Joseph Pine.

Another foundation is that wasting time equates to wasting other resources — by producing more stuff than we need. When he thinks **What the Future**, Gilmore hopes we can incentivize waste reduction by charging for time, not goods.

## 53%

of people feel that they own too much stuff.

## 67%

of Americans value experiences more than material possessions.

(Source: Ipsos survey conducted Sept. 29-30, 2020, among 1,115 U.S. adults.)



# Most Americans are prioritizing experiences over things

Q. To what extent do you agree or disagree with the following statements?

I value experiences more than material possessions



In the past year, I have worked to get rid of some possessions



I feel like I own too much "stuff"



■ Strongly agree  
 ■ Somewhat agree  
 ■ Neither agree nor disagree  
■ Somewhat disagree  
 ■ Strongly disagree  
 ■ Don't know

(Source: Ipsos survey conducted Sept. 29-30, 2020, among 1,115 U.S. adults.)

## Matt Carmichael: You published “The Experience Economy” in 1999. What did that phrase mean then?

Jim Gilmore: We coined a term and gave a voice to what was happening but did not yet have a term. The big argument in the book is that experiences are a distinct economic offering that you can put a price tag on. That has long been established in terms of movies and sporting events and going to a concert. But when you put a price tag on spending time, that was different. Time is the currency of experiences. There is the time we'll save, by making something easier or more convenient—that's the direction services are going in. But then there's time well spent—by making something more engaging and thus memorable.

## Carmichael: What's changed during the pandemic?

Gilmore: Every “time enterprise” faces the same No. 1 competitor, namely the smartphone. People will leave you and spend time elsewhere. With the tap of the screen, they're gone. What we see now is a second competitor, which is basically staying home. You're competing with “Why go at all?” For free economies to remain prosperous, we have to shift to experiences, but we've sort of slid backward since the pandemic. 2016 was

the first year where Americans spent more money in restaurants and bars than they did at grocery stores. That is a milestone event that more money was spent on food service and dining experiences than on commodities. We've since snapped back to commodities and goods.

## Carmichael: Will we get back to “normal” in time?

Gilmore: We think the economy will not bounce back in aggregate until people start paying for time again.

## Carmichael: Do you think that COVID-19 will accelerate a shift to virtual experiences?

Gilmore: Man, I hope not. I thought before all this happened that the digital life was intruding on the physical realm. I suspect in some cases we'll see a move more to virtual, like in medicine. But I also think we'll see a hunger for time well spent in non-digital, non-virtual realms.

## Carmichael: Can there be a trade-off between experiences and “stuff”?

Gilmore: Many goods are merely props for the time you spend. The flat screen is the sporting event you watch. As Peter Drucker once said, your customers are always buying something other than what

you think you're selling to them. My wife and I want to get a fire pit. Why? Because we want to spend time around the fire.

## Carmichael: And how can that lead to less waste?

Gilmore: Let's assume less waste is desirable by most people. One way to get that is mass customization versus mass production. For the experience economy, we have a metric we call customer sacrifice versus satisfaction. Satisfaction is meeting expectations. You expect something, did you get it? OK, I'm satisfied. Sacrifice, we define as the gap between what people settle for versus what they want. So mass customization, which is the ability to produce individualized output efficiently, can reduce sacrifice. It is a way of only using the resources necessary. And selfishly, companies will save money.

## Carmichael: It's about indirect benefits?

Gilmore: It reduces having extra inventory. Any item that goes on sale, means that at full price, nobody wanted it. It's, “Can we pay you enough money for you to take something you really don't want?” That's just wasteful. Just responding to actual orders is without a doubt the least wasteful process.

**“Let’s assume less waste is desirable by most people. One way to get that is mass customization versus mass production.”**

**Carmichael:** Let’s talk more about this idea of time as a waste-reducer and how that can apply to physical waste, too.

Gilmore: Most clothes in the closet are never or rarely worn. If you have a monthly subscription to your clothes, you’re charging for time: for wardrobe management. Or think about printers. If my printer breaks, I go to Staples. Do I have any confidence that spending more money is going to make it last any longer? No. So I buy an even cheaper model the next time by some throwaway, disposable company, whereas if I was paying an annual fee for my printing and all my equipment, then it would behoove them to actually use less resources.

**Carmichael:** How do we tie this all together?

Gilmore: If you can customize, you can charge people for time. I told Ford when the book came out: “Look, the day will come when you’ll make more money producing fewer cars because if you can charge only for the time people drive, then you only have to build the fewest cars necessary to move people around. You’ll make more money.”

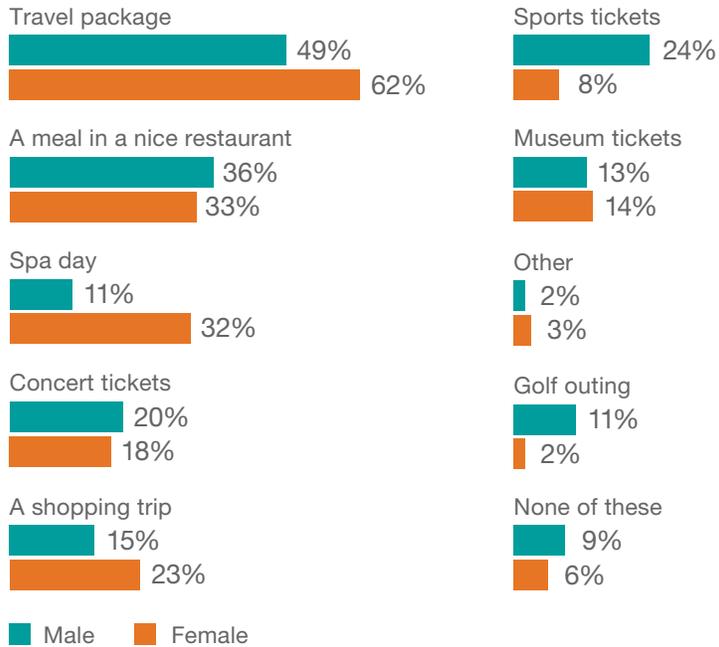
**Carmichael:** So we need to charge for time, not stuff?

Gilmore: Yes, we have to move away from charging for physical things and services, because it’s inherently wasteful, versus charging for time, which is what people most value. People use goods, most of which they have to purchase. And they contract for services because they want to enjoy their time. Well, let’s charge for that time. In the process, companies make more money by using less resources of the Earth. I tell people: Customize, charge for time and get rid of the production of extra stuff. As a means of differentiating and growing your business, you happen to get less waste almost as a byproduct.

*Matt Carmichael is editor of What the Future and vice president of editorial strategy at Ipsos in North America.*

Most people, especially women, want getaway experiences

Q. If someone were to give me an "experience" as a gift, I would be most interested in... (Total agree)



(Source: Ipsos survey conducted Sept. 29-30, 2020, among 1,115 U.S. adults.)

What are you doing in your free time?



(Source: Ipsos US Syndicated Online Community survey conducted Oct. 5-12, 2020, among 659 online adults.)

# Elevating consumer experiences in the age of COVID-19 and beyond



**As people embrace living with less to do more, brands have an opportunity to forge deeper connections by supporting the experiences consumers crave. New experiences may seem harder to come by these days, but this hasn't stopped Americans from readily seeking them out.**

According to Ipsos' Fresh Lab syndicated U.S. online community, people are not only creating new experiences at home but are doing so while actively rethinking spending on material goods. How do brands continue to resonate in this rapidly shifting environment? Here are a few things to consider:

**Provide long-term value:** Consumers in the study — especially younger ones — are seeking products that last. One in two say they plan to reduce spending on material goods in the future, while three in five (60%) say they are trying to buy more multipurpose or cross-functional items. This skews even higher for younger consumers ages 18 to 24. While financial considerations are a significant driver, people also point to a desire for quality, usefulness, sustainability and decluttering (for, among other reasons, better focus and mindfulness) as key reasons to cut back on material things.

**Embrace technology:** People are turning more to technology to pass the time. One in three say their free-time activities (see page 18) involve TV, games, streaming services, social media and online shopping. More than simply supplying entertainment, technology is seen as a way to stay connected to others, especially amid social distancing.

*"[My] most memorable experience of 2020 was playing D&D with my friends via video chat. This was very different from 2019 because it involved us using [a] technology we weren't familiar with and having to use workarounds, but then [we] were surprised with how well it worked out."* – Ipsos Community Member

**Appeal to a sense of adventure:** People are craving unique and memorable experiences, both outside and inside the home. When asked to envision a "future experience" they would spend time or money on, more than half (55%) mentioned travel and the outdoors. Even when homebound, people seek to add some flair into everyday activities such as cooking, baking and gardening.

*"We're eating more frozen pizzas these days, especially garden pizzas, and I bought a wood-fired pizza oven to prepare [them]."* – Ipsos Community Member

The key for brands is to stay close to consumers in the face of ongoing disruptions and seek out the human insights to help people to continue navigating these times with immediacy and confidence.

*Lisa Yu is a vice president of online communities in Ipsos' Social Media Exchange service line.*

## People are embracing living with less to do more

Q. From the following statements, please indicate your level of agreement with each.

- Strongly agree
- Somewhat agree
- Neither agree nor disagree
- Somewhat disagree
- Strongly disagree

(Source: Ipsos US Syndicated Online Community survey conducted Oct. 5-12, 2020, among 659 online adults.)



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