

GERMAN CONSUMERS: Among the Best of the West

Greendex Score: 51.1 (Rank: 10th of 17)

↑ 3.0 points since 2008

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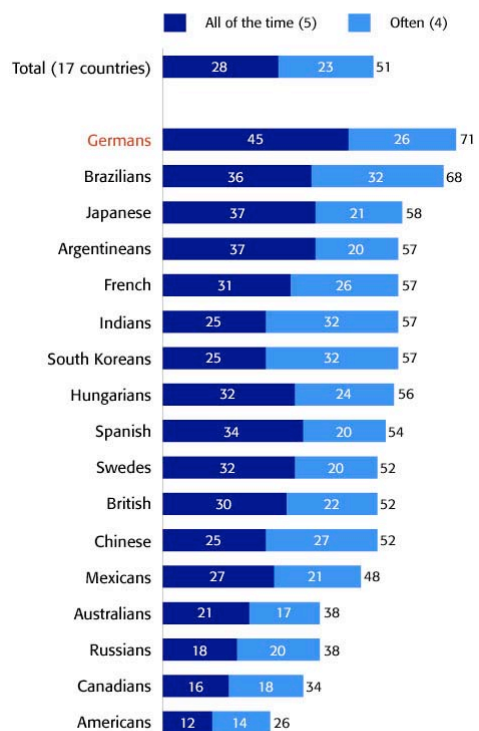
For the second year in a row, German consumers find themselves in the middle rankings, but ahead of those in most of the other Western countries polled. Overall, their Greendex score has improved by 3 points (a relatively large increase compared with other consumers), due mainly to an improved housing score (up 8 points). Scores for the other sub-indices show little change. Germans occupy a position in the top third for food, are in the middle for housing and transportation, and are second to last on goods.

Consistent with the trend overall, German consumers' **housing** score has improved by almost 8 points this year. Contributing to this gain are increased rates of minimizing the use of fresh water, using cold water for laundering, and owning energy-efficient televisions. Overall, Germans rank 10th on the housing sub-index, ahead of most other Western countries, Australia, and Japan. Downward drivers are high rates of home heating (89 percent) and hot running water (93 percent), the second highest incidence of using oil for home heating (26 percent), and a below-average rate of cold-water laundering (37 percent, compared to the 17-country average of 50 percent). Upward drivers are above-average rates of owning energy-efficient appliances, the lowest rate of home air conditioning (3 percent versus the average of 42 percent), and the highest rate of minimizing the use of fresh water (77 percent versus the average of 50 percent). Also positive is an above-average rate of German homes having wall insulation (51 percent versus the average of 43 percent) and keeping their heating/cooling setting on low (65 percent).

Germans consumers' **transportation** score remains relatively unchanged this year and they rank 12th overall. Contributing to this ranking is an above-average rate of car and truck ownership (82 percent) coupled with larger annual mileage rates. Germans tend to drive alone regularly (44 percent on most days or every day), although this rate has decreased by 6 percent, and they use public transportation less often than most others (only 33 percent do so at least weekly). They do, however, have a greater-than-average preference for compact cars (40 percent versus 32 percent), a below-average rate of minivan and SUV ownership (5 percent versus 13 percent), and the highest rate of walking and biking among those polled (71 percent do so often versus 51 percent).

Although they rank second from the bottom, German consumers' **goods** score is essentially on par with that of consumers in many of the

Frequency of Walking or Riding Bike to Destination
"All of the Time (5)" or "Often (4),"* Percentage of Consumers in Each Country, 2009



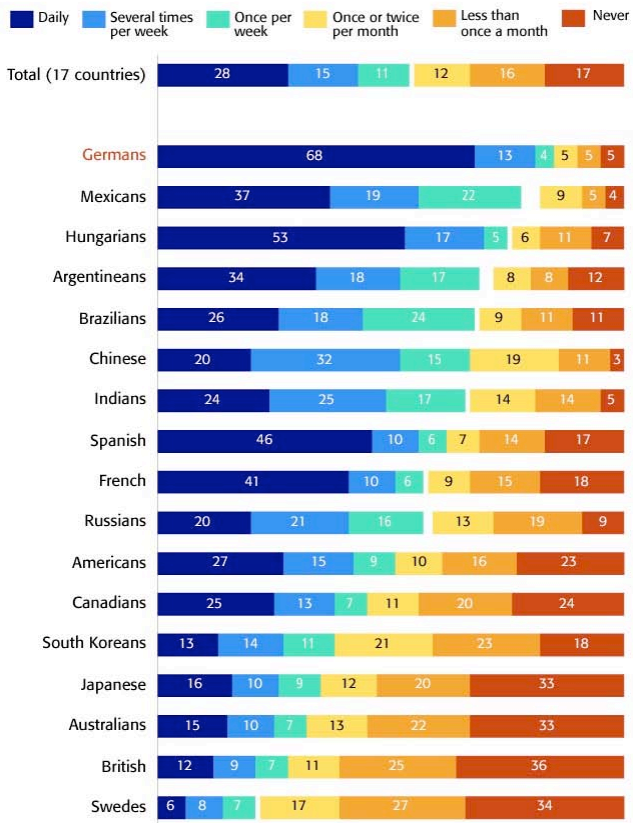
*On a scale where 1 means "Never," 3 means "Sometimes," and 5 means "All of the time."

other Western countries polled, and it remains unchanged from 2008 despite some noted improvements such as increased rates of recycling (from 76 percent in 2008 to 87 percent), avoiding environmentally unfriendly products (from 38 percent to 45 percent), and using their own bags for shopping (from 75 percent to 81 percent). Germans are among the most frequent recyclers (87 percent do so often) and they commonly use their own shopping bags (81 percent do so often). Sixty-nine percent of Germans own a dishwasher, the highest rate among those in the study.

In terms of their relative rankings, German consumers perform best on the **food** sub-index, placing sixth overall, and their overall food score is up from 2008. Lower-than-average consumption of beef, chicken, and fish and seafood help drive their better-than-average ranking. However, driving their food score down is the popularity of bottled water; German consumers are one of the few groups whose bottled water consumption did not decrease in the past year, with 81 percent drinking it at least several times per week, the highest rate among those surveyed. The food habits of Germans remain largely unchanged, with the exception of an increase in consumption of locally grown foods at least several times per week (up 7 points to 55 percent).

Consistent with findings in 2008, the **attitudes** expressed by German consumers suggest they are less concerned about the environment than the other consumers surveyed. They are among the least likely to say that they are very concerned about environmental problems (43 percent versus the 17-country average of 55 percent), that society needs to consume a lot less for the benefit of future generations (37 percent versus the average of 59 percent), or that they are trying very hard to reduce their own negative impact on the environment (34 percent versus 45 percent). Germans are also less likely than others to say they feel guilty about their environmental impacts (14 percent versus the average of 31 percent), that global warming will worsen their way of life (30 percent versus the average of 48 percent), or that an environmentally friendly lifestyle is good for their health (66 percent versus the average of 72 percent). It has been observed that high levels of environmental consumer behavior and government leadership correspond with lower environmental concern in Germany.

Frequency of Consuming Bottled Water
Percentage of Consumers in Each Country, 2009



The white space in this chart represents "DK/NA."