



A research project by National Geographic and GlobeScan



Greenindex 2010:

Consumer Choice and the Environment—
A Worldwide Tracking Survey

2 June 2010

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- This is the third year National Geographic has partnered with GlobeScan (www.GlobeScan.com) to develop an international research approach to measure and monitor consumer progress towards environmentally sustainable consumption. The key objectives of this unprecedented consumer tracking survey are to provide regular quantitative measures of consumer behavior and to promote sustainable consumption.
- This research project differs from other environmental surveys in that it goes beyond attitudes and concerns to focus on actual behavior and material lifestyles across 17 countries. This includes measures such as household footprint, energy use, transportation habits, food consumption, and the relative penetration of green products versus traditional products.
- The central component of this research initiative is the creation of a composite index of environmentally sustainable consumption called the Greendex. The Greendex will be used over time to monitor and report changes in consumer behavior by replicating the research annually.
- In addition, GlobeScan assembled a parallel set of empirical indicators of consumption against which the Greendex results were validated in 2008 and 2009.

- The National Geographic Society wishes to inspire action both among the millions that the National Geographic brand touches worldwide, and among others who will hear about this study. Therefore, the research is specifically focused on consumer behavior. Although we recognize the importance of regulatory frameworks, country-specific climatic conditions, culture, economic development, and other factors affecting consumption, this study is limited to measuring consumer behavior in absolute terms.
- Throughout this report, “sustainable consumption” is defined as consumption that demands less of the ecosystem services that the Earth provides, and is less likely to impair the ability of future generations to meet their own needs as a result.
- The following is GlobeScan’s third report of findings from this research project conducted with consumers in 17 countries.

Participating Countries

2010



- GlobeScan used a quantitative Internet methodology for this study. It is recognized that Internet panels do have some limitations in providing a thoroughly “representative” sample of the general population, but it is felt that the objective of measuring *consumer* behavior can be well met by the use of Internet research in the countries included in this study. Even though access to the Internet is more restricted in developing countries, it is believed that the preferences of the consuming public can be determined through Internet research, as long as sufficiently large panels are used.
- In addition, since the norm for public opinion research is quickly evolving toward the use of online panels, it is sensible to adopt this methodology at the outset so that modal changes that negatively affect the ability to track changes will be avoided.
- This report is based on the results of online interviews with approximately 1,000 consumers in each of the 17 countries, representing both the developed and developing world.

Methodology: Country Selection



- At the outset of this research project in 2008, the National Geographic Society (NGS) commissioned GlobeScan to conduct an analysis of its existing survey research to identify potential target populations for NGS's planned research project.
- GlobeScan annually tracks global public opinion on a range of issues; annual surveys include over 20,000 interviews across 20+ countries on six continents, using face-to-face or telephone interviews with samples of 1,000 citizens per country. GlobeScan had relevant survey data available for 18 of National Geographic's initial list of 22 potential target countries. GlobeScan applied a quantitative approach to this body of research to classify countries according to like behaviors and attitudes, in order to help National Geographic select countries for inclusion in the Greendex.

- To ensure that no demographic groups were over-represented in the quantitative survey sample, quota caps were set for education, age, gender, and region.
- The maximum number of survey completions by consumers who had completed a university degree or more was set at 30 percent for Argentina, Brazil, China, India, and Mexico, and at 35 percent for Australia, Canada, France, Germany, Hungary, Japan, Russia, South Korea, Spain, Sweden, the United Kingdom, and the USA.
- Quota caps for age were set at 30 percent of respondents under 35 in Australia, Canada, France, Germany, Hungary, Japan, Russia, Spain, Sweden, the United Kingdom and the USA; 40 percent of respondents in Argentina and South Korea; 50 percent of respondents under 35 in Brazil, China, India, and Mexico; 40 percent of respondents between 35 and 55 in all the countries; 40 percent of respondents over 55 in Sweden; 30 percent of respondents over 55 in Argentina, Australia, Canada, France, Germany, Hungary, Japan, Russia, South Korea, Spain, the United Kingdom, and the USA; and 10 percent of respondents over 55 in Brazil, China, India, and Mexico.
- Quotas for gender were set at 50 percent male and 50 percent female in all countries.
- The data for each country were then weighted according to the latest census data to reflect the demographic profile of each country.
- The sample in this study is representative of national adult populations based on age, gender, and education. Online panels are made up of people who have previously agreed to take part in surveys and, as a result, are not taken randomly from the general population. For this reason, theoretical margin of error cannot be calculated; however, it has been shown that an online sample of this size, representing an adult national population, yields comparable results to a nationally representative random sample having a margin of error of +/- 3.1.

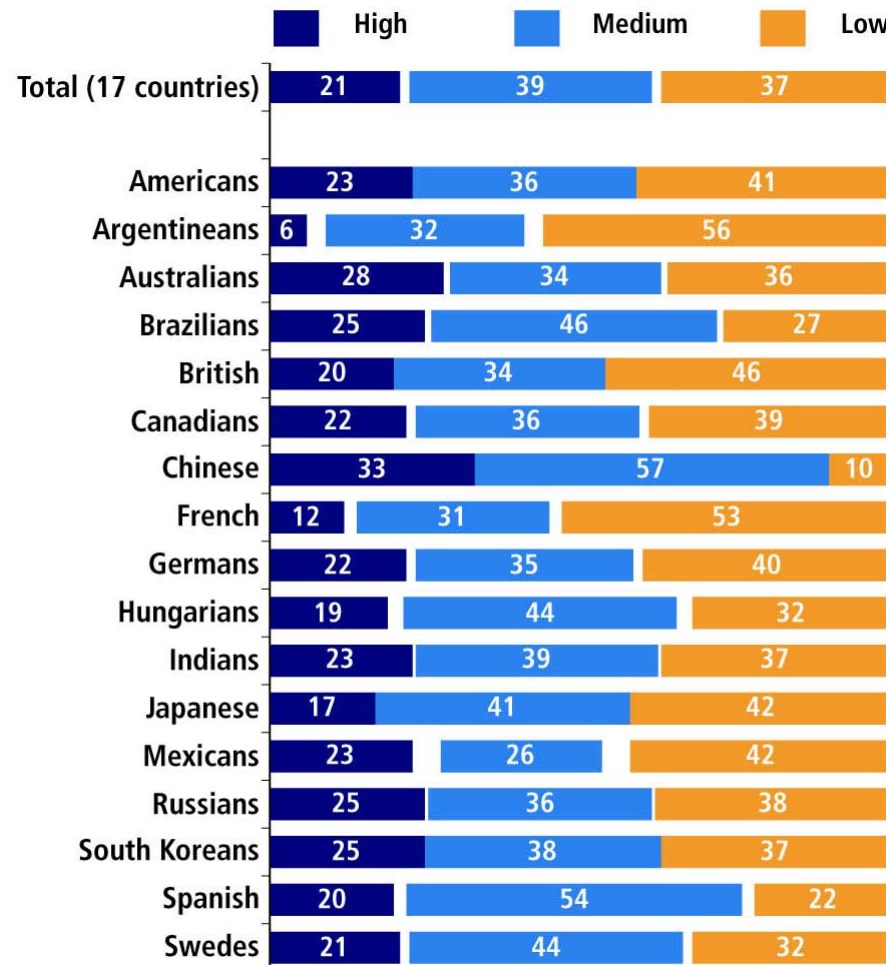
- GlobeScan systematically follows strict research quality management procedures in compliance with its ISO 9001 registration and its ESOMAR membership requirements.
- Among other elements, compliance for this study required rigorous translation, fieldwork, and data-quality controls.
- Questionnaire translations were conducted by native speakers and then back-translated by additional independent translators.
- Quotas were applied to each country's survey sample and results were weighted according to the latest census data.
- Respondents who completed the questionnaire in unrealistically short times or who illustrated clearly and consistently contradictory response patterns were removed from the database.
- All statements and figures in this report have been fact-checked and proofed by individuals other than the report authors.

- As a function of the quotas applied to the survey sample and the weighting factors applied to the results, the populations surveyed can be briefly described as representative cross sections of consumers in each country who have access to the Internet in order to complete surveys in either their homes or offsite in libraries, cafes, schools, etc.
- Survey respondents are frequently referred to in this report as “consumers” since the focus of the research is the the consumption behavior of citizens surveyed. GlobeScan does not equate the words “citizens” or “individuals” with the word “consumers.”

Figures and Charts

- All figures and charts except those reporting Greendex findings are expressed in percentages, unless otherwise noted. Totals may not add to 100 because of rounding.
- In the case of certain bar charts, white space represents the portion of respondents who either answered “Do not know” or did not answer at all (i.e., “DK/NA”).

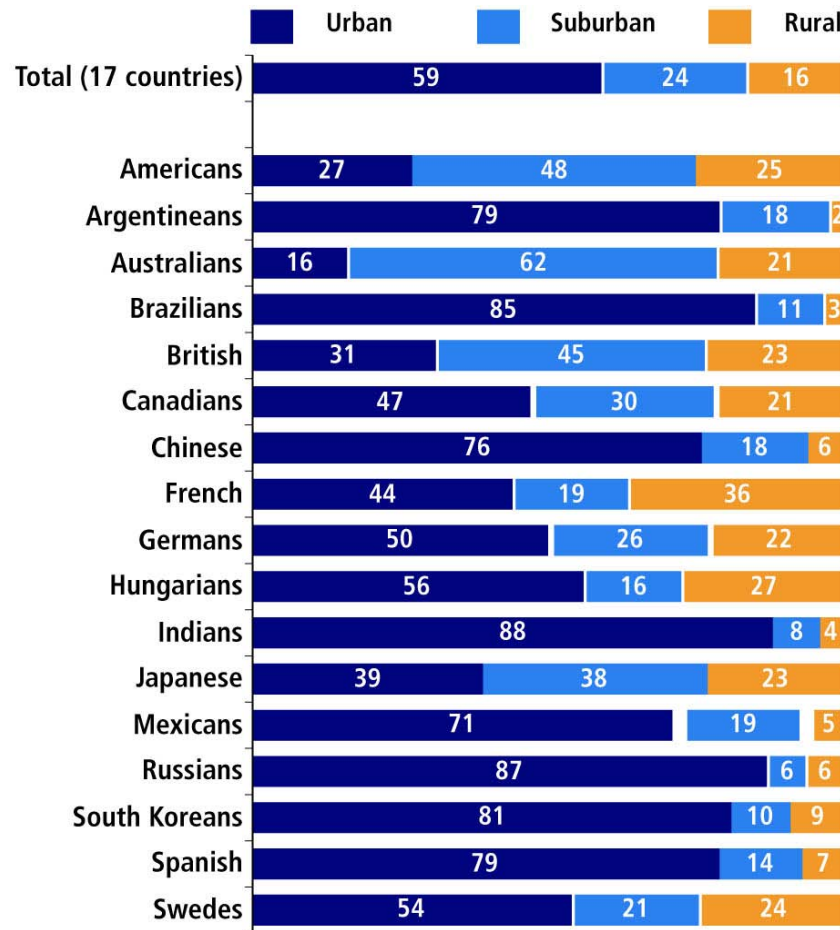
Percentage of Consumers in Each Country, 2010



NGS10_income

Community Type

Percentage of Consumers in Each Country, 2010



NGS10_commtype

Methodology: Field Dates

2010

Argentina	March 4–22, 2010	Japan	February 23 – March 22, 2010
Australia	February 1–24, 2010	Mexico	March 1–22, 2010
Brazil	April 13–26, 2010	Russia	February 25 – March 22, 2010
Canada	February 24 – March 22, 2010	South Korea	February 25 – March 22, 2010
China	February 18 – March 22, 2010	Spain	March 1–9, 2010
France	February 27 – March 22, 2010	Sweden	February 23 – March 22, 2010
Germany	February 25 – March 22, 2010	UK	February 1–20, 2010
Hungary	February 24 – March 9, 2010	USA	February 1–9, 2010
India	February 1–15, 2010		

NGS10_FWSch

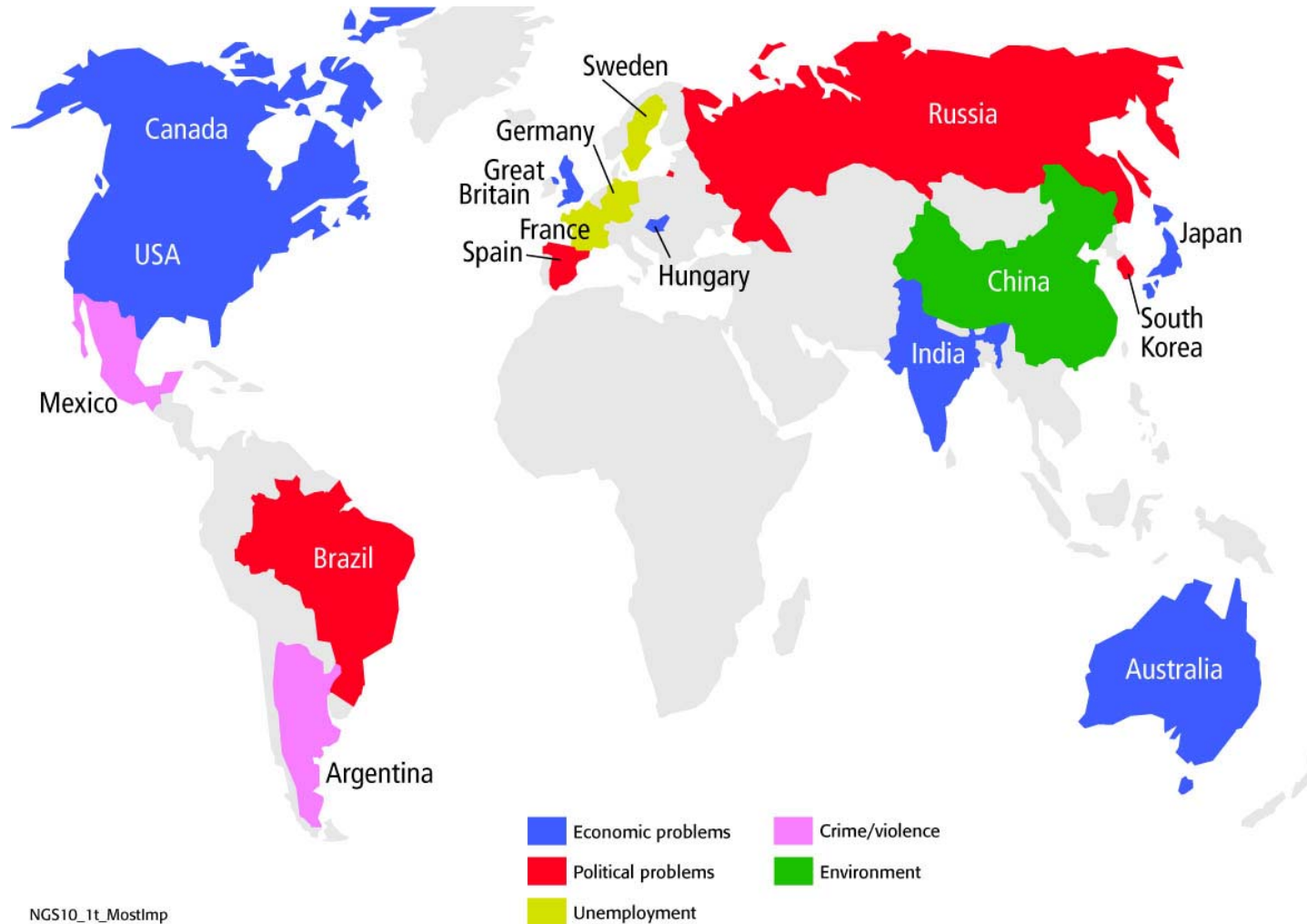
Top-of-Mind Issues

- Mentions of the economy as a top-of-mind issue have decreased significantly in most countries, but concern about the economy remains high among Americans and Japanese. Some recession-related issues such as unemployment and political problems are also commonly mentioned in France, Germany, Brazil, and Spain.
- The environment is not the most top-of-mind issue in most countries. One-third of Chinese consumers, however, mention the environment as the most important issue facing their country, up 15 points from 2009. Indians and Russians are also increasingly likely to think that the environment is the most important national issue.
- Consumers in emerging economies, particularly the Chinese, Indians, and Brazilians, tend to be the most likely to be concerned about global environmental issues such as climate change, air pollution, water pollution, shortages of fresh water, and loss of species and habitats. The number of Indians and Chinese concerned about these issues has increased significantly since last year.

- The economy and the cost of energy and fuel are the only global issues that a majority of Americans and British consumers say they are “very concerned” about.
- Consumers in industrialized countries tend to be less concerned than others about global environmental issues. Around half or less of American, German, Swedish, and Japanese consumers are very concerned about the environmental issues examined.

Most Important National Issue

Unprompted, Consumers in Each Country, 2010



Most Important National Issue



Unprompted, Combined Mentions, Percentage of Consumers in Each Country, 2010

	Total	Americans	Argentines	Australians	Brazilians	British	Canadians	Chinese	French	Germans	Hungarians	Indians	Japanese	Mexicans	Russians	South Koreans	Spanish	Swedes
Economic problems	29	49	25	17	3	40	36	22	28	25	30	23	52	27	18	29	45	17
Political problems	18	7	31	6	28	7	8	7	7	16	27	19	15	20	26	30	49	11
Unemployment	18	25	11	9	5	12	16	8	46	34	25	12	12	15	12	19	12	33
Crime/violence	6	0	31	4	12	5	1	0	1	1	0	1	0	42	1	2	0	1
Environment	5	0	1	3	4	1	5	37	1	1	0	14	2	2	10	1	0	5
Poverty/homelessness	4	1	9	2	4	1	5	1	3	4	6	14	0	5	4	0	0	1
Education	3	0	8	3	14	1	1	3	0	3	1	5	2	6	1	5	0	1
Health	3	9	1	7	4	1	14	2	0	1	1	1	1	1	1	0	0	4
Immigration	3	1	0	11	0	18	2	0	2	4	2	0	0	0	0	0	1	6
Climate change	2	1	0	13	2	2	2	1	1	1	0	2	1	0	0	0	0	3
Overpopulation	2	0	0	2	0	1	0	10	1	0	0	15	0	0	2	0	0	0
Social inequality	2	0	1	1	13	0	1	12	2	1	0	0	2	0	0	5	0	2
Social security	2	0	2	1	0	1	2	5	2	1	1	0	7	0	2	2	0	6
Other	5	2	4	8	1	3	1	4	3	13	7	4	8	2	8	8	1	7
DK/NA	3	1	2	1	2	1	5	1	3	3	7	0	1	1	3	1	1	7

Top concern

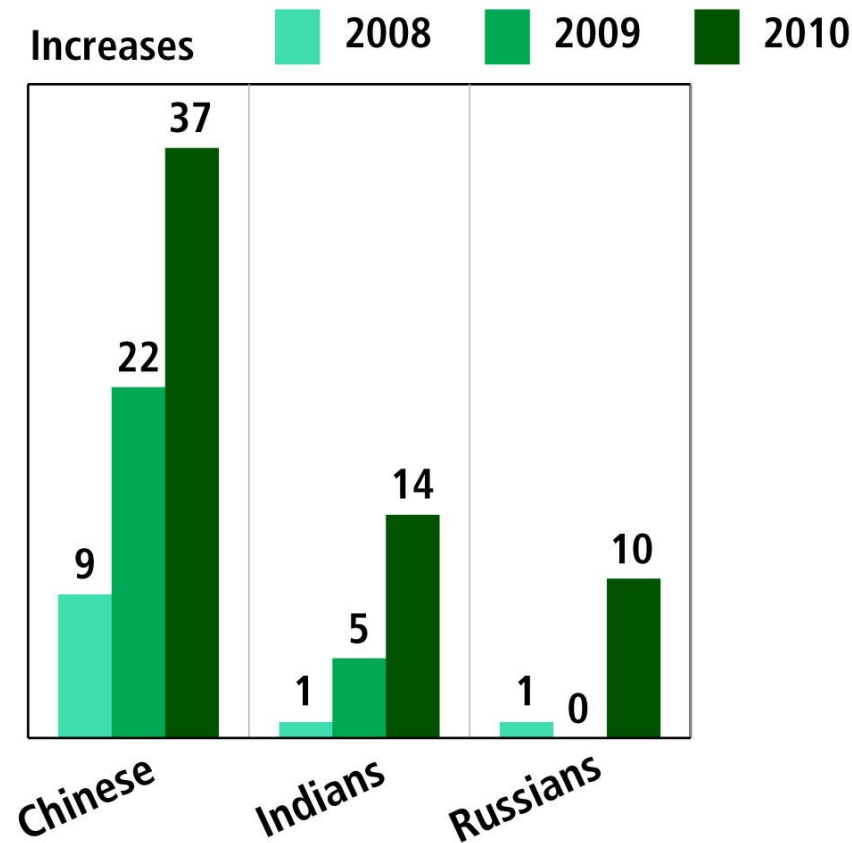
NGS10_Q1_Total



Most Important National Issue: Environment / Climate Change



Unprompted, Percentage of Consumers in Each Country, Trends: 2008–2010

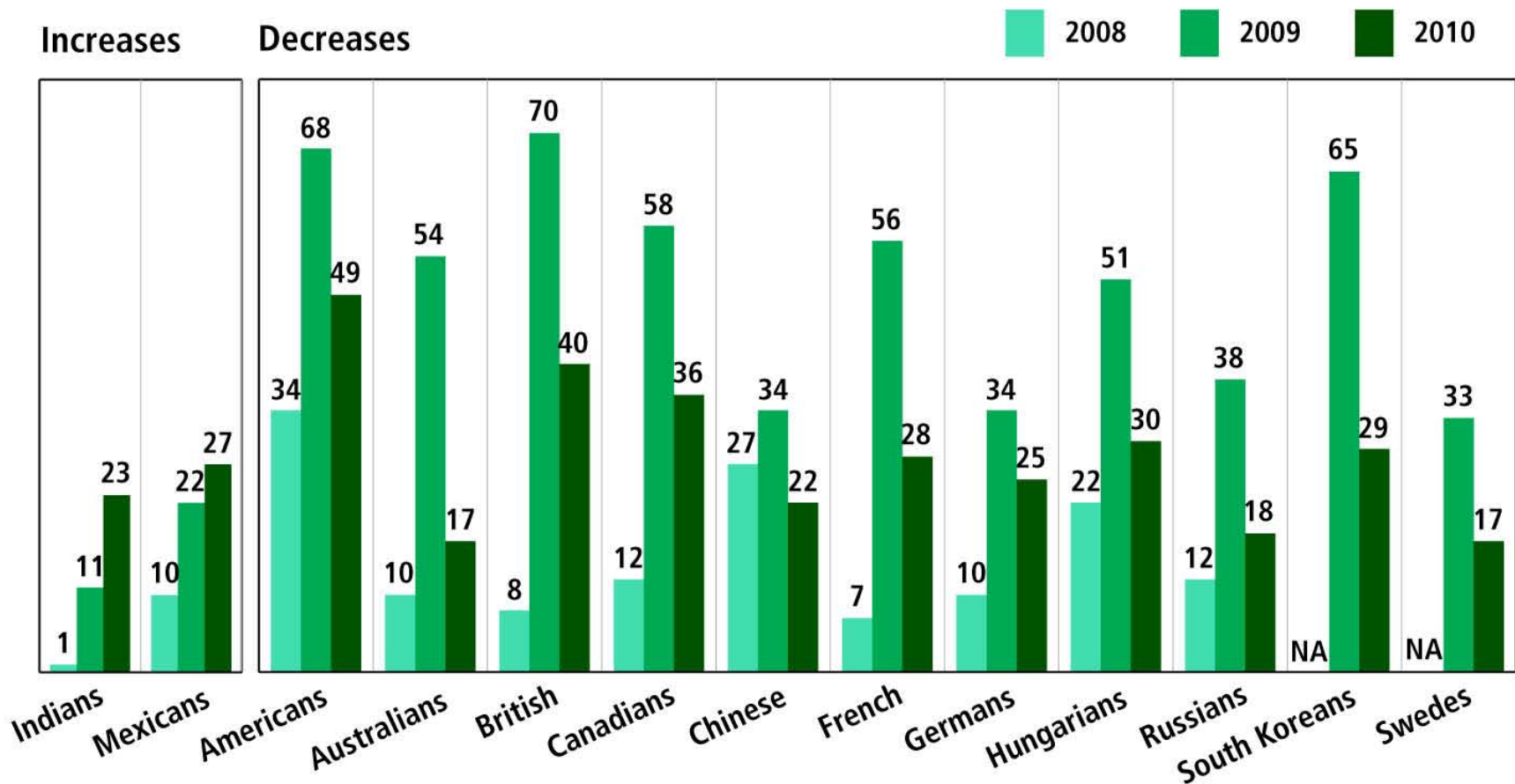


NGS10_1t_Env_trk

Most Important National Issue: Economic Problems



Unprompted, Percentage of Consumers in Each Country, Trends: 2008–2010




NGS10_1t_Economy

Concern about Global Issues

“Concerned (4+5),” Prompted, Percentage of Consumers in Each Country, 2010

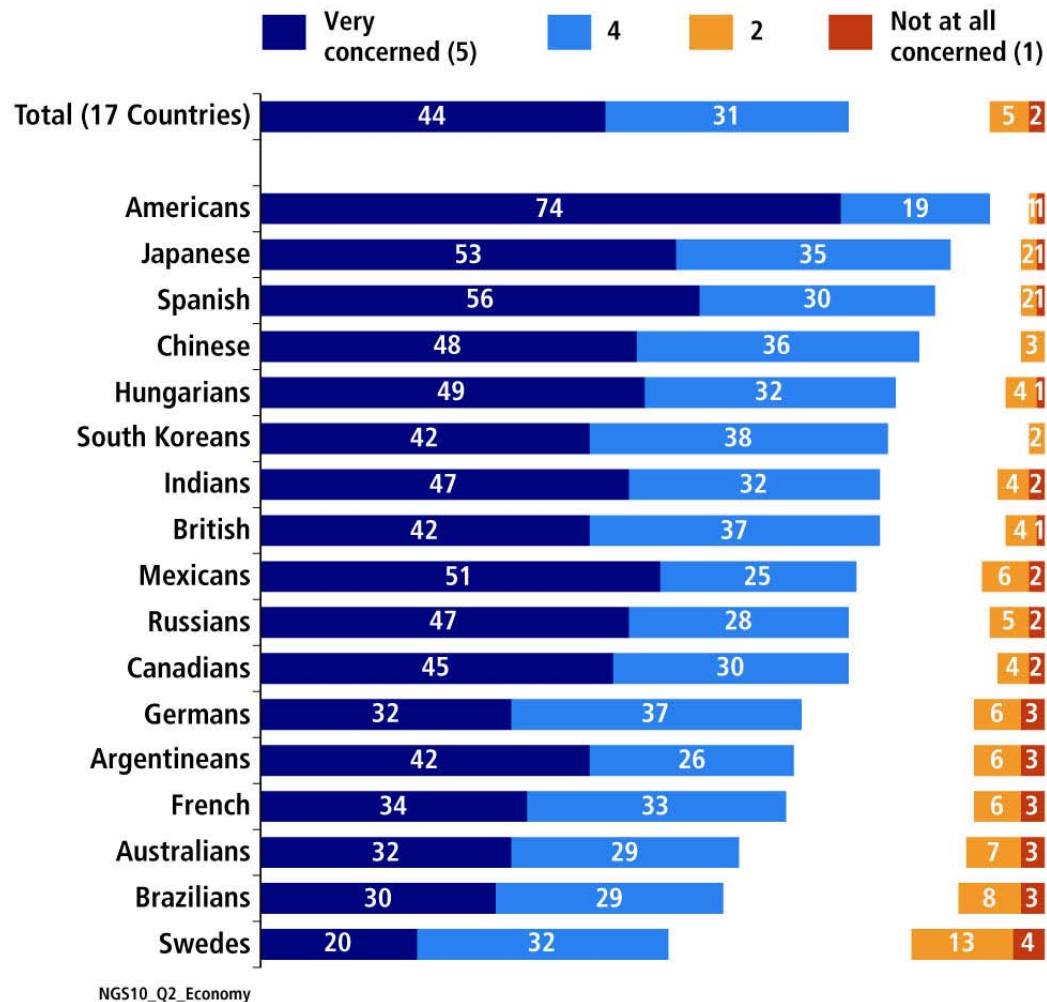
	Total	Americans	Argentineans	Australians	Brazilians	British	Canadians	Chinese	French	Germans	Hungarians	Indians	Japanese	Mexicans	Russians	South Koreans	Spanish	Swedes
The economy	75	93	68	61	60	79	75	84	67	69	81	79	88	76	75	80	86	52
Cost of energy/fuel	71	79	59	78	66	79	74	74	73	66	76	83	66	73	74	79	65	51
Air pollution	67	51	72	61	83	42	64	88	65	50	72	85	61	76	74	79	60	50
Water pollution	66	54	79	62	86	36	64	89	68	41	73	83	47	81	78	77	57	47
Climate change / global warming	64	45	79	61	82	49	57	78	61	53	60	83	73	79	39	82	62	51
Loss of species/habitat	59	48	68	64	75	51	59	62	58	48	62	70	43	71	63	58	53	53
War/terrorism	59	73	52	56	57	64	51	60	55	47	57	82	49	66	75	56	70	39
Fresh water shortages	58	51	69	73	79	37	55	77	58	34	59	85	30	77	42	71	49	36
Spread of infectious disease	53	48	60	49	75	40	50	84	48	28	52	78	33	66	69	49	45	35

 Top concern

NGS10_Q2_Total

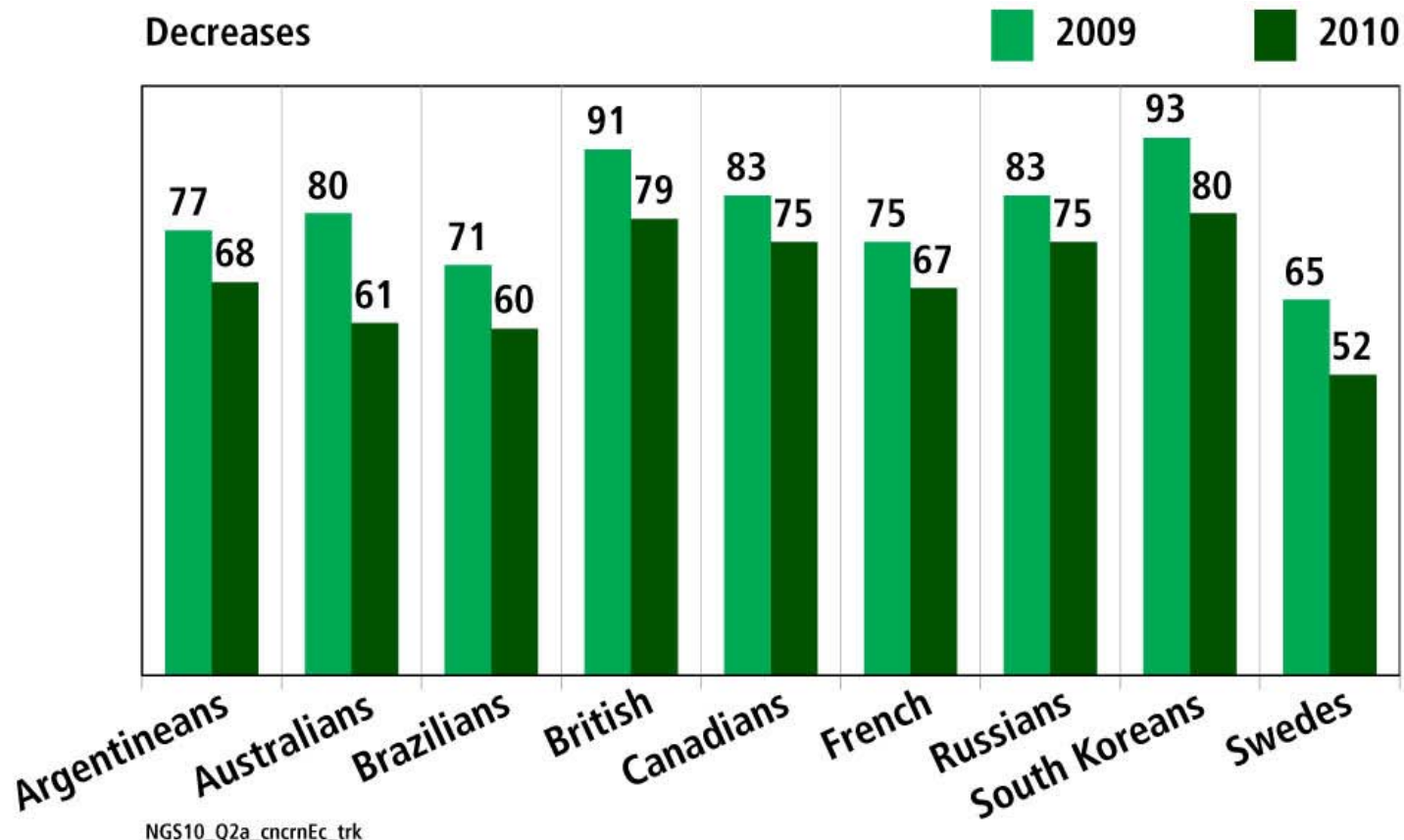
Concern about Global Issues: the Economy

Percentage of Consumers in Each Country, 2010



Concern about Global Issues: the Economy

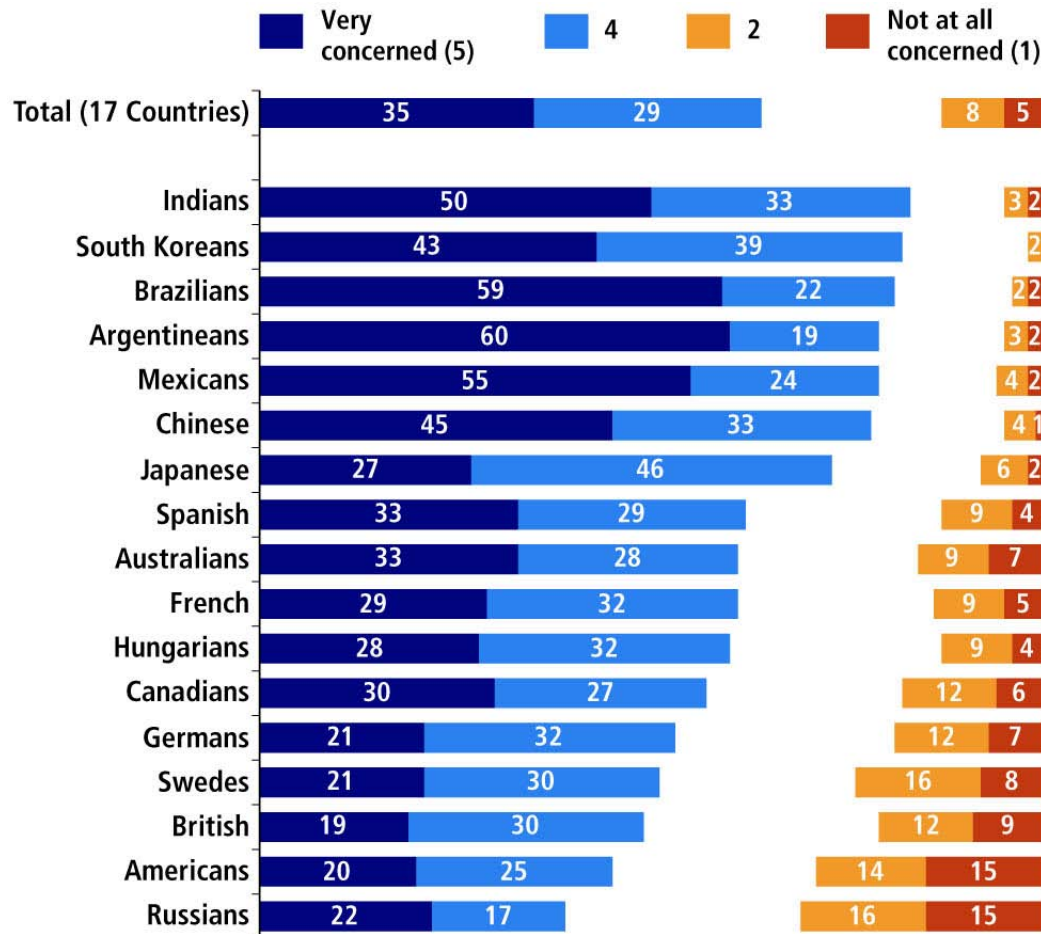
Percentage of Consumers in Each Country, Trends: 2009–2010



Concern about Global Issues: Climate Change / Global Warming



Percentage of Consumers in Each Country, 2010

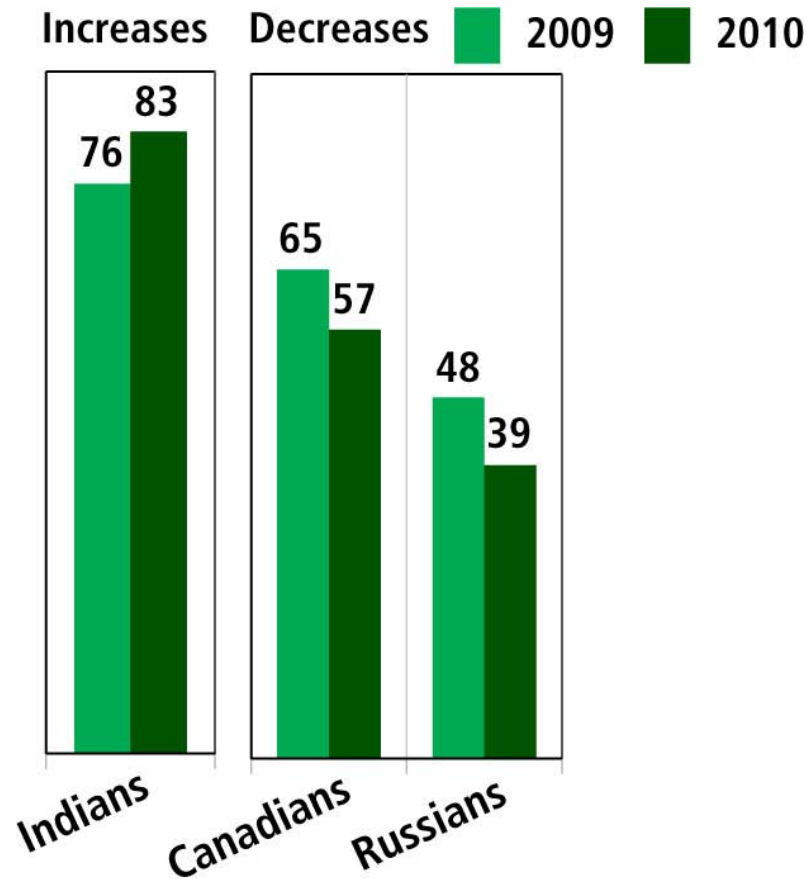


NGS10_Q2_Climate



Concern about Global Issues: Climate Change / Global Warming

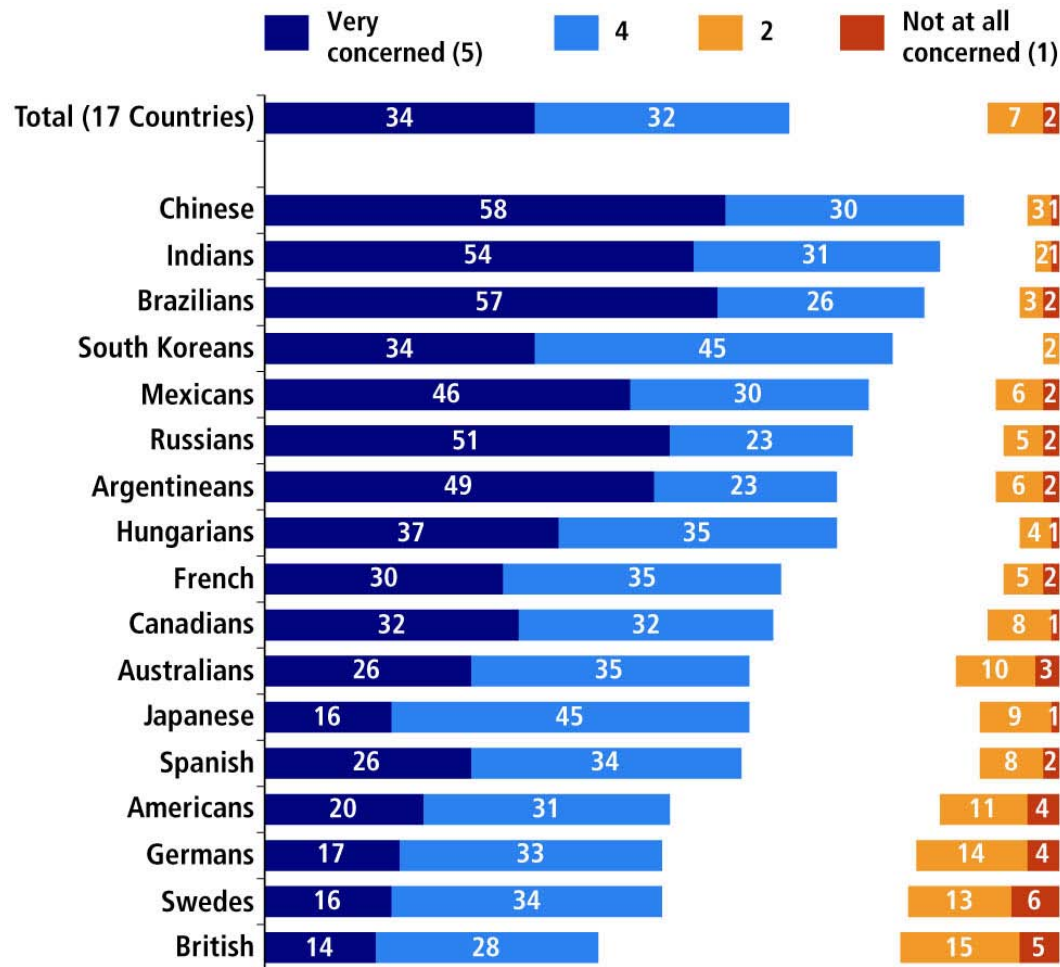
Percentage of Consumers in Each Country, Trends: 2009–2010



NGS10_Q2b_cncrnEnv_trk

Concern about Global Issues: Air Pollution

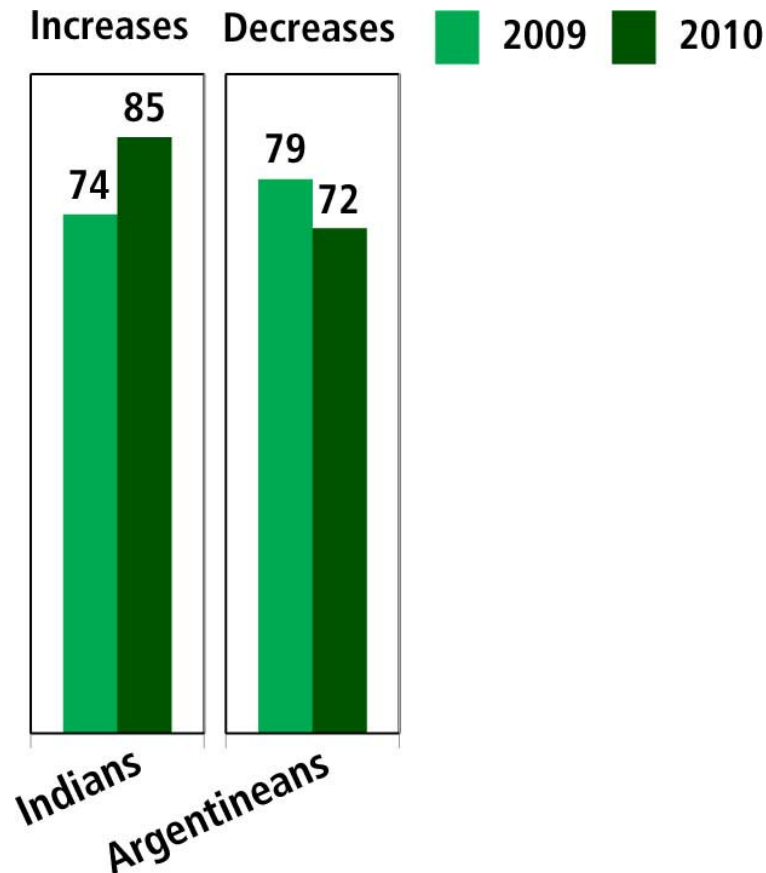
Percentage of Consumers in Each Country, 2010



NGS10_Q2_Air_Pollution

Concern about Global Issues: Air Pollution

Percentage of Consumers in Each Country, Trends: 2009–2010

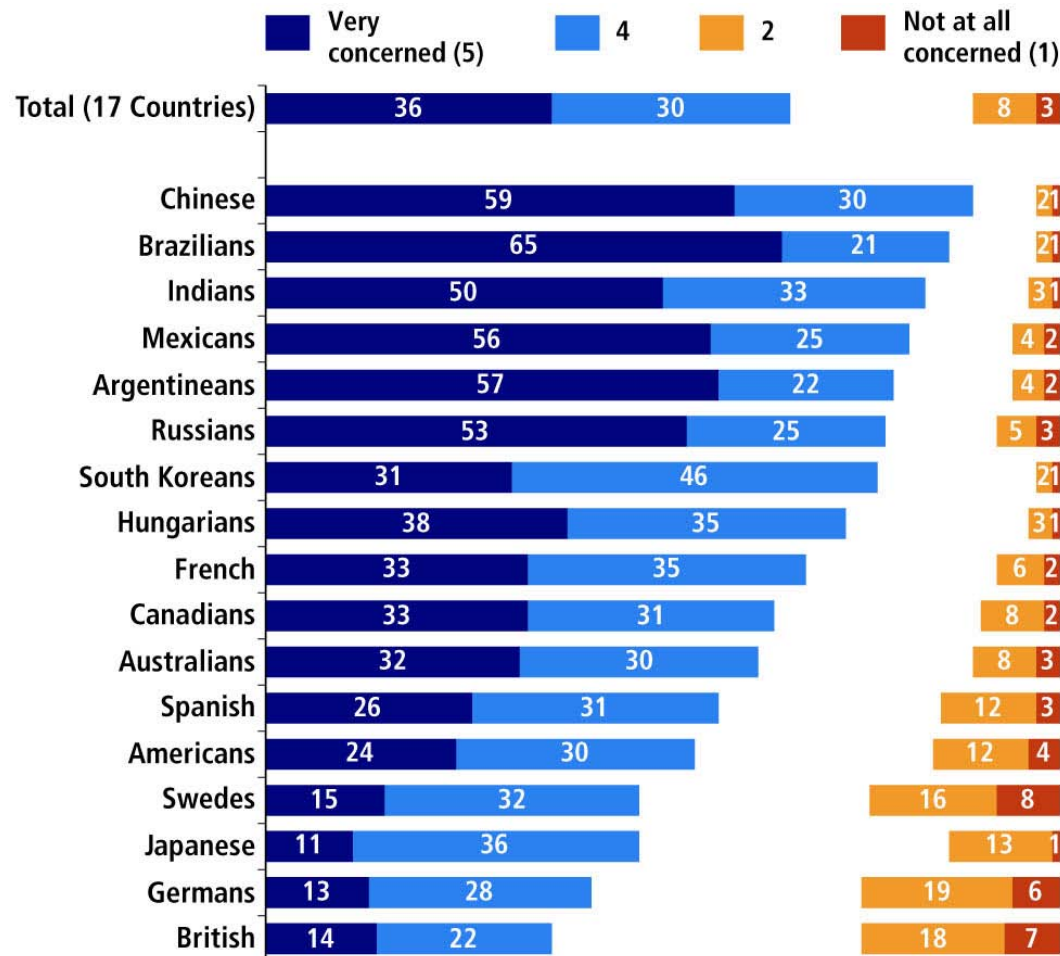


NGS10_Q2f_airpol_trk

Concern about Global Issues: Water Pollution



Percentage of Consumers in Each Country, 2010

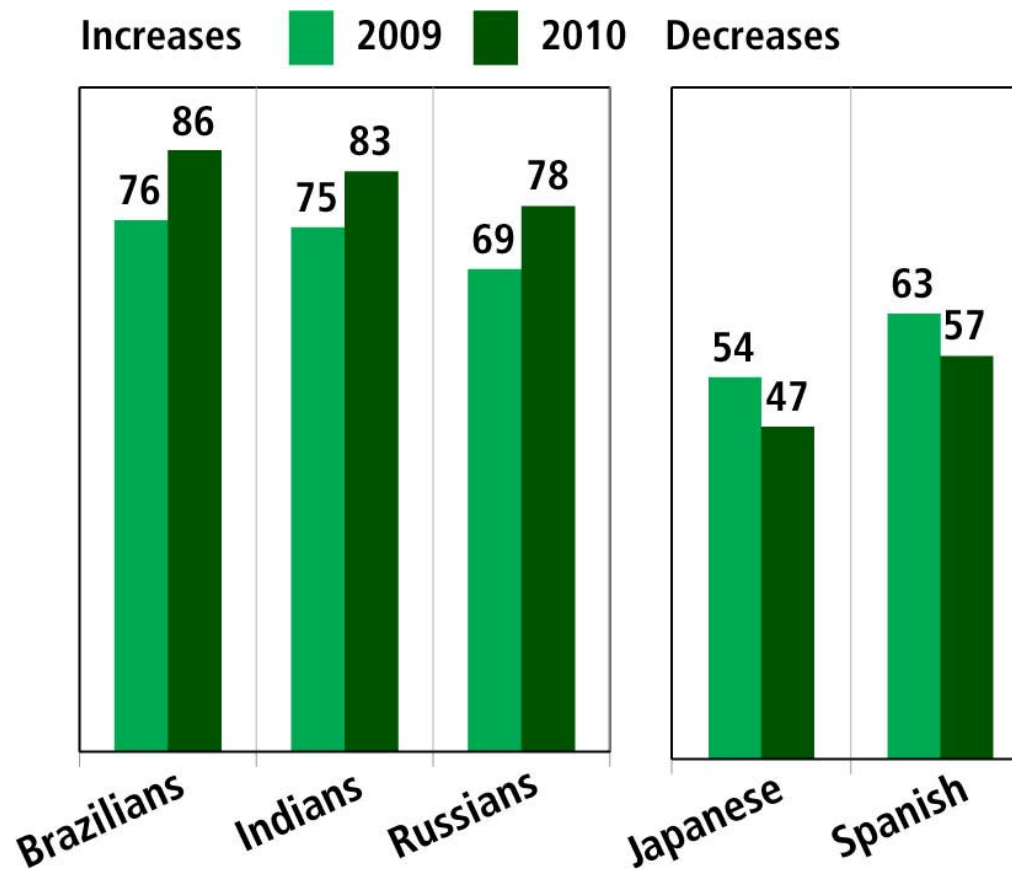


NGS10_Q2_Water_Pollution



Concern about Global Issues: Water Pollution

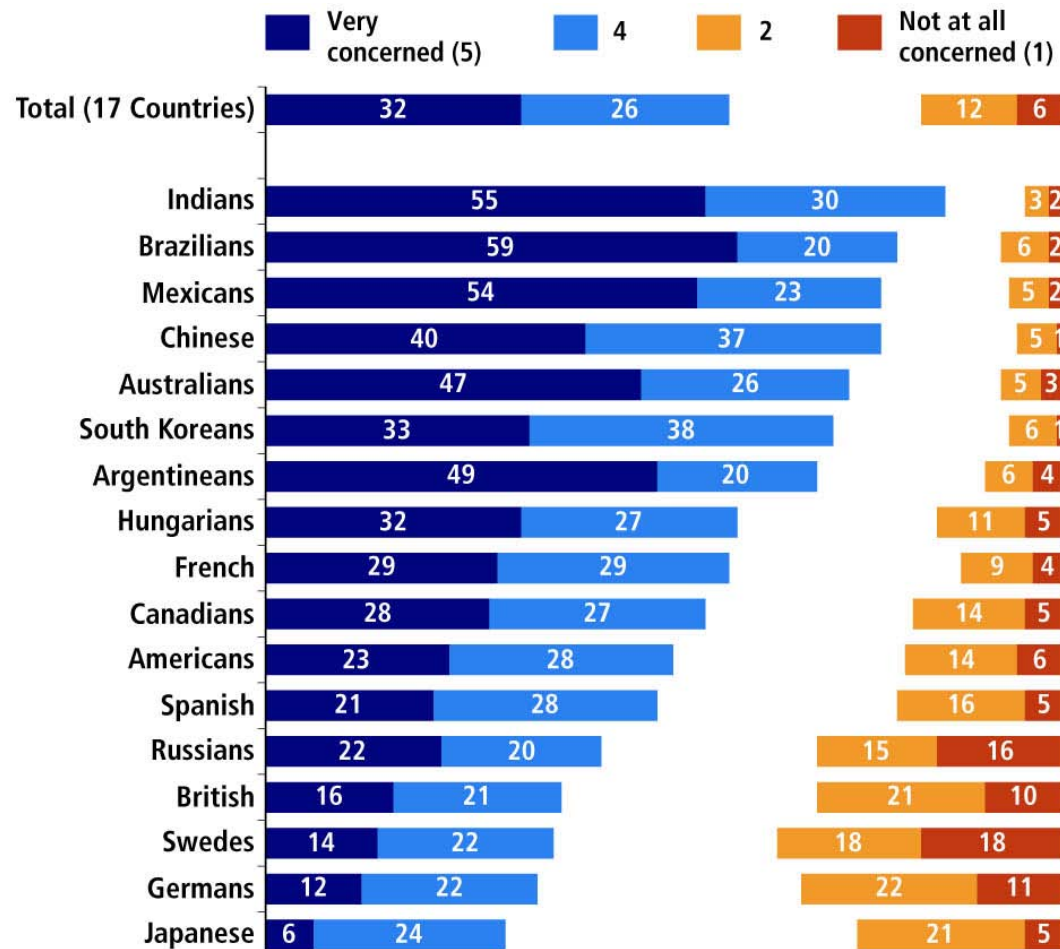
Percentage of Consumers in Each Country, Trends: 2009–2010



NGS10_Q2g_WatPol_trk

Concern about Global Issues: Shortages of Fresh Water

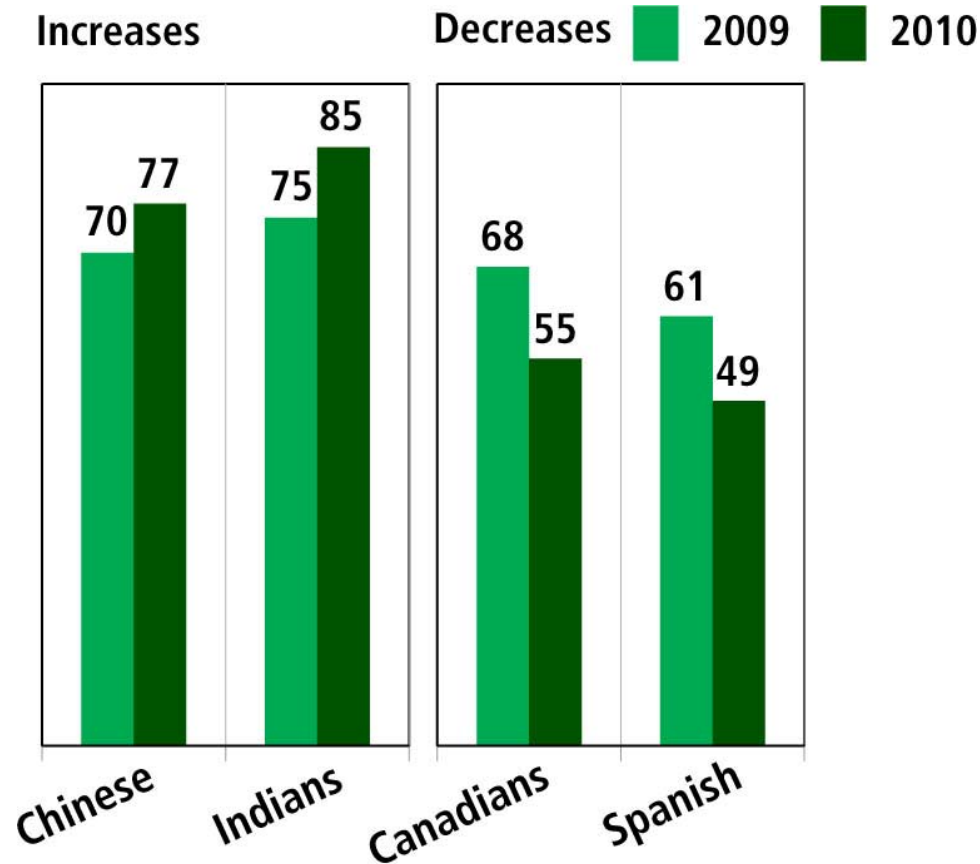
Percentage of Consumers in Each Country, 2010



NGS10_Q2_Shortages_of_Fresh_Water

Concern about Global Issues: Shortages of Fresh Water

Percentage of Consumers in Each Country, Trends: 2009–2010

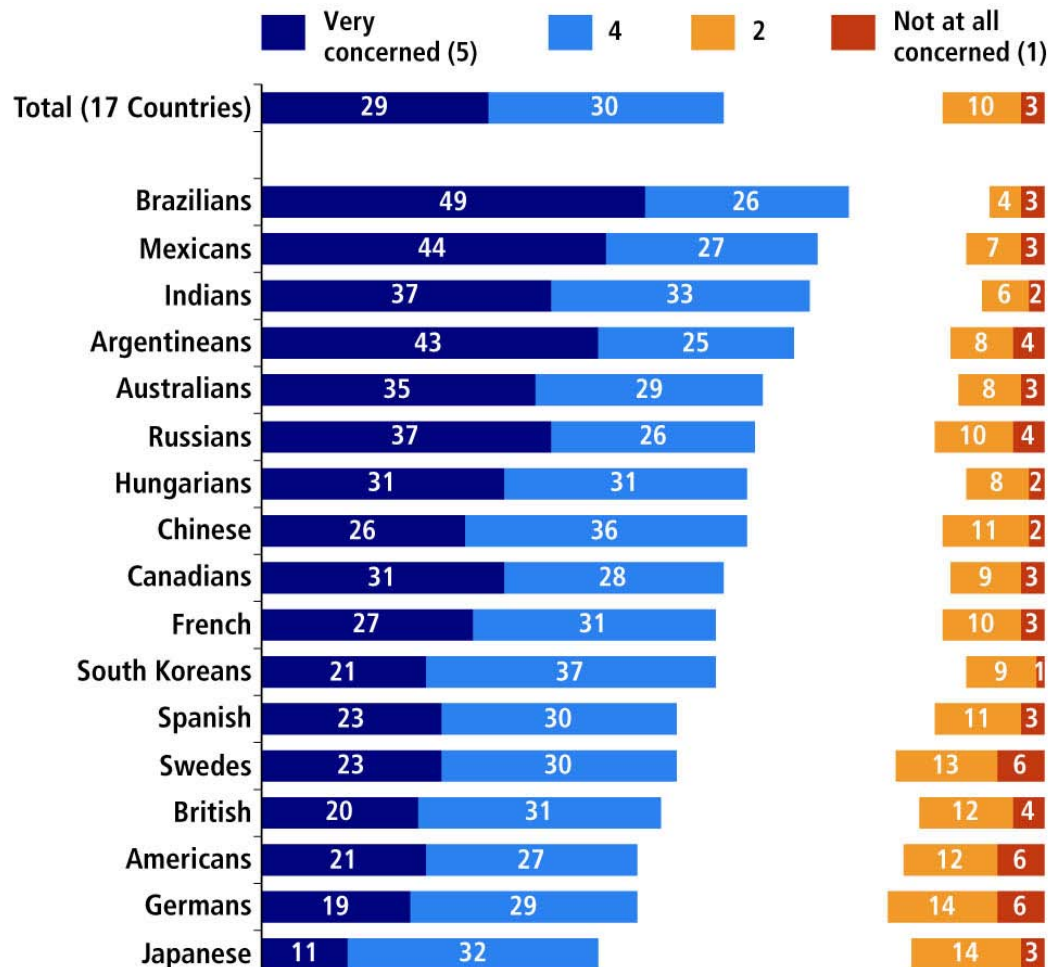


NGS10_Q2h_ShrtWat_trk

Concern about Global Issues: Loss of Species and Habitat



Percentage of Consumers in Each Country, 2010

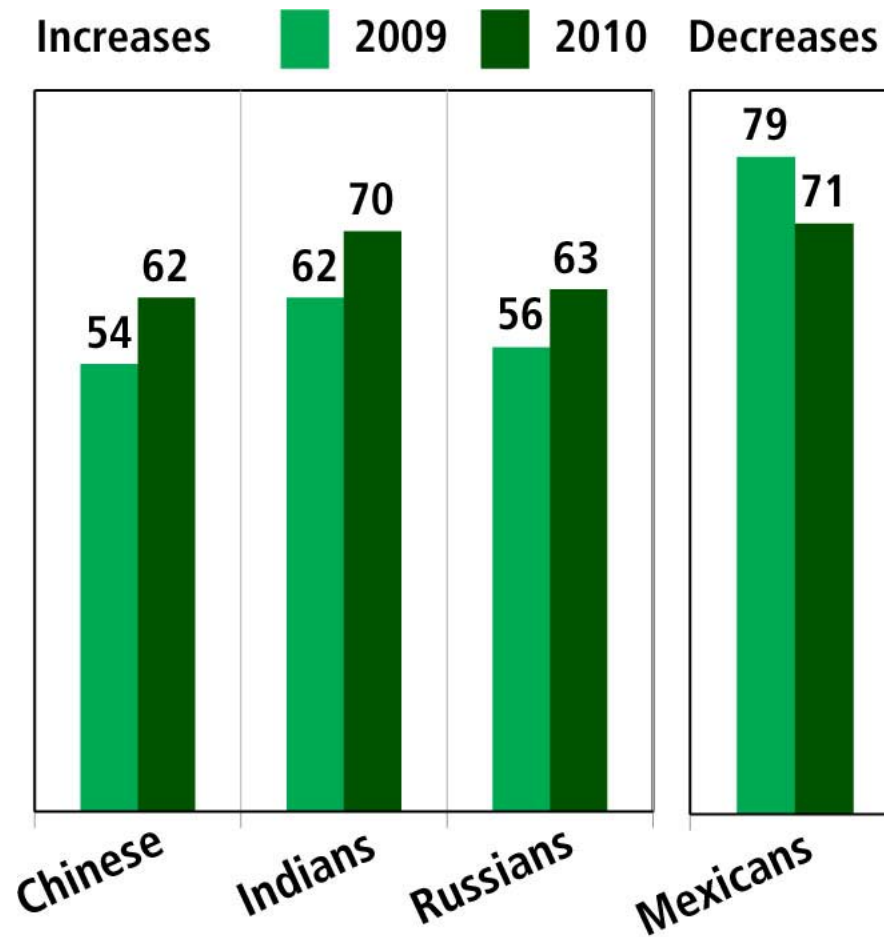


NGS10_Q2_Species & Habitat



Concern about Global Issues: Loss of Species and Habitat

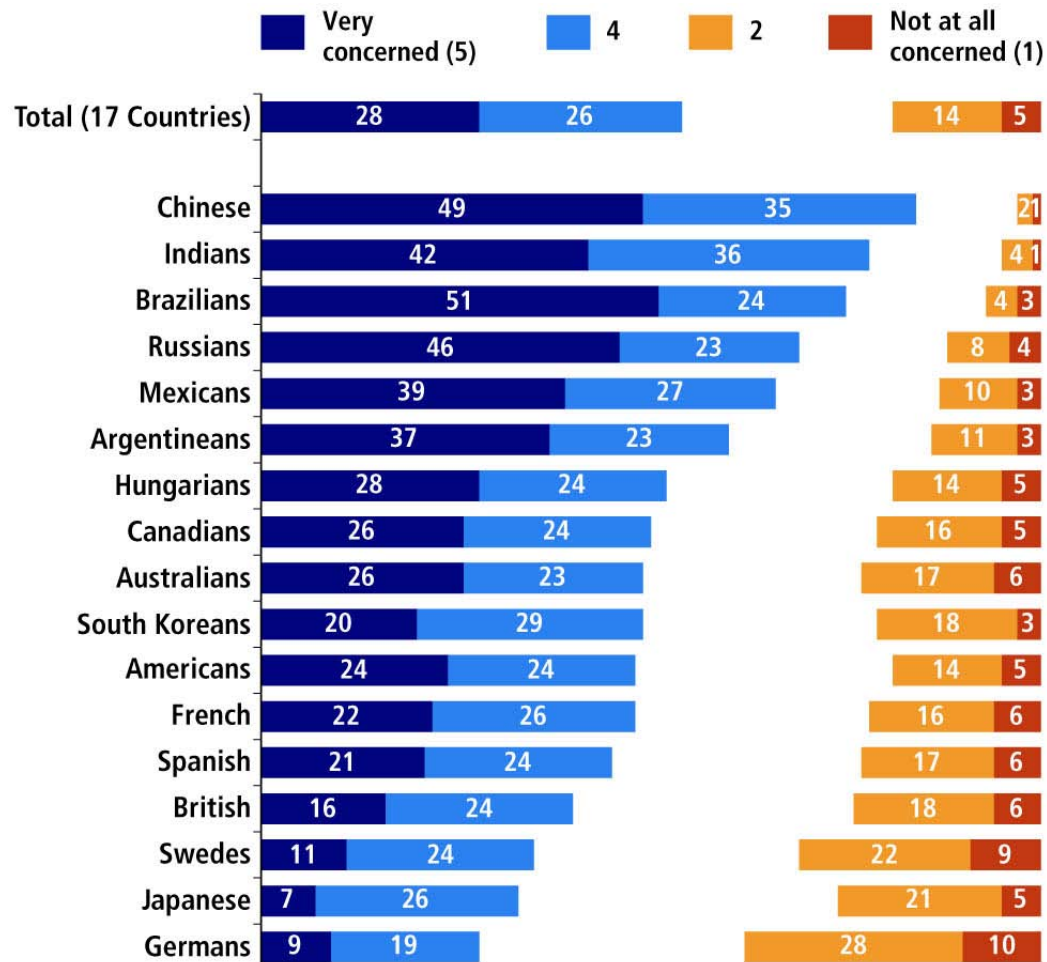
Percentage of Consumers in Each Country, Trends: 2009–2010



NGS10_Q2c_lossspe_trk

Concern about Global Issues: Spread of Infectious Diseases

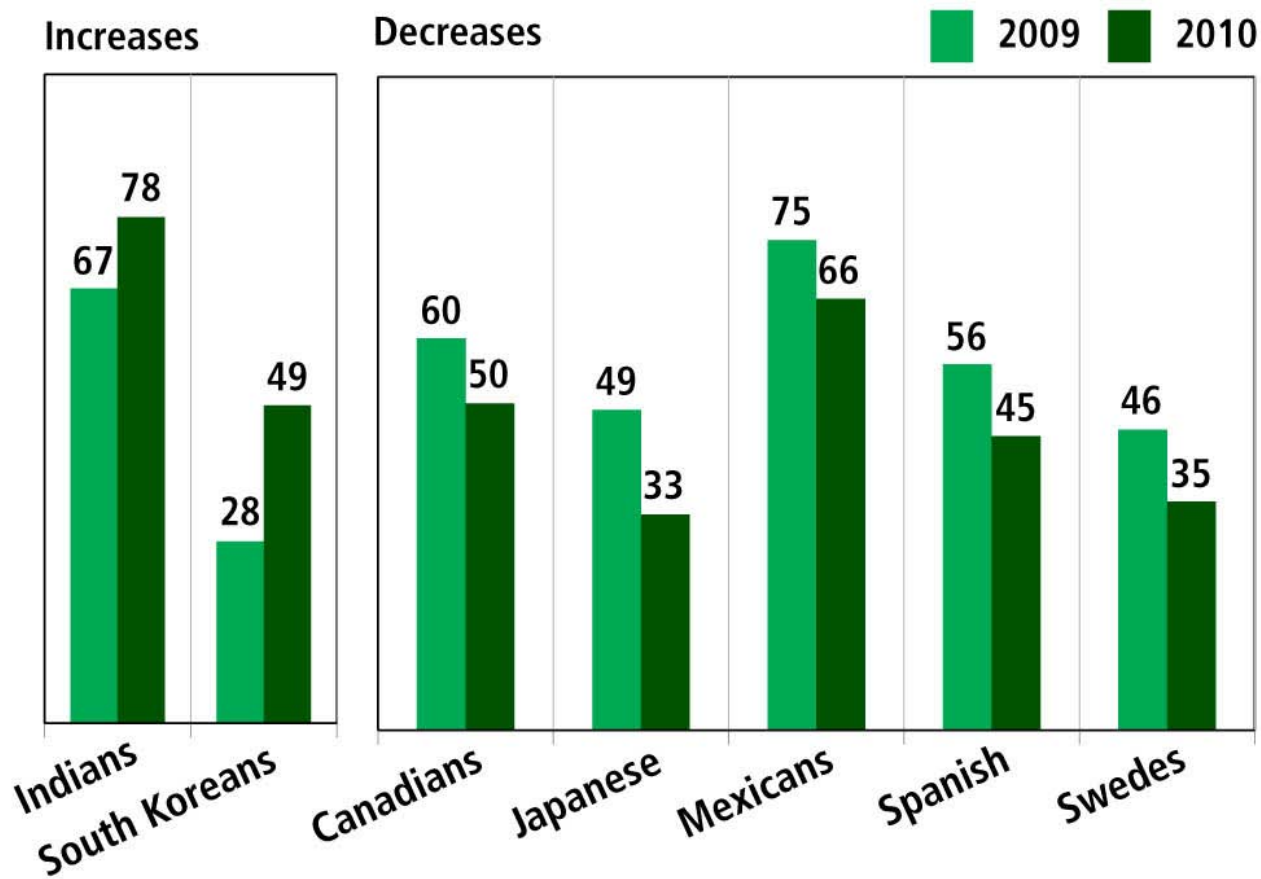
Percentage of Consumers in Each Country, 2010



NGS10_Q2_Infectious_Disease

Concern about Global Issues: Spread of Infectious Diseases

Percentage of Consumers in Each Country, Trends: 2009–2010

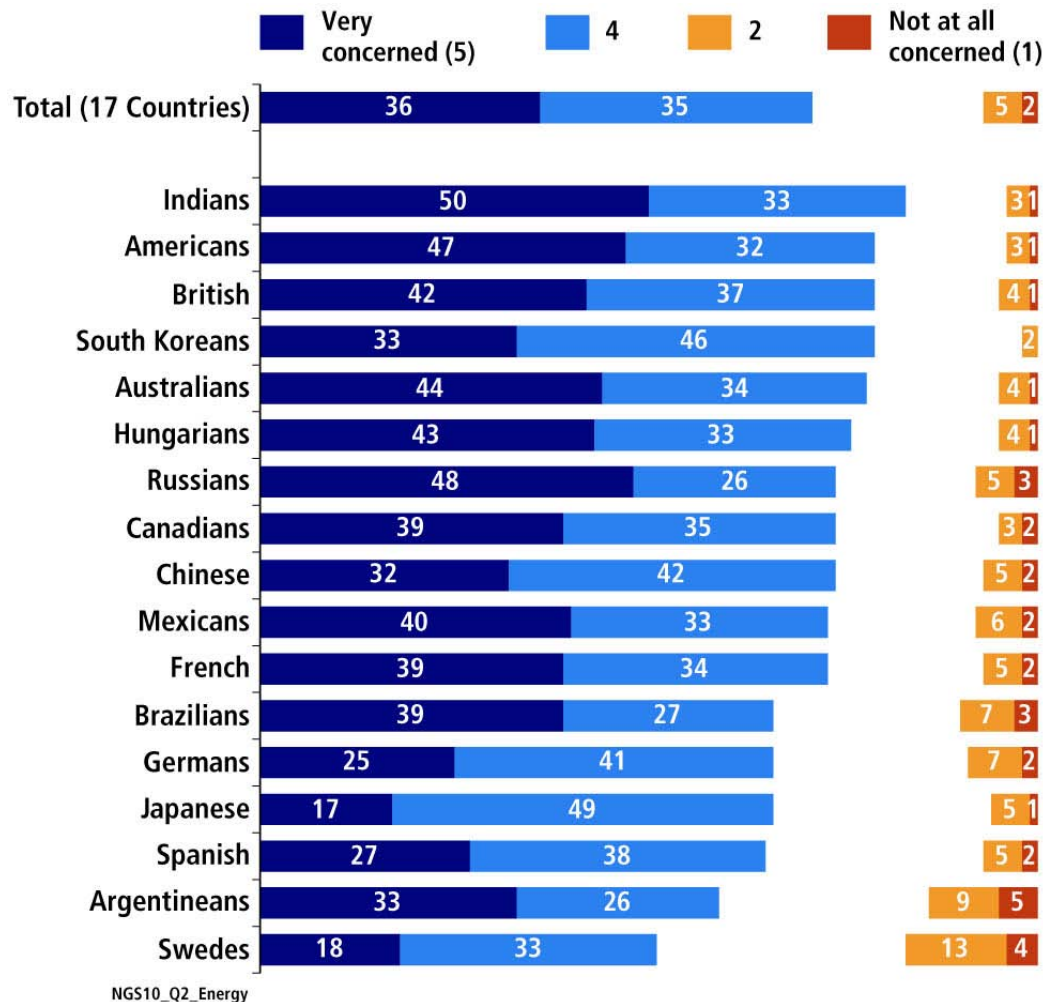


NGS10_Q2d_sprddis_trk

Concern about Global Issues: Cost of Energy and Fuel

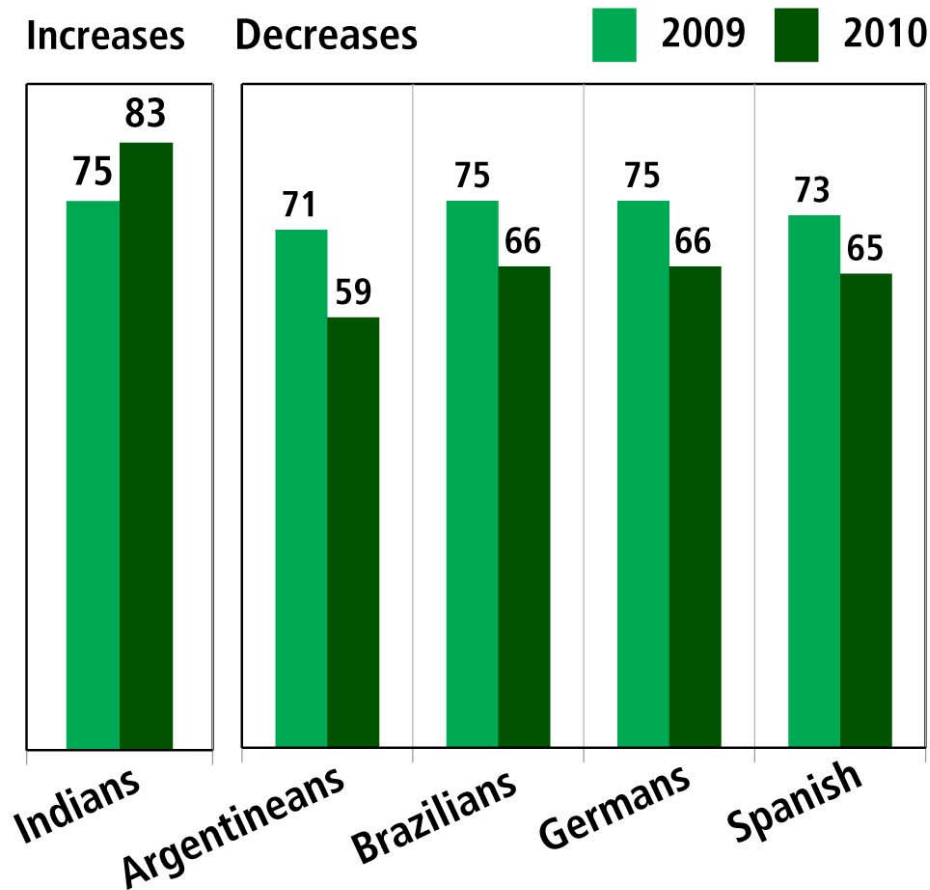


Percentage of Consumers in Each Country, 2010



Concern about Global Issues: Cost of Energy and Fuel

Percentage of Consumers in Each Country, Trends: 2009–2010

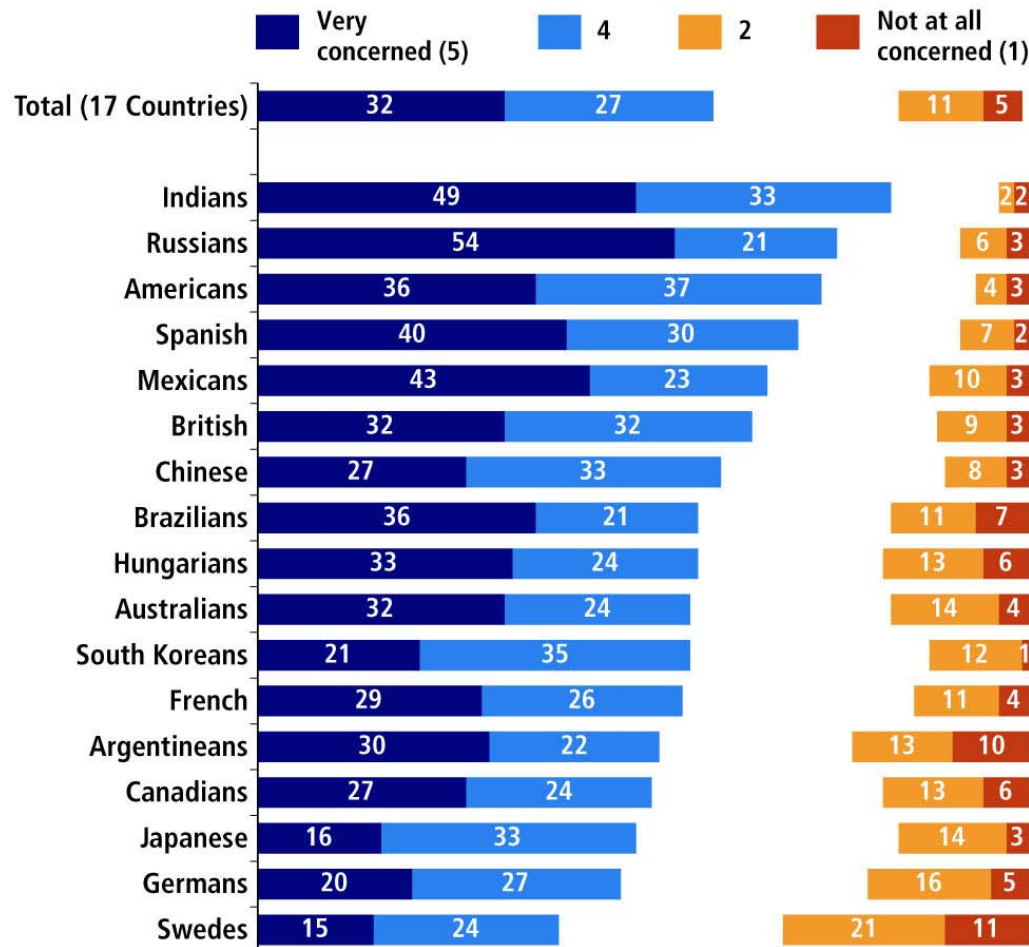


NGS10_Q2i_EngyCst_trk

Concern about Global Issues: War and Terrorism



Percentage of Consumers in Each Country, 2010



NG510_Q2_War_and_Terrorism



The Greendex

Introducing the Greendex



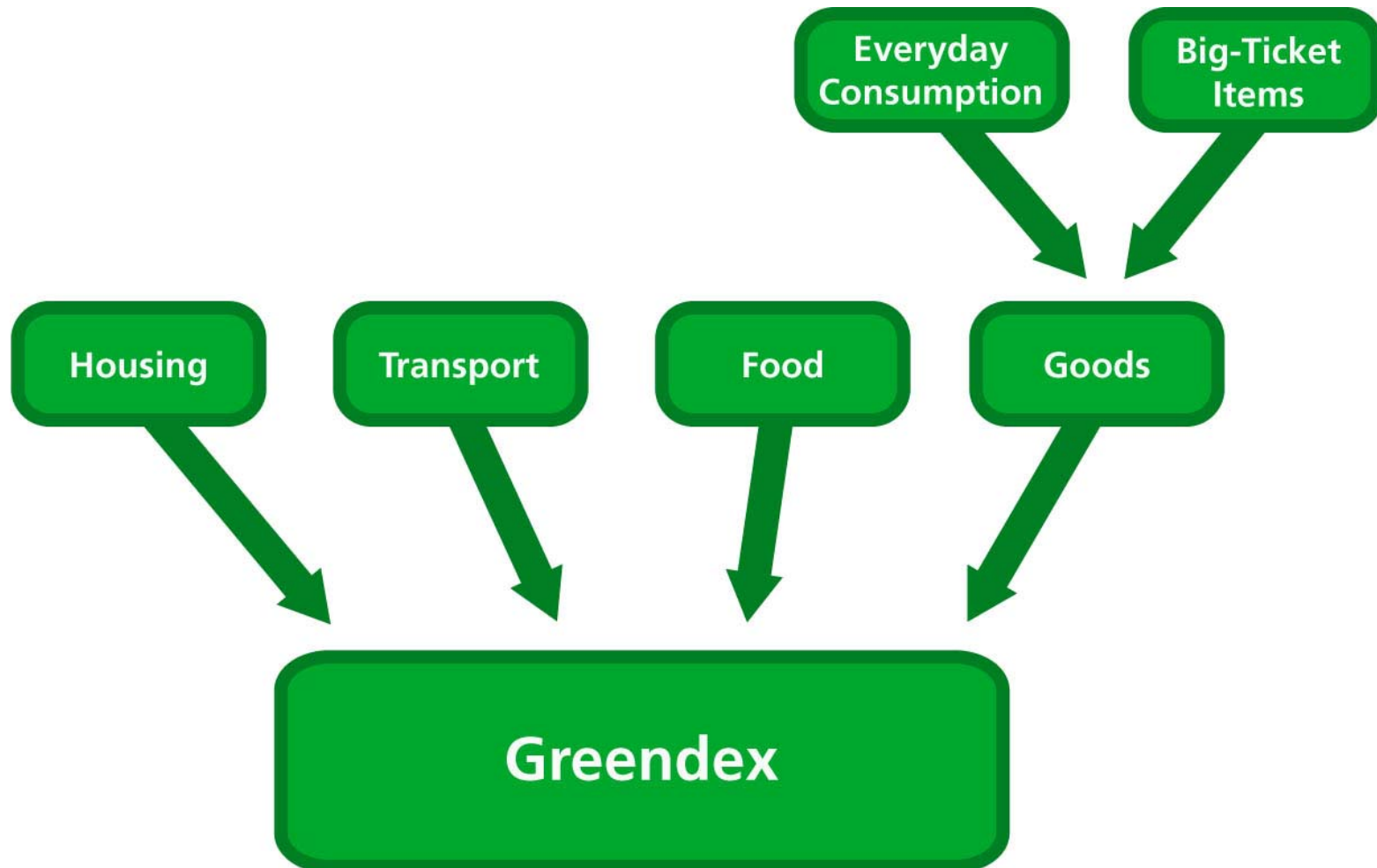
- National Geographic and GlobeScan developed a composite measure of environmentally sustainable consumption called the Greendex. The Greendex scores each respondent based on the consumption patterns they report in the survey, and compares average scores by country.
- The Greendex measures consumer behavior in four broad areas: housing, transportation, food consumption, and goods.
- Over time and with subsequent waves of the survey, the Greendex will be used to track changes in sustainable consumption at the global level and within specific countries.
- In the short term, the Greendex is meant to encourage sustainable consumption by increasing consumer awareness and providing consumers with global reference points for comparing their own consumption patterns.
- The Greendex will also provide governments and corporations with the insights they need to facilitate or encourage sustainable consumer behavior, through government legislation, product development, or other sustainability initiatives.

- Each respondent earns a score that reflects the environmental impact of consumption patterns. Low scores signify greater environmental impacts, and vice versa.
- Points are awarded or subtracted for specific forms of consumer behavior, resulting in a score out of a maximum total available for each respondent.
- No allowances are made for consumer behavior that is determined by geography, climatic conditions where respondents live, culture, religion, or the relative availability of sustainable products.
- Most forms of sustainable consumer behavior are weighted equally within the main components of the Greendex.
- Forms of behavior that have obviously larger environmental costs or benefits are weighted more heavily (e.g., home heating and driving alone). That is, these activities have a greater impact on Greendex scores.

- Greendex calculations are weighted to account for the fact that housing and transportation behaviors generally have a more significant impact than the consumption of food and consumer goods.
- The weighting factors are based on both the direct and indirect impacts of consumption within each category. For example, Greendex calculations take into account the impact not only of driving a vehicle, but also the impact of manufacturing and disposing of the vehicle.
- Greendex scores are based on approximately 65 response variables to uncover persistent patterns.
- Using many variables avoids skews that can occur within a smaller set of variables.
- Greendex values are expressed as a score out of 100. One hundred, however, does not represent a perfect score since there is no definition of perfectly sustainable consumer behavior. One hundred represents only the total number of Greendex points available in the index algorithm and questionnaire.
- The index is indicative and provides an estimate, while not claiming scientific precision.

- The Greendex is a meta-index composed of sub-indices.
- Sub-indices were created to gauge consumer behavior in four broad areas:
 - Housing
 - Transportation
 - Food
 - Consumption of Goods
 - Everyday purchases and disposal
 - Big-ticket items (e.g., appliances)

Greendex scores are calculated at the respondent level using the model below:



The Housing sub-index consists of 24 variables measuring the following:

- Size of residence relative to number of inhabitants
- Home heating and cooling, including fuel source
- Hot water and water-heating equipment
- Recent upgrades to residence that result in more efficient heating or cooling
- Consumption of renewable energy (both through the grid and generated on-site)
- Energy-efficient major appliances
- Water usage

Sub-Index Content: Transportation



The Transportation sub-index consists of 17 variables measuring the following:

- Driving
- Ownership of motorized vehicles
- Size of vehicle driven
- Distance vehicle is driven
- Owning an ultra-low emissions vehicle (ULEV or hybrid)
- Air travel
- Use of public transit
- Taking trains
- Riding a bicycle
- Walking
- Location of residence relative to primary destination

The Food sub-index consists of eight variables measuring consumption of the following:

- Locally produced foods
- Foods grown or raised by oneself
- Fruits and vegetables
- Beef
- Chicken
- Seafood
- Bottled water
- Organic foods were not included in the sub-index due to high variability in the definition and understanding of “organic” from country to country

The Goods sub-index is a combination of everyday consumption and ownership of big-ticket items. It consists of 16 variables such as:

- Purchase and/or avoidance of specific products for environmental reasons
- Avoidance of excessive packaging
- Preference for reusable consumer goods over disposable products
- Willingness to pay an environmental premium
- Preference for used rather than new items
- Preference to repair rather than to buy a replacement
- Recycling
- Number of TVs and PCs per household member
- Numbers of refrigerators, dishwashers, and laundry machines per household member
- Second homes, recreational vehicles, lawnmowers, and other small engines

Within Sub-Indices

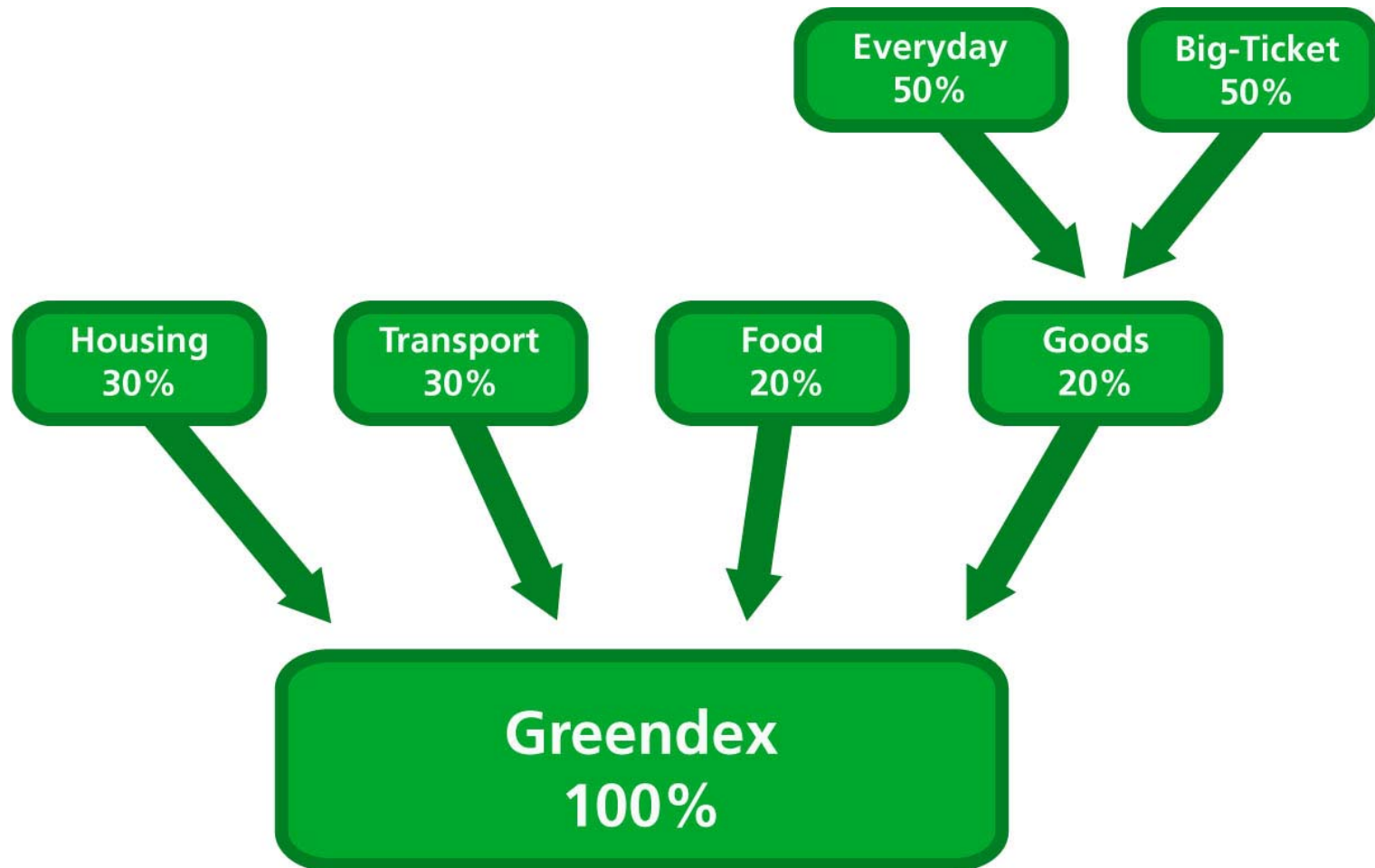
- Within each sub-index, each respondent earns a score on a continuum from $-x$ to $+y$, where $-x$ represents the minimum possible score and $+y$ is the maximum possible score.
- The scale and respondent's scores are converted to positive numbers.
- Respondent scores are then standardized across the indices to be expressed as a score out of 1, which can be thought of as a percentage score.

Combining the Sub-Indices to Form the Meta-Index

- First, the Purchase and Disposal sub-index and the Big Ticket sub-index are combined by calculating a mean score across the two sub-indices. This creates the new sub-index called Goods.
- The percentage scores within the individual sub-indices are then multiplied against the total weighted contribution the sub-index contributes to the Greendex total scores.
- The resulting scores are then summed to create a score out of 100 for each respondent.

Index Structure with Weighting

In calculating the total Greendex scores, the sub-indices are weighted as follows:

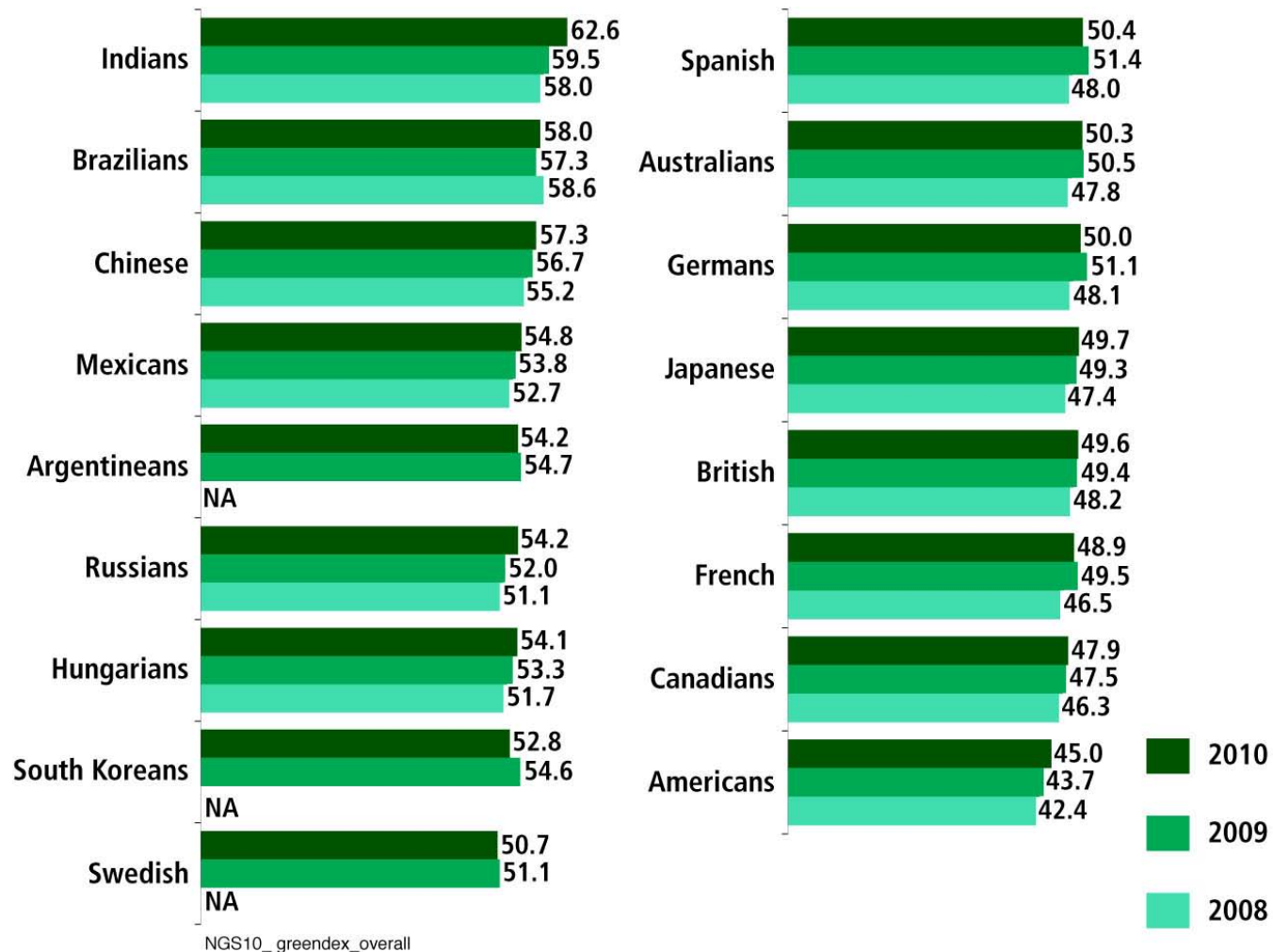


Greendex Results

- Generally, Greendex scores in most countries have remained relatively stable since 2009 and often remain higher than the 2008 scores. However, Indians', Russians', and Americans' Greendex scores have increased notably this year. Greendex scores for Spanish, German, and South Korean consumers decreased modestly.
- The increased score for Indians preserves their top spot in the overall ranking. Brazilians consumers remain second.
- Consumers in emerging economies continue to round out the top tier of the Greendex rankings, while the bottom six countries are all industrialized countries. Canadians and Americans are ranked as the bottom two for the third consecutive year, but average consumers in both countries have improved their Greendex score each year. Despite the increased score for American consumers this year, their score remains below that of the 2008 Canadian score.
- As was found in 2009, improvements in Greendex scores are often driven by increases in the housing sub-index rather than in other areas of consumption. Indian consumers are an exception; their housing score has declined somewhat, with increases occurring for the other three sub-indices.

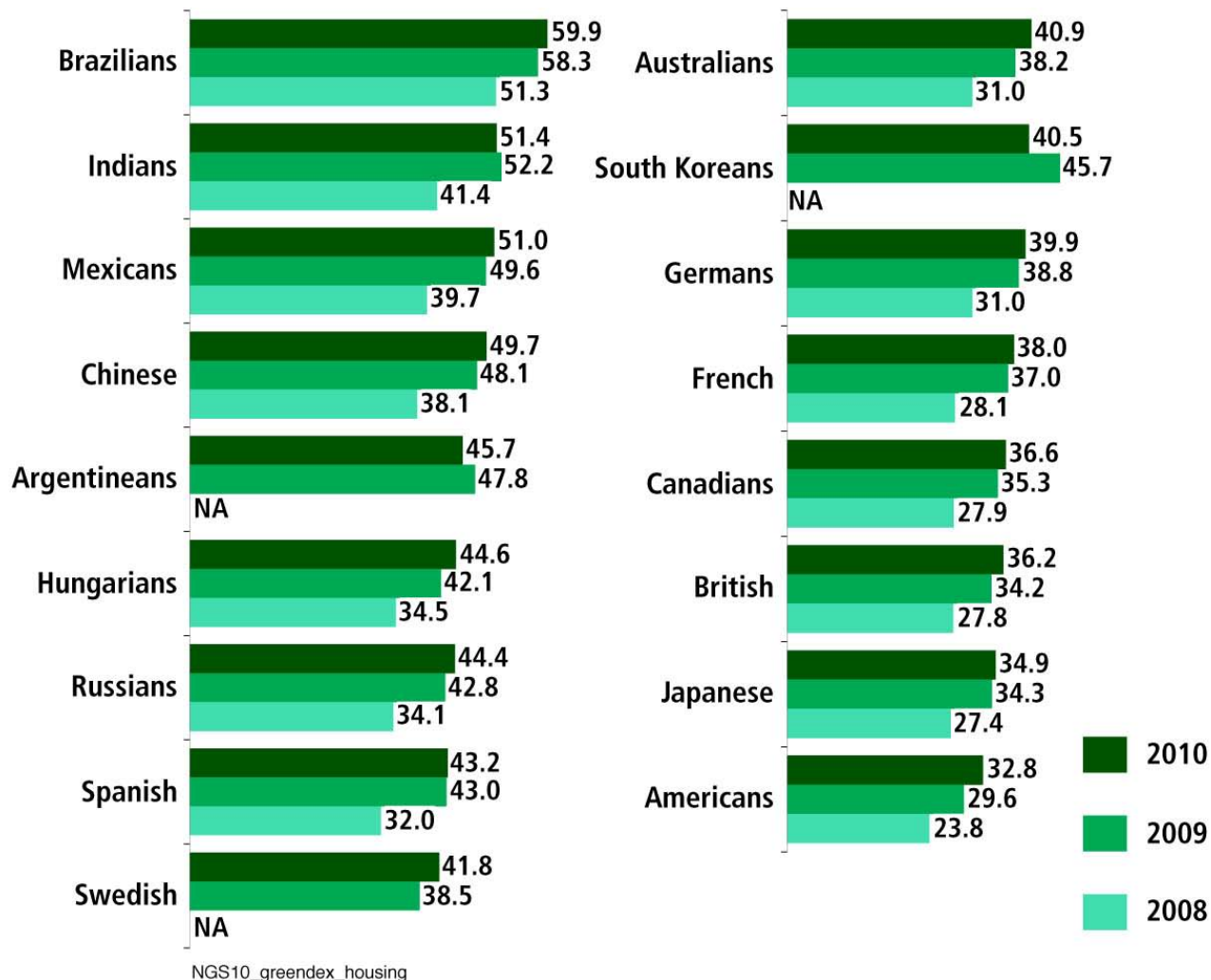
Greendex: Overall Rankings

Trends: 2008–2010



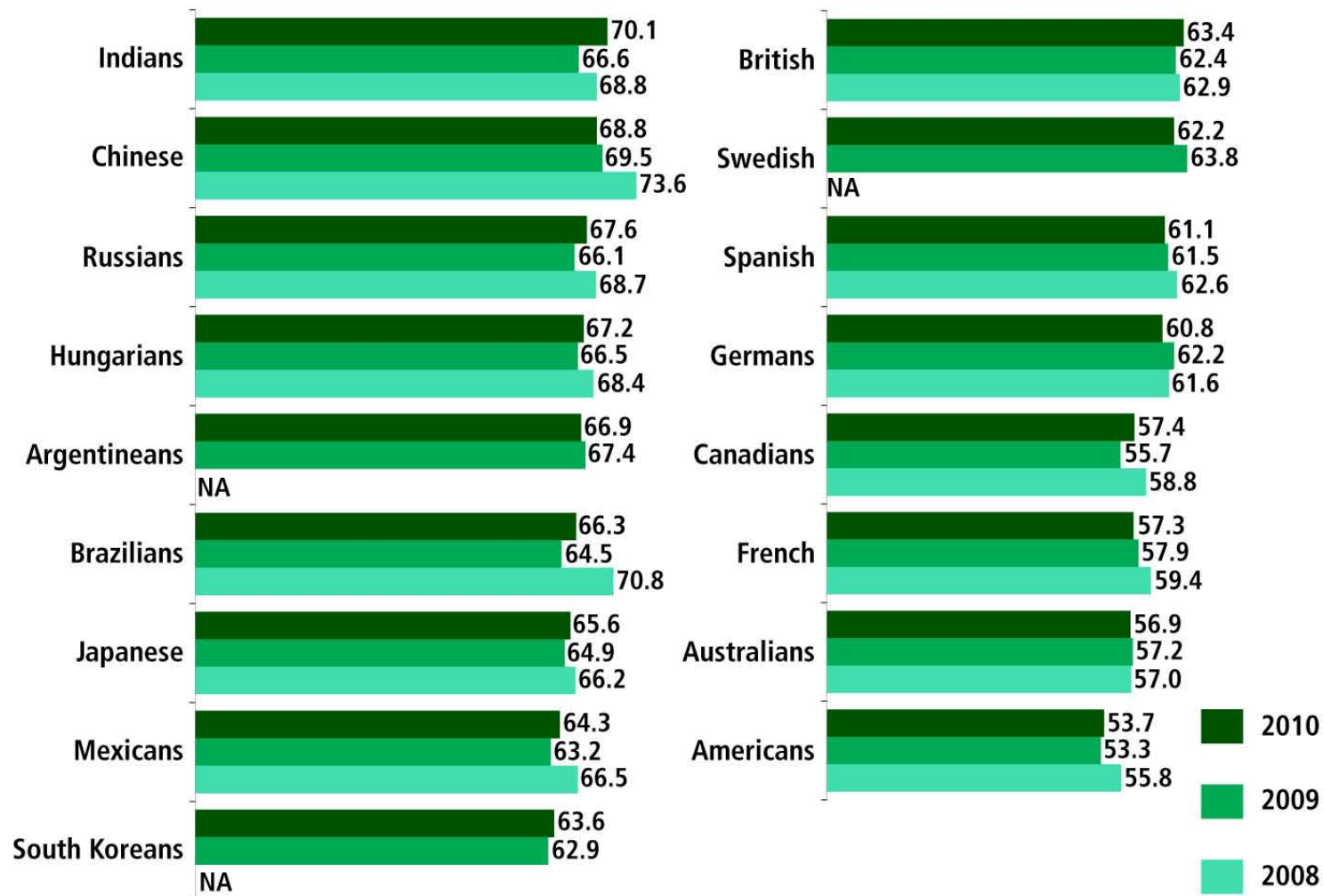
Greendex: Housing

Trends: 2008–2010



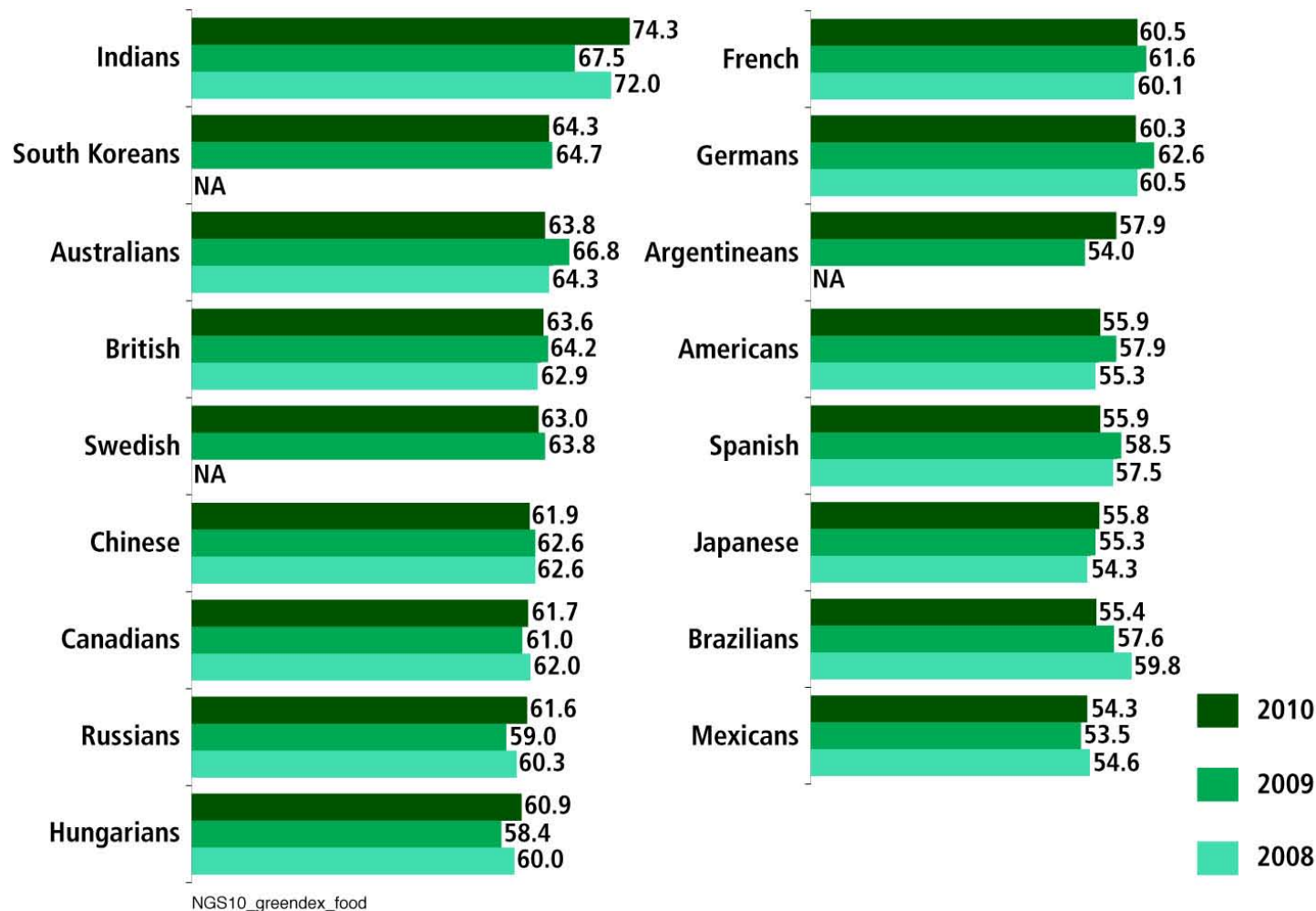
Greendex: Transportation

Trends: 2008–2010



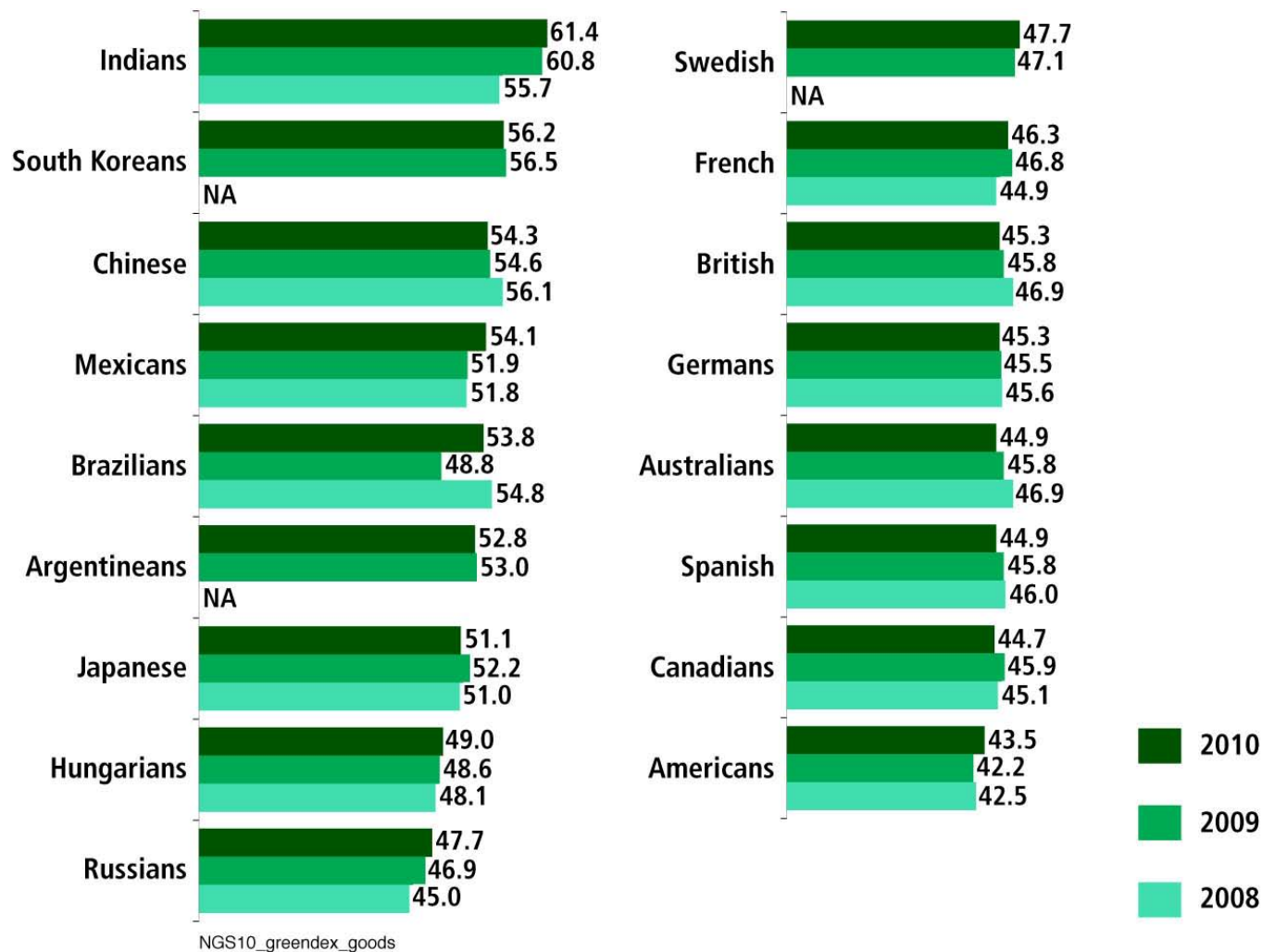
NGS10_greendex_transportation

Trends: 2008–2010



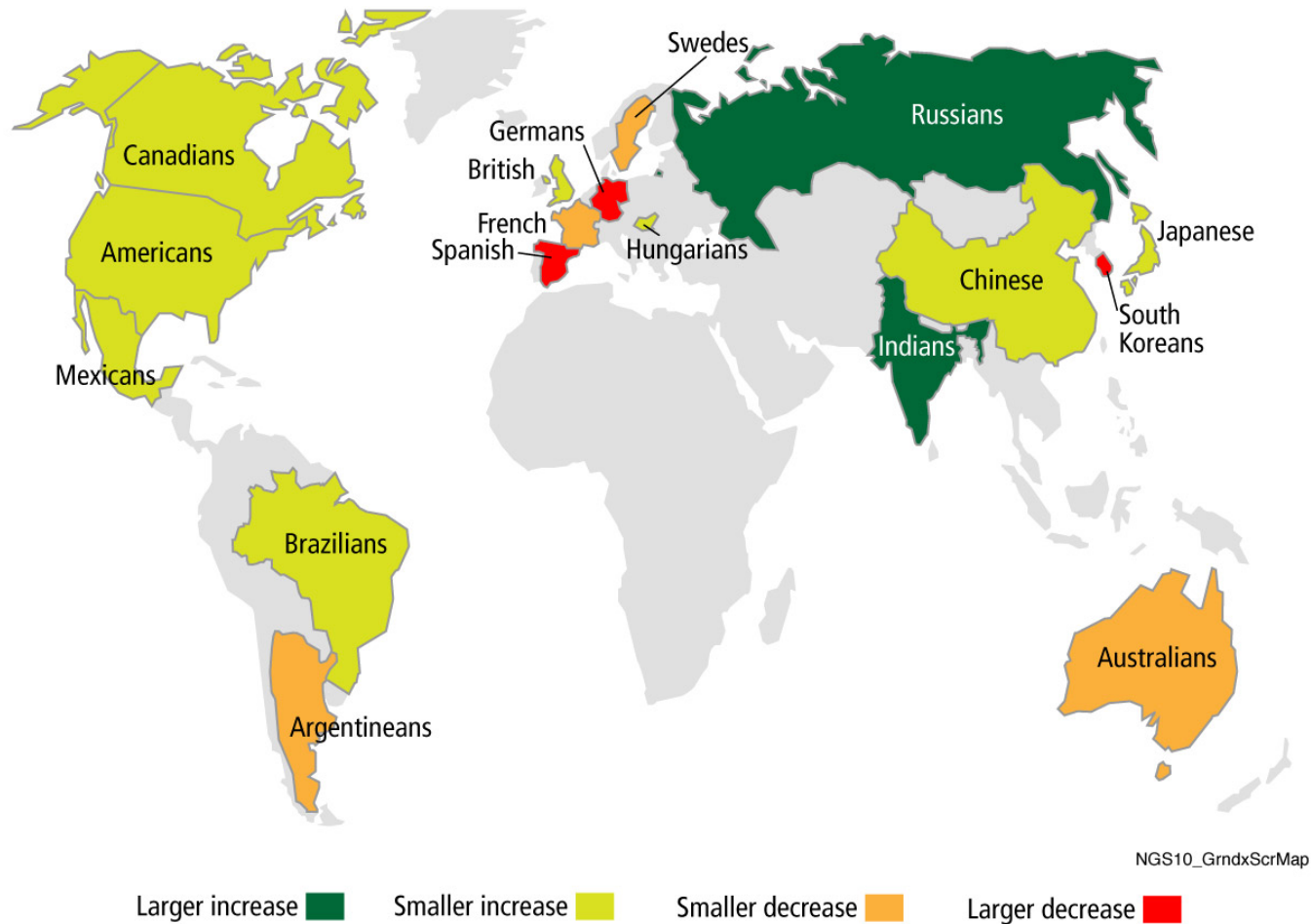
Greendex: Goods

Trends: 2008–2010



Changes in Overall Greendex Score

Trends: 2009–2010



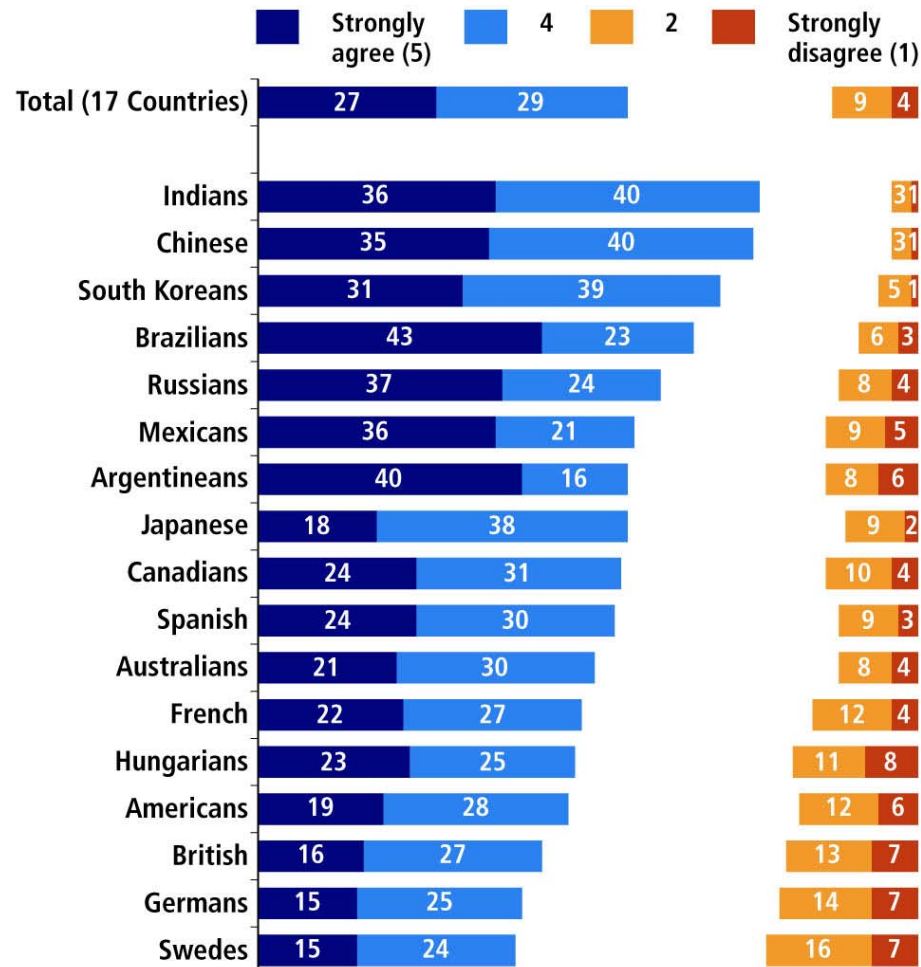
2009–2010 Dynamic Country Clusters

Larger increases		Smaller increases	
Indians	3.2	Americans	1.3
Russians	2.2	Mexicans	1.0
		Hungarians	0.8
		Brazilians	0.7
		Chinese	0.6
		Canadians	0.4
		Japanese	0.4
		British	0.2
Smaller decreases		Larger decreases	
Australians	-0.1	Spanish	-1.0
Swedes	-0.3	Germans	-1.1
Argentineans	-0.5	South Koreans	-1.8
French	-0.7		

Attitudes and Beliefs: Findings by Country

I Am Very Concerned about Environmental Problems

Percentage of Consumers in Each Country, 2010

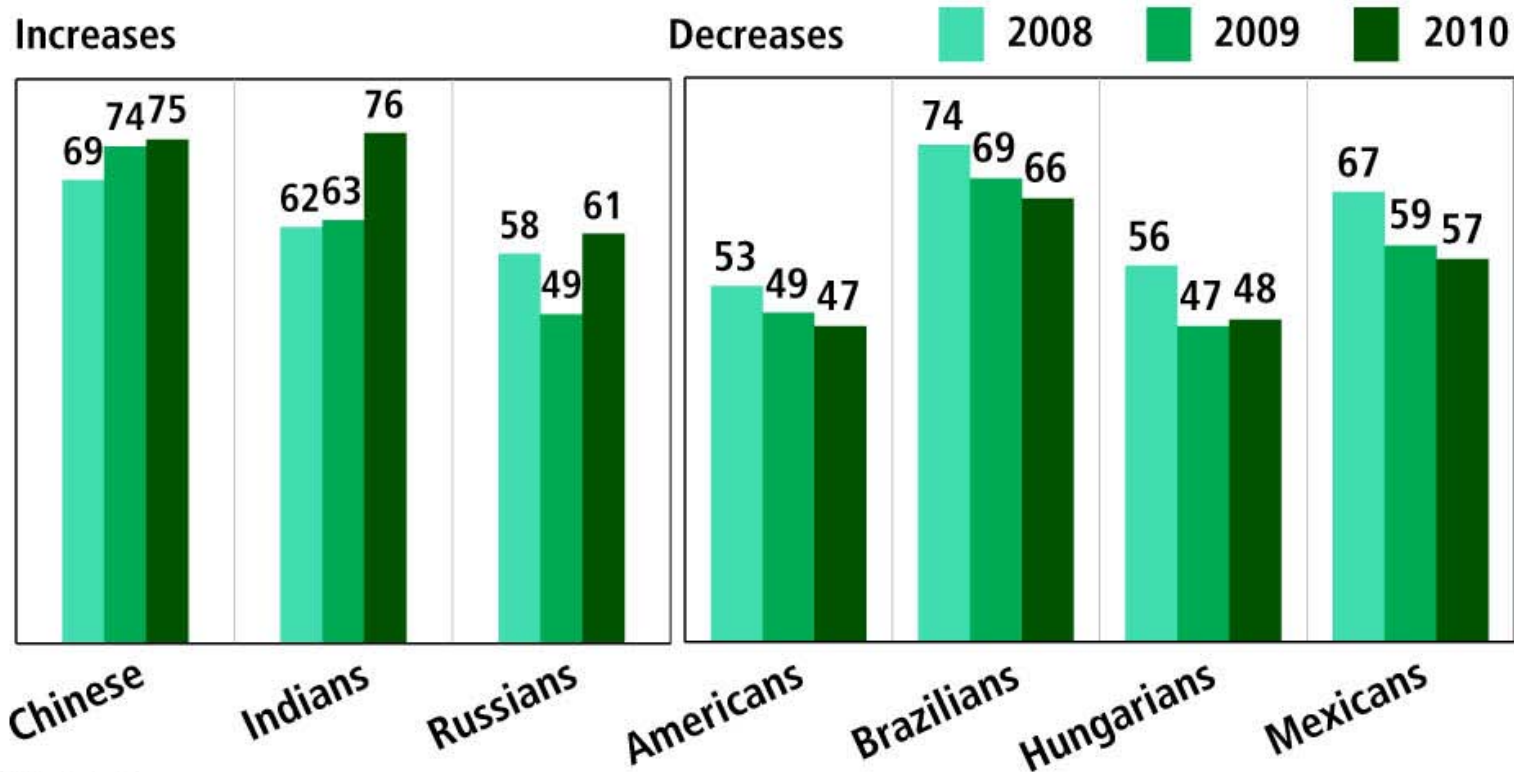


NGS10_17Aa_EnvCon

The white space in this chart represents “3” (on a scale of 1 to 5 where 1 means “Strongly disagree” and 5 means “Strongly agree”) and “DK/NA.”

I Am Very Concerned about Environmental Problems

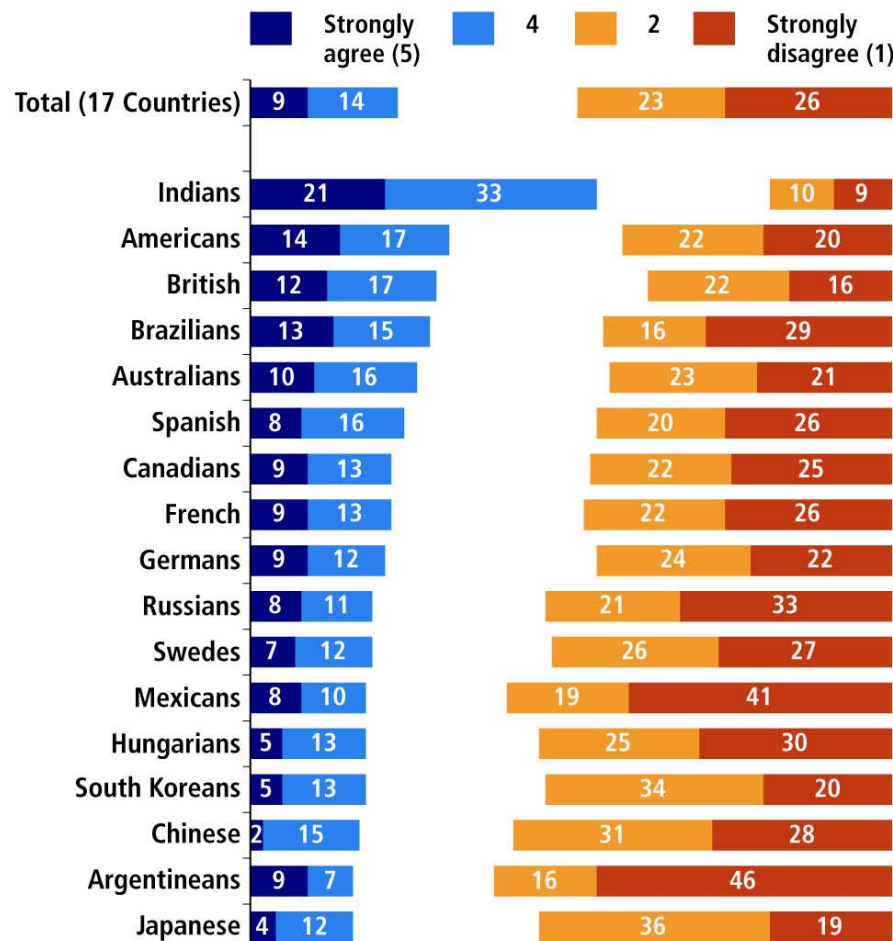
“Agree (4+5),” Percentage of Consumers in Each Country, Trends: 2008–2010



NGS10_17Atmta_IncDec

The Seriousness of Environmental Problems Is Exaggerated Today

Percentage of Consumers in Each Country, 2010



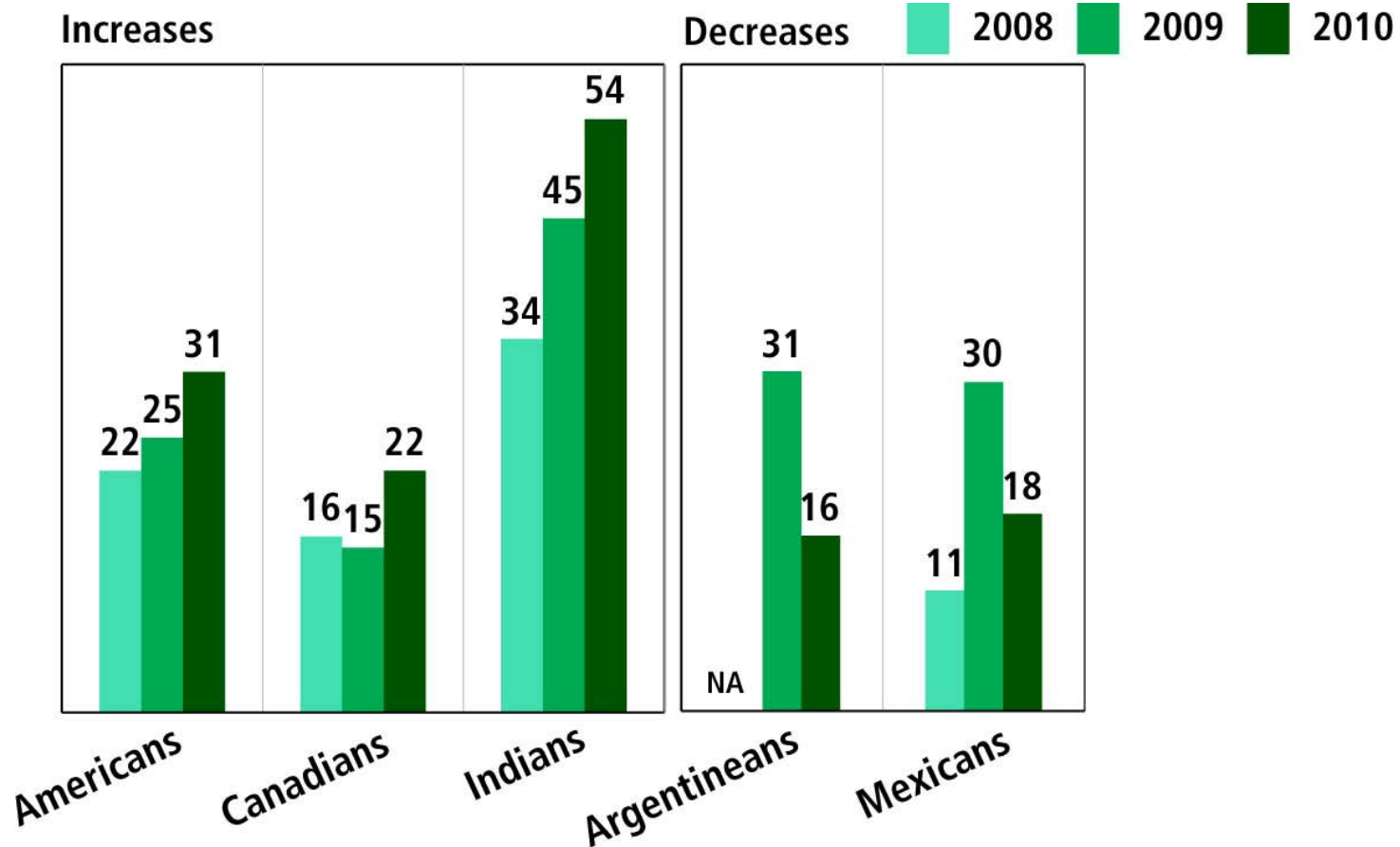
NG510_17Ad_EnvSerious

The white space in this chart represents “3” (on a scale of 1 to 5 where 1 means “Strongly disagree” and 5 means “Strongly agree”) and “DK/NA.”

The Seriousness of Environmental Problems Is Exaggerated Today



“Agree (4+5),” Percentage of Consumers in Each Country, Trends: 2008–2010

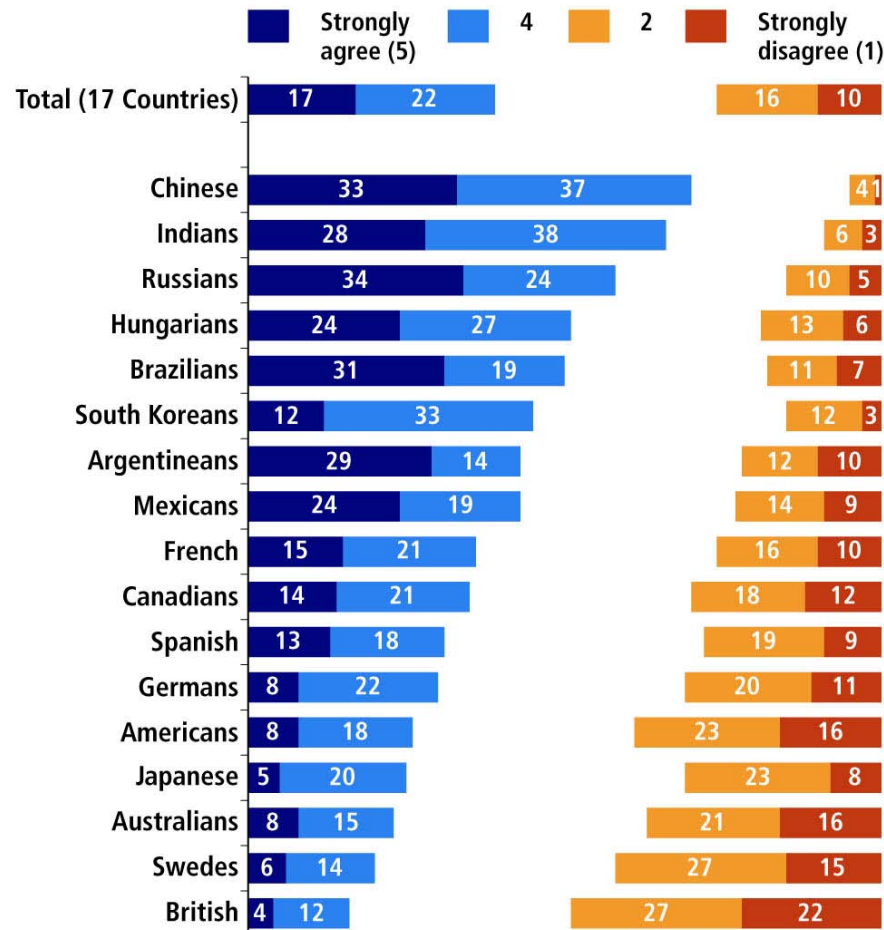


NGS10_17Atmtd_IncDec

Environmental Problems Are Having a Negative Impact on My Health Today



Percentage of Consumers in Each Country, 2010



NGS10_17Ae_Env_Health_neg

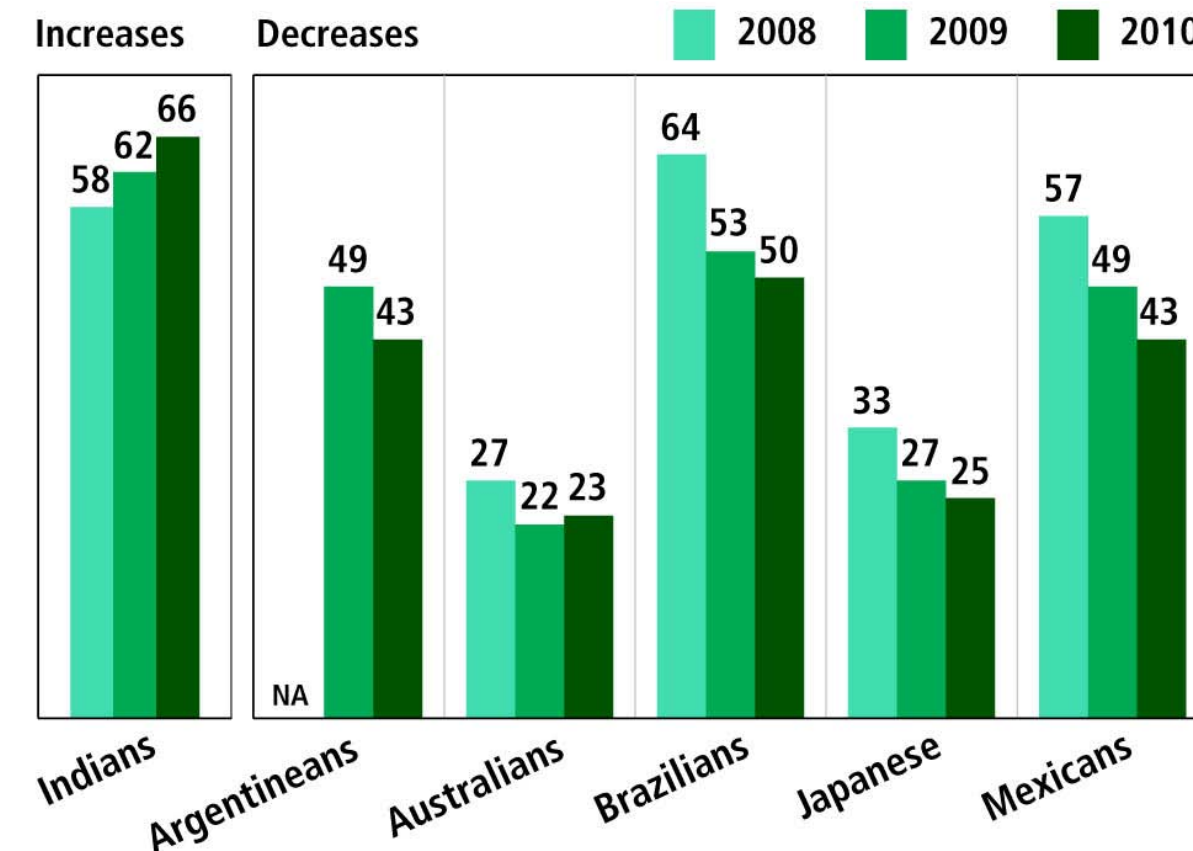
The white space in this chart represents “3” (on a scale of 1 to 5 where 1 means “Strongly disagree” and 5 means “Strongly agree”) and “DK/NA.”



Environmental Problems Are Having a Negative Impact on My Health Today



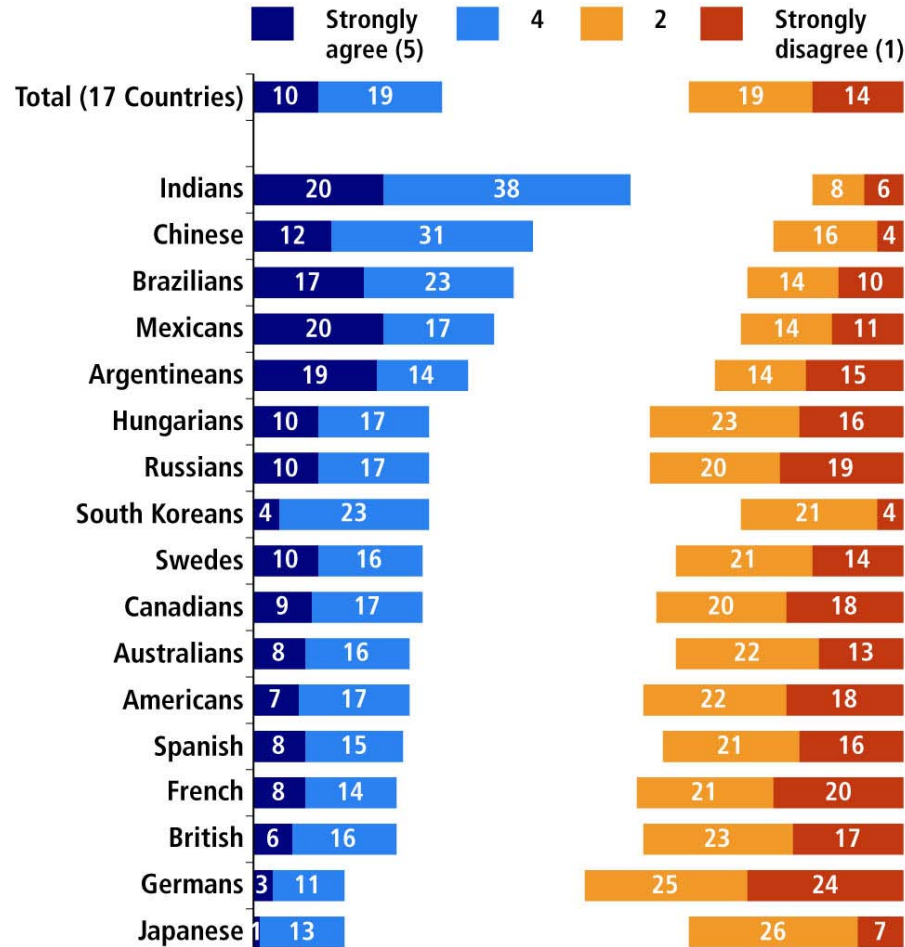
“Agree (4+5),” Percentage of Consumers in Each Country, Trends: 2008–2010



NGS10_17Atmte_IncDec

I Feel Guilty about the Impact I Have on the Environment

Percentage of Consumers in Each Country, 2010



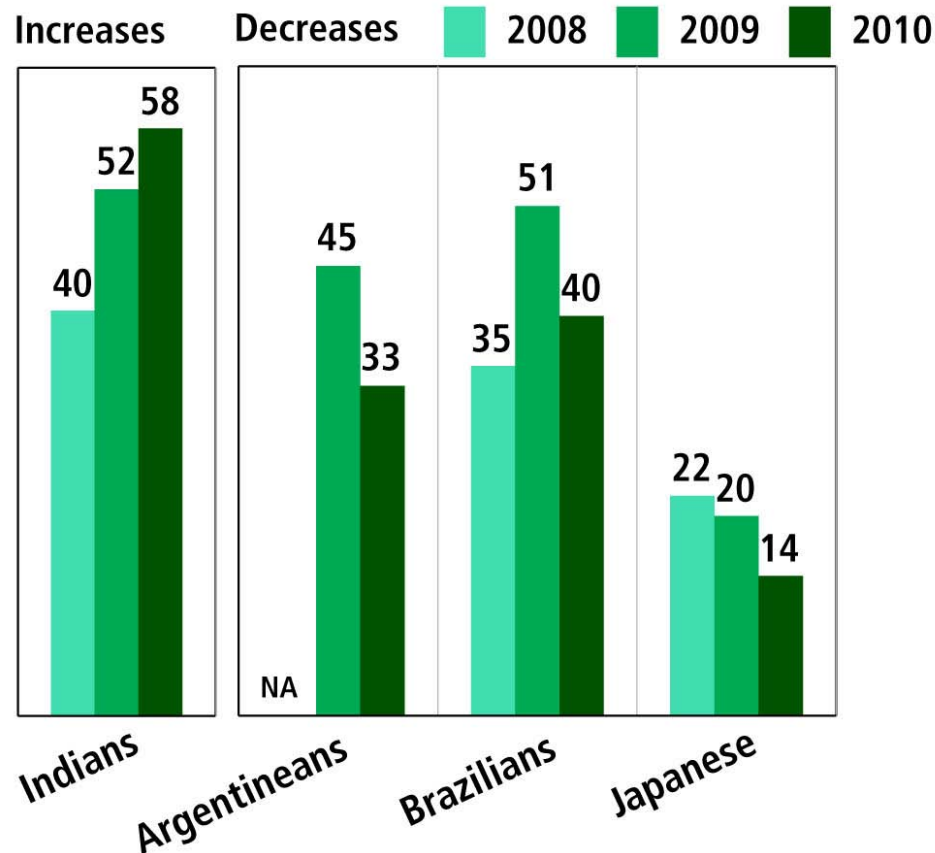
NGS10_17Af_Env_Guilt

The white space in this chart represents “3” (on a scale of 1 to 5 where 1 means “Strongly disagree” and 5 means “Strongly agree”) and “DK/NA.”

I Feel Guilty about the Impact I Have on the Environment



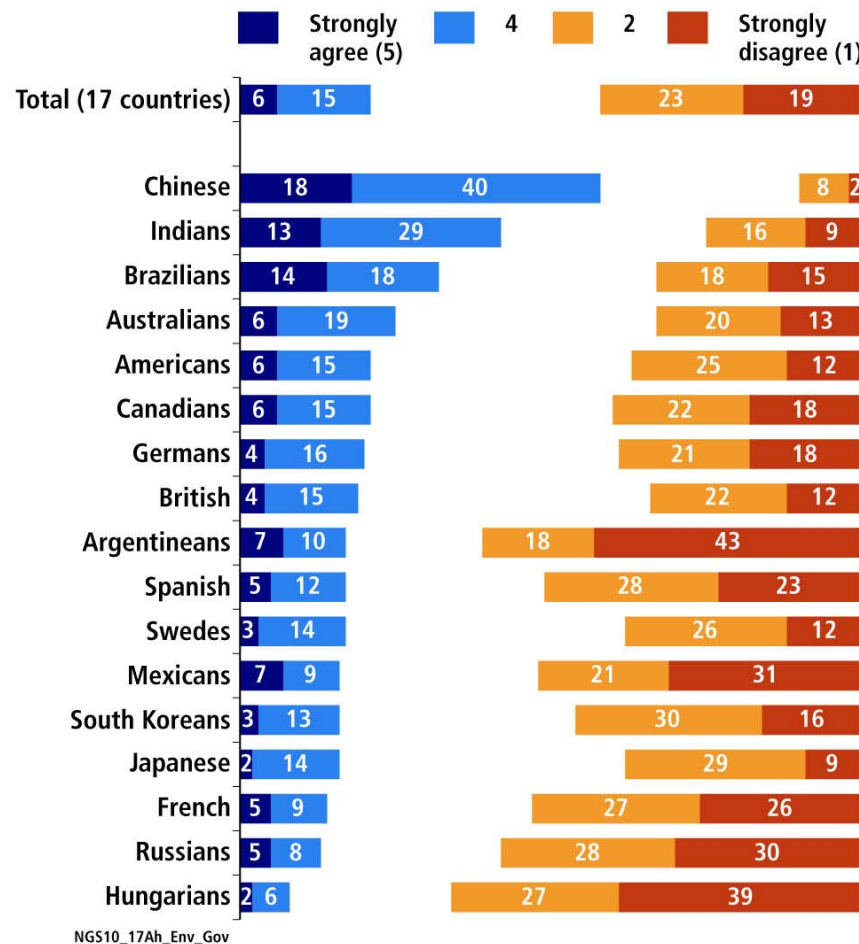
“Agree (4+5),” Percentage of Consumers in Each Country, Trends: 2008–2010



NGS10_17Atmtf_IncDec

My Government Is Currently Working Very Hard to Make Sure that We Have a Clean Environment

Percentage of Consumers in Each Country, 2010

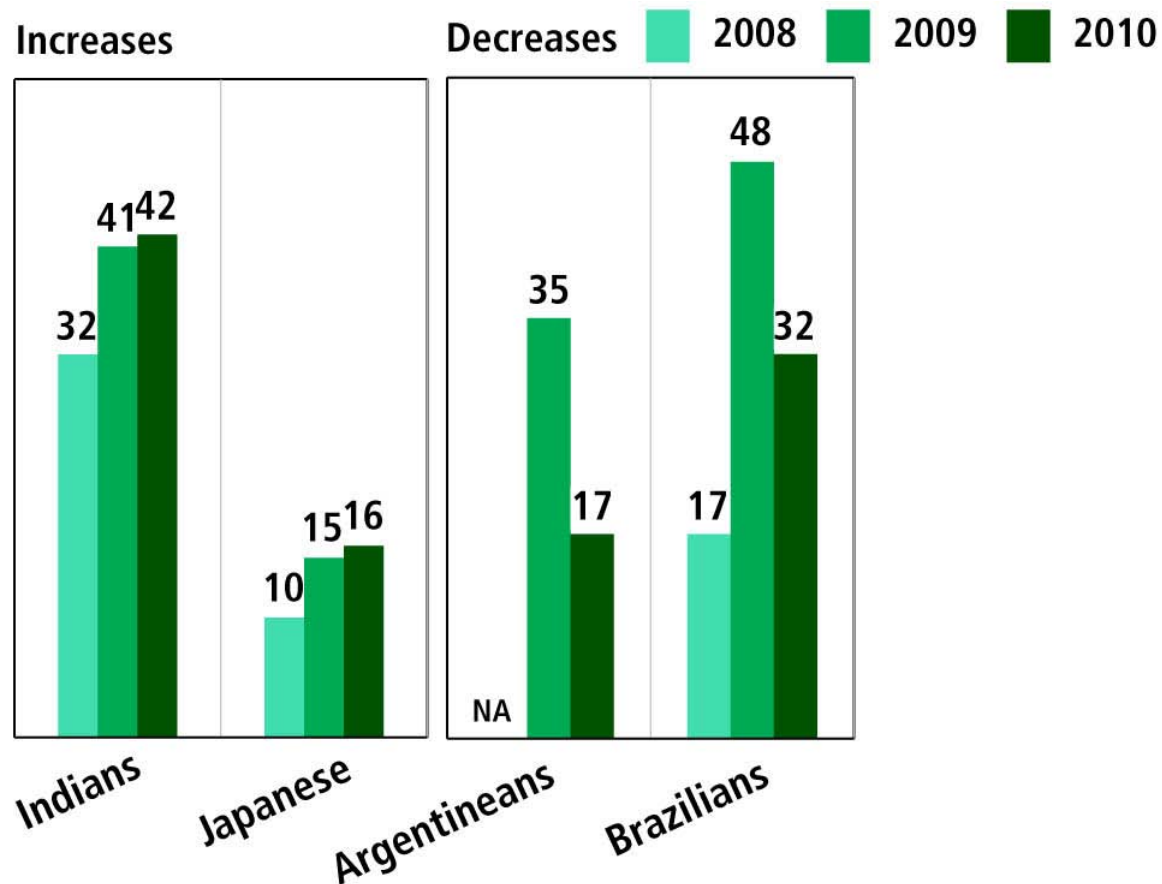


The white space in this chart represents “3” (on a scale of 1 to 5 where 1 means “Strongly disagree” and 5 means “Strongly agree”) and “DK/NA.”

My Government Is Currently Working Very Hard to Make Sure that We Have a Clean Environment



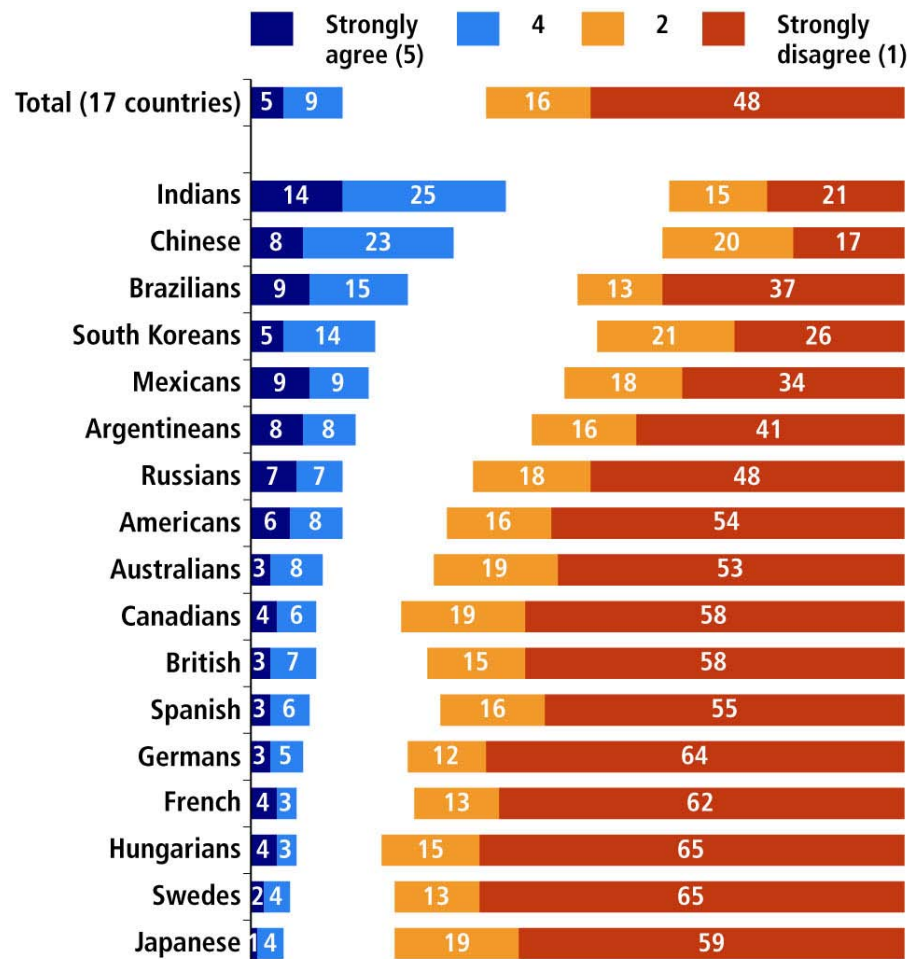
“Agree (4+5),” Percentage of Consumers in Each Country, Trends: 2008–2010



NGS10_17Atmth_IncDec

Owning a Luxury Car Is a Very Important Goal in My Life

Percentage of Consumers in Each Country, 2010



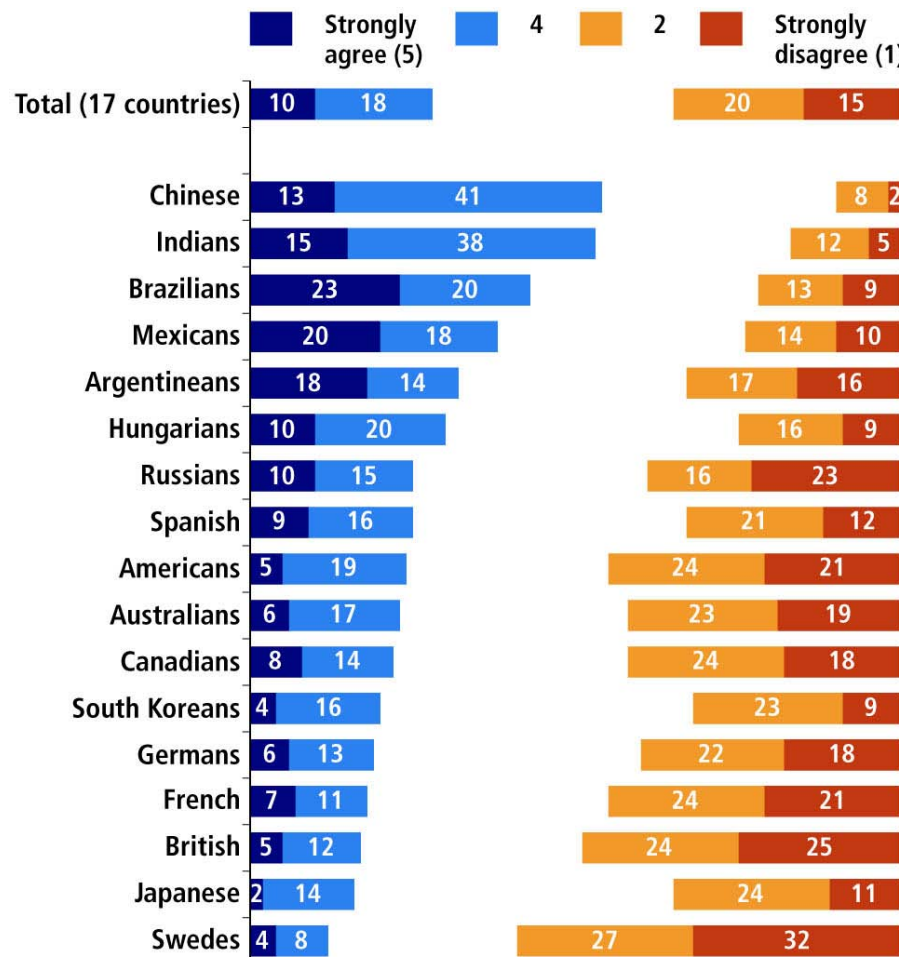
NGS10_17Bb_Env_LuxCar

The white space in this chart represents “3” (on a scale of 1 to 5 where 1 means “Strongly disagree” and 5 means “Strongly agree”) and “DK/NA.”

People I Know Have Encouraged Me to Become More Environmentally Responsible through Their Words and Actions



Percentage of Consumers in Each Country, 2010



NGS10_17Bk_EncEnVRes

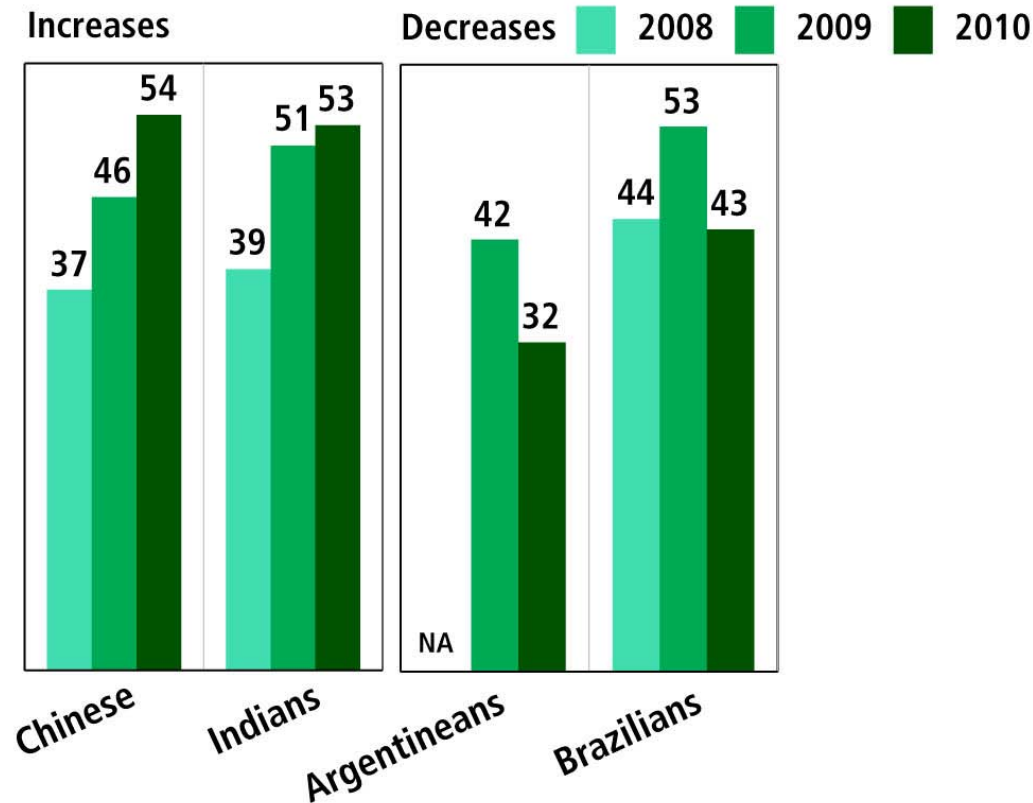
The white space in this chart represents “3” (on a scale of 1 to 5 where 1 means “Strongly disagree” and 5 means “Strongly agree”) and “DK/NA.”



People I Know Have Encouraged Me to Become More Environmentally Responsible through Their Words and Actions



“Agree (4+5),” Percentage of Consumers in Each Country, Trends: 2008–2010

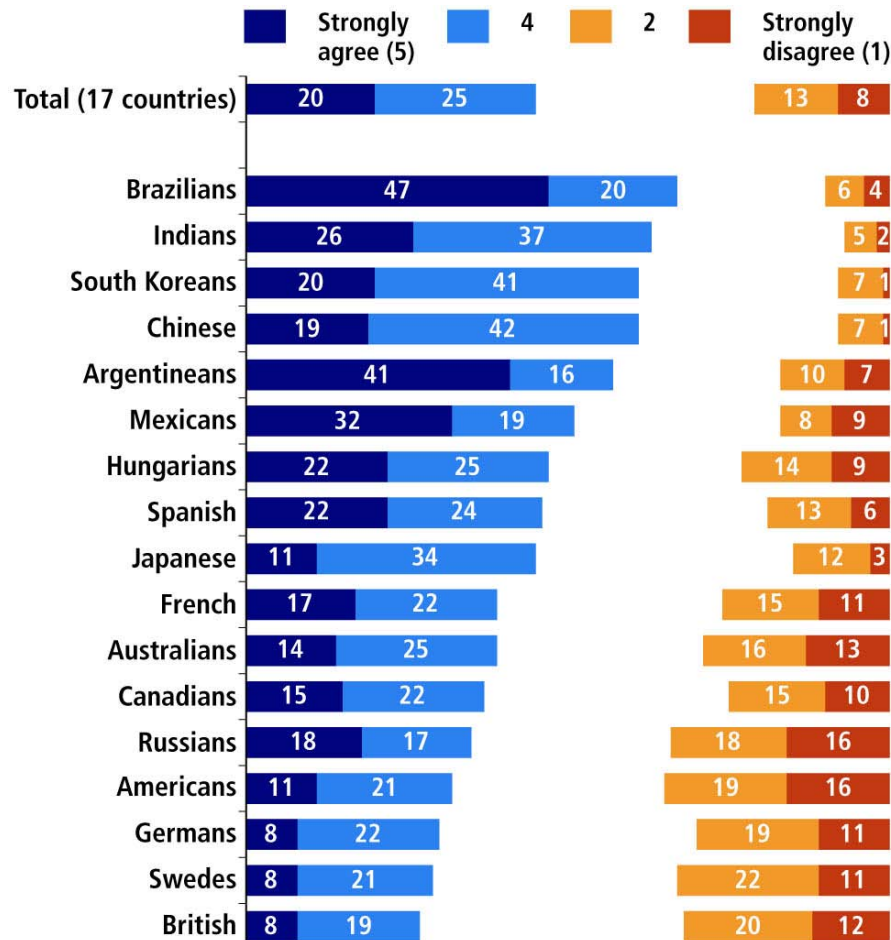


NGS10_17Btmk_IncDec

Global Warming Will Worsen My Way of Life within My Own Lifetime



Percentage of Consumers in Each Country, 2010



NGS10_17Ai_Env_Warming

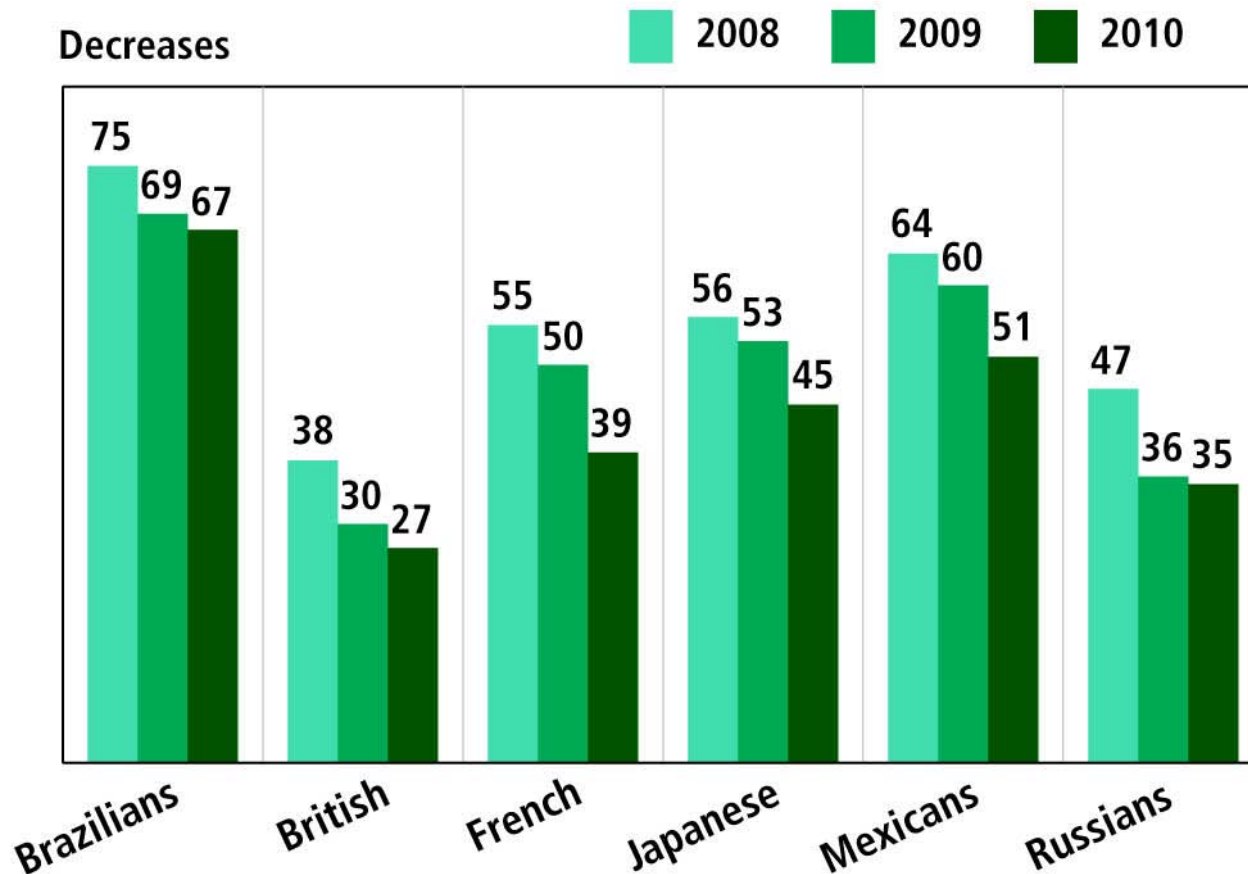
The white space in this chart represents “3” (on a scale of 1 to 5 where 1 means “Strongly disagree” and 5 means “Strongly agree”) and “DK/NA.”



Global Warming Will Worsen My Way of Life within My Own Lifetime



“Agree (4+5),” Percentage of Consumers in Each Country, Trends: 2008–2010

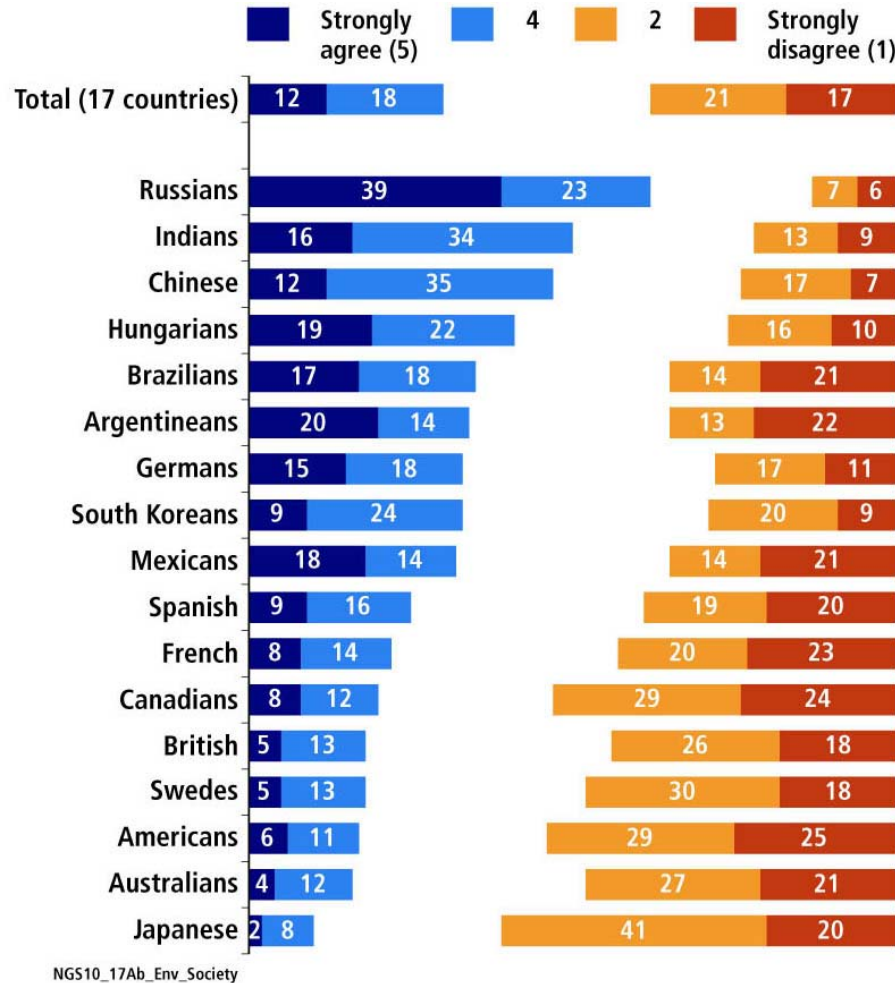


NGS10_17Atmti_IncDec

The Impact That Our Society Has on the Environment Is So Severe That There Is Very Little Individuals Can Do about It



Percentage of Consumers in Each Country, 2010

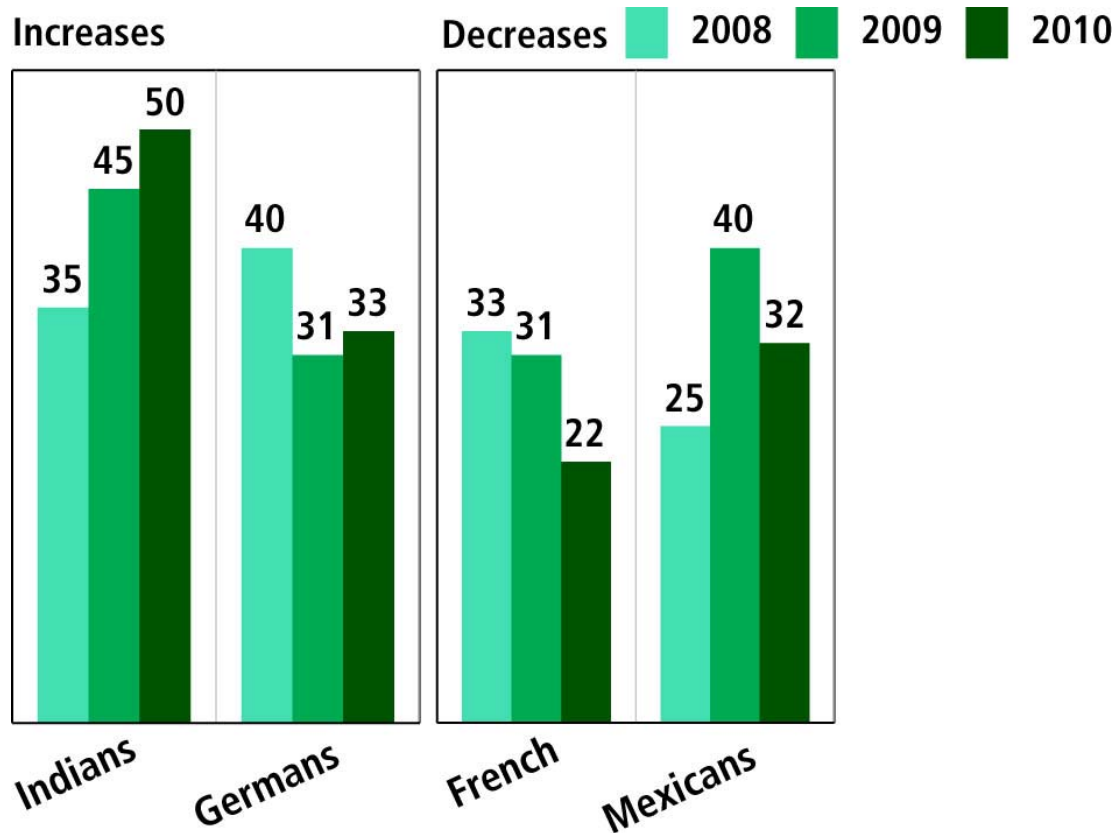


The white space in this chart represents “3” (on a scale of 1 to 5 where 1 means “Strongly disagree” and 5 means “Strongly agree”) and “DK/NA.”

The Impact That Our Society Has on the Environment Is So Severe That There Is Very Little Individuals Can Do about It



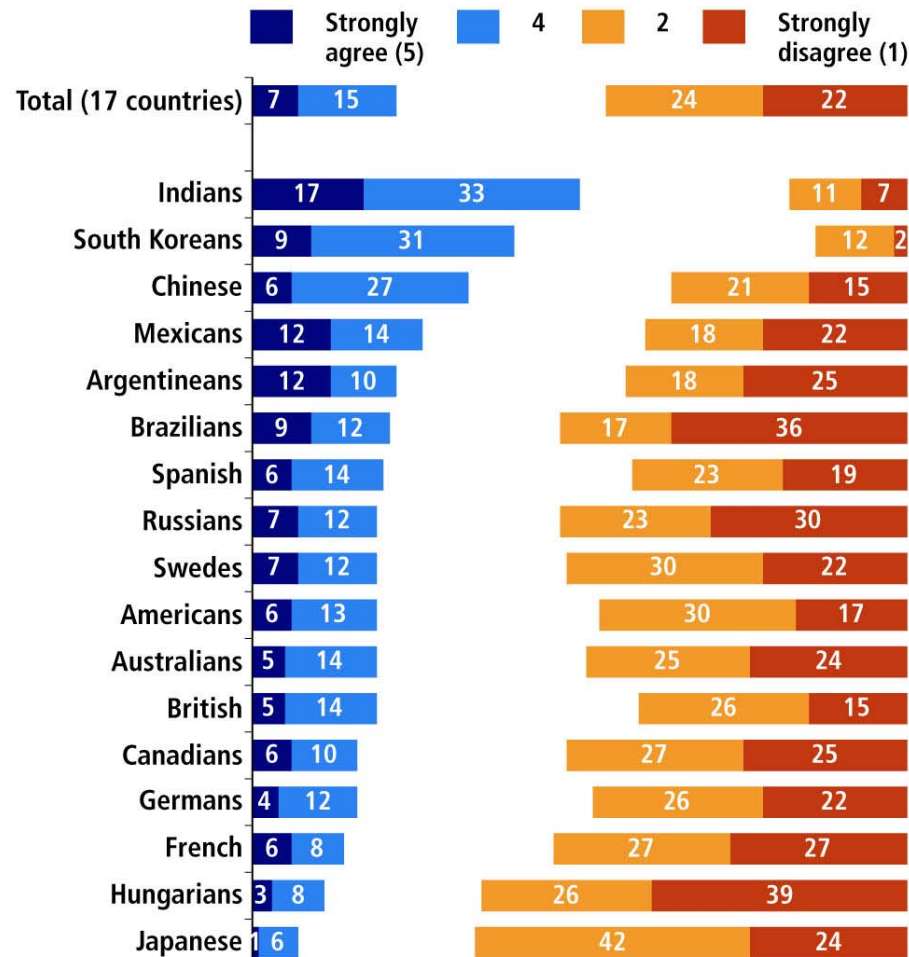
“Agree (4+5),” Percentage of Consumers in Each Country, Trends: 2008–2010



NGS10_17Atmtb_IncDec

New Technology Will Ultimately Solve Our Environmental Problems

Percentage of Consumers in Each Country, 2010



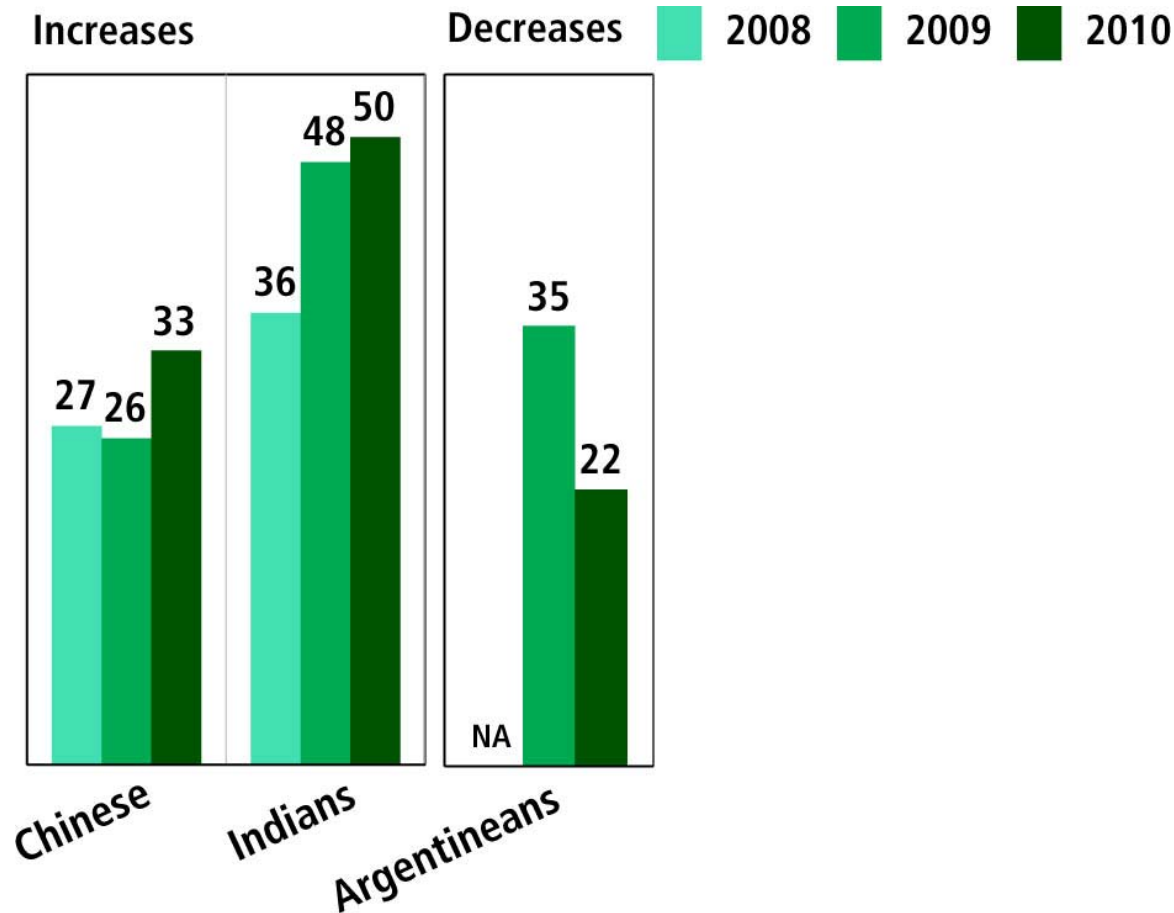
NG510_17Ac_Env_Tech

The white space in this chart represents “3” (on a scale of 1 to 5 where 1 means “Strongly disagree” and 5 means “Strongly agree”) and “DK/NA.”

New Technology Will Ultimately Solve Our Environmental Problems



“Agree (4+5),” Percentage of Consumers in Each Country, Trends: 2008–2010

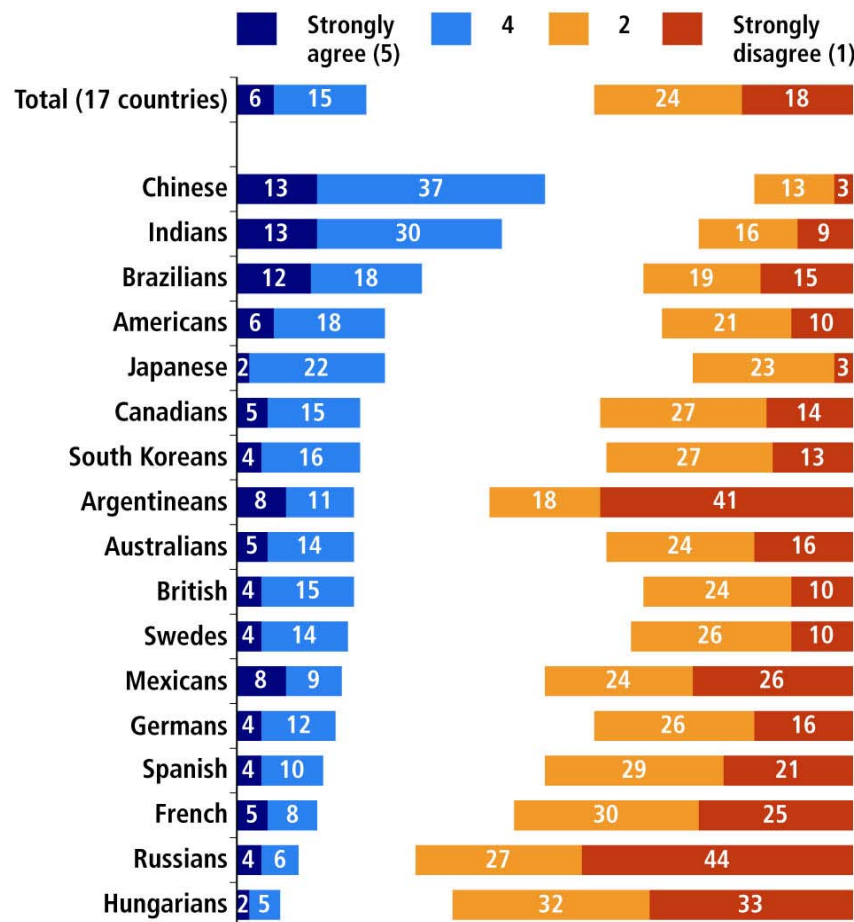


NGS10_17Atmtc_IncDec

Companies and Industries Are Currently Working Very Hard to Make Sure That We Have a Clean Environment in My Country



Percentage of Consumers in Each Country, 2010



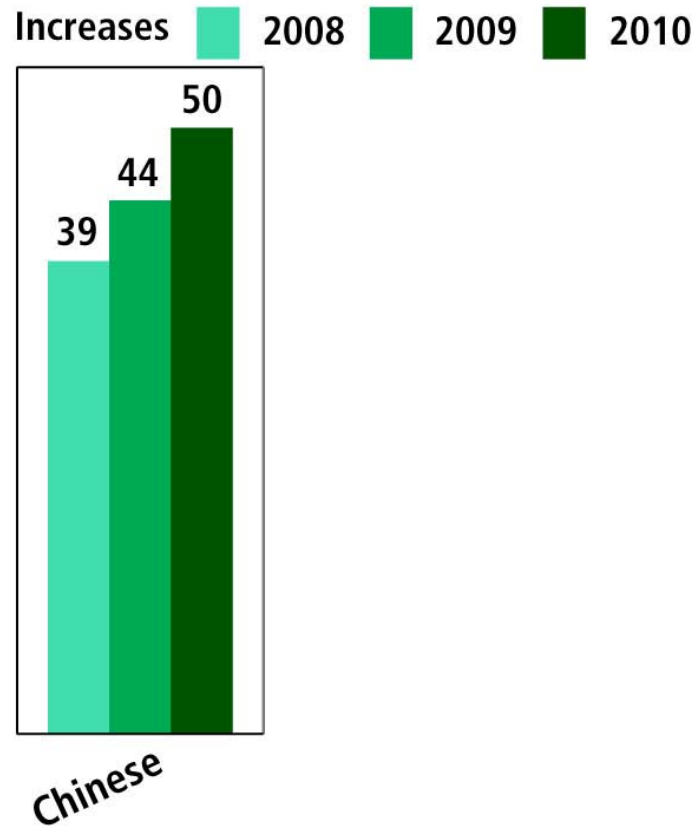
NGS10_17Ag_Env_Com

The white space in this chart represents “3” (on a scale of 1 to 5 where 1 means “Strongly disagree” and 5 means “Strongly agree”) and “DK/NA.”

Companies and Industries Are Currently Working Very Hard to Make Sure That We Have a Clean Environment in My Country



“Agree (4+5),” Percentage of Consumers in Each Country, Trends: 2008–2010

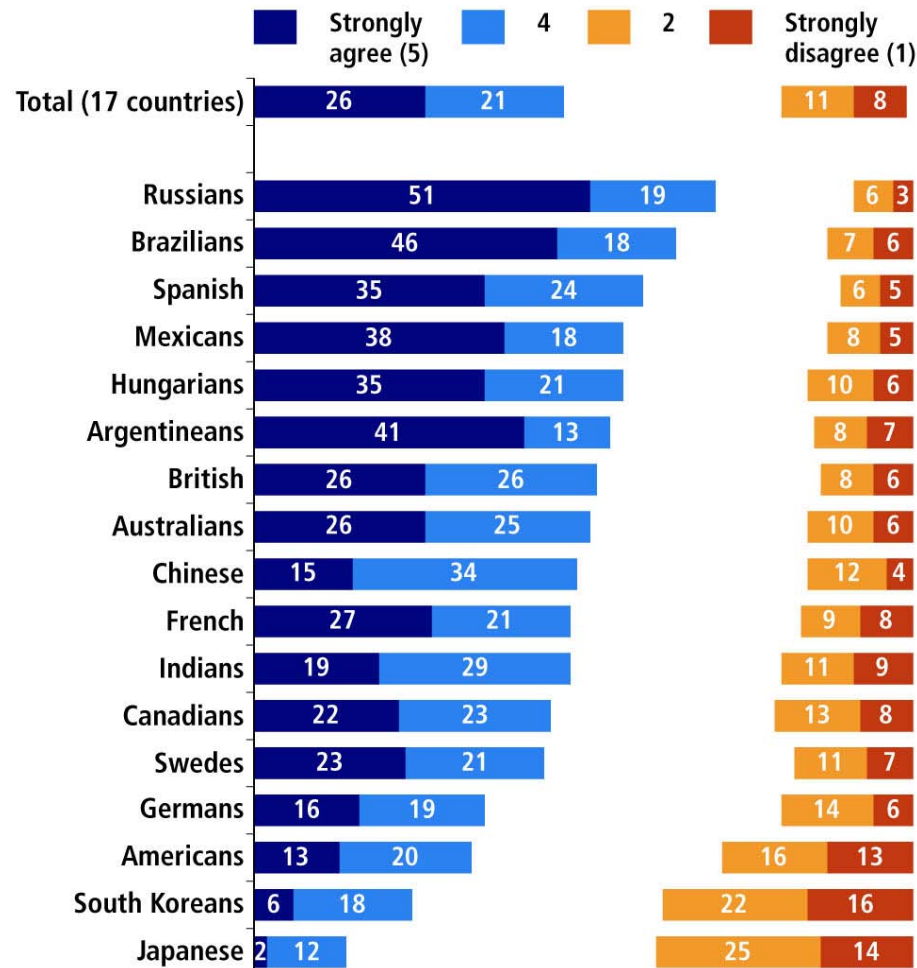


NGS10_17Atmtg_IncDec

People in All Countries Should Have the Same Standard of Living as People in the Most Wealthy Countries



Percentage of Consumers in Each Country, 2010



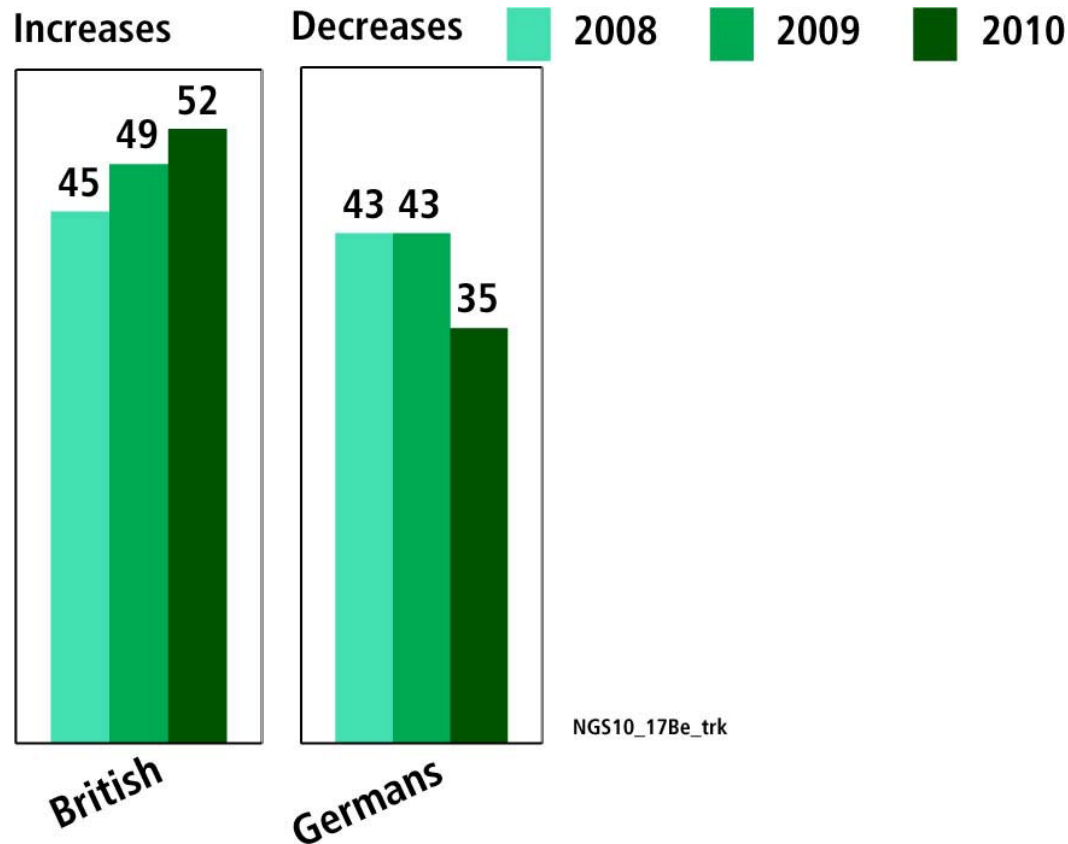
NGS10_17Be_SameStdLiv

The white space in this chart represents “3” (on a scale of 1 to 5 where 1 means “Strongly disagree” and 5 means “Strongly agree”) and “DK/NA.”

People in All Countries Should Have the Same Standard of Living as People in the Most Wealthy Countries



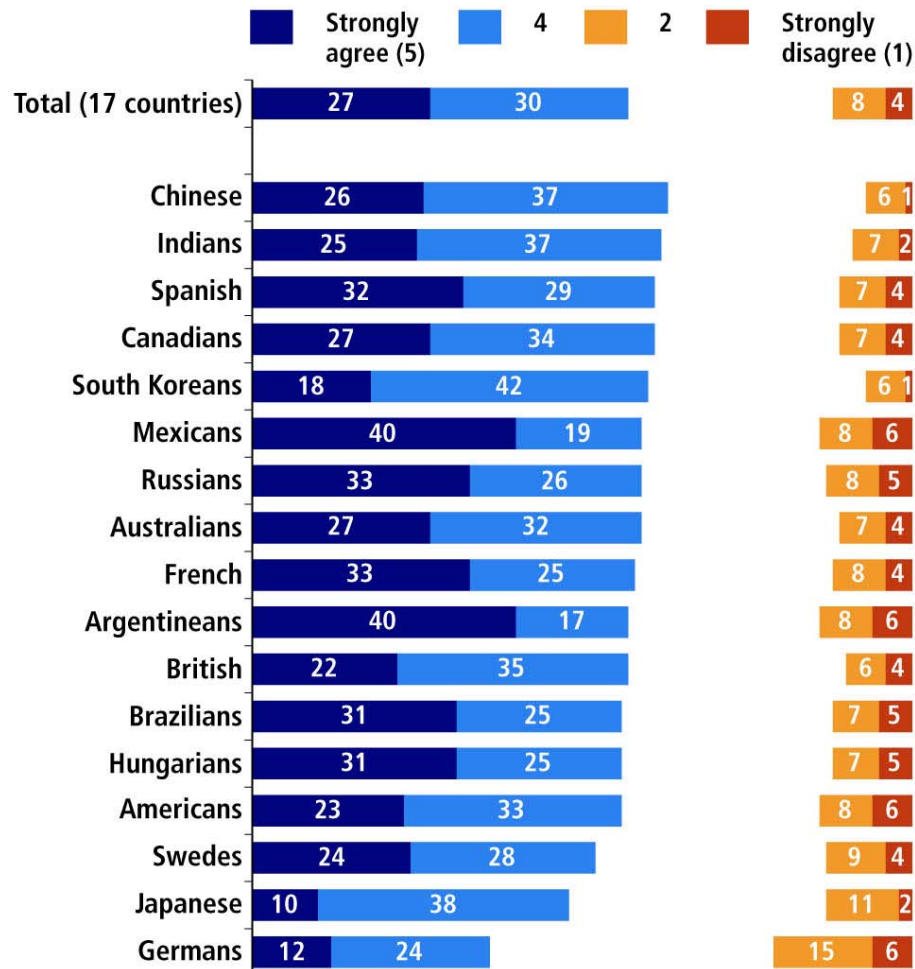
“Agree (4+5),” Percentage of Consumers in Each Country, Trends: 2008–2010



As a Society, We Will Need to Consume a Lot Less to Improve the Environment for Future Generations



Percentage of Consumers in Each Country, 2010



NGS10_17Bh_ConsumeLess

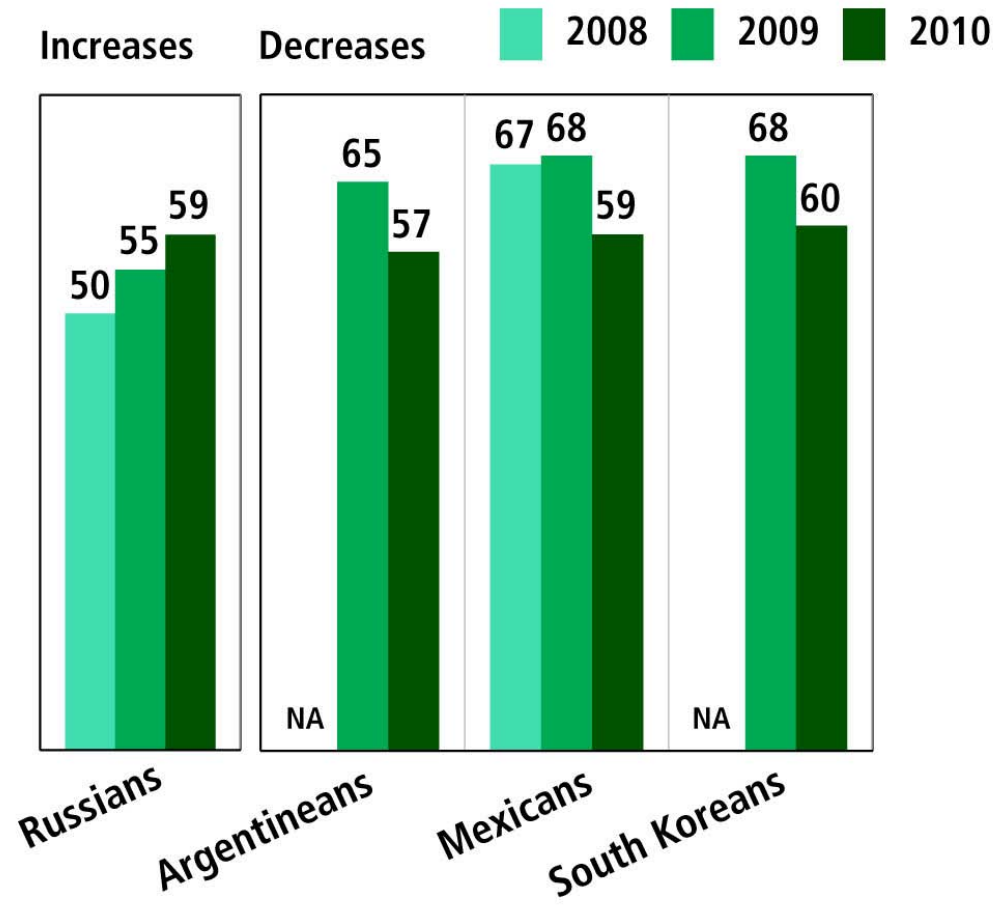
The white space in this chart represents “3” (on a scale of 1 to 5 where 1 means “Strongly disagree” and 5 means “Strongly agree”) and “DK/NA.”



As a Society, We Will Need to Consume a Lot Less to Improve the Environment for Future Generations



“Agree (4+5),” Percentage of Consumers in Each Country, Trends: 2008–2010

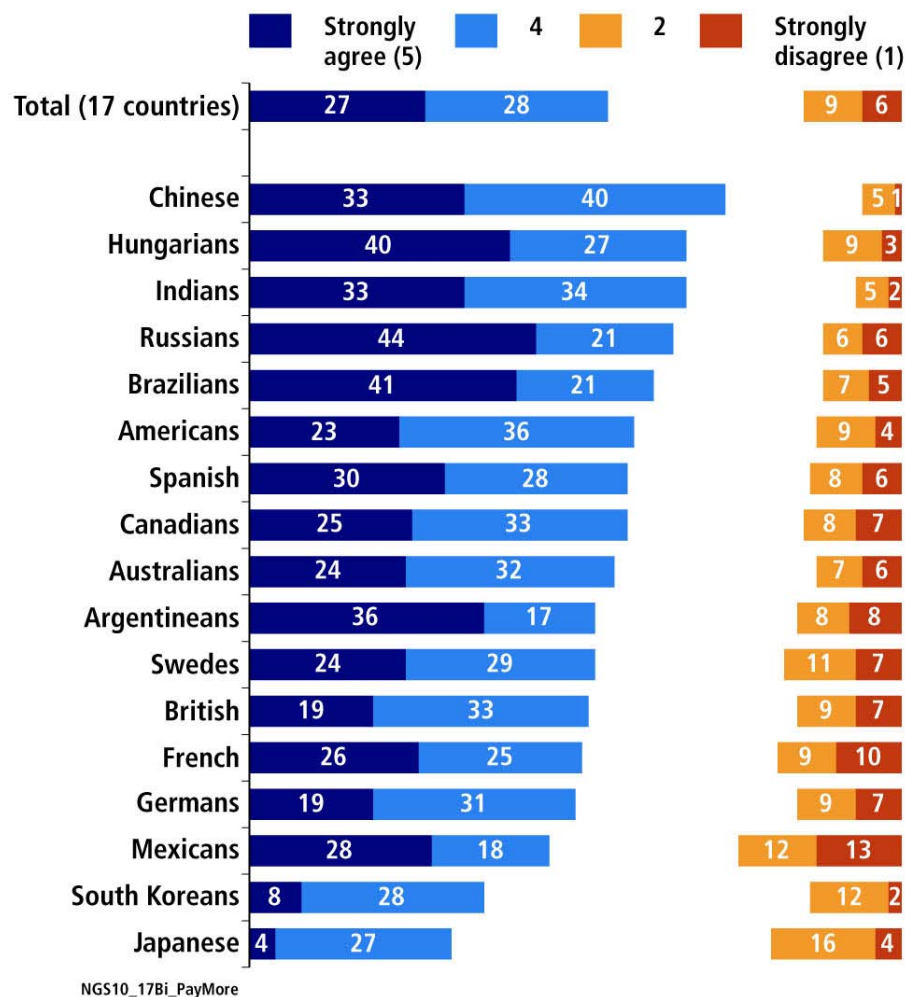


NGS10_17Btmth_IncDec

I Am Willing to Pay More for an Energy-Saving Product If It Will Save Me Money over the Product's Life because of Lower Energy Costs



Percentage of Consumers in Each Country, 2010

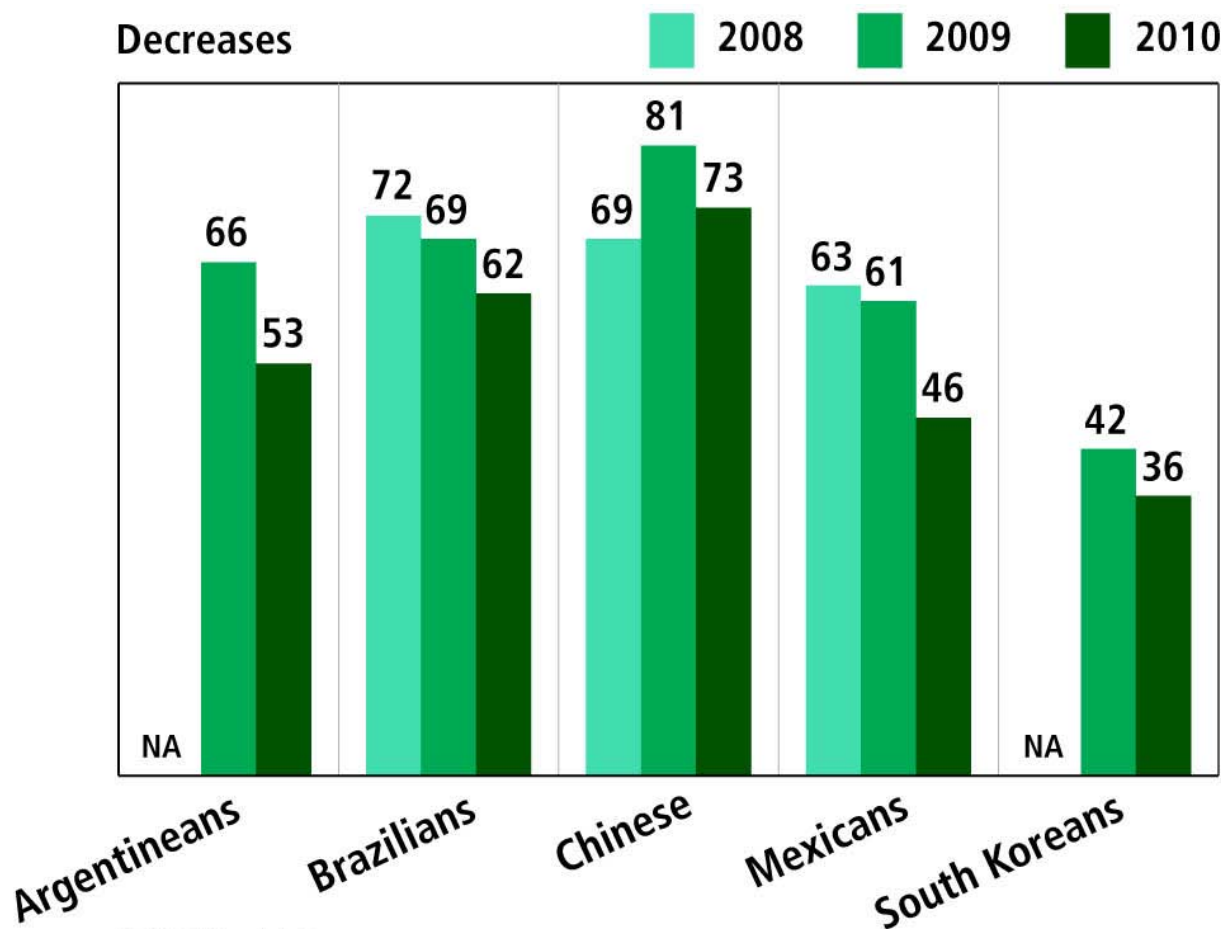


The white space in this chart represents “3” (on a scale of 1 to 5 where 1 means “Strongly disagree” and 5 means “Strongly agree”) and “DK/NA.”

I Am Willing to Pay More for an Energy-Saving Product If It Will Save Me Money over the Product's Life because of Lower Energy Costs



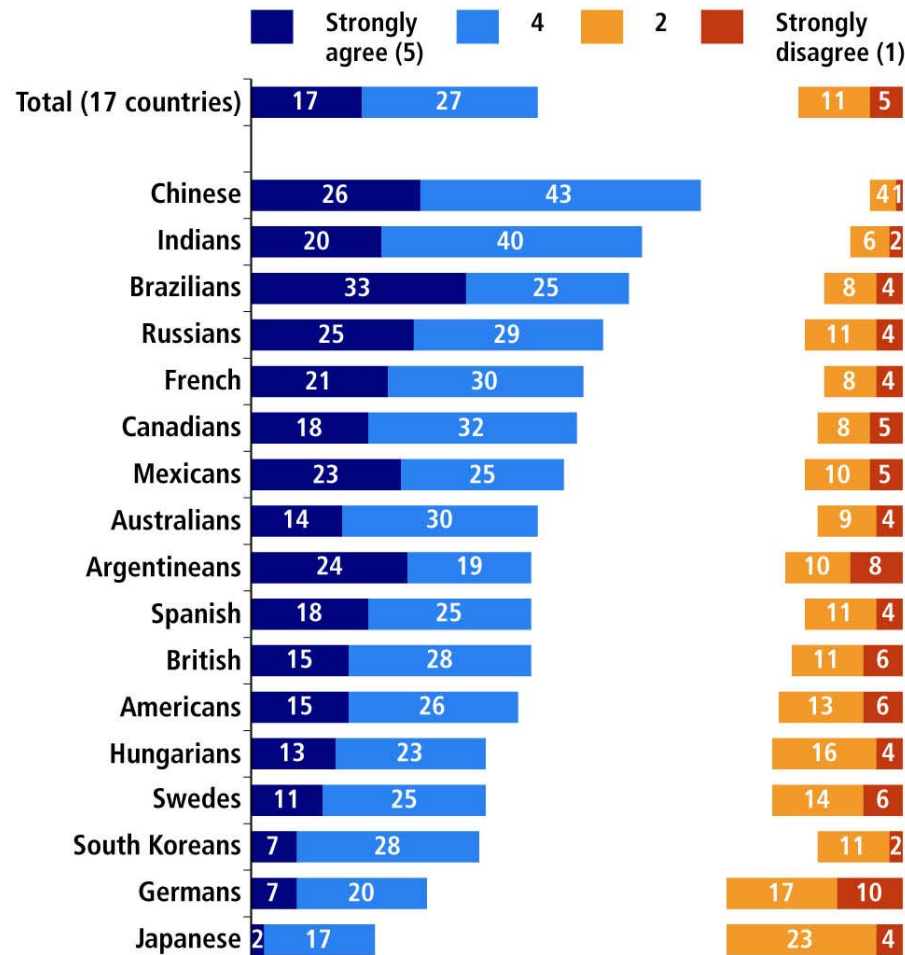
“Agree (4+5),” Percentage of Consumers in Each Country, Trends: 2008–2010



NGS10_17Btmti_IncDec

I Am Currently Trying Very Hard to Reduce My Own Negative Impact on the Environment

Percentage of Consumers in Each Country, 2010



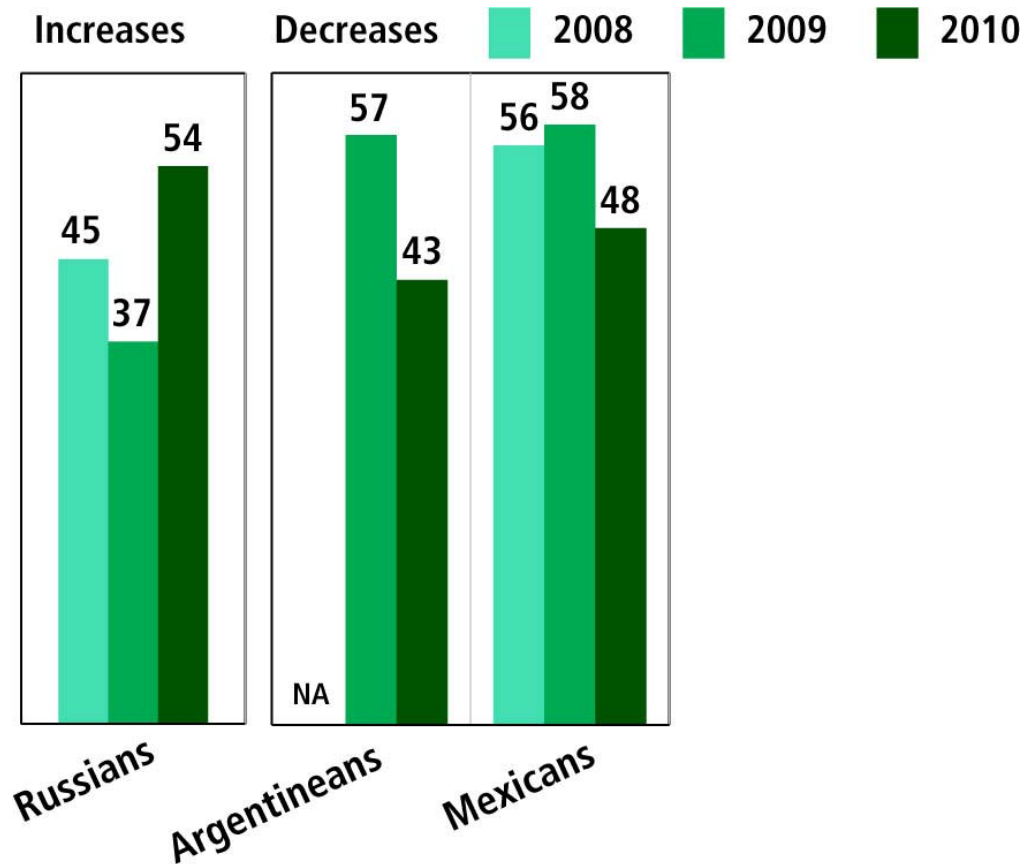
NGS10_17BI_ReduceImpact

The white space in this chart represents "3" (on a scale of 1 to 5 where 1 means "Strongly disagree" and 5 means "Strongly agree") and "DK/NA."

I Am Currently Trying Very Hard to Reduce My Own Negative Impact on the Environment



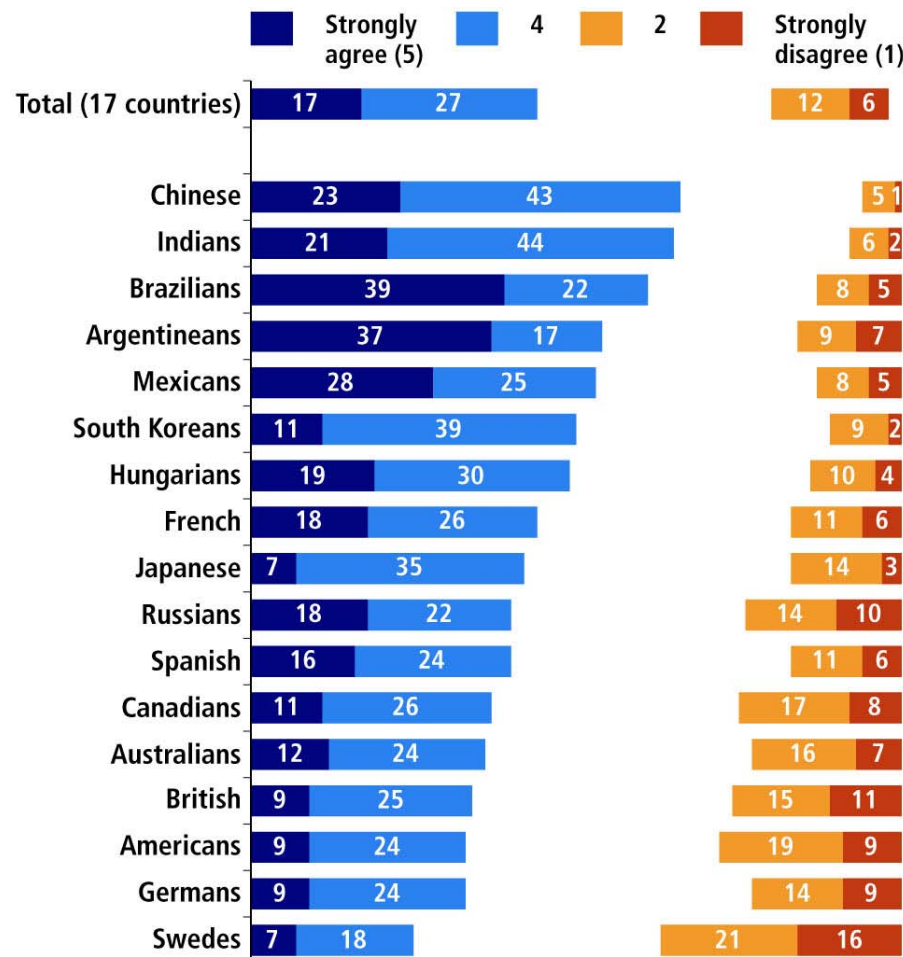
“Agree (4+5),” Percentage of Consumers in Each Country, Trends: 2008–2010



NGS10_17Btm1_IncDec

I Have Recently Been Paying More Attention to News Stories about the Environment

Percentage of Consumers in Each Country, 2010



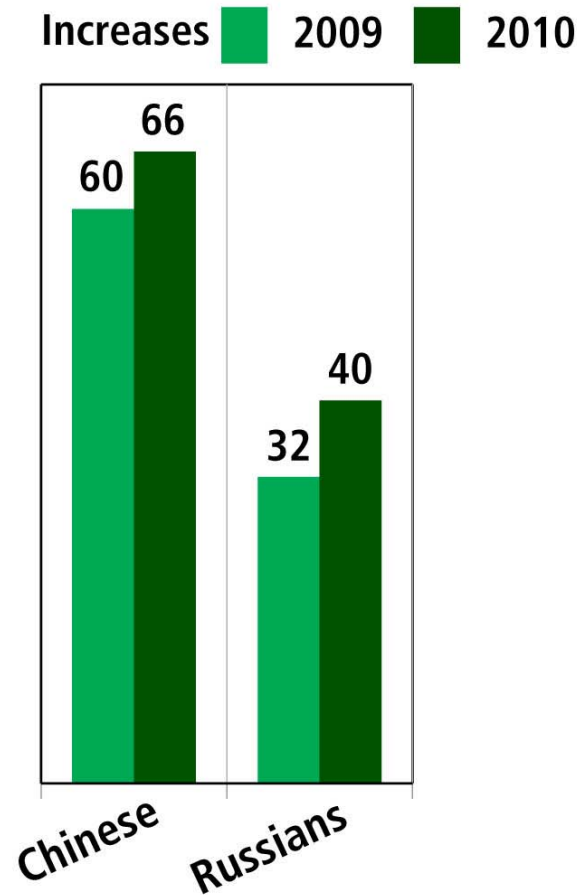
NGS10_17Bn_ReduceImpact

The white space in this chart represents “3” (on a scale of 1 to 5 where 1 means “Strongly disagree” and 5 means “Strongly agree”) and “DK/NA.”

I Have Recently Been Paying More Attention to News Stories about the Environment



“Agree (4+5),” Percentage of Consumers in Each Country, Trends: 2008–2010

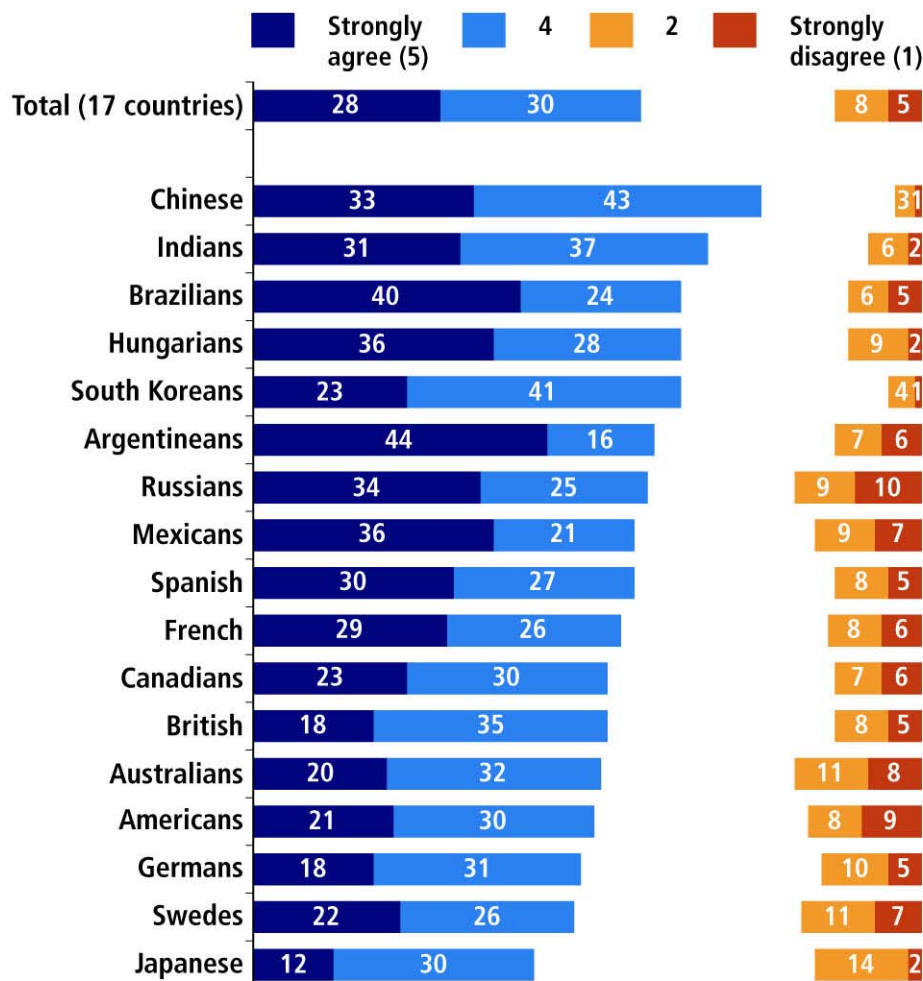


NGS10_17Bn_trk

Most Scientists Are Convinced That Human Activity Causes Climate Change and Global Warming



Percentage of Consumers in Each Country, 2010



NGS10_17Aj_Env_Scie

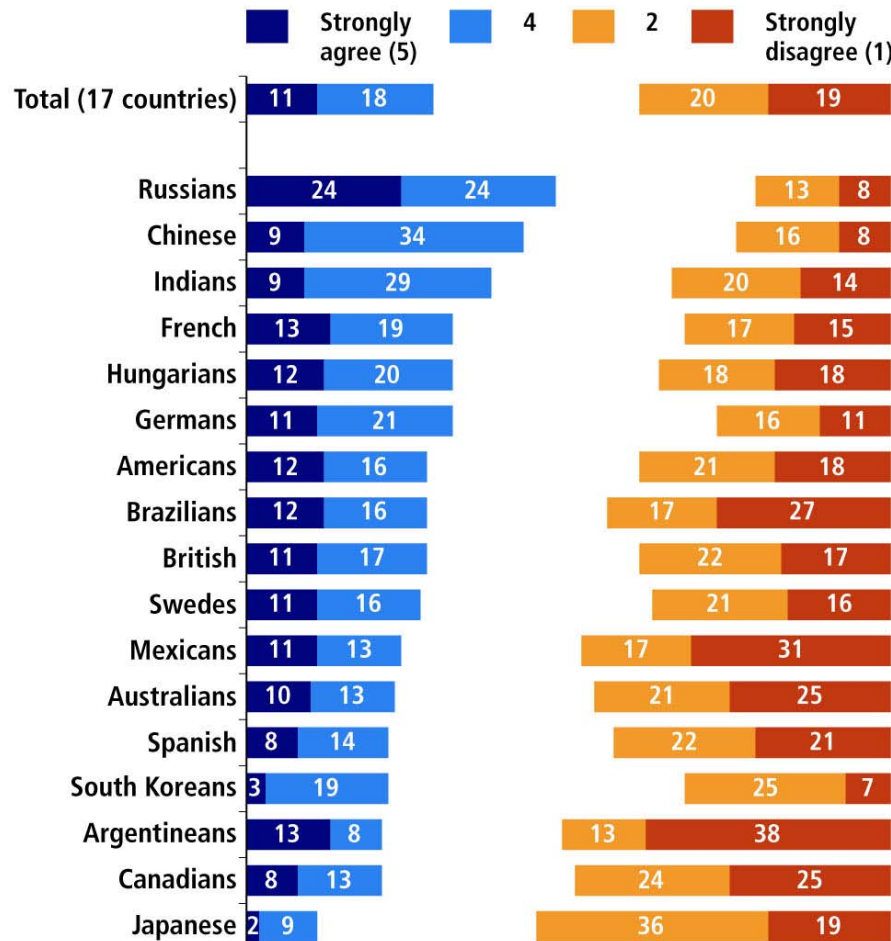
The white space in this chart represents “3” (on a scale of 1 to 5 where 1 means “Strongly disagree” and 5 means “Strongly agree”) and “DK/NA.”



Scientists Do Not Know Enough about Climate Change and Global Warming to Justify Society Taking Action Now



Percentage of Consumers in Each Country, 2010



NGS10_17Ak_Env_Sci_Know

The white space in this chart represents “3” (on a scale of 1 to 5 where 1 means “Strongly disagree” and 5 means “Strongly agree”) and “DK/NA.”

Housing

- Brazilians, Indians, Mexicans, and Chinese top the housing sub-index, while Germans, French, Canadians, British, Japanese, and Americans round out the bottom six. For the most part, the housing sub-index scores have trended upward from 2008.
- Homes in industrialized countries are more likely than those in emerging economies to have home heating. Less than half of Chinese, Indian, and Brazilian consumers report having home heating, while a large majority of households in France (97 percent), USA (94 percent), UK (94 percent), Canada (90 percent), and Germany (89%) do. Canadian and American consumers, however, along with Swedish consumers, are very likely to have insulation in the walls of their homes.
- Compared with last year, more South Korean consumers report having home heating, but this is likely attributable to the abnormally cold winter the country experienced in 2010 and the resulting increase in ownership of supplementary heating such as space heaters.
- Japanese and Chinese households rely heavily on non-renewable and environmentally unfriendly sources of energy to heat their home. Among Japanese households that have home heating, a little more than half use oil, and of those Chinese consumers who have home heating, almost half use coal.
- Air conditioning is very common in Japanese and American households, and is found in three-quarters of Chinese and Australian homes. Air conditioners are not a usual feature of European households.

- Brazilian consumers continue to be the most likely to report that they purchase electricity sold as “green” or generated from renewable resources, but this has declined somewhat from last year. Brazil continues to produce large amounts of biofuel. Green electricity consumption is becoming more common in China, Germany, Spain, and Sweden.
- Since 2008, a three-year trend shows an increase in the number of consumers in many countries engaging in energy-saving activities. More than half of consumers in 14 of the 17 countries surveyed report that they frequently moderate the temperature settings in their homes to save energy. There is also a growing trend to conserve the use of fresh water, particularly among Indian and Russian consumers.
- Consumers in emerging economies, particularly the Chinese and Indians, are more likely to aspire to own a large home, while consumers in industrialized countries in North America, Europe, Australia, Japan, and South Korea are less likely to share this goal.
- In most countries, more consumers report having decreased their home energy use over the preceding 12 months than say that their consumption has increased. Only Indians and South Koreans are more likely to report that their consumption of fuel has increased than to say that their consumption has decreased.

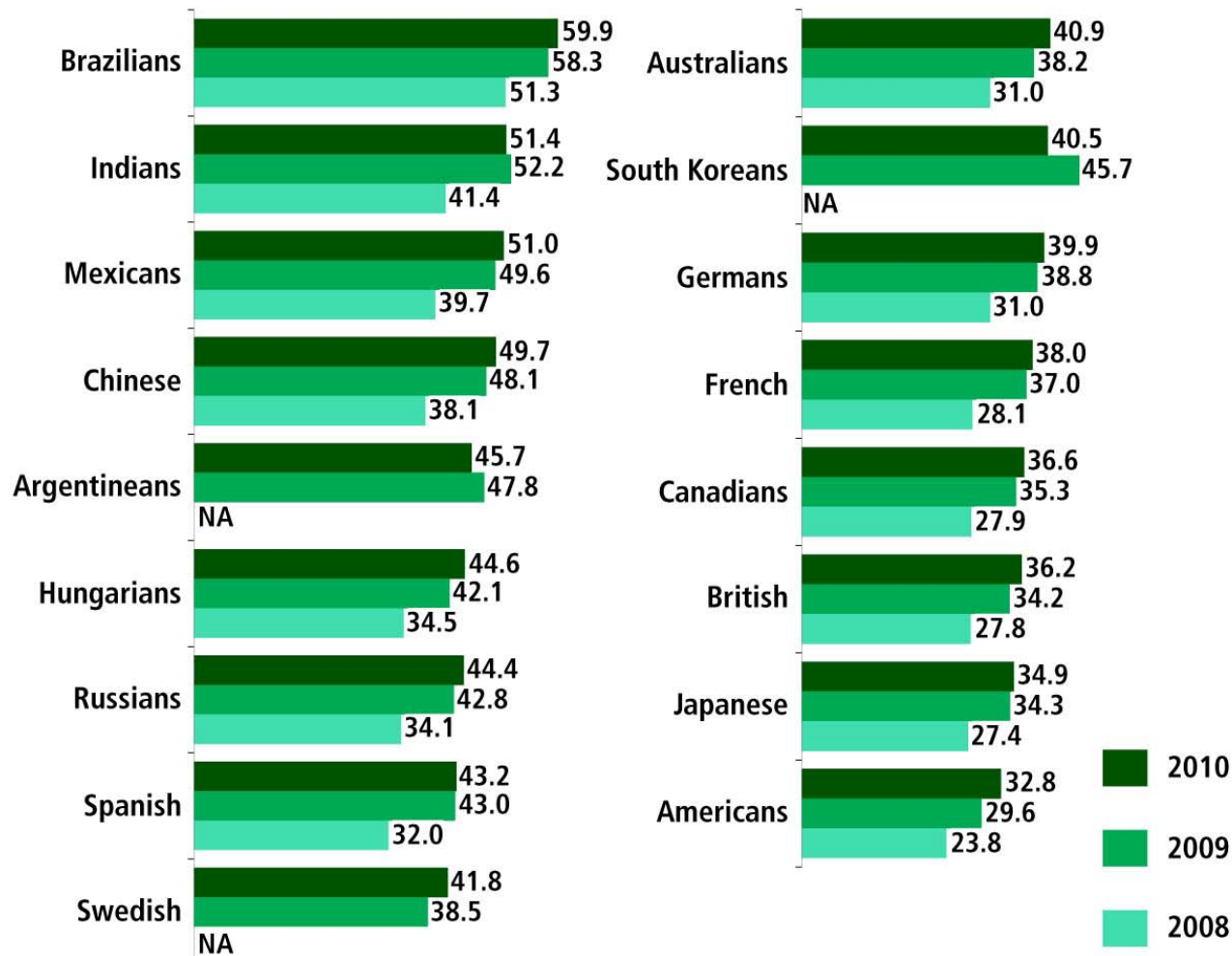
Housing: Energy-Saving Appliances



- Across all countries surveyed except Japan, cost is cited as the number-one reason for decreased household energy consumption.
- Among those who report decreased consumption of home energy, environmental concerns are one of the top two reasons for the reduction for four in ten consumers overall. Australians and Chinese are particularly likely to have reduced their energy consumption for environmental reasons.
- Close to half of North American, Chinese, and Brazilian consumers report possessing energy-saving televisions. Over the past three years, ownership of these types of televisions has increased considerably among consumers in Australia, Canada, China, France, Germany, South Korea, and Sweden. This likely reflects a transition to the use of LCD technology in televisions.
- Australians are the most likely to report owning an energy-efficient refrigerator, while approximately half of Brazilian, Canadian, and American consumers report having one. Since 2008, the number of Chinese and Indian consumers who report possessing an energy-efficient refrigerator has increased each year.

Greendex Rankings: Housing

Percentage of Consumers in Each Country, 2010



NGS10_greendex_housing

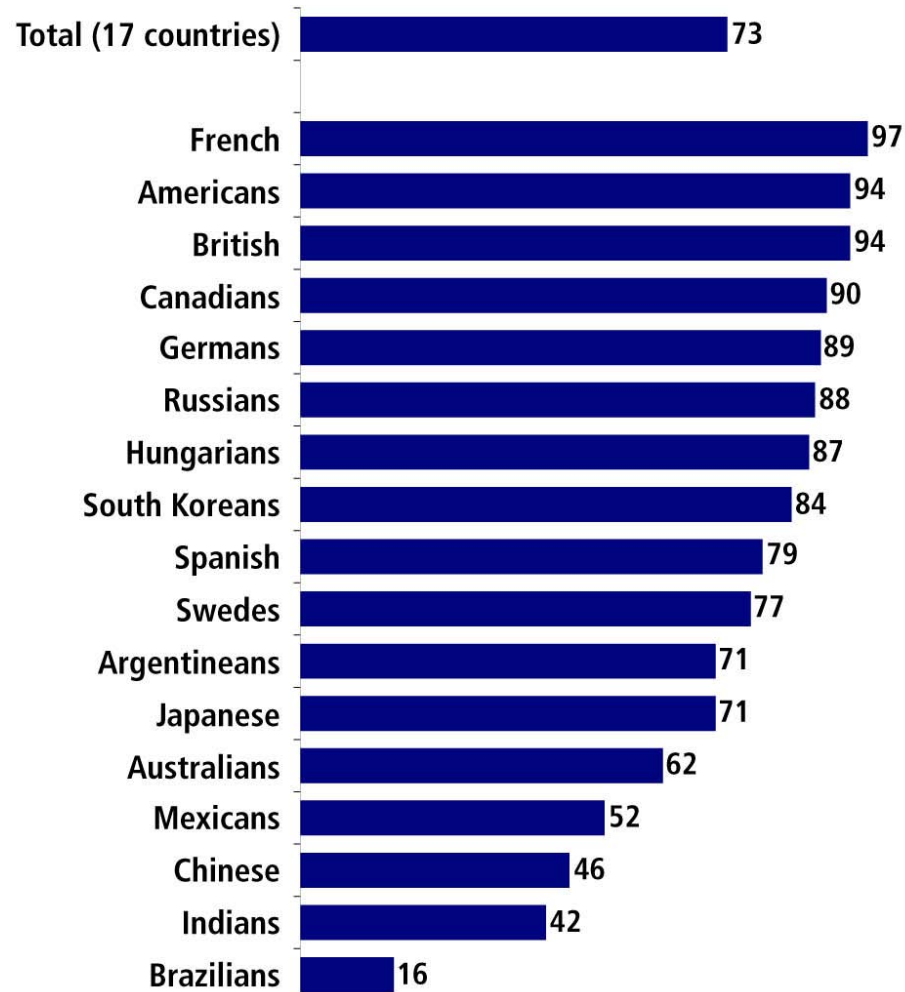
The Housing sub-index consists of 24 variables measuring the following:

- Size of residence relative to number of inhabitants
- Home heating and cooling, including fuel source
- Hot water and water-heating equipment
- Recent upgrades to residence that result in more efficient heating or cooling
- Consumption of renewable energy (both through the grid and generated onsite)
- Energy-efficient major appliances
- Water usage

Questions Included in Housing Sub-Index

Features of Primary Residence: Home Heating

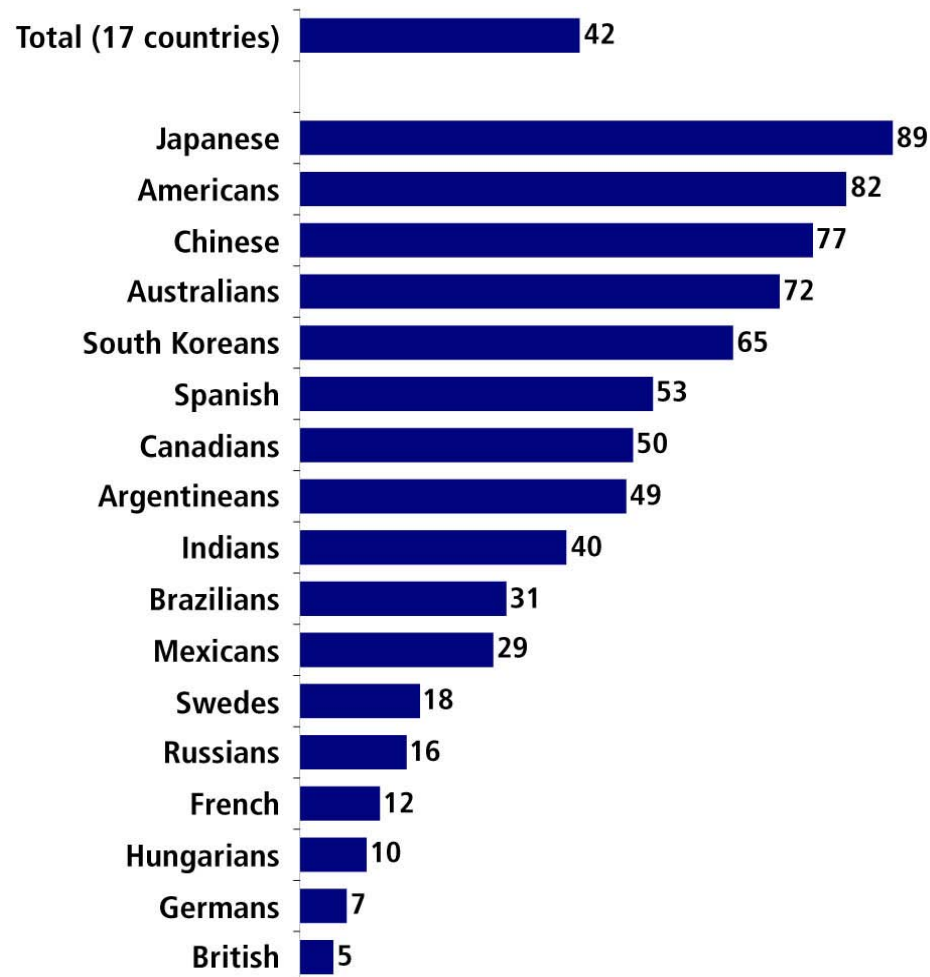
Percentage of Consumers in Each Country, 2010



NGS10_Q5t_Home_Heating

Features of Primary Residence: Air Conditioning

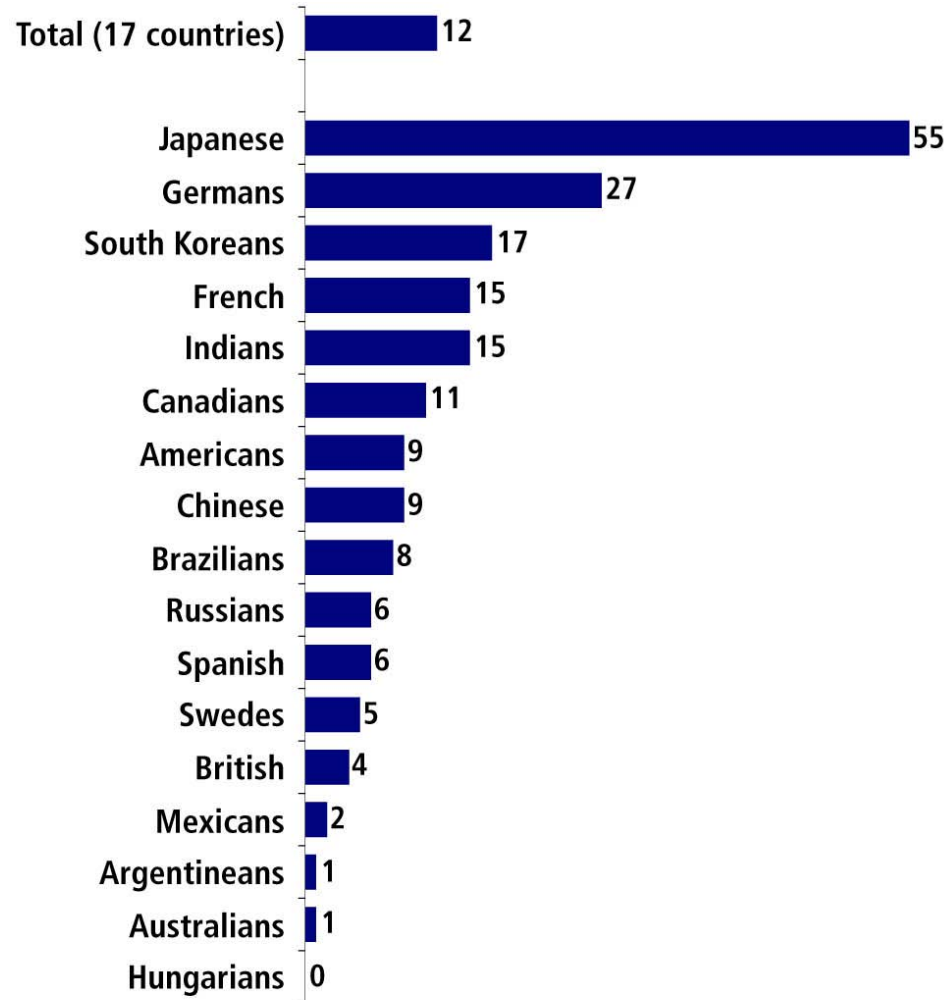
Percentage of Consumers in Each Country, 2010



NGS10_Q5t_Air_Conditioning

Oil Primary Energy Source to Heat Home

Percentage of Consumers in Each Country, 2010

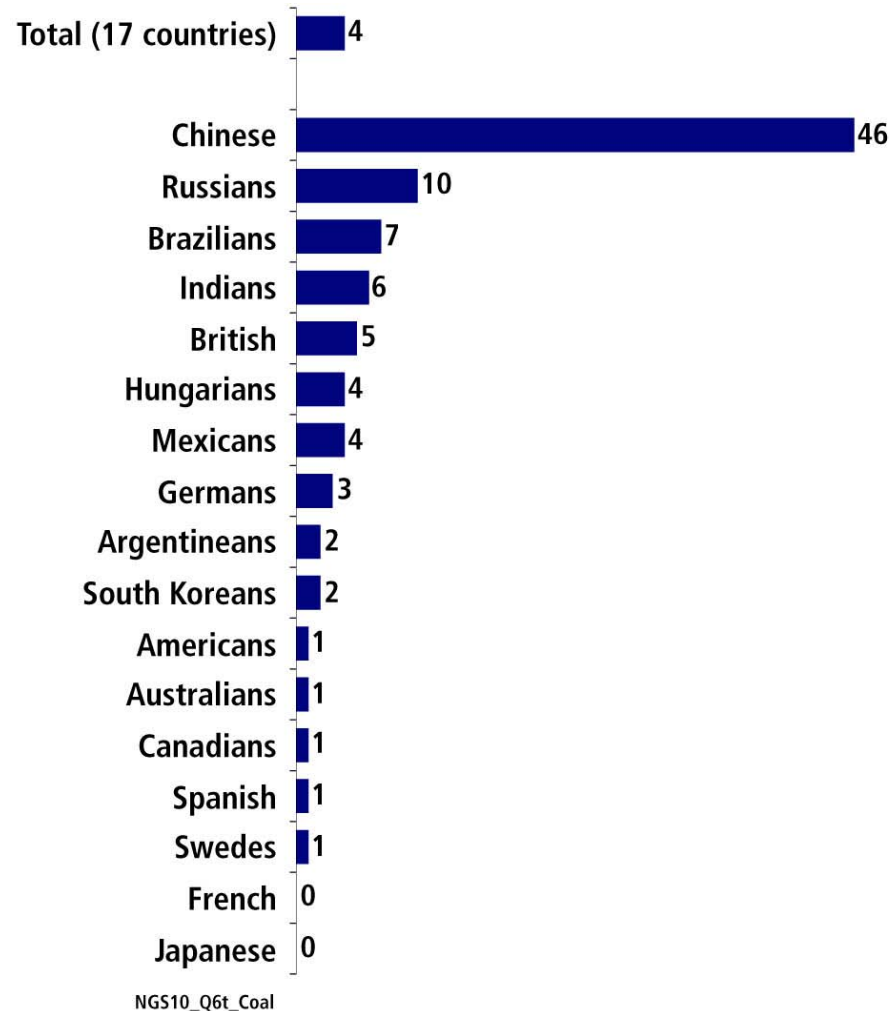


NGS10_Q6t_Oil

Subsample: Consumers who have home heating, including furnaces and stoves (n=12405)

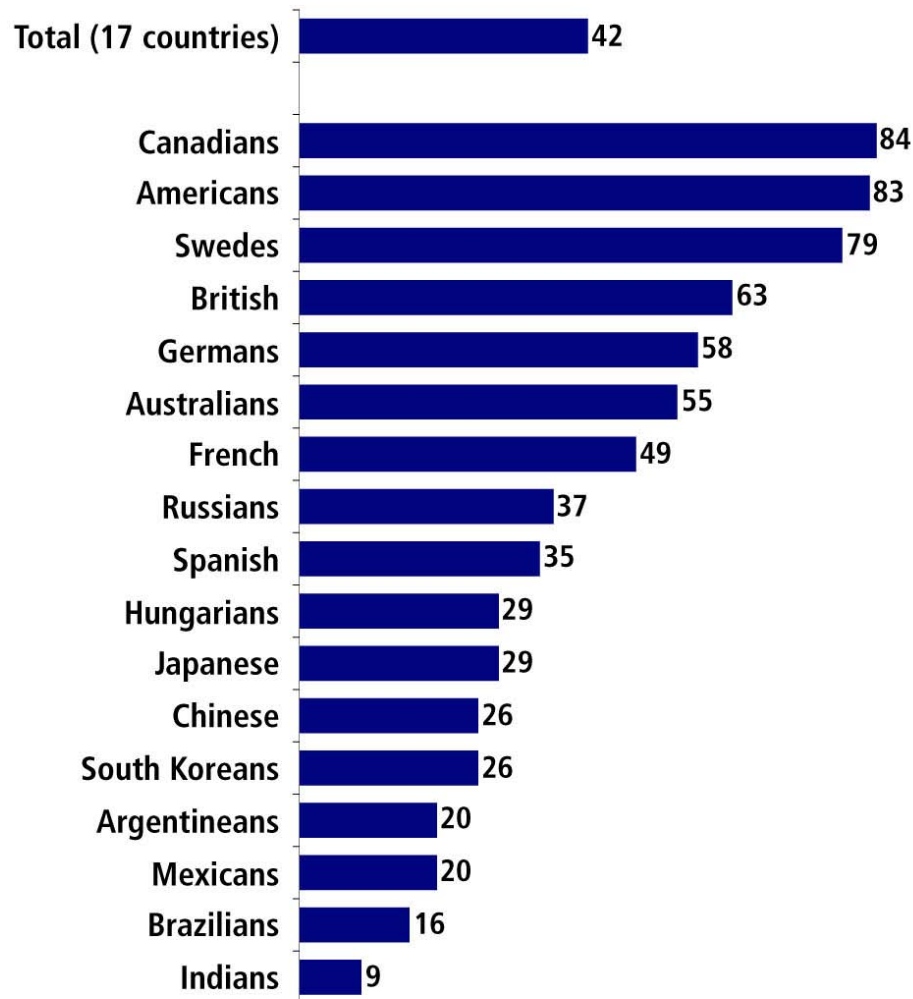
Coal Primary Energy Source to Heat Home

Percentage of Consumers in Each Country, 2010



Features of Primary Residence: Insulation in Walls

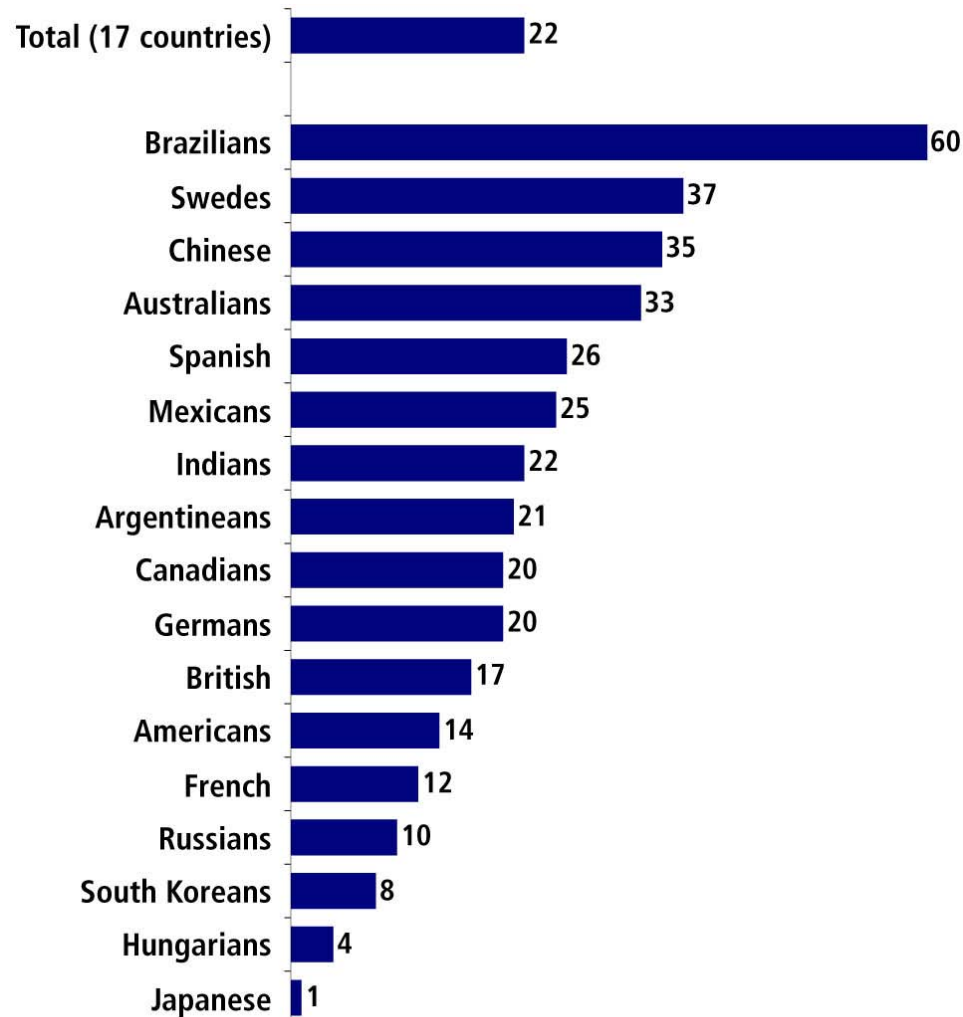
Percentage of Consumers in Each Country, 2010



NGS10_Q5t_Insulation

Household Purchases "Green" Electricity

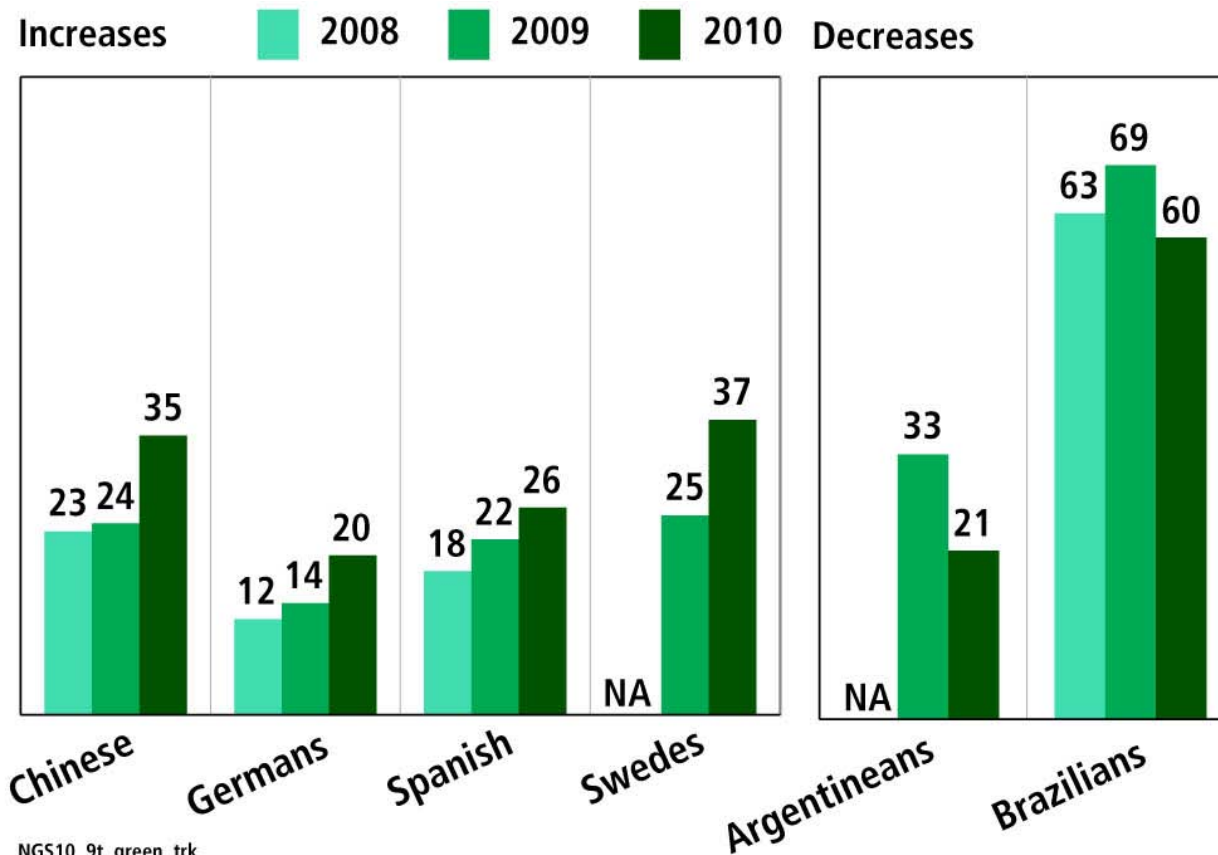
"Yes," Percentage of Consumers in Each Country, 2010



NGS10_9t_Greenelec

Household Purchases "Green" Electricity

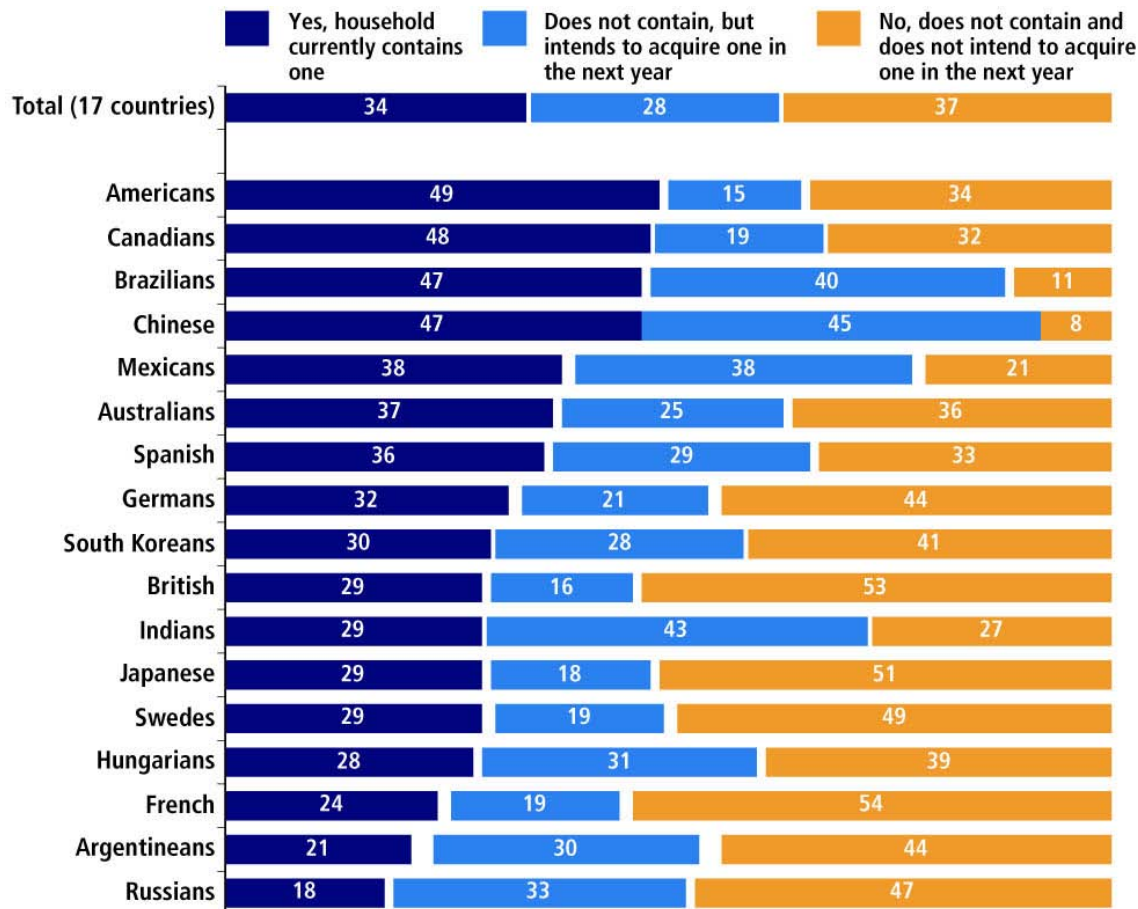
"Yes," Percentage of Consumers in Each Country, Trends: 2008–2010



Household Contains Energy-Saving Television



Percentage of Consumers in Each Country, 2010

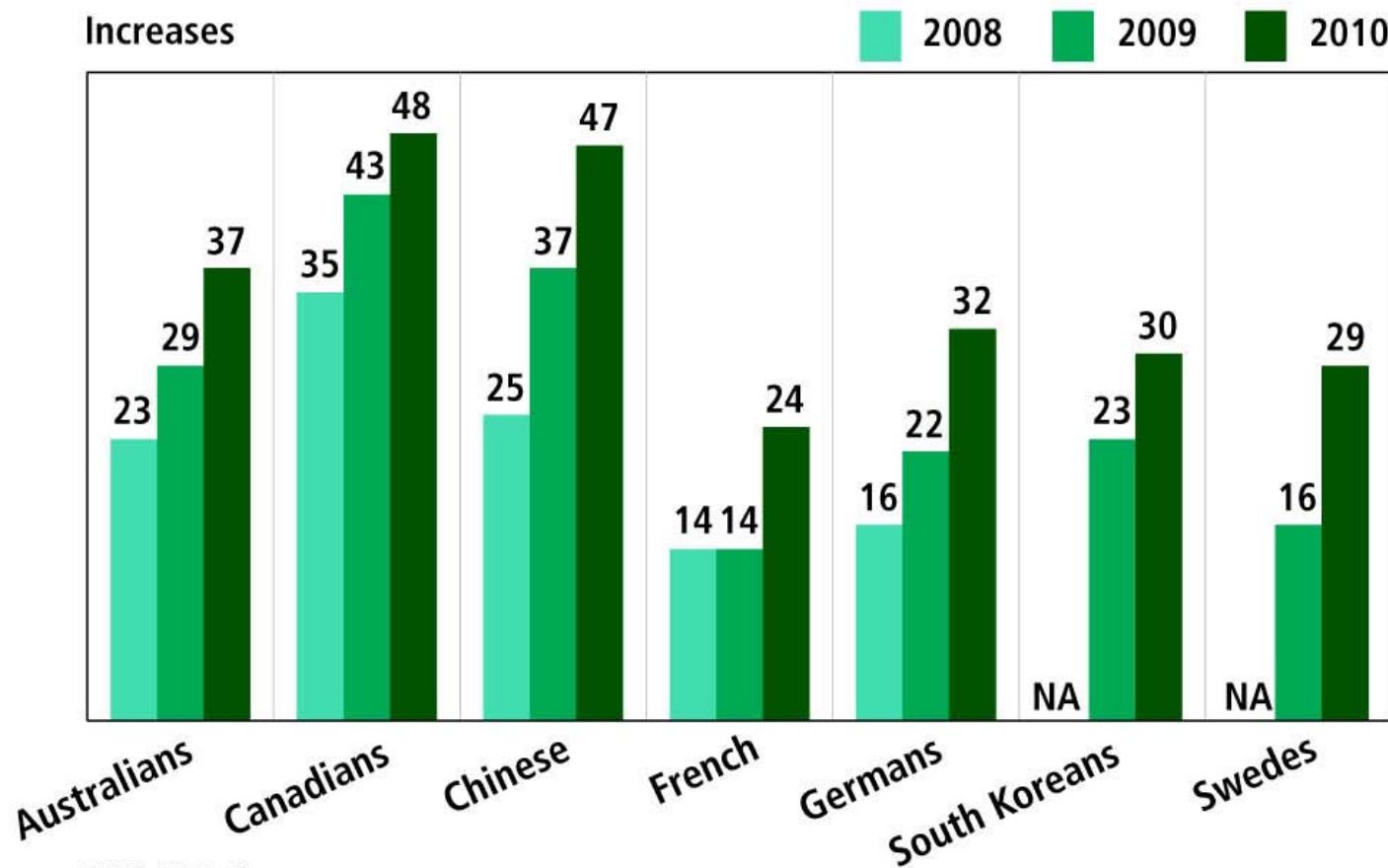


NGS10_Q14_Energ_sav_TV

Household Contains Energy-Saving Television



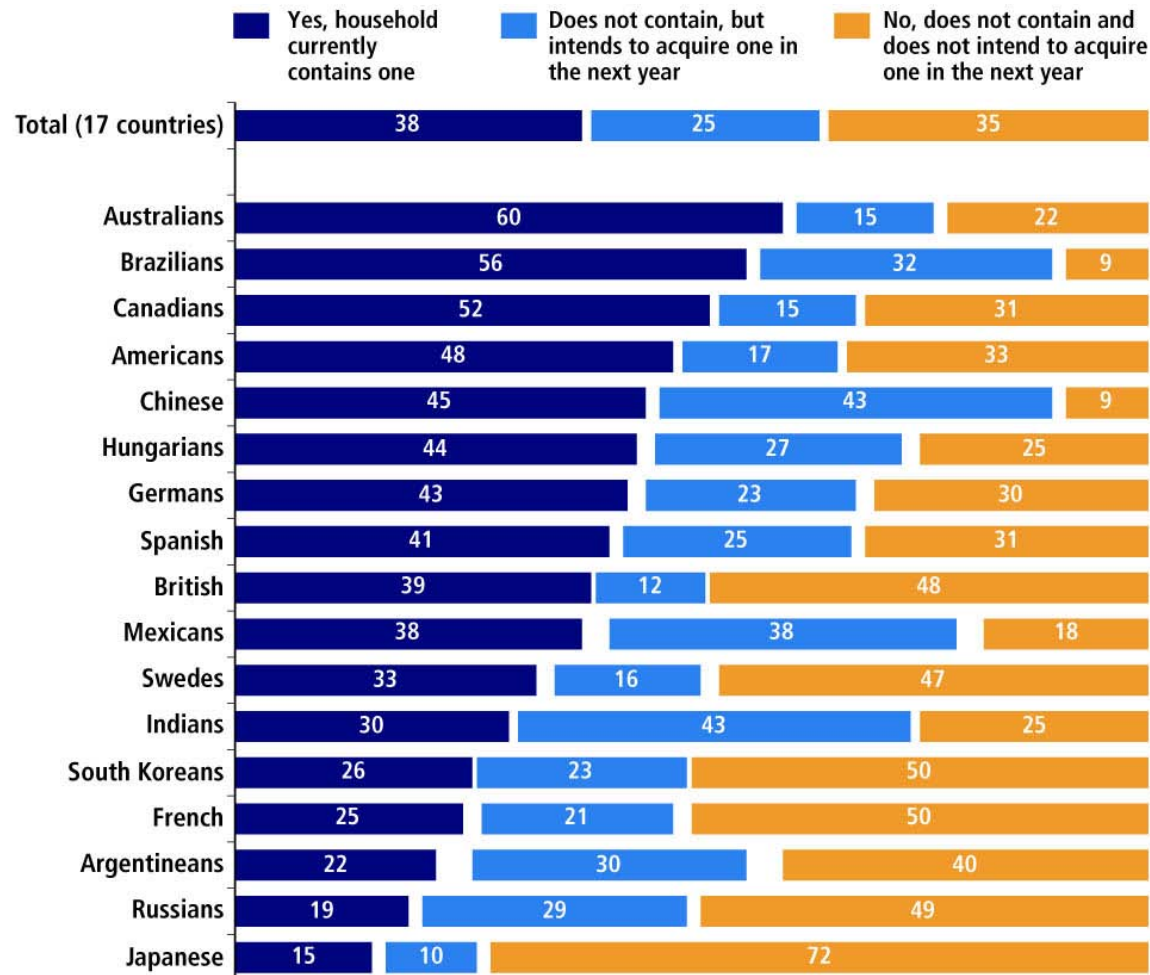
“Yes, Household Currently Contains One,” Percentage of Consumers in Each Country, Trends: 2008–2010



Household Contains Energy-Saving Refrigerator/Freezer



Percentage of Consumers in Each Country, 2010

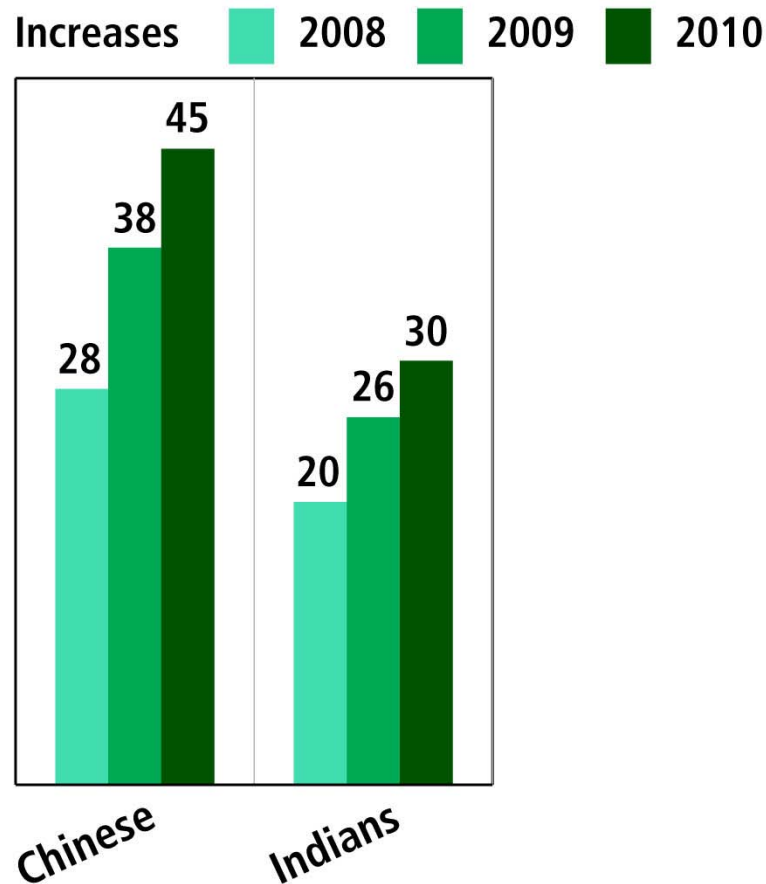


NGS10_Q14_Energ_sav_Fridge



Household Contains Energy-Saving Refrigerator/Freezer

Percentage of Consumers in Each Country, Trends: 2008–2010

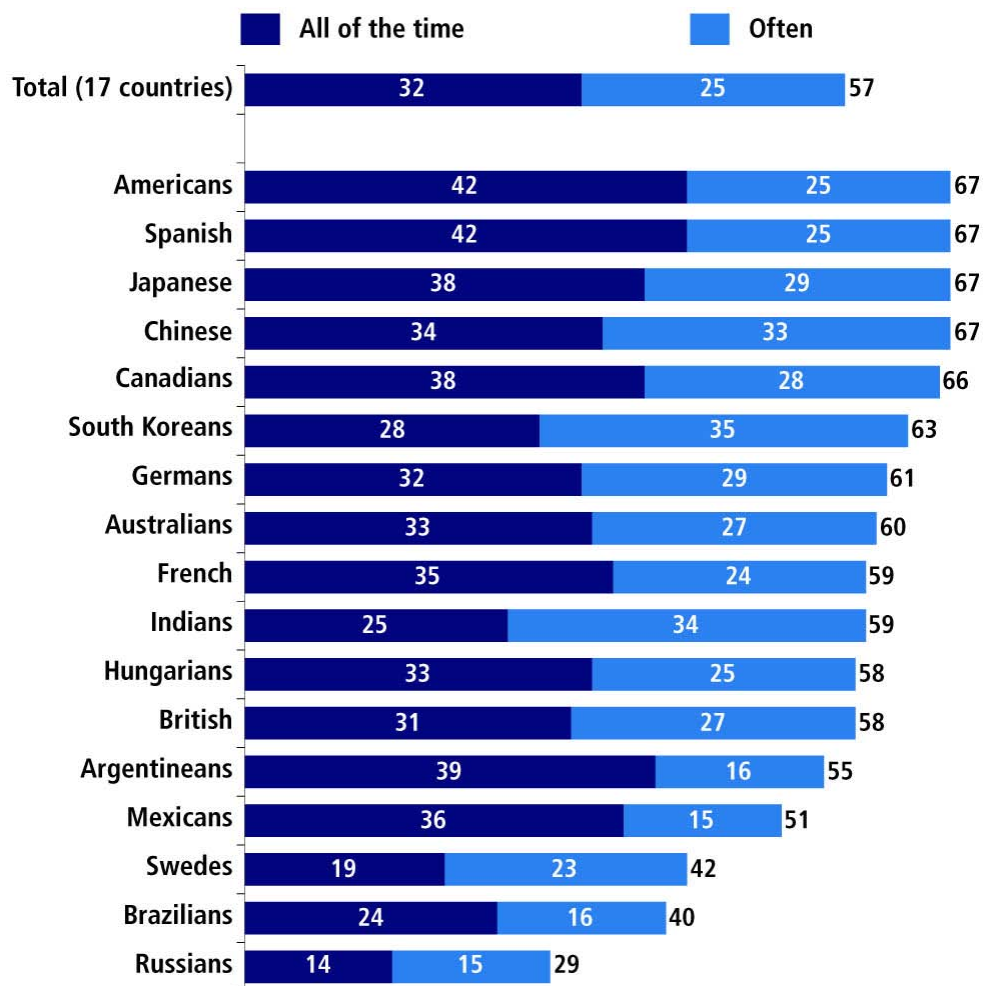


NGS10_14tmt_d_trk

Frequency of Keeping Heating/Cooling at Low Setting to Save Energy



“All of the Time (5)” or “Often (4),” Percentage of Consumers in Each Country, 2010



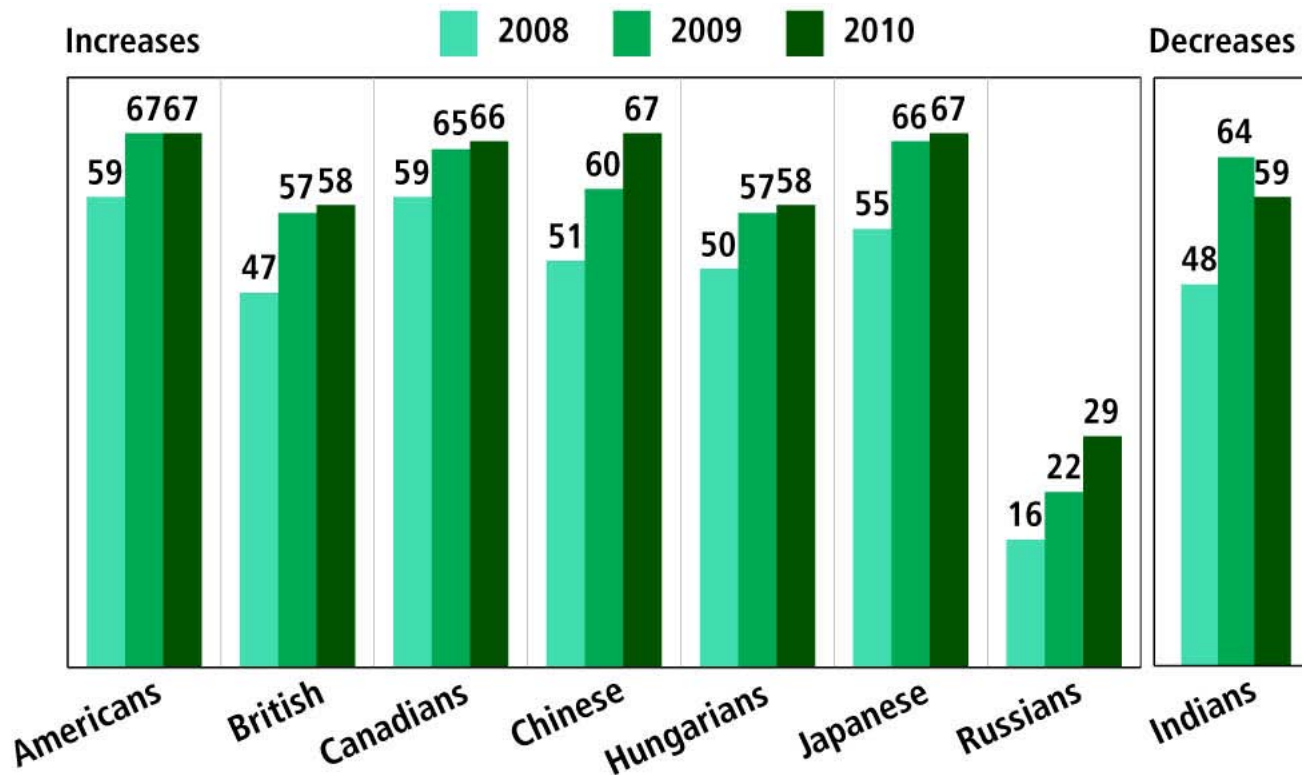
NGS10_Q15_Freq_HeatCool



Frequency of Keeping Heating/Cooling at Low Setting to Save Energy



“All of the Time (5)” or “Often (4),” Percentage of Consumers in Each Country, Trends: 2008–2010

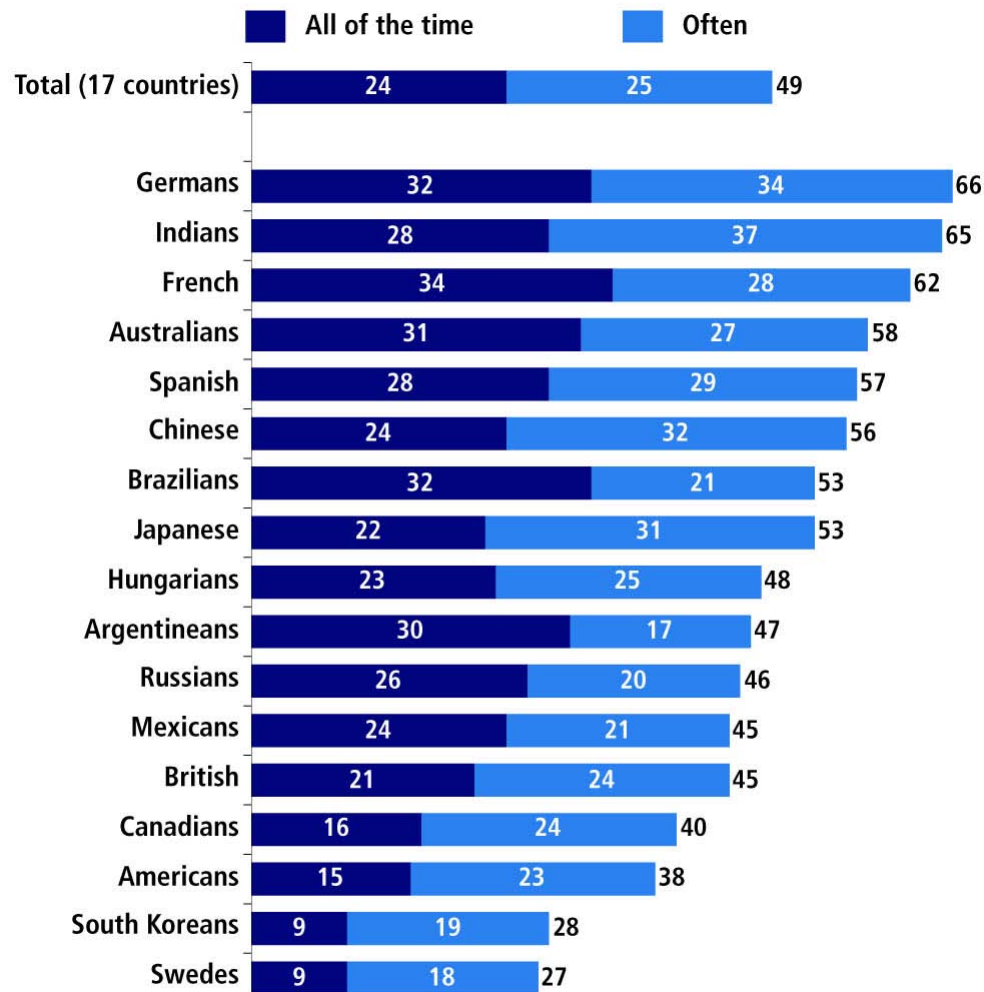


NGS10_15tmtg_trk

Frequency of Minimizing Use of Fresh Water



“All of the Time (5)” or “Often (4),” Percentage of Consumers in Each Country, 2010



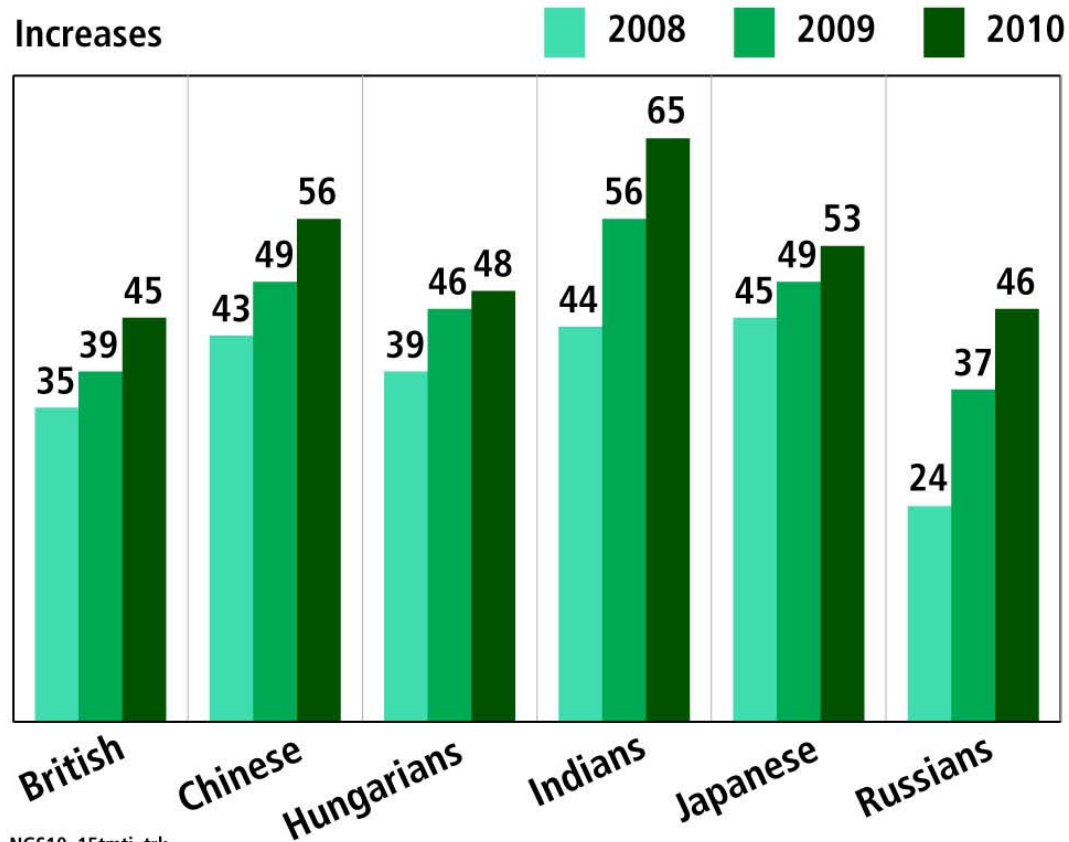
NGS10_Q15_Freq_Fre_Water



Frequency of Minimizing Use of Fresh Water



“All of the Time (5)” or “Often (4),” Percentage of Consumers in Each Country,
Trends: 2008–2010

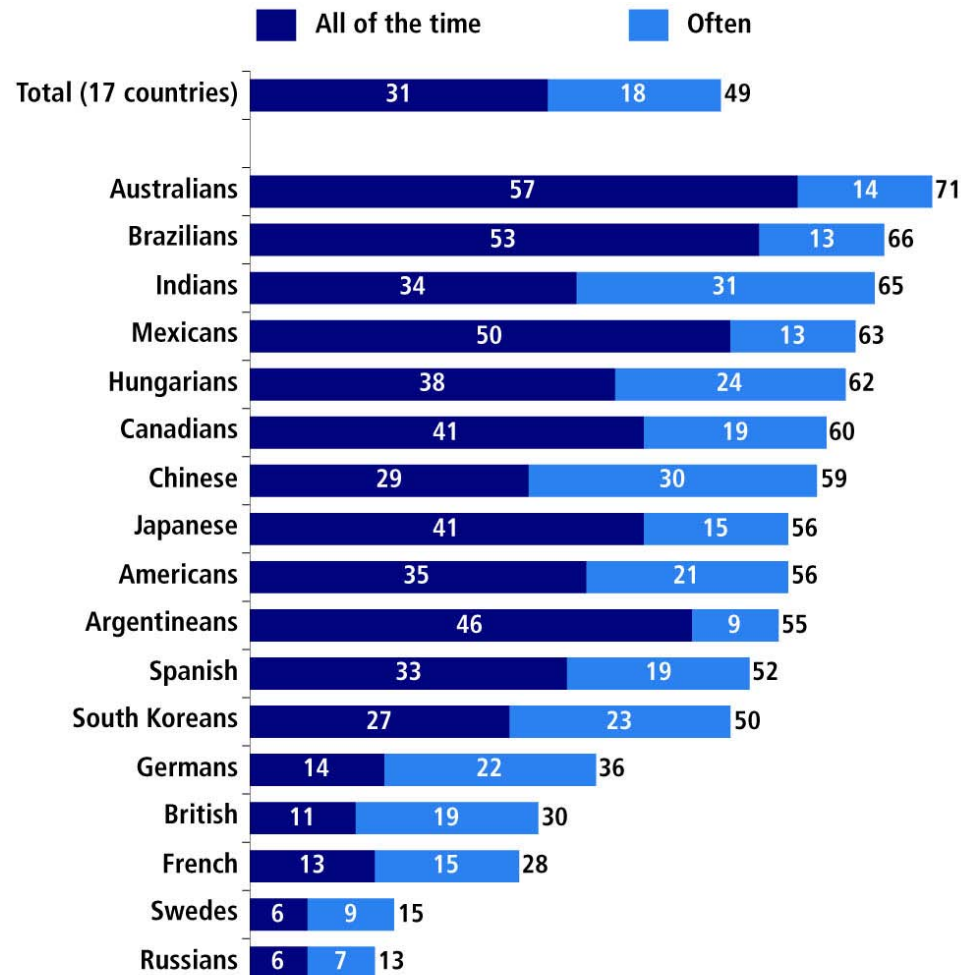


NGS10_15tmti_trk

Frequency of Washing Laundry in Cold Water to Save Energy



“All of the Time (5)” or “Often (4),” Percentage of Consumers in Each Country, 2010



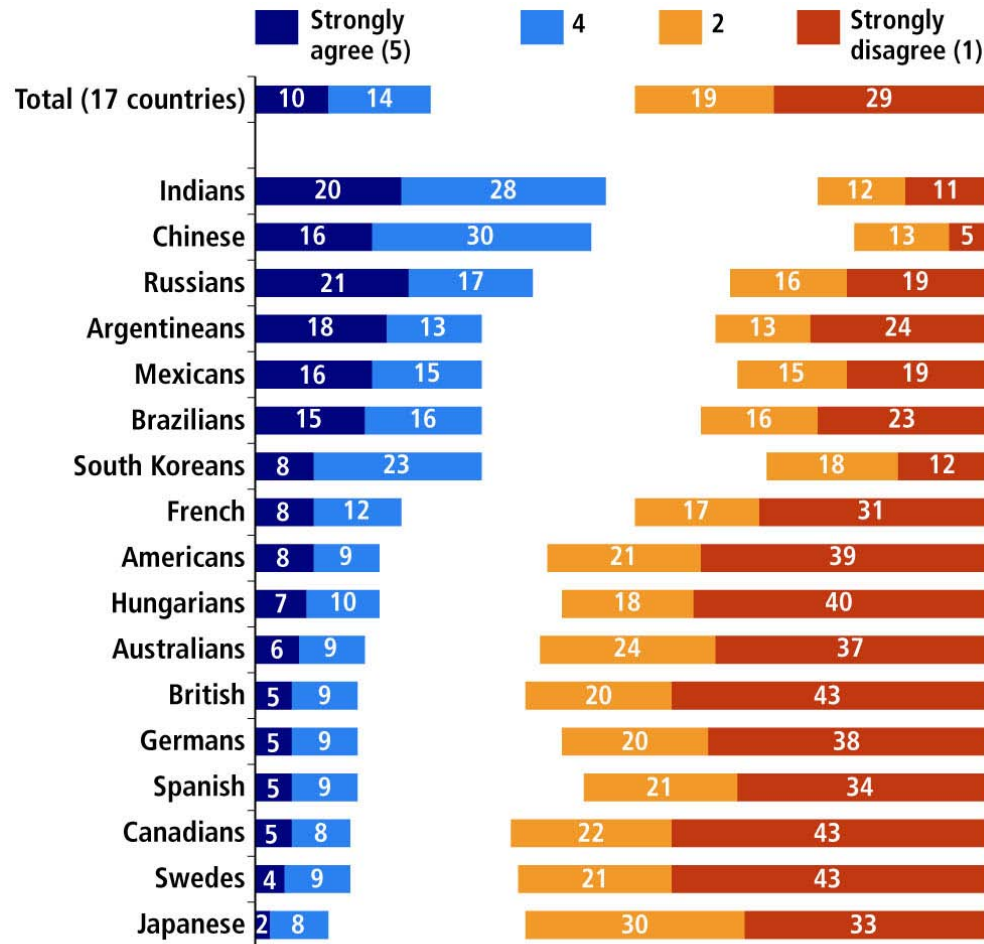
NGS10_Q15_Freq_Lau_CWater



Additional Questions Not Included in Housing Sub-Index

Owning a Big House Is a Very Important Goal in My Life

Percentage of Consumers in Each Country, 2010



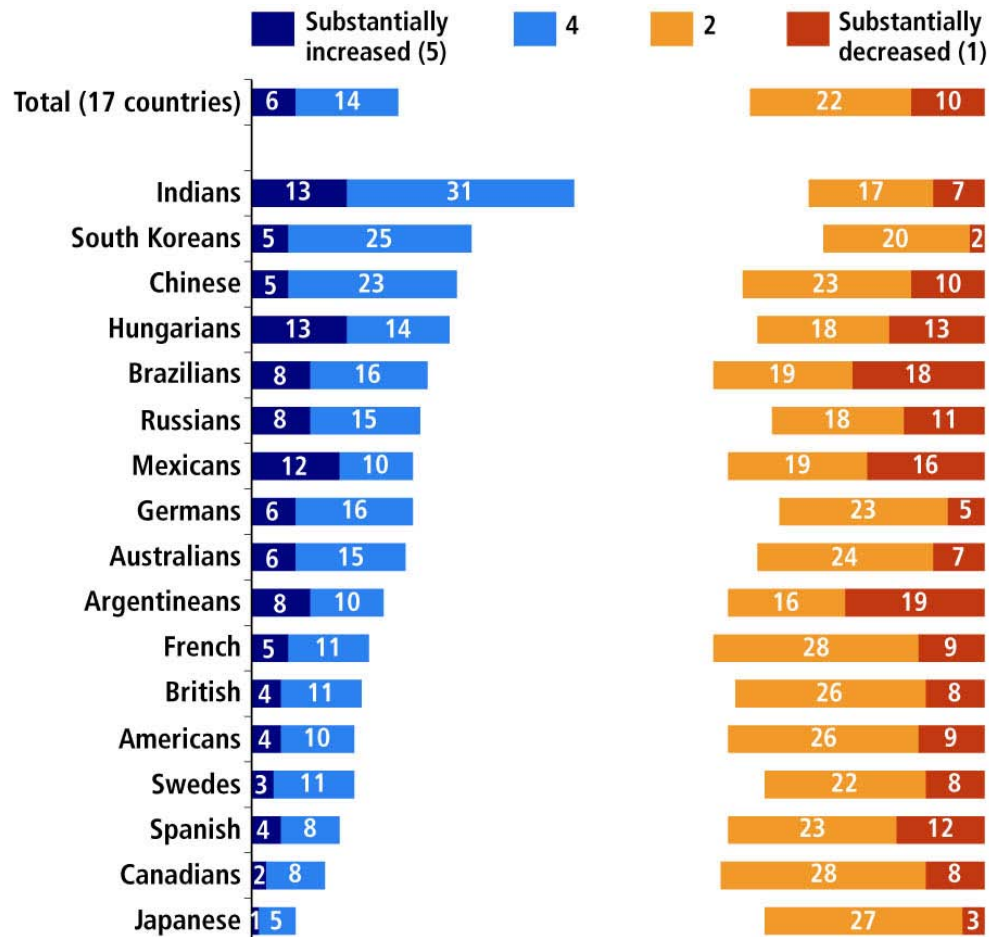
NGS10_Q17a_Bighouse

The white space in this chart represents "3" (on a scale of 1 to 5 where 1 means "Strongly disagree" and 5 means "Strongly agree") and "DK/NA."

Change in Consumption of Electricity and Fuel Consumed in Your Home over the Past Year



Percentage of Consumers in Each Country, 2010



NGS10_Q16_fuel_electricity_consumption

The white space in this chart represents "3" (on a scale of 1 to 5 where 1 means "Strongly disagree" and 5 means "Strongly agree") and "DK/NA."




Reasons for Decreased Consumption of Electricity and Fuel Consumption in Your Home



Combined Mentions, Percentage of Consumers in Each Country, 2010

	Total (17 countries)	Americans	Argentineans	Australians	Brazilians	British	Canadians	Chinese	French	Germans	Hungarians	Indians	Japanese	Mexicans	Russians	South Koreans	Spanish	Swedes
Cost	68	83	57	74	61	84	73	54	75	78	65	69	57	61	67	75	64	54
Environmental concerns	39	33	38	51	45	36	44	51	42	40	22	47	41	40	21	23	40	43
Changes in your financial situation	32	55	22	23	19	44	34	15	28	27	36	20	58	25	38	41	32	22
Changes in your living circumstances	20	13	14	22	17	17	22	30	20	20	20	17	32	14	21	30	24	14
Health reasons	17	7	18	11	25	9	10	43	18	11	13	25	8	25	32	11	13	9

 Top concern

NGS10_16b_CnsmpnHome

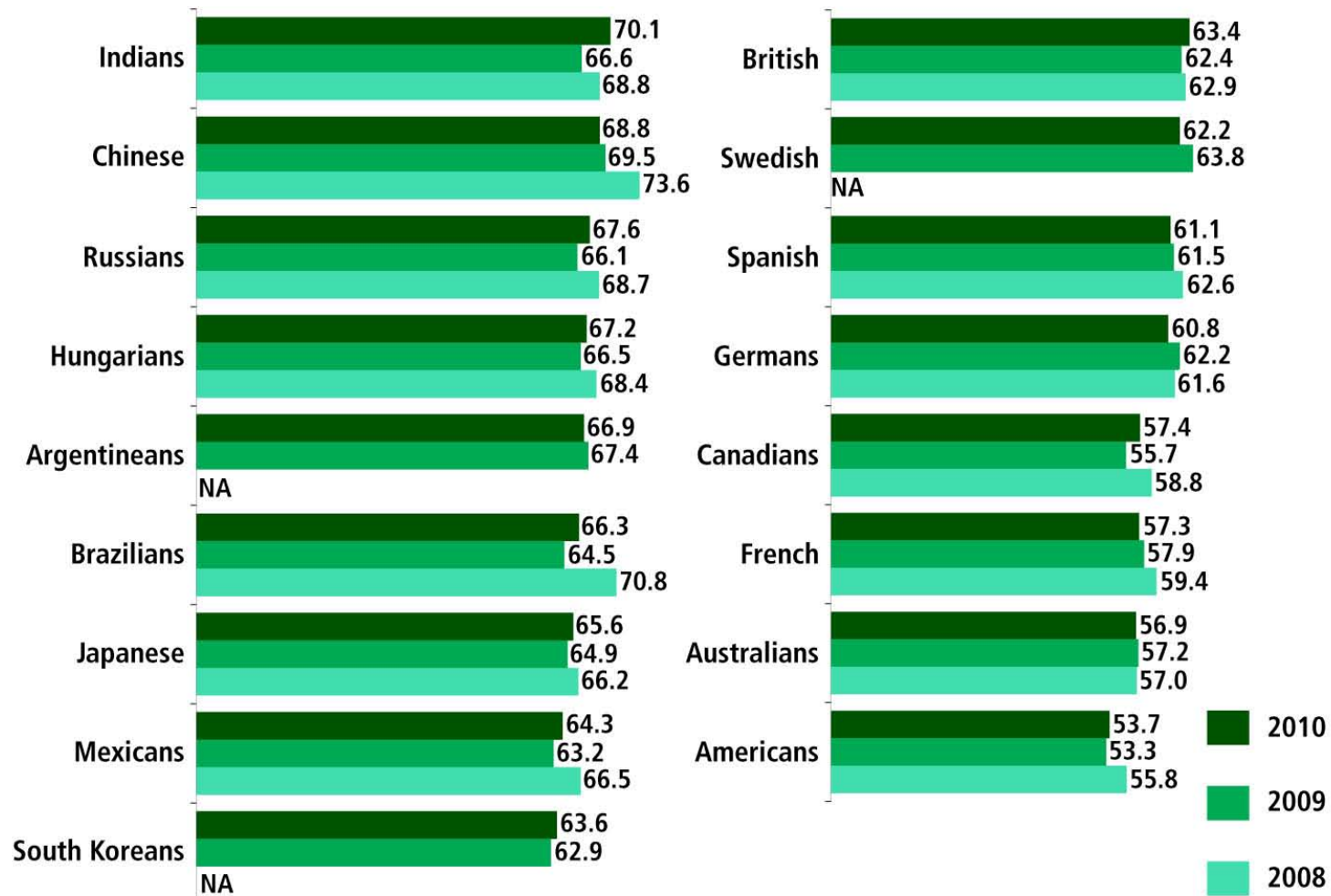
Transportation

- Transportation sub-index scores are up from 2009 in ten countries, for most only slightly, and down in the remainder, again usually only slightly. Consumers generally appear to be stuck in their transportation routines, either unwilling or unable to make meaningful changes in their behavior.
- The possession of cars or trucks is much more common among consumers in industrialized economies than emerging economies. Consumers in China, India, and Argentina are the least likely to own at least one, but the use of cars is increasing at least in China and India. Still, Chinese and Indian consumers are the most likely to say that they live close to their usual destinations to minimize the impact of their personal transportation on the environment, and Indians and Chinese retain the first and second ranks on the sub-index respectively. If trends in Chinese transportation habits continue, however, Greendex scores will decline further.
- Consumers in industrialized economies are the most likely to travel alone in their vehicles. French, American, and Australian consumers are the most likely to do so on a daily basis.
- Since 2008, British, Canadian, and Indian consumers have reduced their frequency of driving alone in a car (perhaps due to fuel costs), while the percentage of Chinese consumers who drive alone in a car or truck has increased by six points.
- The frequency of use of public transportation is relatively low in most countries. Half of Russians, however, use public transportation every day or most days (47 percent).

- Australian, Canadian, and American consumers are the least likely to use public transportation and are less inclined than others to do so to save fuel and reduce pollution. Consumers in these countries are also the least likely to walk or ride a bike to their usual destinations.
- Chinese and Indian consumers are the most frequent users of public transportation and the most likely to report that they use it to save fuel and reduce pollution at least in part. Chinese consumers (73 percent) also remain the most likely to walk or ride a bicycle to their destination.
- Generally, most consumers in the countries surveyed report no change in their consumption of fuel for motorized vehicles over the preceding year. In all countries surveyed except India, however, the proportion of consumers who decreased their fuel consumption is larger than those who say that they increased their consumption of fuel.
- A majority of consumers in most countries report cost savings as the reason they decreased their consumption of fuel for motorized vehicles. A majority of American and Japanese consumers also cite changes in their financial situation as a reason for decreased consumption.
- Environmental concerns are identified as one of the top two motives for reducing fuel consumption by three in ten consumers overall, but the proportion is particularly high in China.

Greendex Rankings: Transportation

Percentage of Consumers in Each Country, 2010



NGS10_greendex_transportation

The Transportation sub-index consists of 17 variables measuring the following:

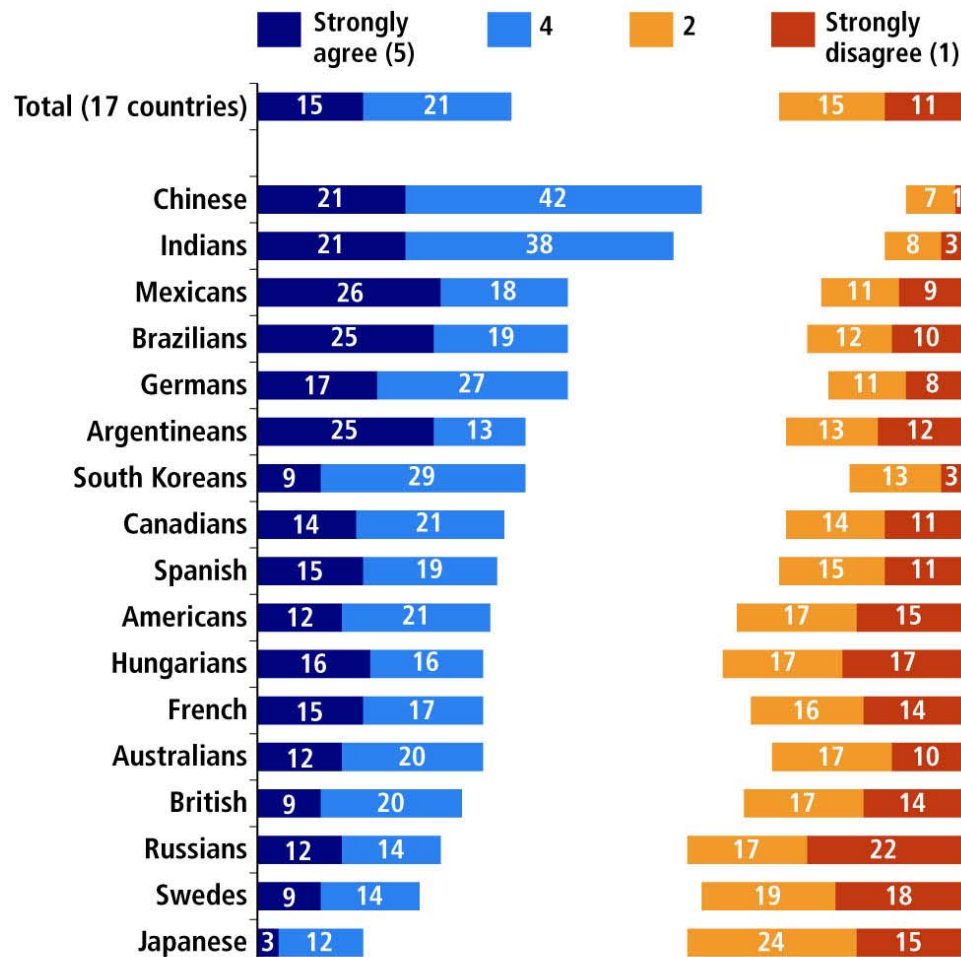
- Driving
- Ownership of motorized vehicles
- Size of vehicle driven
- Distance vehicle is driven
- Owning an ultra-low emissions vehicle (ULEV or hybrid)
- Air travel
- Use of public transit
- Taking trains
- Riding a bicycle
- Walking
- Location of residence relative to primary destination

Questions Included in Transportation Sub-Index

I Choose to Live Close to Usual Destinations to Minimize Impact of Transportation on the Environment



Percentage of Consumers in Each Country, 2010



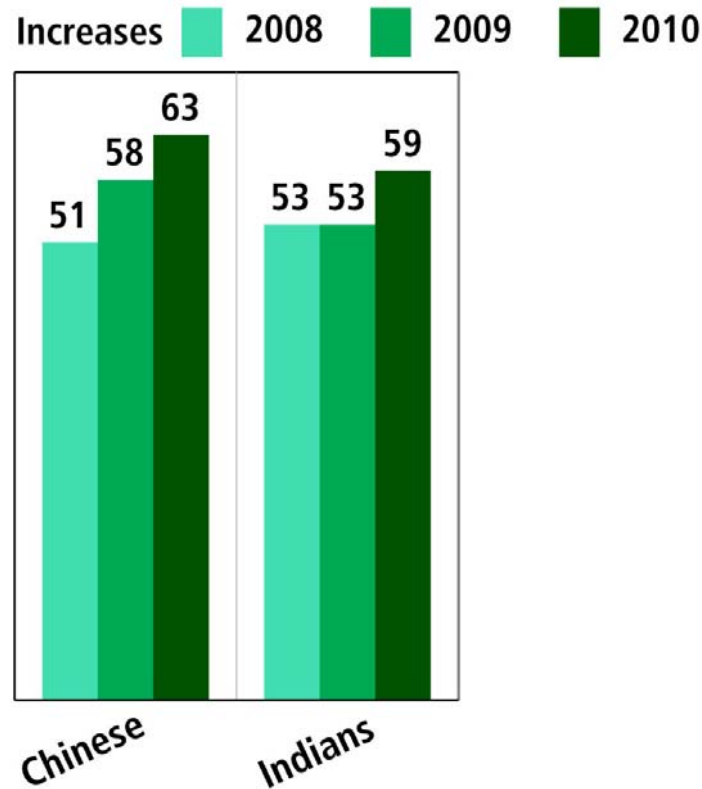
NGS10_17Btmt_close

The white space in this chart represents “3” (on a scale of 1 to 5 where 1 means “Strongly disagree” and 5 means “Strongly agree”) and “DK/NA.”

I Choose to Live Close to Usual Destinations to Minimize Impact of Transportation on the Environment



“Agree (4+5),” Percentage of Consumers in Each Country, Trends: 2008–2010

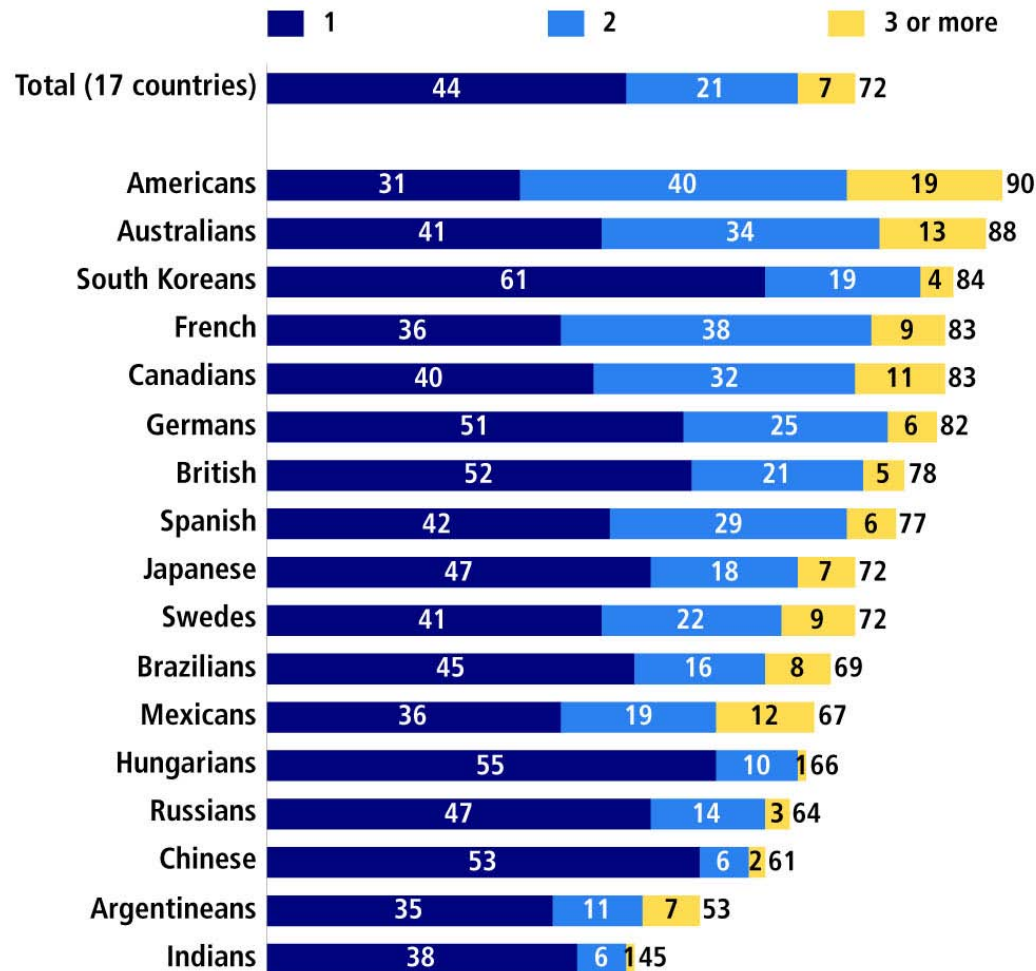


NGS10_17Bm_trk

Average Number of Cars or Trucks Owned, Rented, or Leased by Household Members



Percentage of Consumers in Each Country, 2010

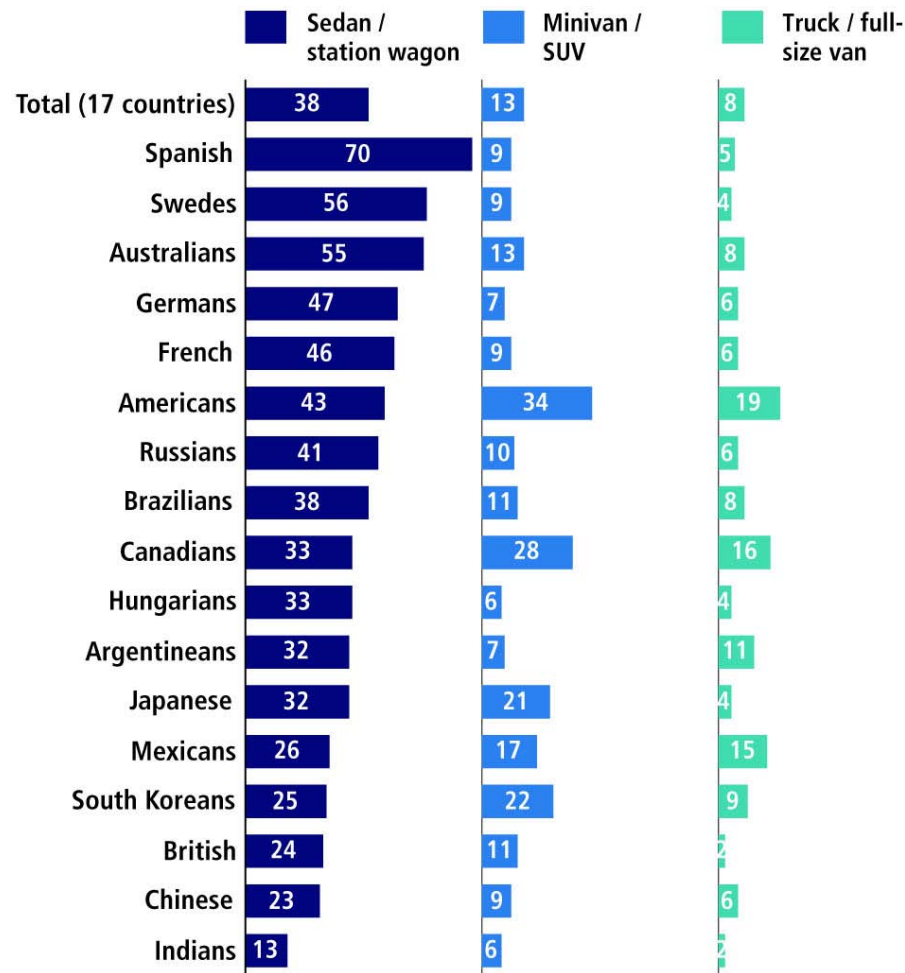


NGS10_10mtb_cars

Type of Car Consumers Personally Drive: Large Motorized Vehicles



Percentage of Consumers in Each Country, 2010



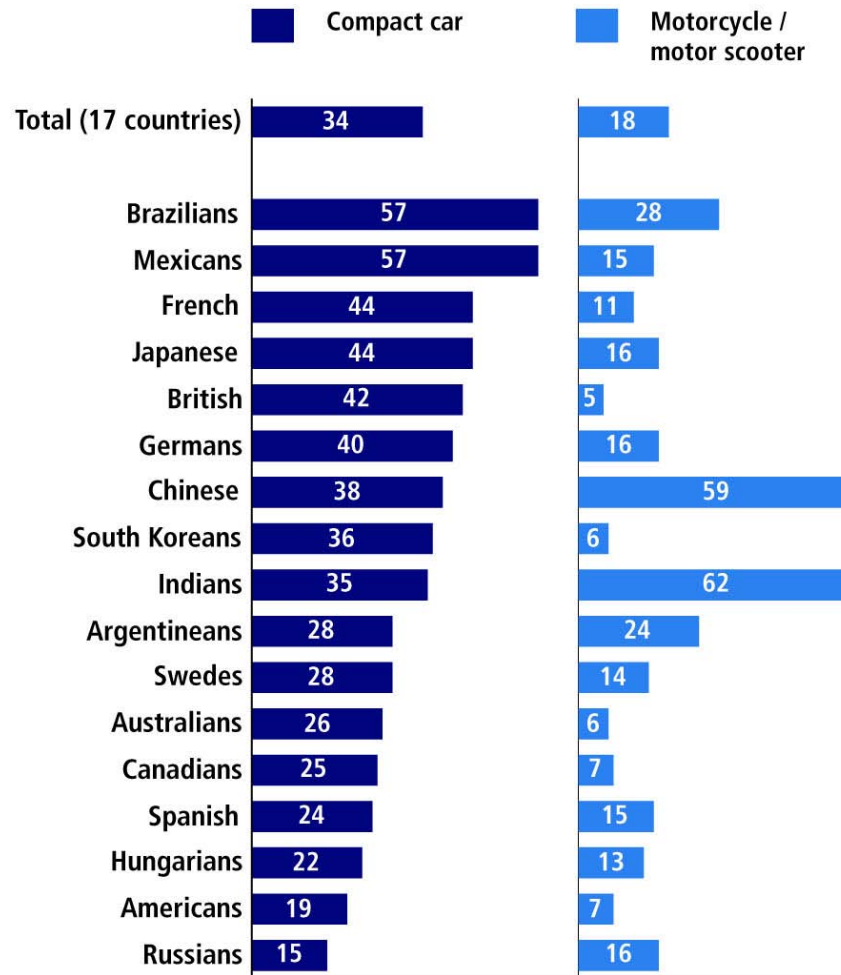
NGS10_12ta_DrvnBig



Type of Car Consumers Personally Drive: Small Motorized Vehicles



Percentage of Consumers in Each Country, 2010



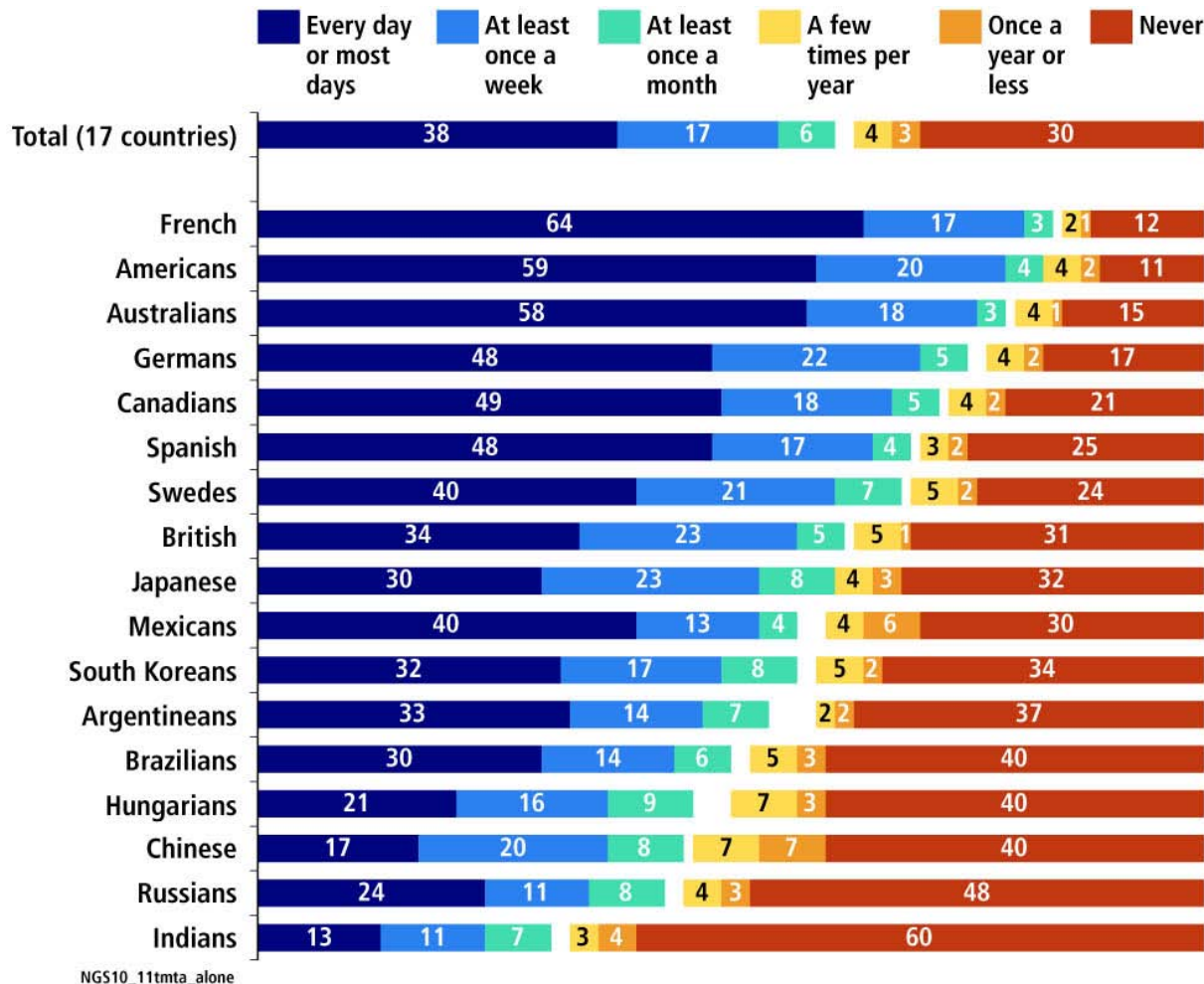
NGS10_12ta_DrvnSmall



Frequency of Driving Alone in a Car/Truck



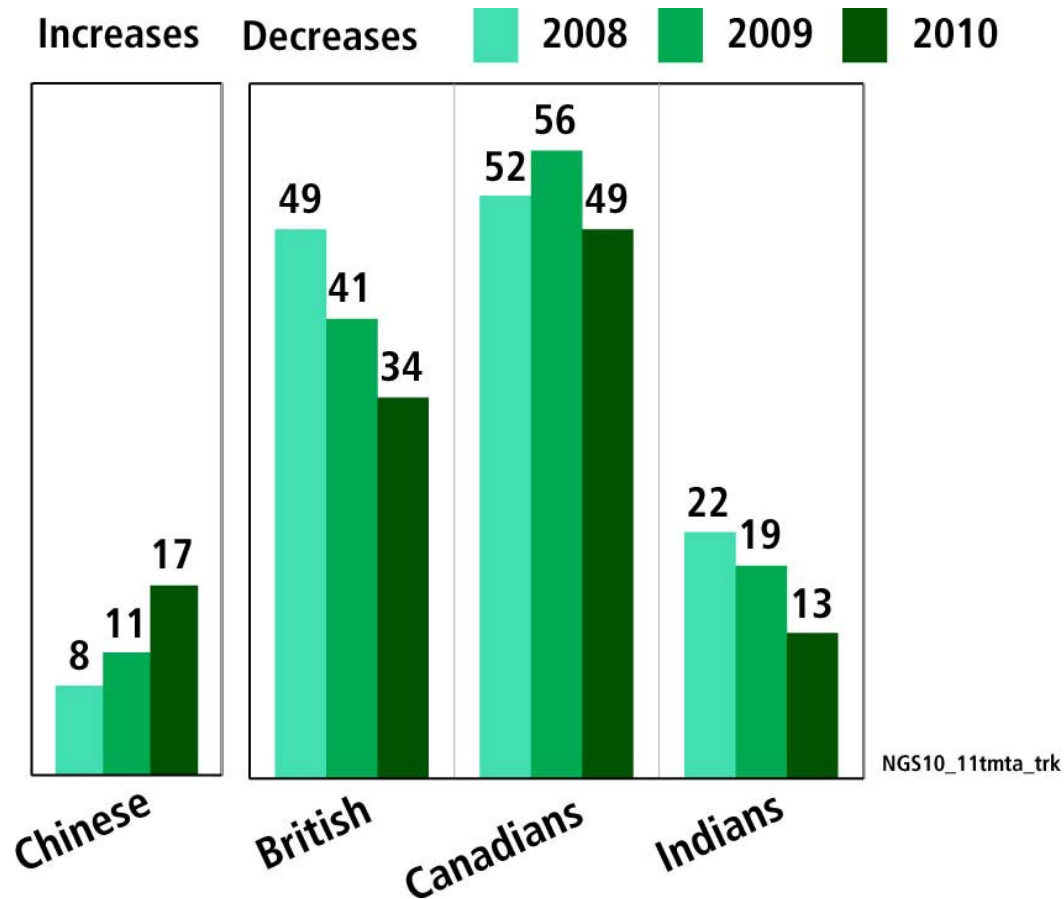
Percentage of Consumers in Each Country, 2010



Frequency of Driving Alone in a Car/Truck

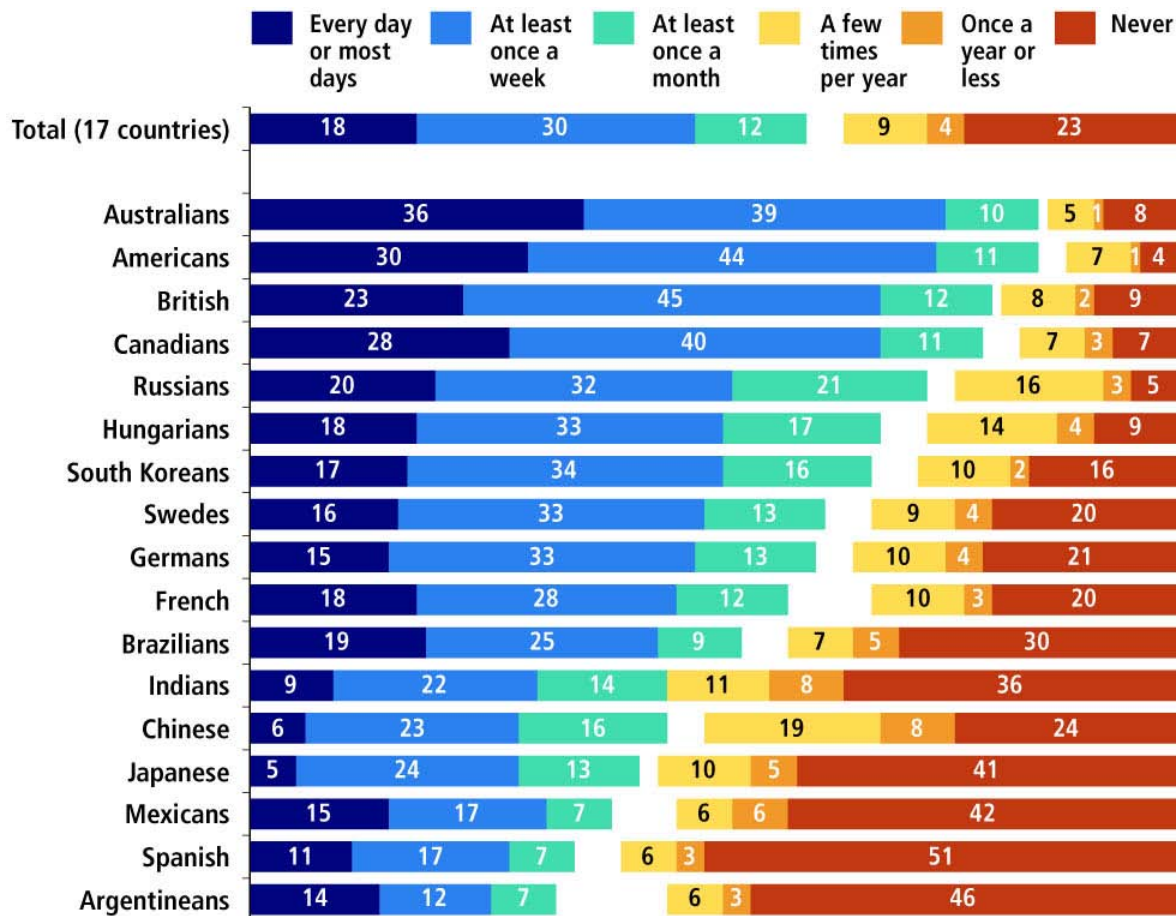


“Every Day or Most Days,” Percentage of Consumers in Each Country,
Trends: 2008–2010



Frequency of Driving with Others

Percentage of Consumers in Each Country, 2010

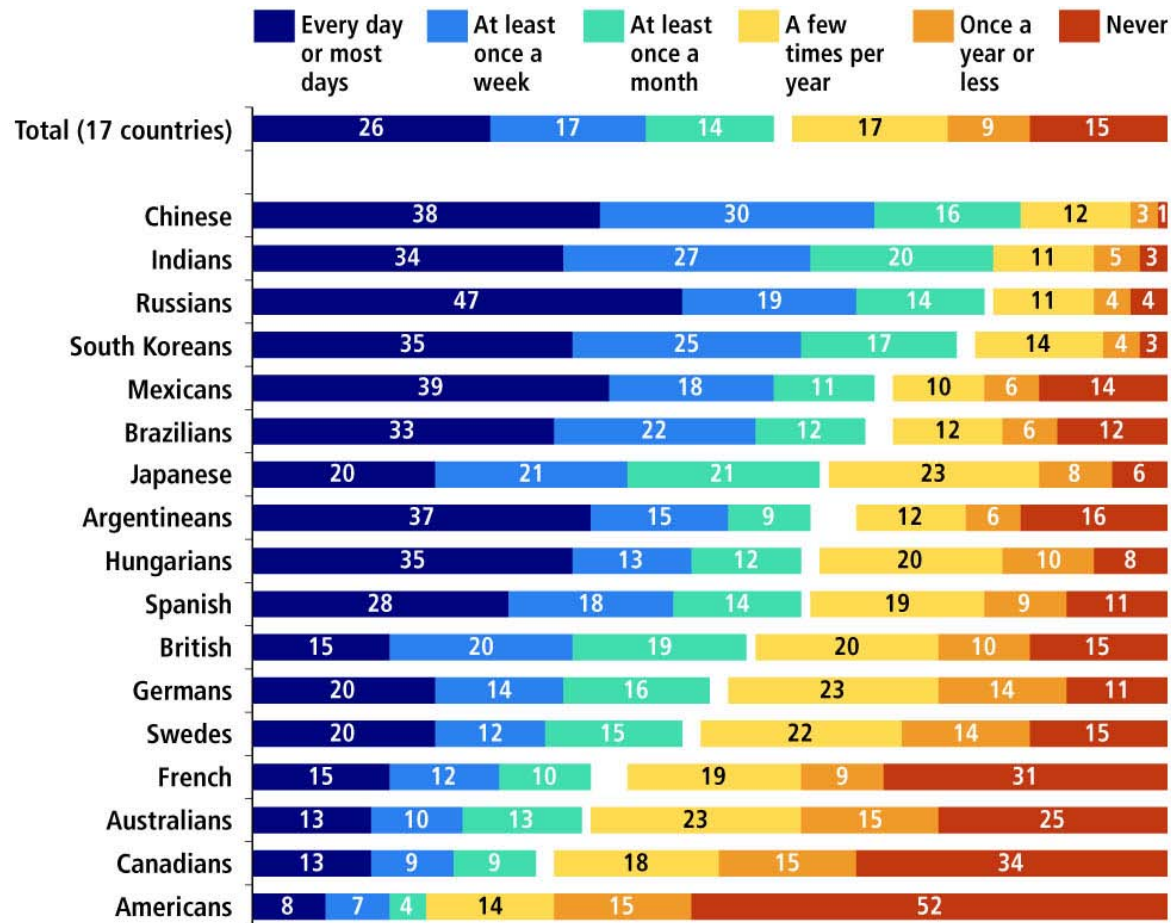


NGS10_11mtb_wthothrs

Frequency of Using Local Public Transportation



Percentage of Consumers in Each Country, 2010

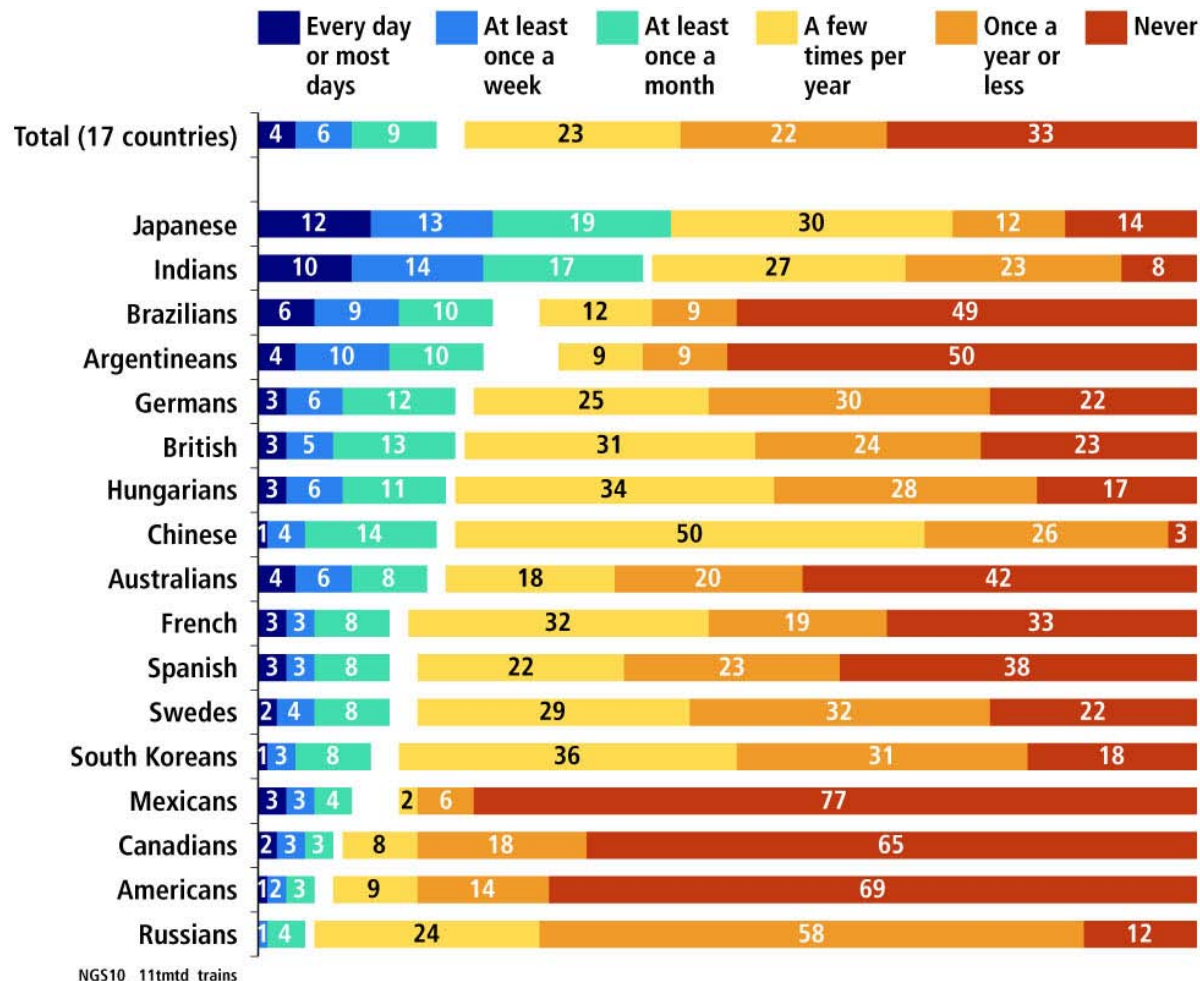


NGS10_11tmtc_public

Frequency of Using Trains (other than Local Public Transportation)

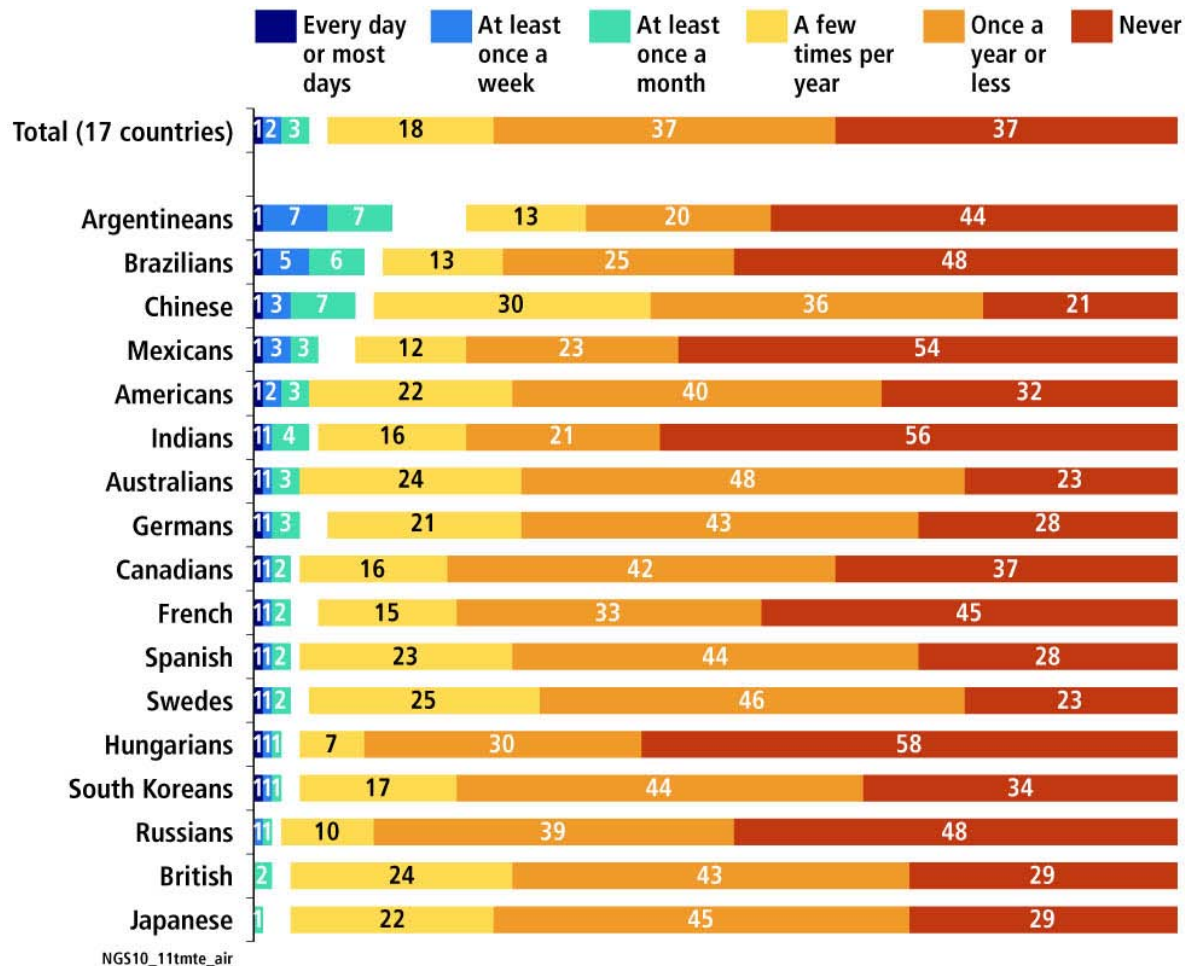


Percentage of Consumers in Each Country, 2010



Frequency of Using Airplanes

Percentage of Consumers in Each Country, 2010

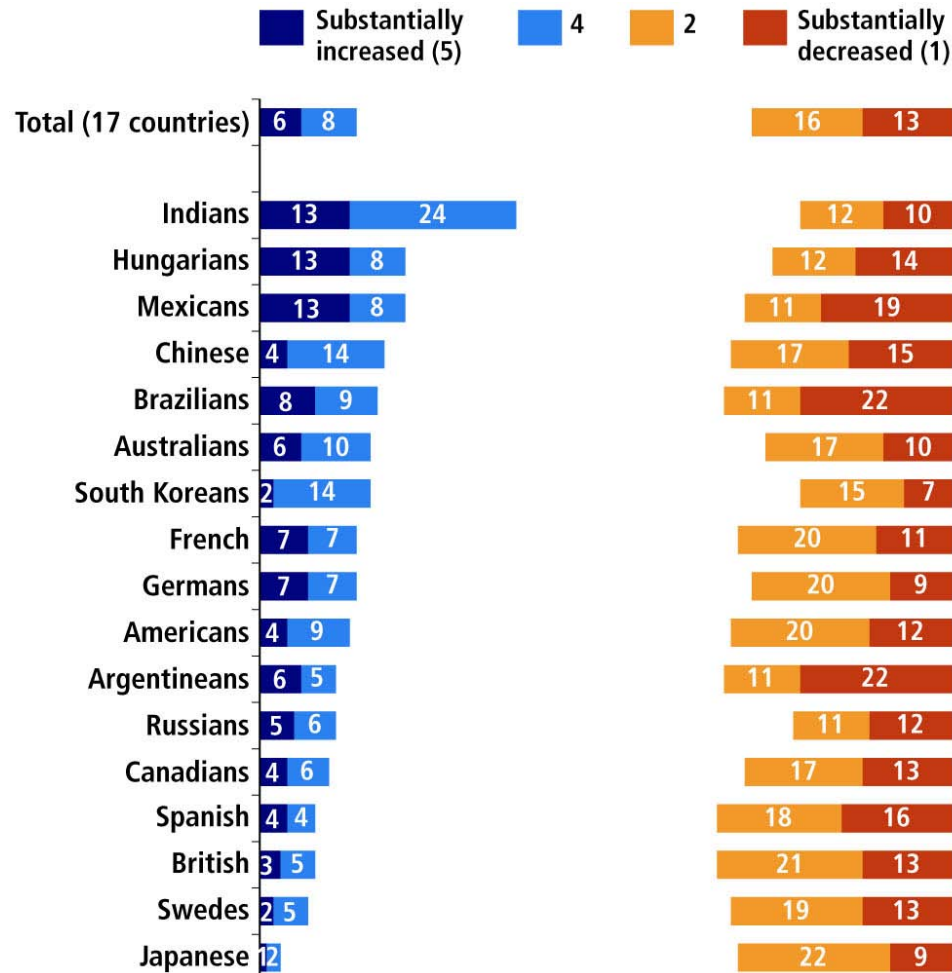


Additional Questions Not Included in Transportation Sub-Index

Change in Consumption of Fuel for Motorized Vehicles over the Past Year



Percentage of Consumers in Each Country, 2010



NGS10_16at_fuelcons



Reasons for Decreased Consumption of Fuel for Motorized Vehicles

Combined Mentions, Percentage of Consumers in Each Country, 2010

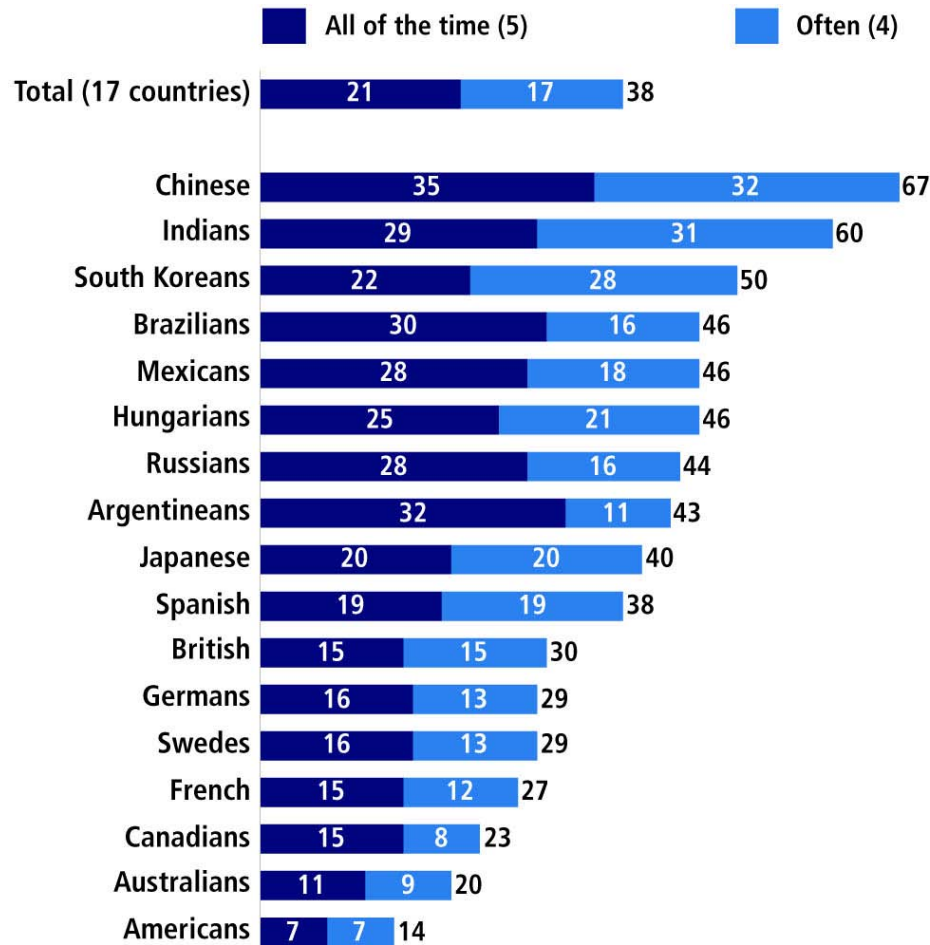
	Total (17 countries)	Americans	Argentines	Australians	Brazilians	British	Canadians	Chinese	French	Germans	Hungarians	Indians	Japanese	Mexicans	Russians	South Koreans	Spanish	Swedes
Cost	57	73	48	59	49	71	62	53	62	67	51	56	50	51	57	68	51	43
Changes in your financial situation	33	54	24	32	20	45	39	16	29	28	41	21	51	21	40	42	37	22
Environmental concerns	30	22	24	29	34	29	27	52	38	33	11	41	35	32	16	20	27	28
Changes in your living circumstances	27	23	17	37	19	27	31	21	31	28	24	21	33	22	30	28	36	29
Health reasons	21	12	24	15	35	14	16	43	21	16	13	36	20	23	28	20	17	13

NGS10_16b_CnsmptnVhcl

Frequency of Using Local Public Transportation to Save Fuel and Reduce Pollution



“All of the Time (5)” or “Often (4),” Percentage of Consumers in Each Country, 2010



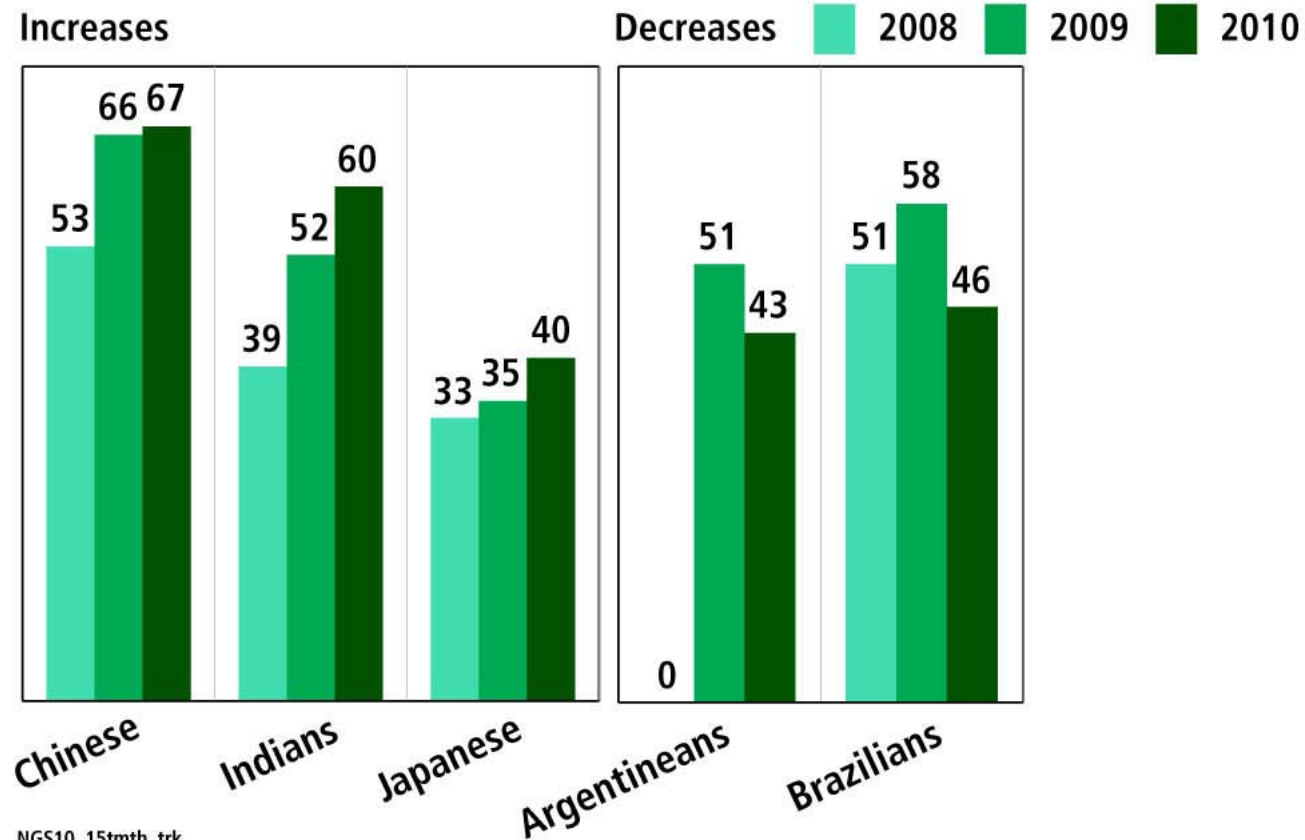
NGS10_15tmth_pubtrans



Frequency of Using Local Public Transportation to Save Fuel and Reduce Pollution



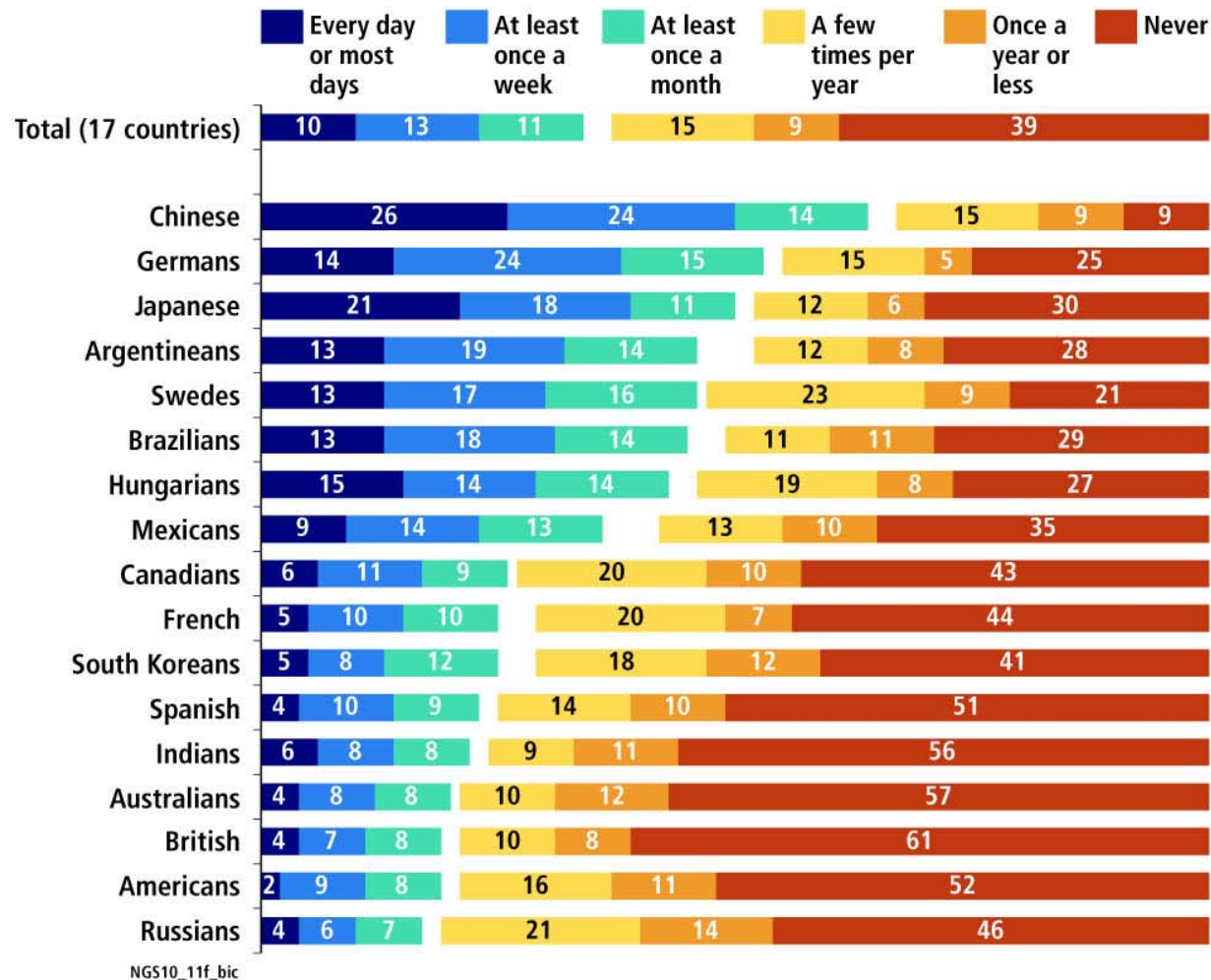
“All of the Time (5)” or “Often (4),” Percentage of Consumers in Each Country,
Trends: 2008–2010



NGS10_15tmth_trk

Frequency of Using Bicycles

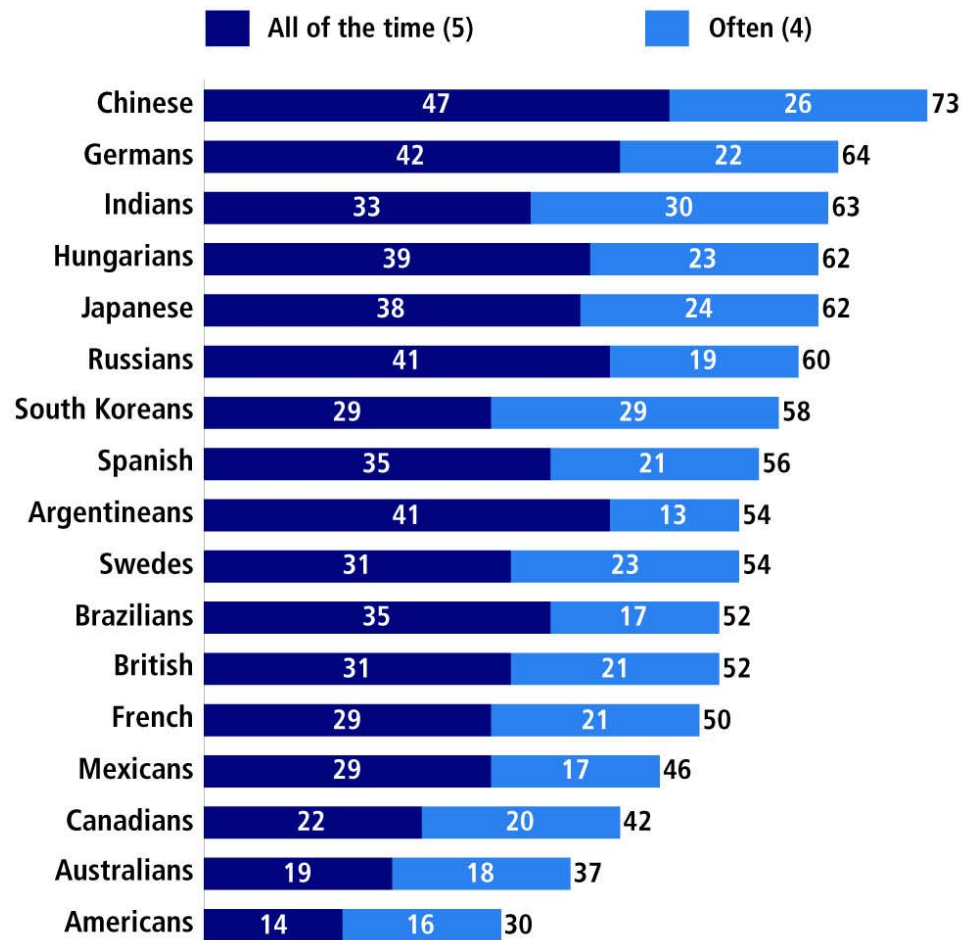
Percentage of Consumers in Each Country, 2010



Frequency of Walking or Riding Bike to Destination



“All of the Time (5)” or “Often (4),” Percentage of Consumers in Each Country, 2010



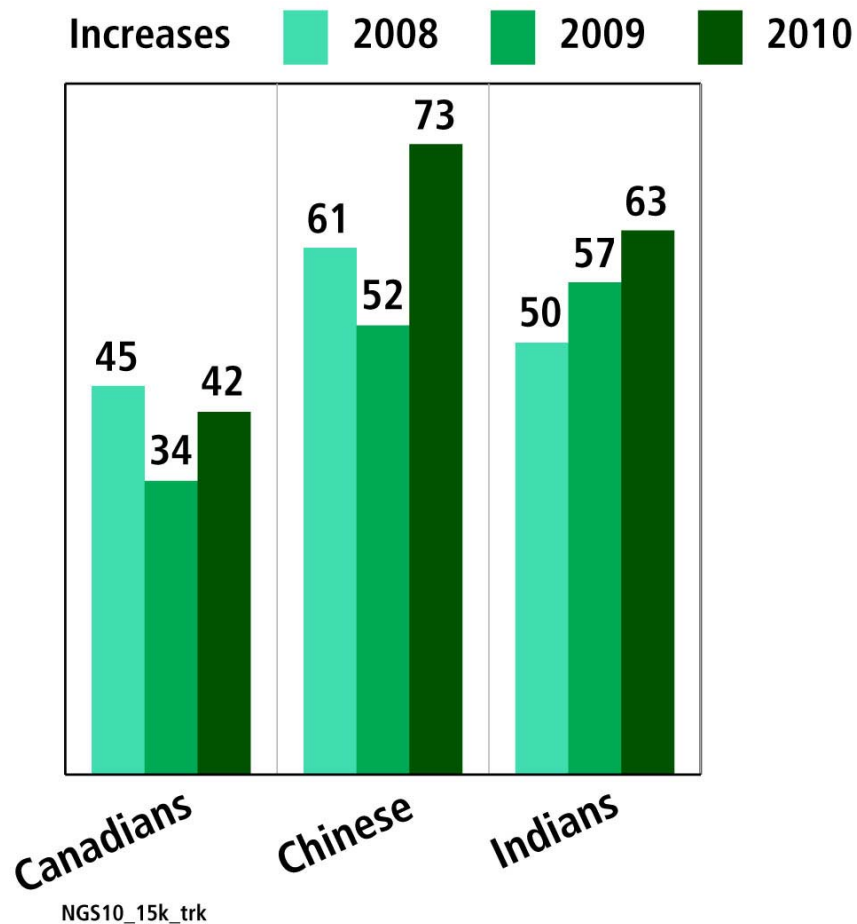
NGS10_15k



Frequency of Walking or Riding Bike to Destination



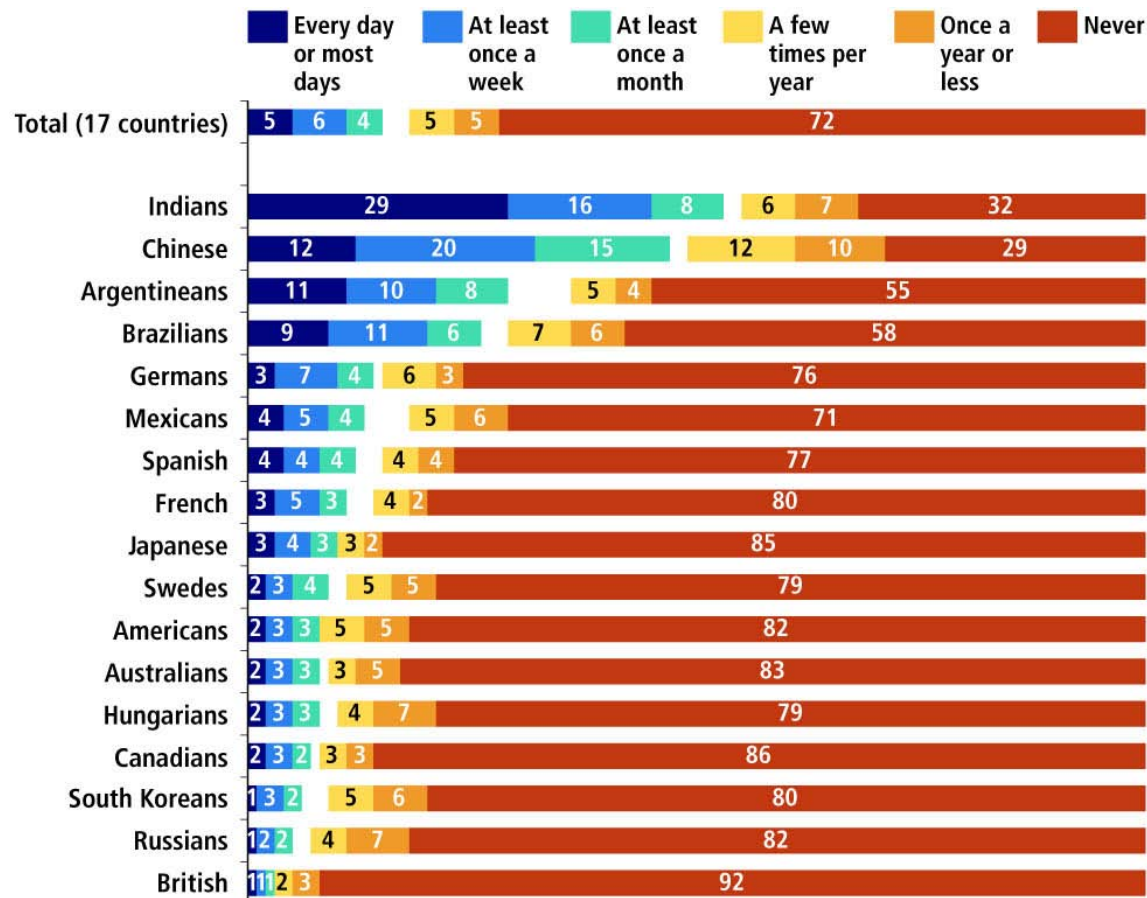
“All of the Time (5)” or “Often (4),” Percentage of Consumers in Each Country,
Trends: 2008–2010



Frequency of Using Motorcycles or Motor Scooters



Percentage of Consumers in Each Country, 2010



NGS10_11g_motorscooter

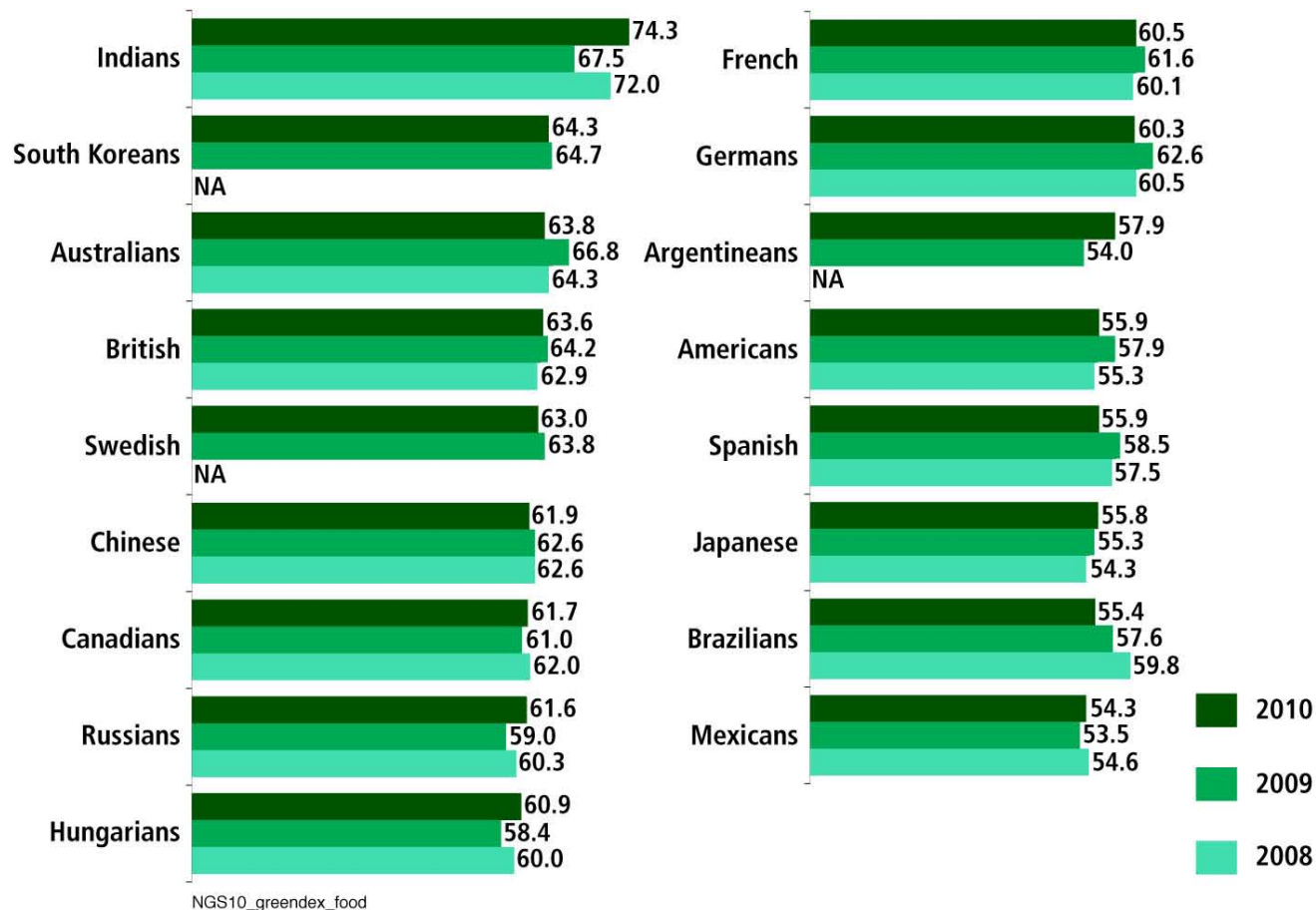
Food

- Food sub-index scores have increased in seven countries but have decreased in ten countries. The score among Indian consumers has increased notably and is much higher than the score for average consumers in other countries, with low meat consumption being the reason. Brazilians and Mexicans continue to score lowest.
- Generally, most consumers in most countries surveyed consume beef at most once or twice per week. Argentinean and Brazilian consumers are the most likely to consume beef, with over 50 percent indicating they consume it daily or several times a week. Indians eat the least beef.
- Australians, Russians, Chinese, and Indians are the most likely to consume locally grown food frequently, while only one-third or less of Swedish, Japanese, and South Koreans report that they consume locally grown food at least several times a week.
- Over the past three years, the trend shows that British, French, and Spanish consumers have significantly increased their consumption of locally grown food, while Brazilian and Chinese consumers have significantly decreased their consumption of it.
- Russians, Australians, Hungarians, Chinese, and Indians consume food they have grown on their own more frequently than those in other countries.

- Japanese consumers are the most likely to consume fish and seafood, with more than 50 percent indicating that they consume it daily or several times per week. Consumption of fish and seafood has decreased considerably among consumers in Argentina, India, and South Korea, while consumption in Brazil has increased since 2008.
- Drinking bottled water is very common among German consumers, with 65 percent reporting that they do so on a daily basis. Germans continue to consume more bottled water than those in all other countries surveyed.
- Consumption of bottled water continues to decrease from the 2008 benchmark among Canadian and Hungarian consumers. From 2009 levels, frequent consumption of bottled water among Mexicans has grown by 13 points.

Greendex Rankings: Food

Percentage of Consumers in Each Country, 2010



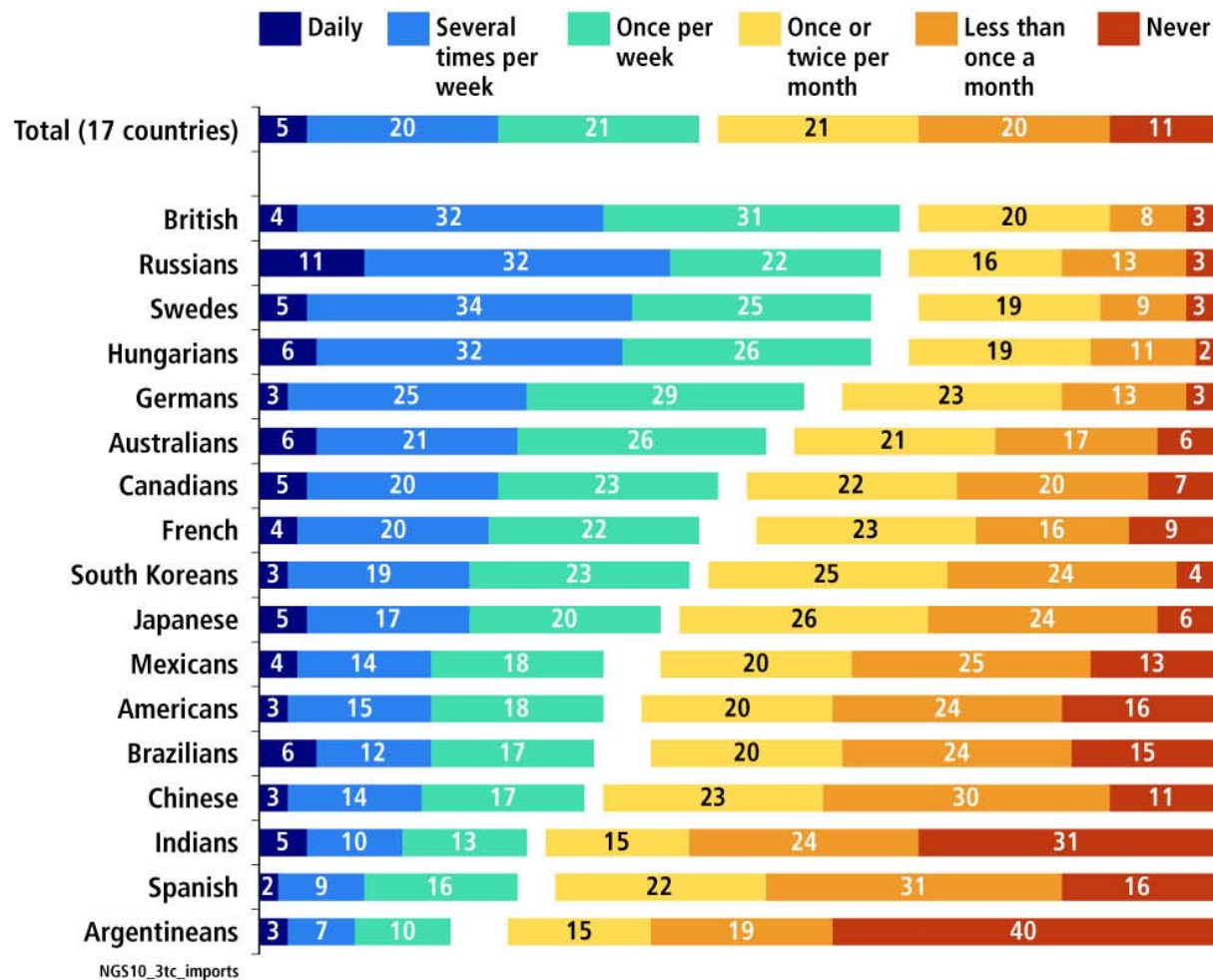
The Food sub-index consists of eight variables measuring consumption of the following:

- Locally produced foods
- Foods grown or raised by oneself
- Fruits and vegetables
- Beef
- Chicken
- Seafood
- Bottled water
- Organic foods were not included in the sub-index due to high variability in the definition and understanding of “organic” from country to country

Questions Included in Food Sub-Index

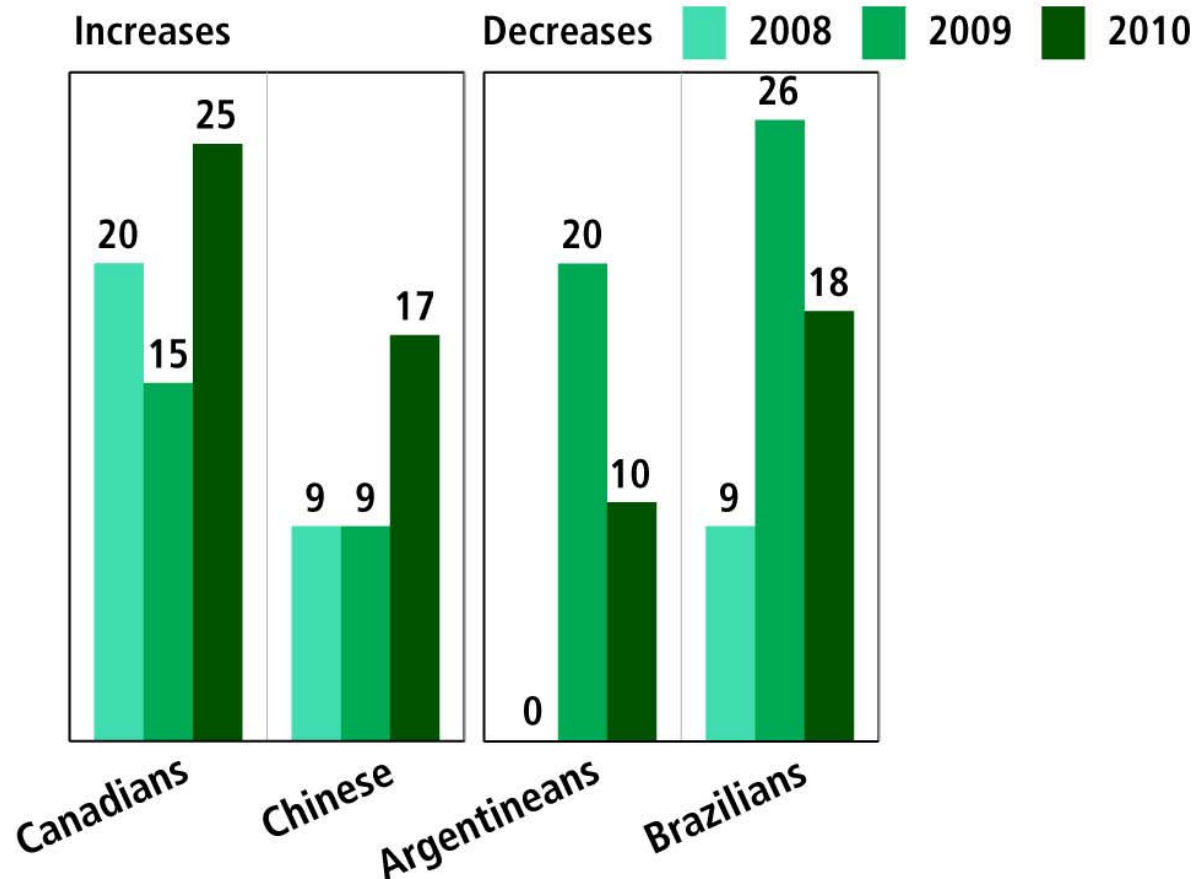
Frequency of Consuming Imported Foods

Percentage of Consumers in Each Country, 2010



Frequency of Consuming Imported Foods

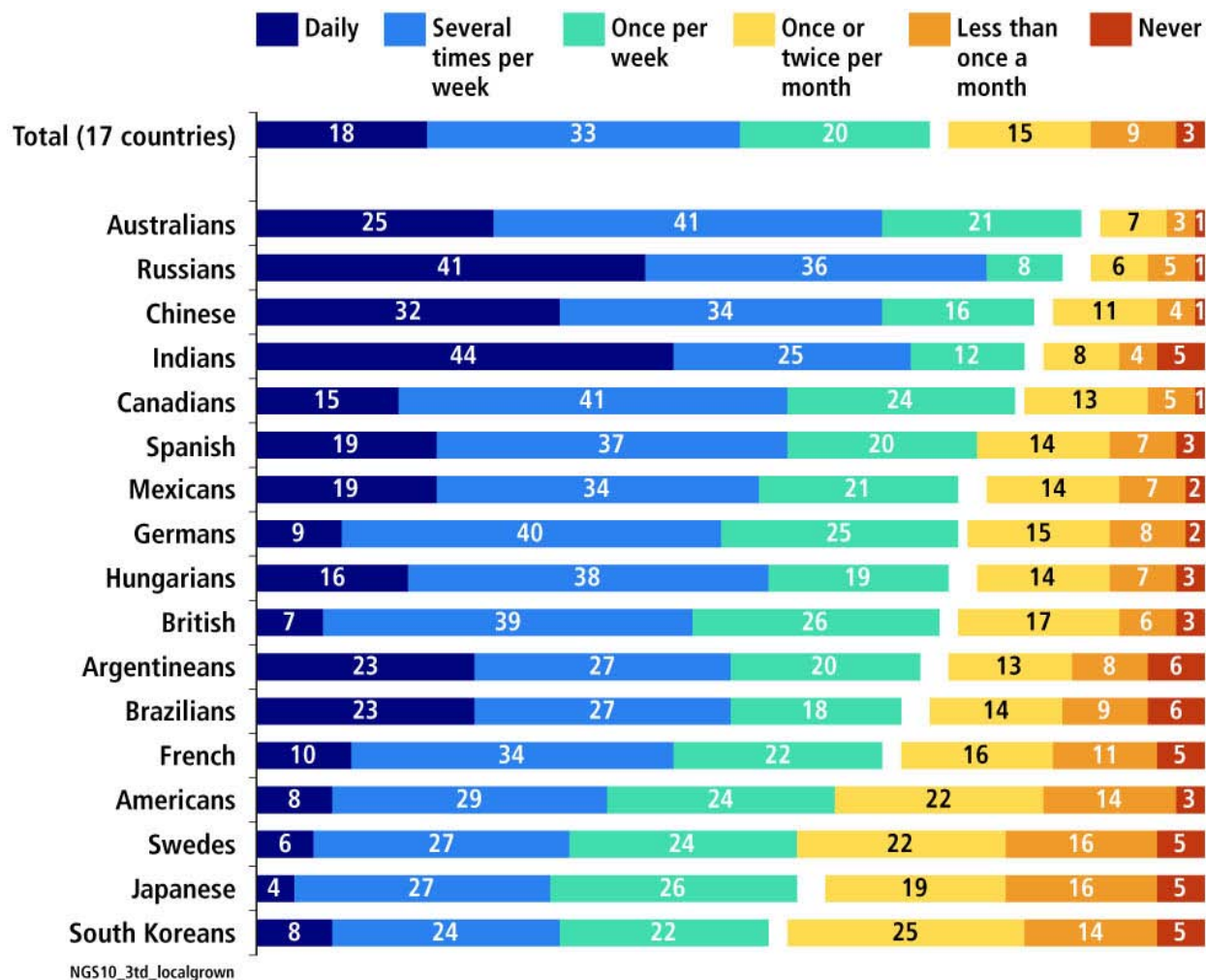
"Daily" and "Several Times a Week," Percentage of Consumers in Each Country,
Trends: 2008–2010



NGS10_3tc_imp_trk

Frequency of Consuming Locally Grown Food

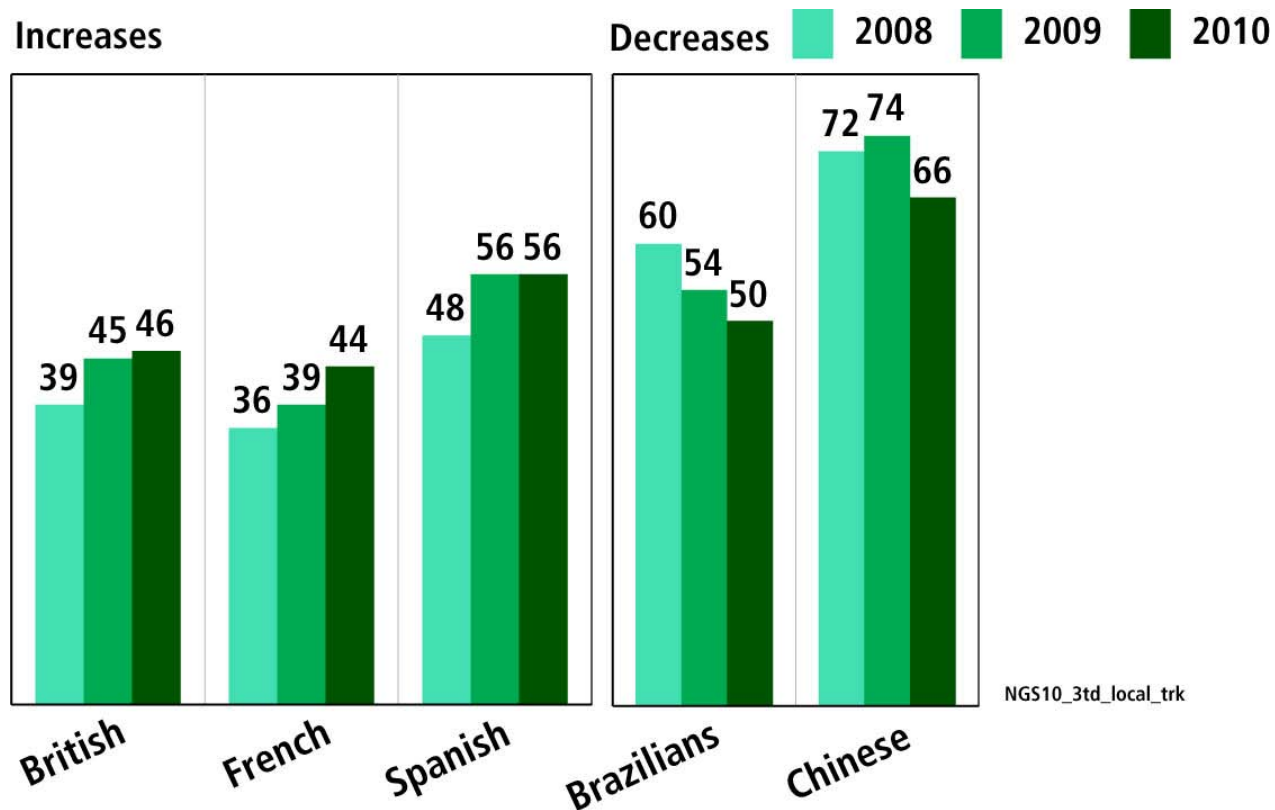
Percentage of Consumers in Each Country, 2010



Frequency of Consuming Locally Grown Food

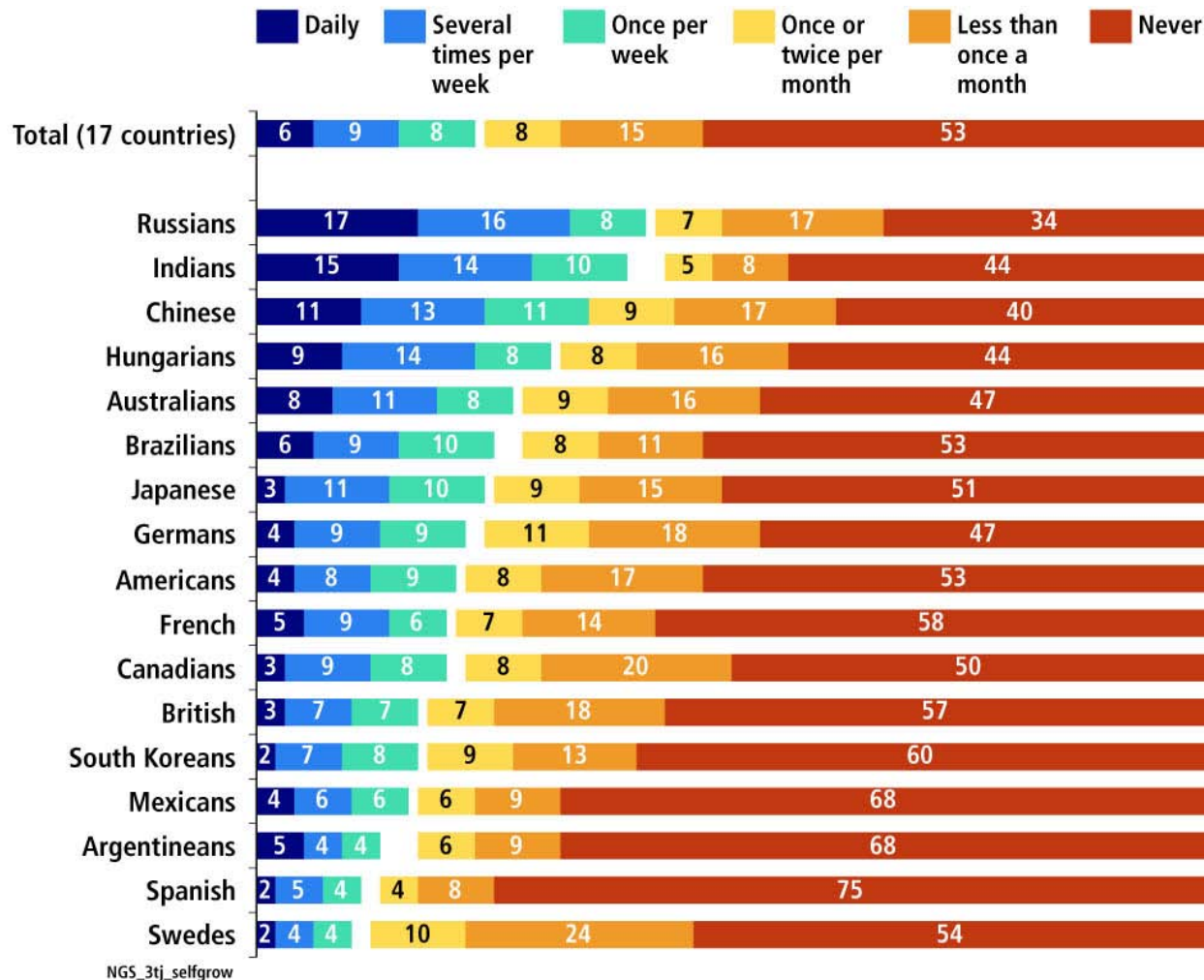


"Daily" and "Several Times a Week," Percentage of Consumers in Each Country,
Trends: 2008–2010



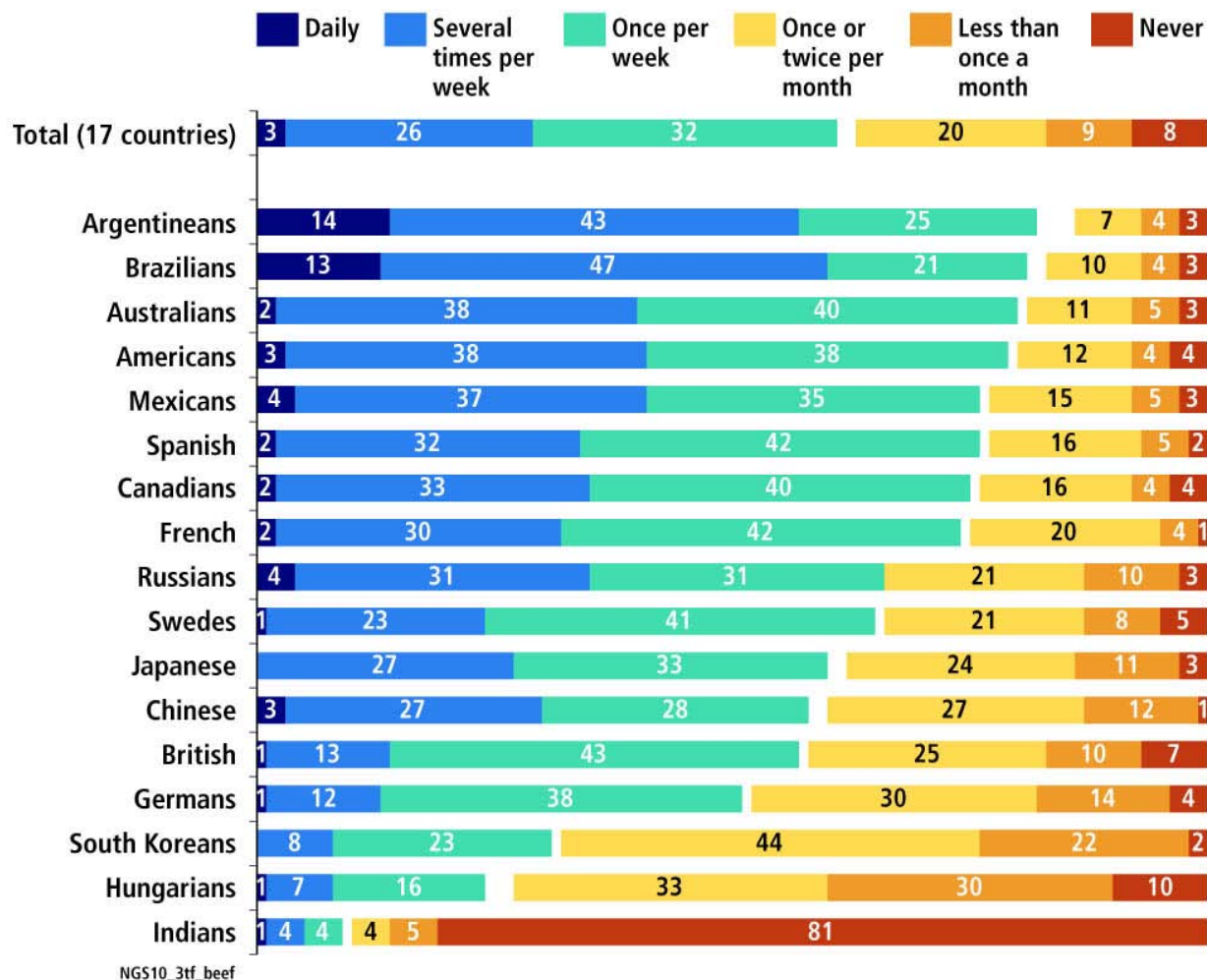
Frequency of Consuming Self-Grown Food

Percentage of Consumers in Each Country, 2010



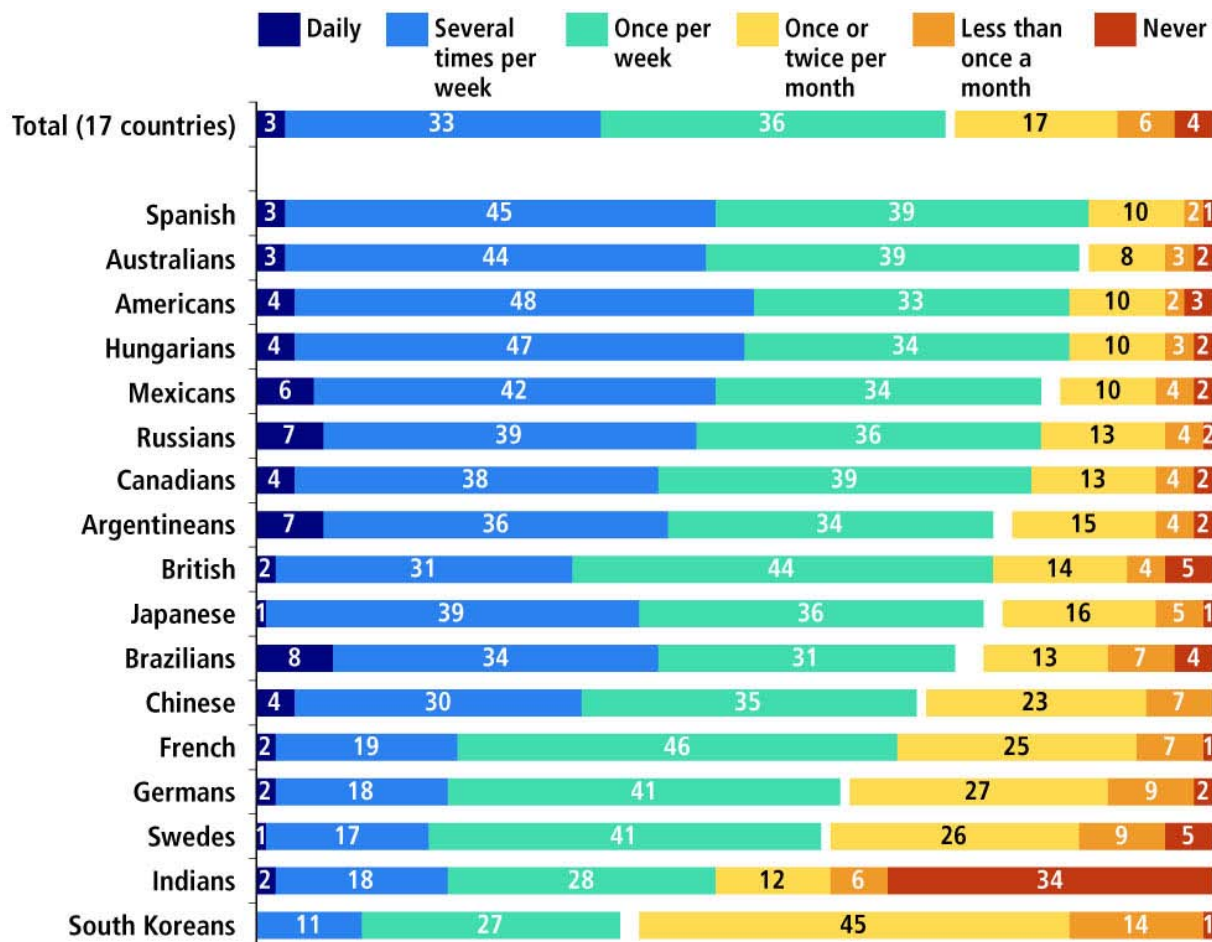
Frequency of Consuming Beef

Percentage of Consumers in Each Country, 2010



Frequency of Consuming Chicken

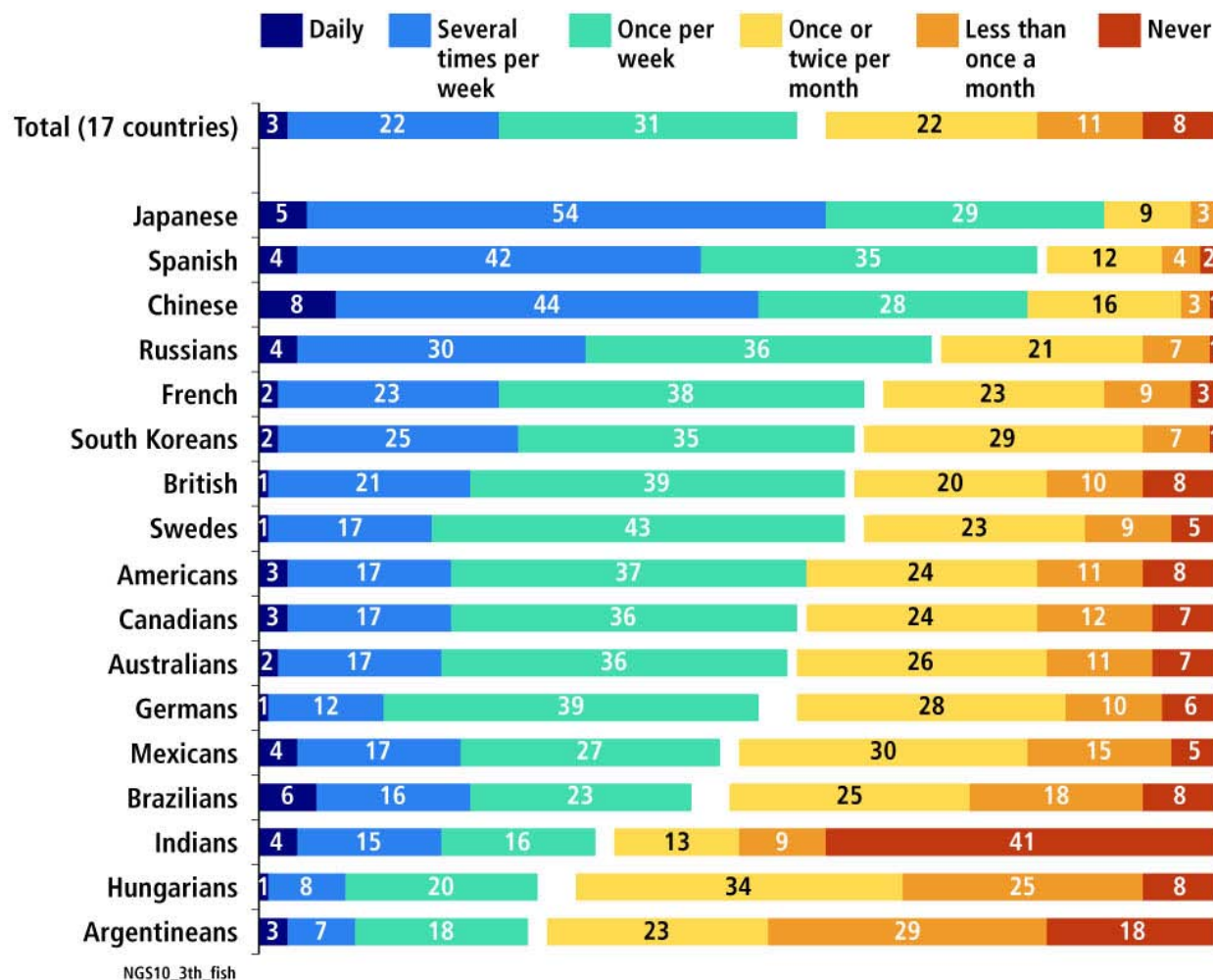
Percentage of Consumers in Each Country, 2010



NGS10_3te_chicken

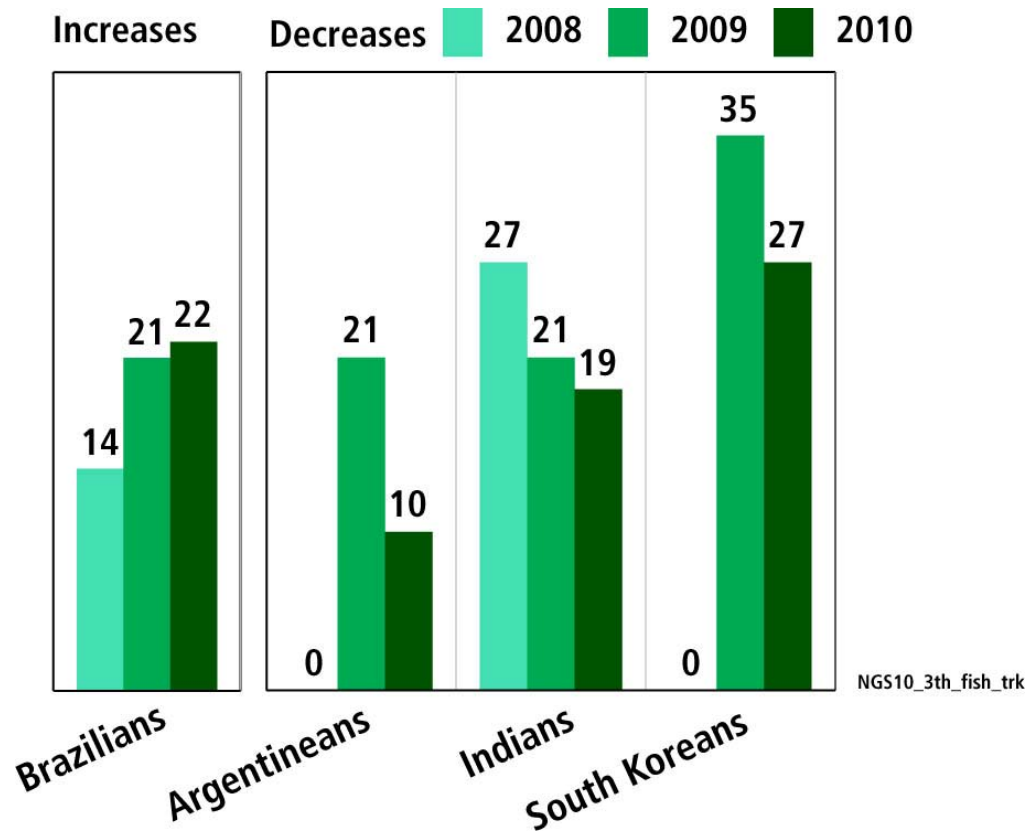
Frequency of Consuming Fish and Seafood

Percentage of Consumers in Each Country, 2010



Frequency of Consuming Fish and Seafood

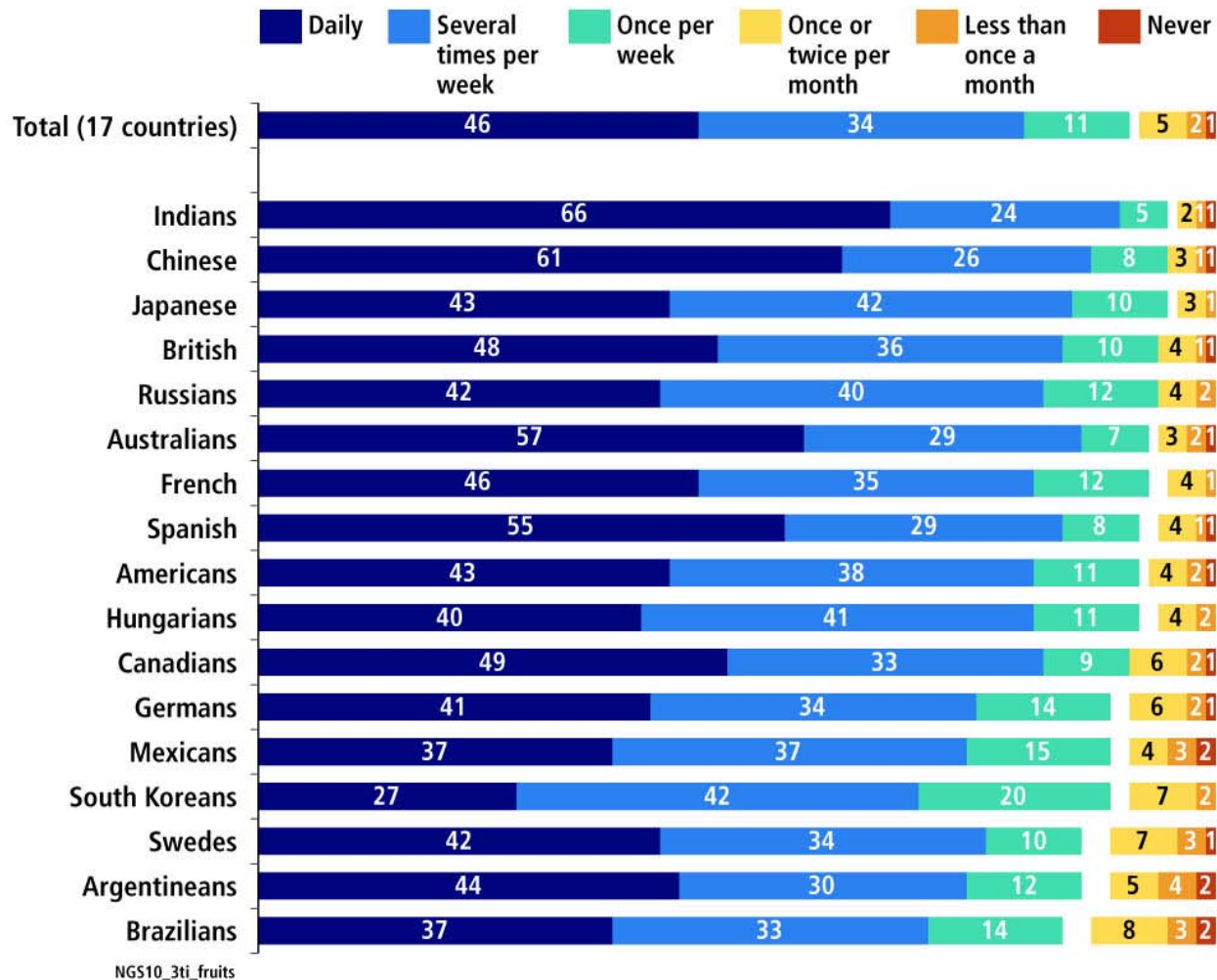
"Daily" and "Several Times a Week," Percentage of Consumers in Each Country,
Trends: 2008–2010



Frequency of Consuming Fruits and Vegetables



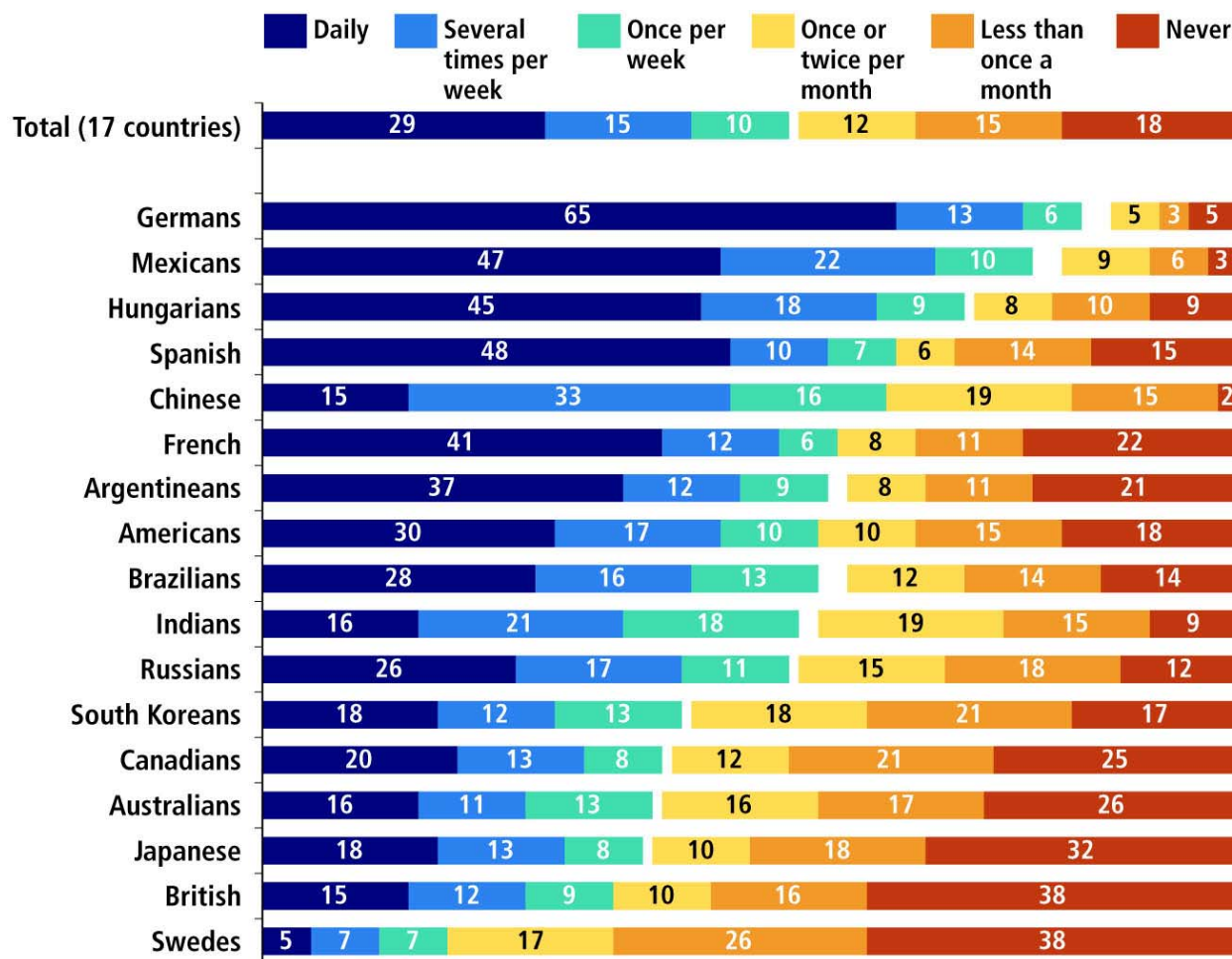
Percentage of Consumers in Each Country, 2010



Frequency of Consuming Bottled Water



Percentage of Consumers in Each Country, 2010

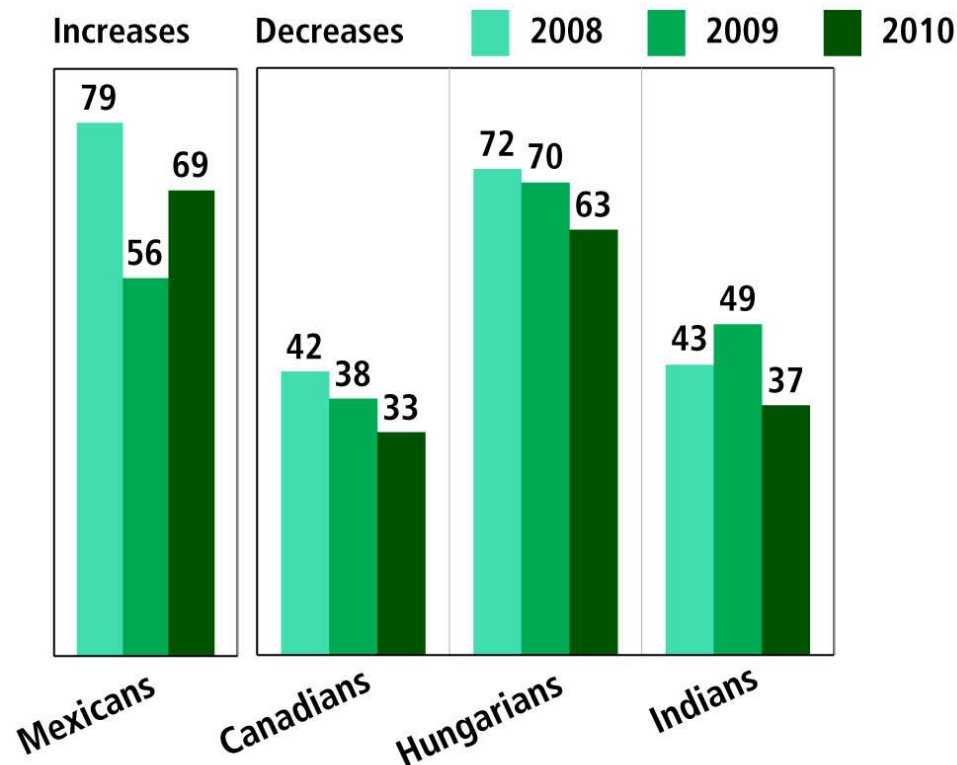


NGS10_3tk_botwater



Frequency of Consuming Bottled Water

"Daily" and "Several Times a Week," Percentage of Consumers in Each Country,
Trends: 2008–2010

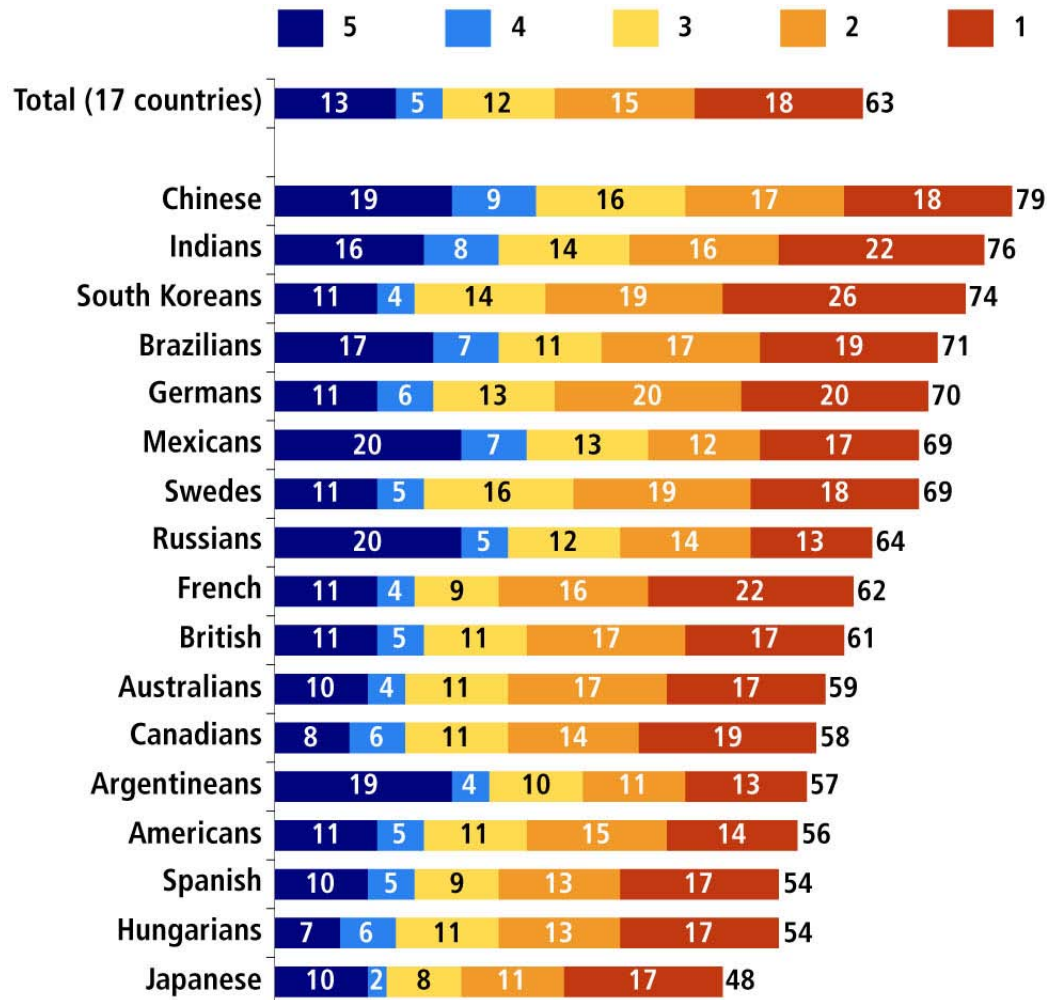


NGS10_3tk_btlwat_trk

Additional Questions Not Included in Food Sub-Index

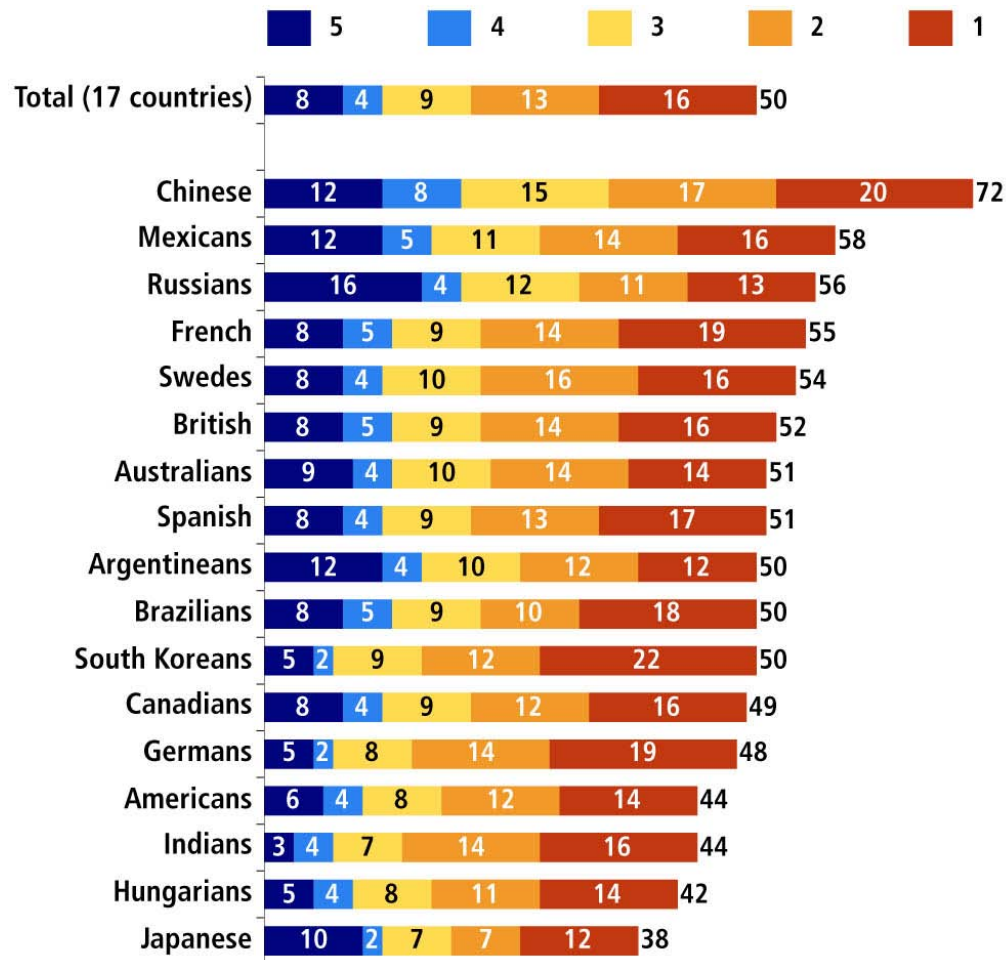
Number of Purchases of Organic Fruits and Vegetable (out of Past Five Purchases)

Percentage of Consumers in Each Country, 2010



Number of Purchases of Organic Meats and Poultry (out of Past Five Purchases)

Percentage of Consumers in Each Country, 2010

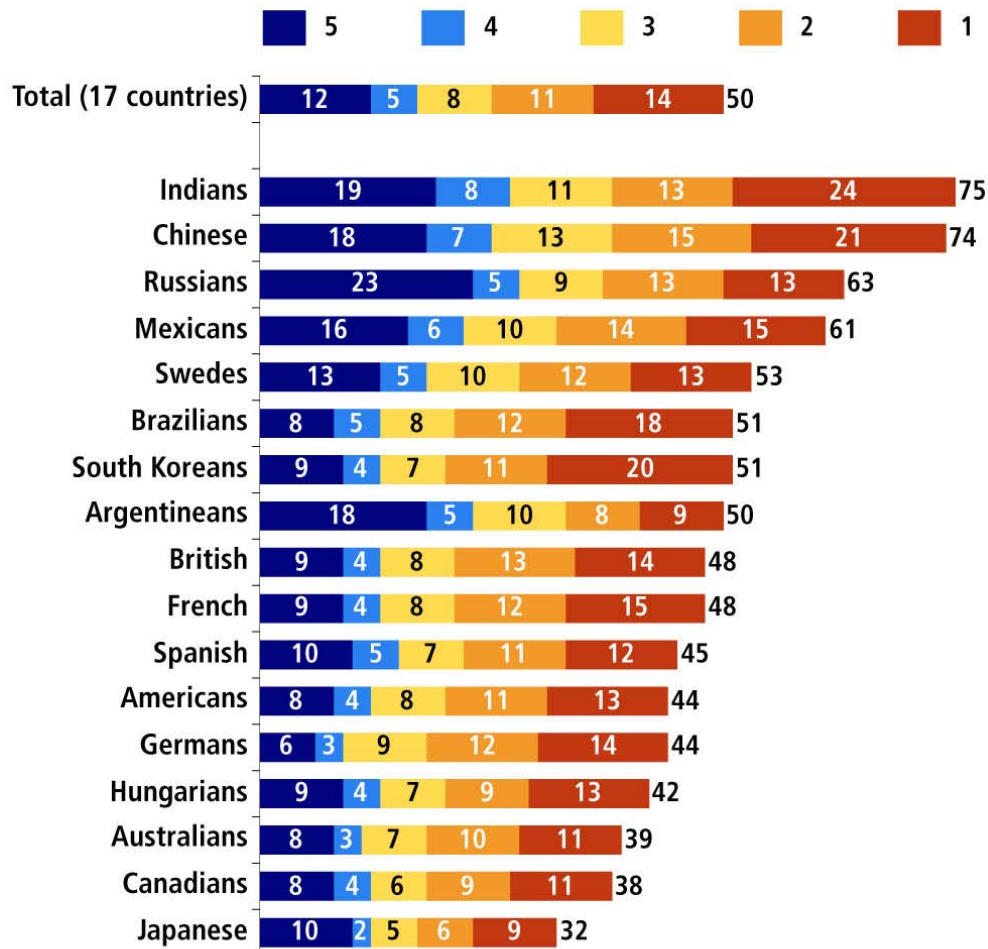


NGS10_13te_meats

Number of Purchases of Organic Dairy Products (out of Past Five Purchases)



Percentage of Consumers in Each Country, 2010



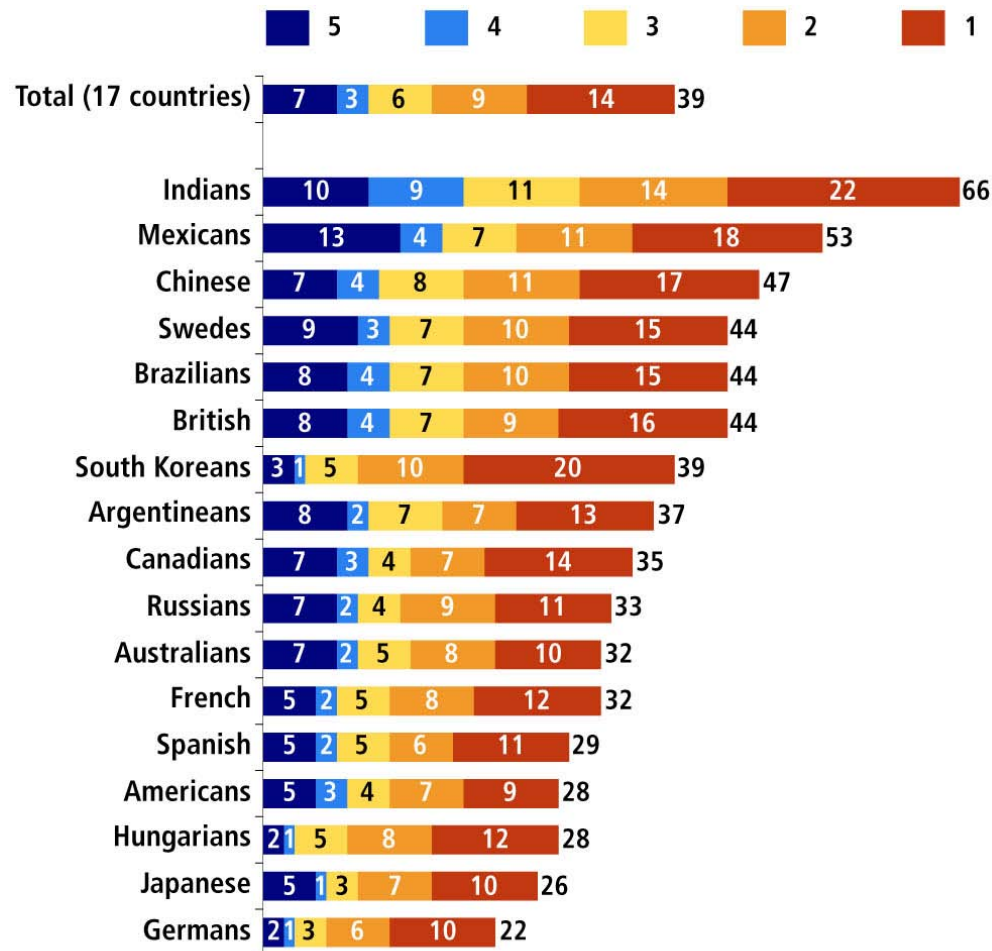
NGS10_13f_dairy



Number of Purchases of Organic/Shade-Grown Coffee or Tea (out of Past Five Purchases)



Percentage of Consumers in Each Country, 2010

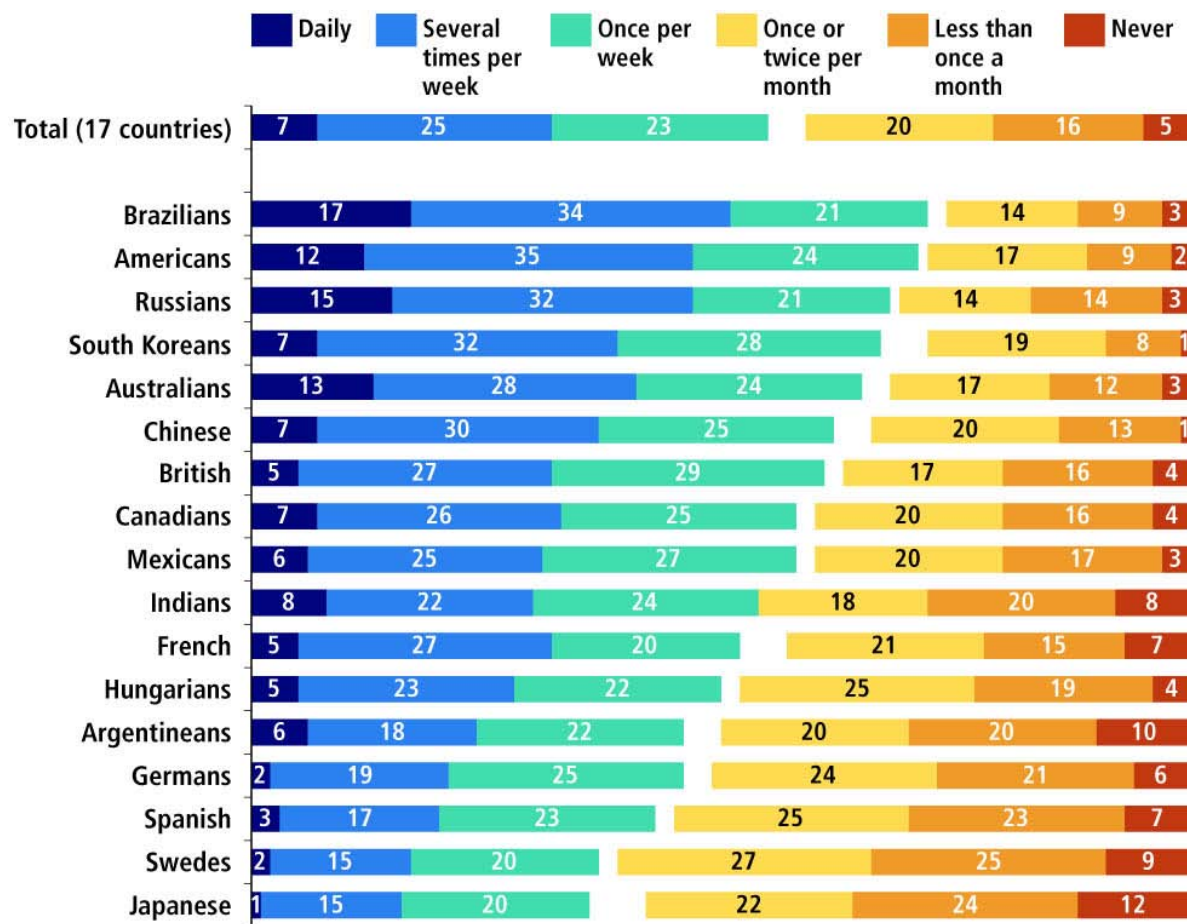


NGS10_13tg_coffee



Frequency of Consuming Convenient (Prepared/Processed/Packaged) Foods

Percentage of Consumers in Each Country, 2010



NGS10_3tb_packfood

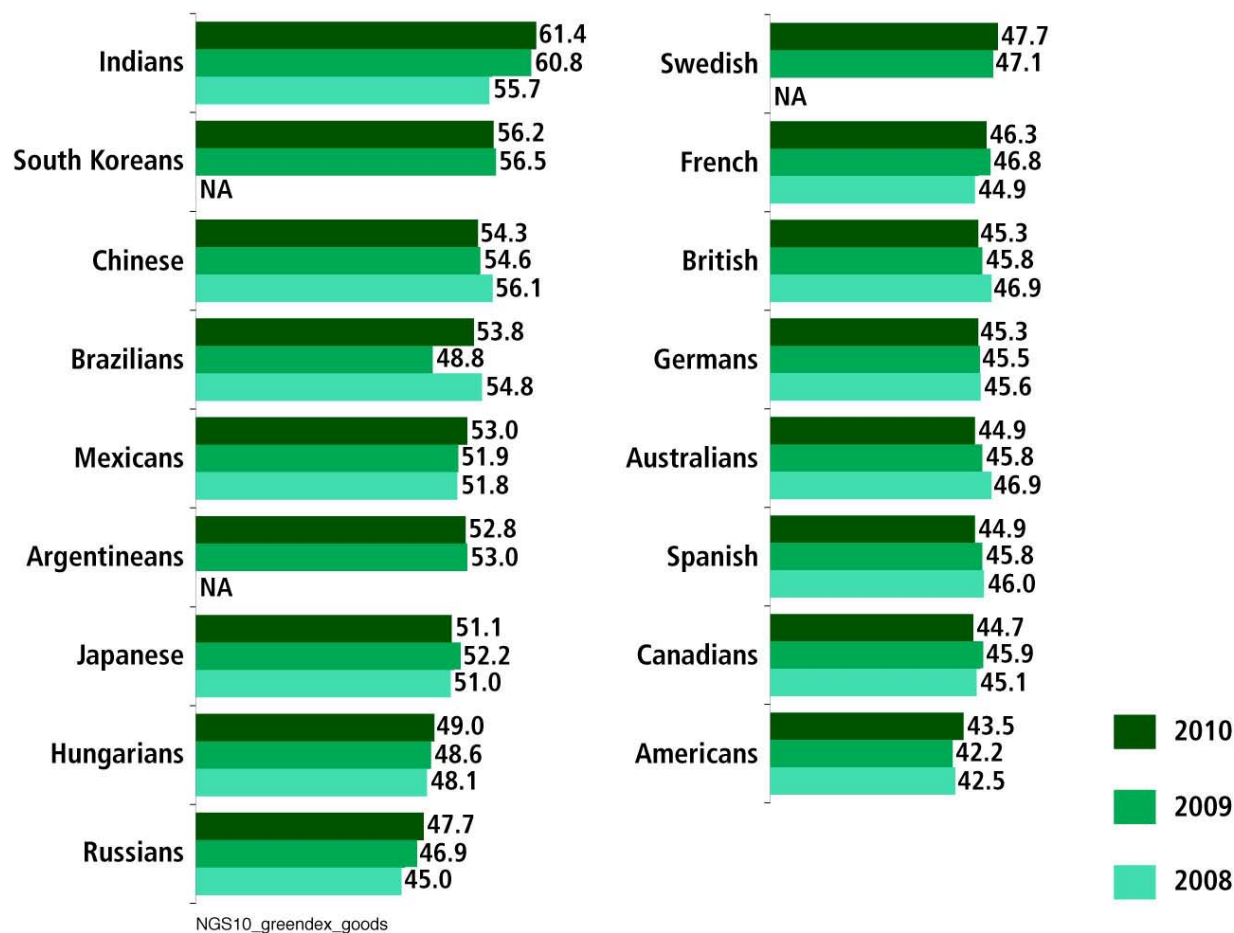
Goods

- Greendex goods scores for average consumers have increased in seven mostly less wealthy countries, including Brazil, Russia, and Mexico, but also in the USA. Scores have decreased somewhat among Europeans, Canadians, and Australians.
- Majorities of consumers in 15 of the 17 countries surveyed indicate that they prefer to repair something when it is broken rather than to replace it. Since 2008, the number of consumers who prefer to repair rather than replace broken items has continued to increase in China, India, and Russia.
- Since 2008, there has been a significant increase in the number of Americans, Chinese, and Indians who generally try to buy things “used” or “pre-owned” rather than new (up 11, 9, and 21 points respectively).
- In most countries, consumers report a preference for reusable over disposable products, especially in Japan, Sweden, and South Korea. India is one exception.
- Consumers in most countries say that environmentally friendly product premiums are generally worth it to them, but Russians, Indians, and Brazilians have the opposite opinion.
- Consumers in North America and Western Europe are the most likely to report that they recycle materials “all of the time” or “often.” Only half of Hungarians, Russians, Mexicans, Argentineans, and South Koreans report recycling “all of the time” or “often.”

- Actions such as avoiding environmentally unfriendly products or buying environmentally friendly products are most common in emerging economies, particularly among Chinese and Indian consumers. British and Japanese consumers are the least likely to report such behavior.
- Indians and Chinese are the only two countries in which a majority of consumers reports avoiding excessively packaged goods. This tendency has increased from 2008 levels.
- Majorities of consumers in most countries frequently use their own durable bags when visiting stores, with French consumers the most likely to do so. Considerably more Canadian consumers have adopted this behavior in the past year. Indeed, two of Canada's major grocery stores charge a five-cent surcharge on all plastic bags, and governments are increasingly requiring this. Government regulation can have a powerful impact on everyday consumer behavior.
- Nearly all consumers report possessing a least one television or one computer. More American consumers than others report living in households that contain four or more televisions.
- More than half of American, British, and Canadian consumers say that they frequently recycle their electronic items, up from 2008 levels. Electronic recycling has increased in five countries in total, likely as a result of both private and public sector initiatives.

Greendex Rankings: Goods

Percentage of Consumers in Each Country, 2010



The Goods sub-index is a combination of everyday consumption and ownership of big-ticket items. It consists of 16 variables such as:

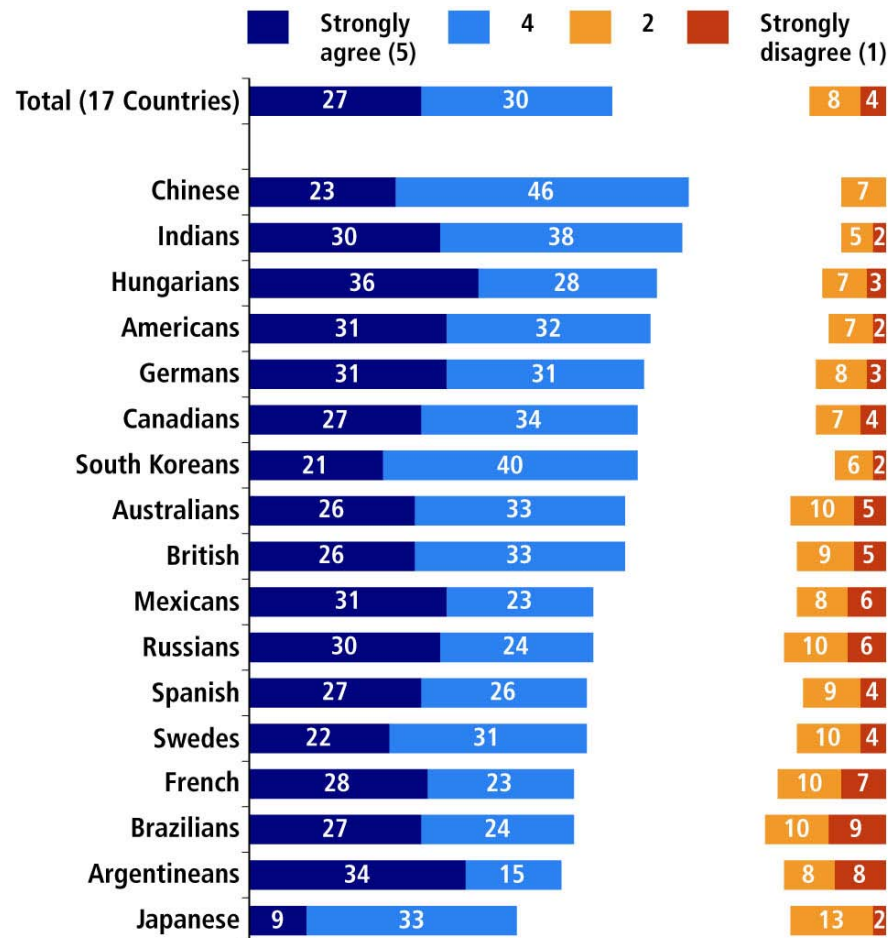
- Purchase and/or avoidance of specific products for environmental reasons
- Avoidance of excessive packaging
- Preference for reusable consumer goods over disposable products
- Willingness to pay an environmental premium
- Preference for used rather than new items
- Preference to repair rather than to buy a replacement
- Recycling
- Number of TVs and PCs per household member
- Numbers of refrigerators, dishwashers, and laundry machines per household member
- Second homes, recreational vehicles, lawnmowers and other small engines

Questions Included in Goods Sub-Index

I Prefer to Repair Something When It Is Broken Rather than Replace It



Percentage of Consumers in Each Country, 2010



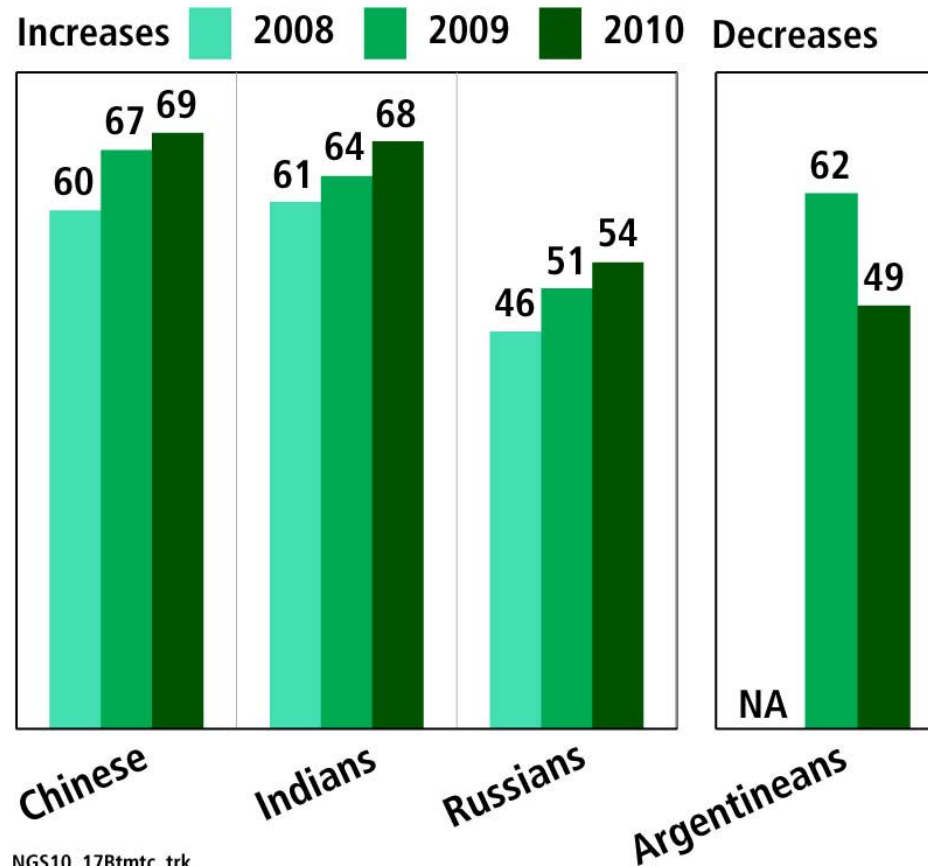
NGS10_17Btmtc_repair

The white space in this chart represents “3” (on a scale of 1 to 5 where 1 means “Strongly disagree” and 5 means “Strongly agree”) and “DK/NA.”

I Prefer to Repair Something When It Is Broken Rather than Replace It



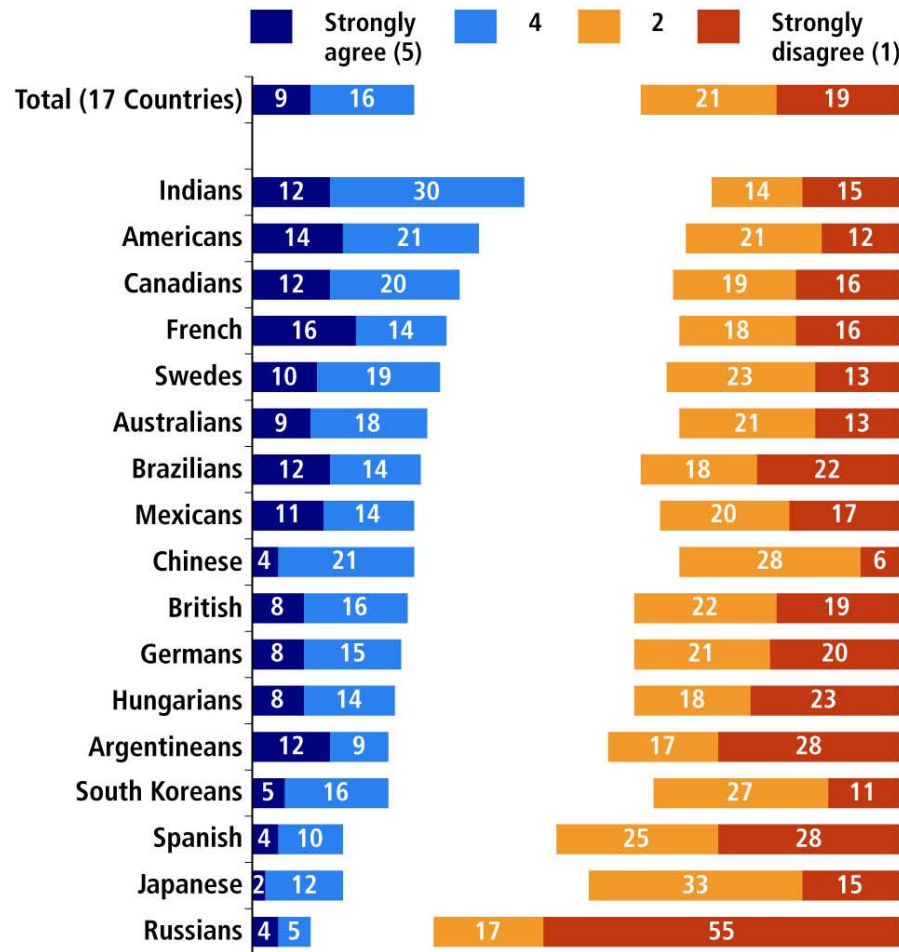
“Agree (4+5),” Percentage of Consumers in Each Country, Trends: 2008–2010



I Generally Try to Buy Things "Used" or Pre-Owned Rather Than Brand New



Percentage of Consumers in Each Country, 2010



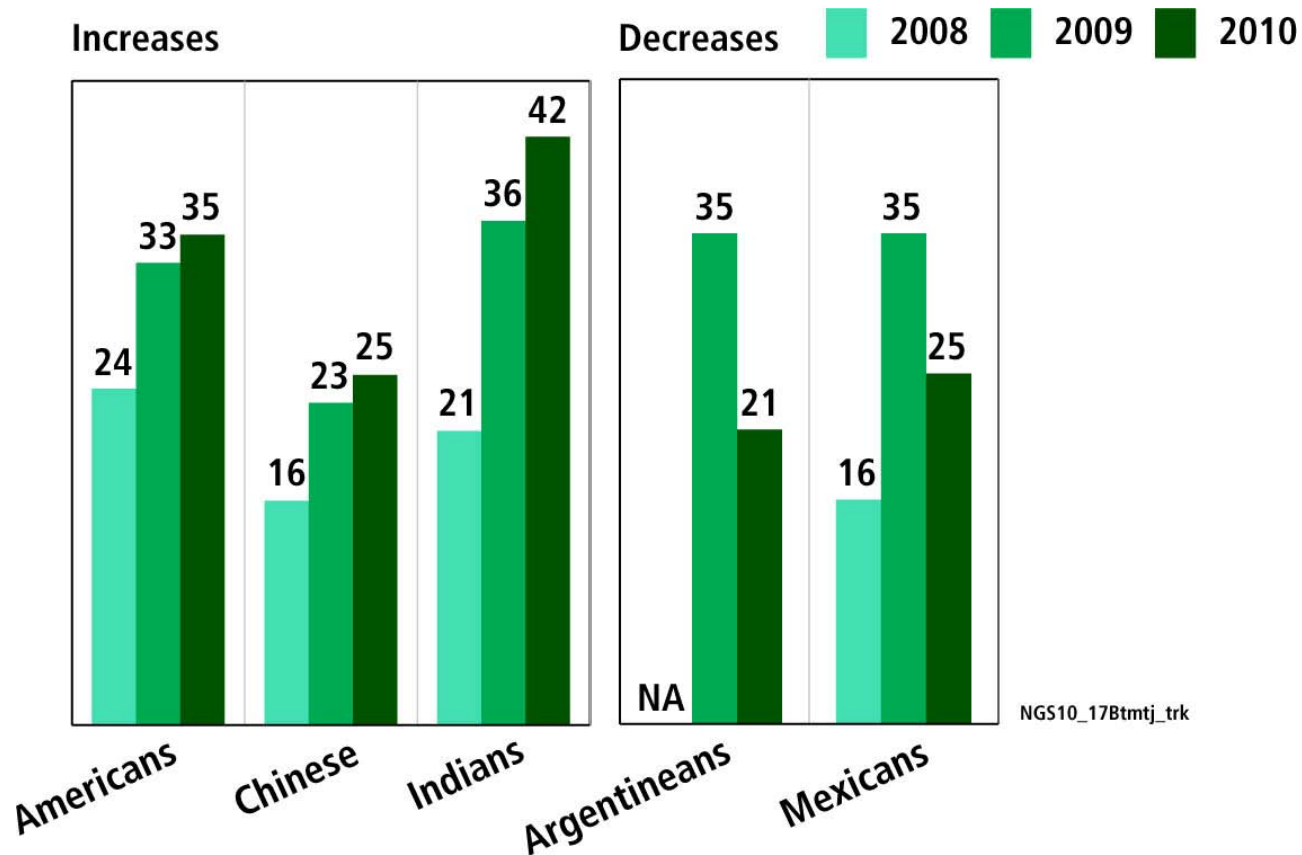
NGS10_17Btmjtj_used

The white space in this chart represents "3" (on a scale of 1 to 5 where 1 means "Strongly disagree" and 5 means "Strongly agree") and "DK/NA."

I Generally Try to Buy Things "Used" or Pre-Owned Rather Than Brand New

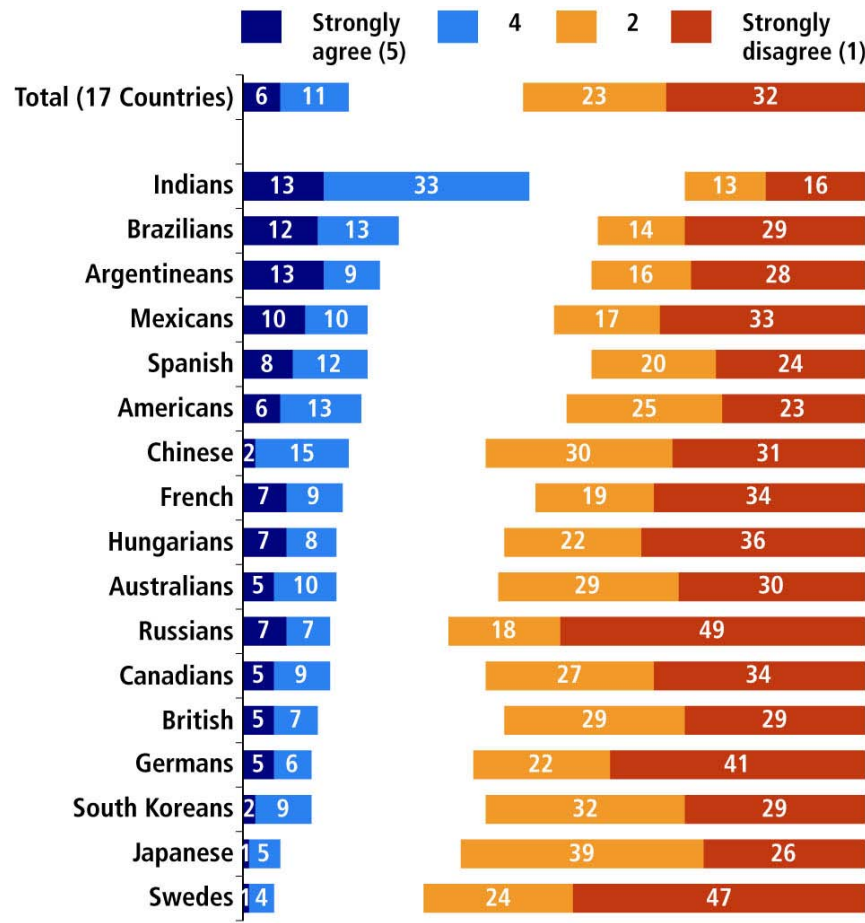


"Agree (4+5)," Percentage of Consumers in Each Country, Trends: 2008–2010



I Prefer Disposable Household Products Rather Than Things I Need to Wash and Reuse

Percentage of Consumers in Each Country, 2010



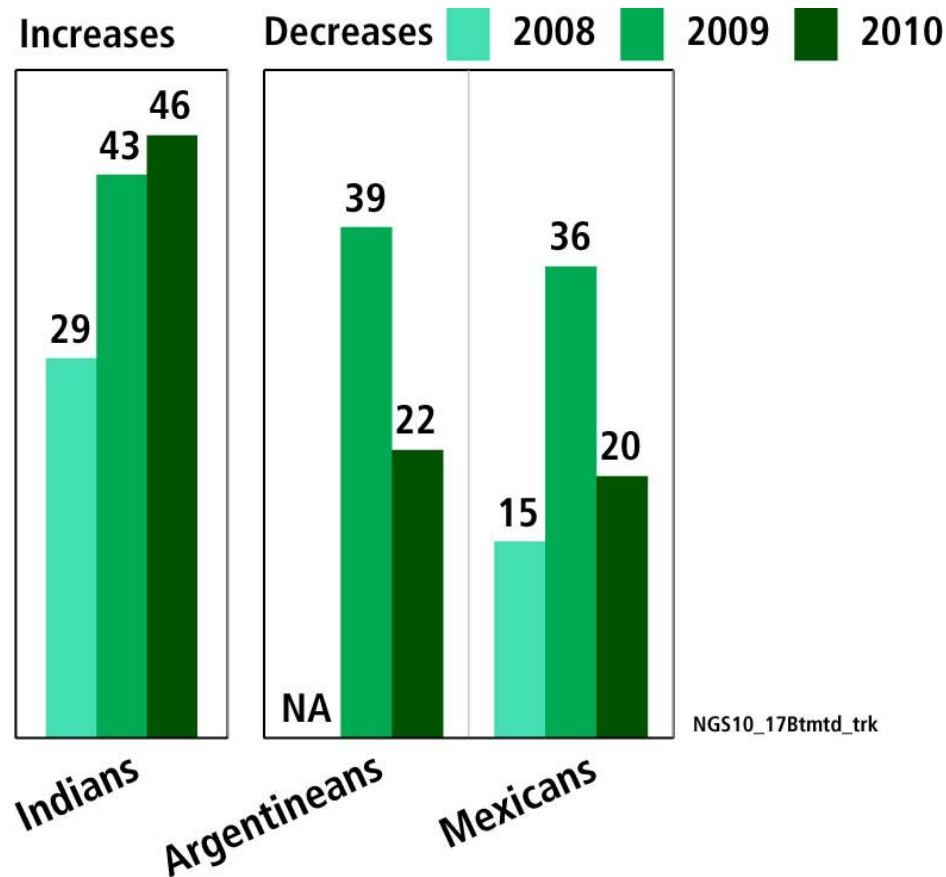
NGS10_17Btmt_dspoble

The white space in this chart represents “3” (on a scale of 1 to 5 where 1 means “Strongly disagree” and 5 means “Strongly agree”) and “DK/NA.”

I Prefer Disposable Household Products Rather Than Things I Need to Wash and Reuse

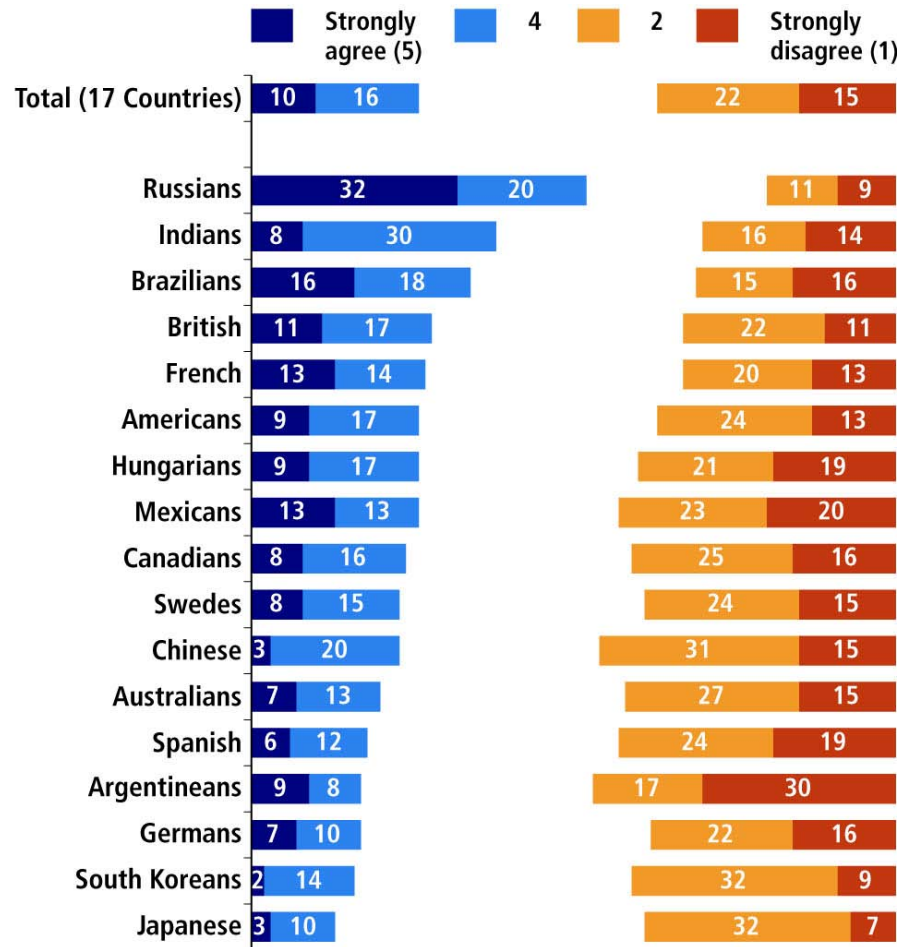


“Agree (4+5),” Percentage of Consumers in Each Country, Trends: 2008–2010



The Extra Cost of Environmentally Friendly Products Is Not Worth It to Me

Percentage of Consumers in Each Country, 2010



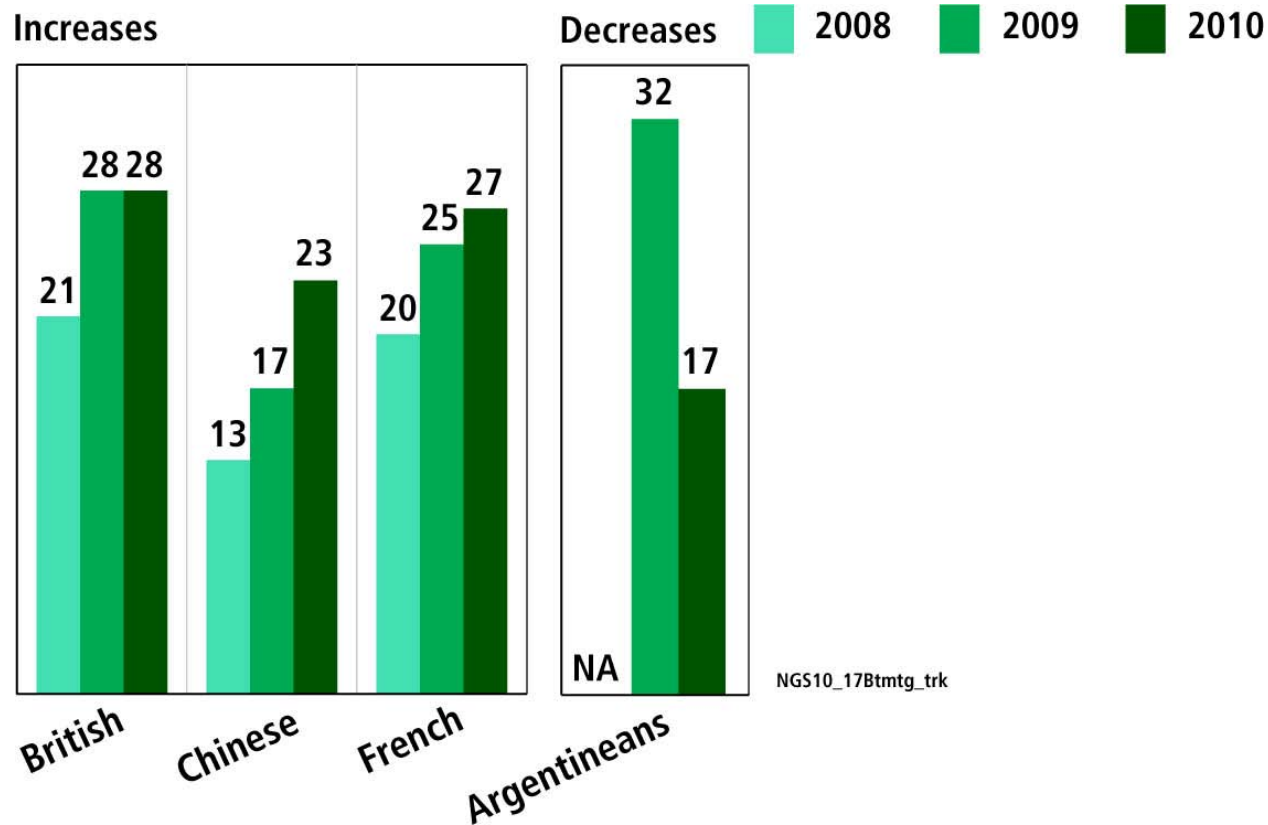
NGS10_17Bmtg_xtracst

The white space in this chart represents "3" (on a scale of 1 to 5 where 1 means "Strongly disagree" and 5 means "Strongly agree") and "DK/NA."

The Extra Cost of Environmentally Friendly Products Is Not Worth It to Me

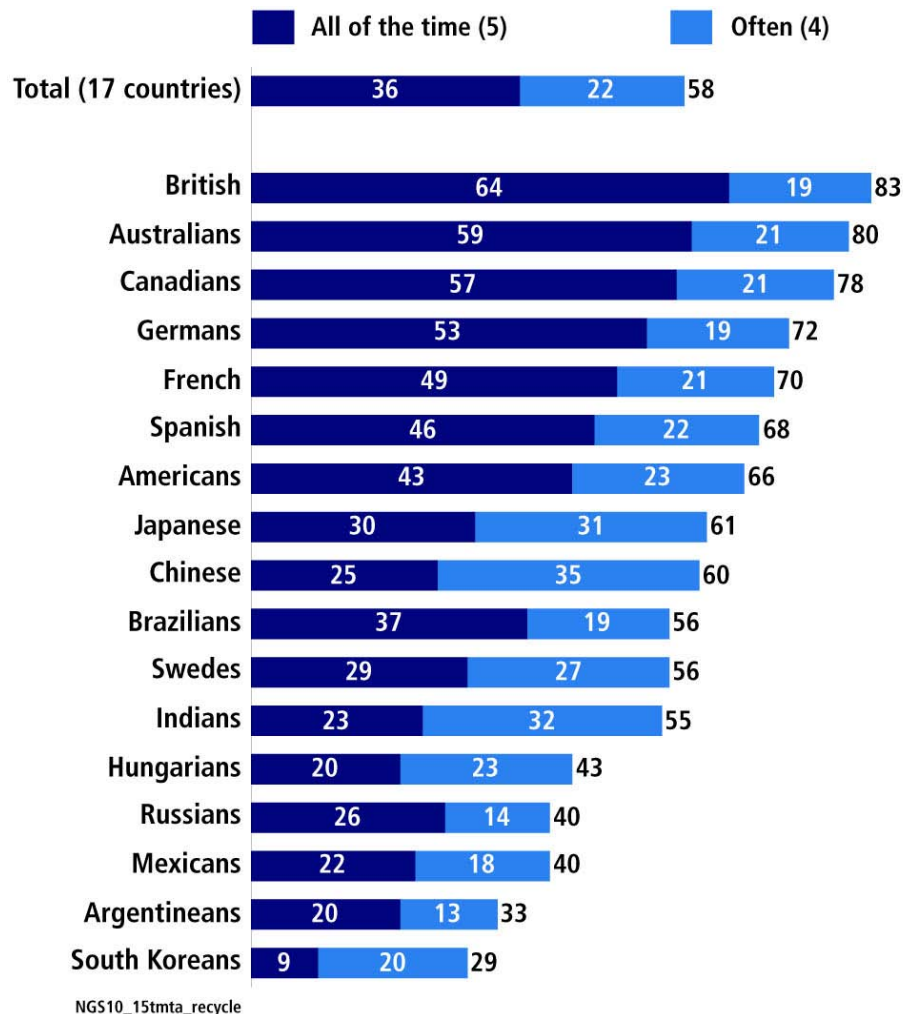


“Agree (4+5),” Percentage of Consumers in Each Country, Trends: 2008–2010



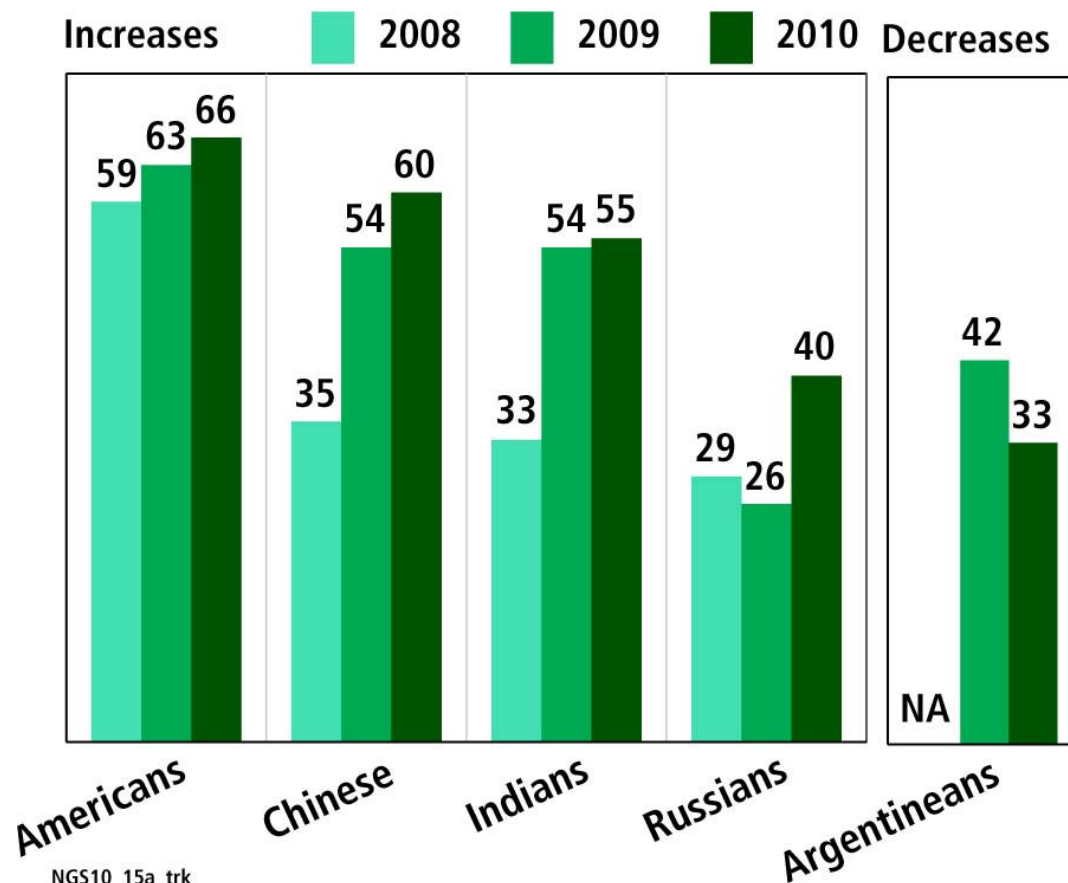
Frequency of Recycling Materials

“All of the Time (5)” or “Often (4),” Percentage of Consumers in Each Country



Frequency of Recycling Materials

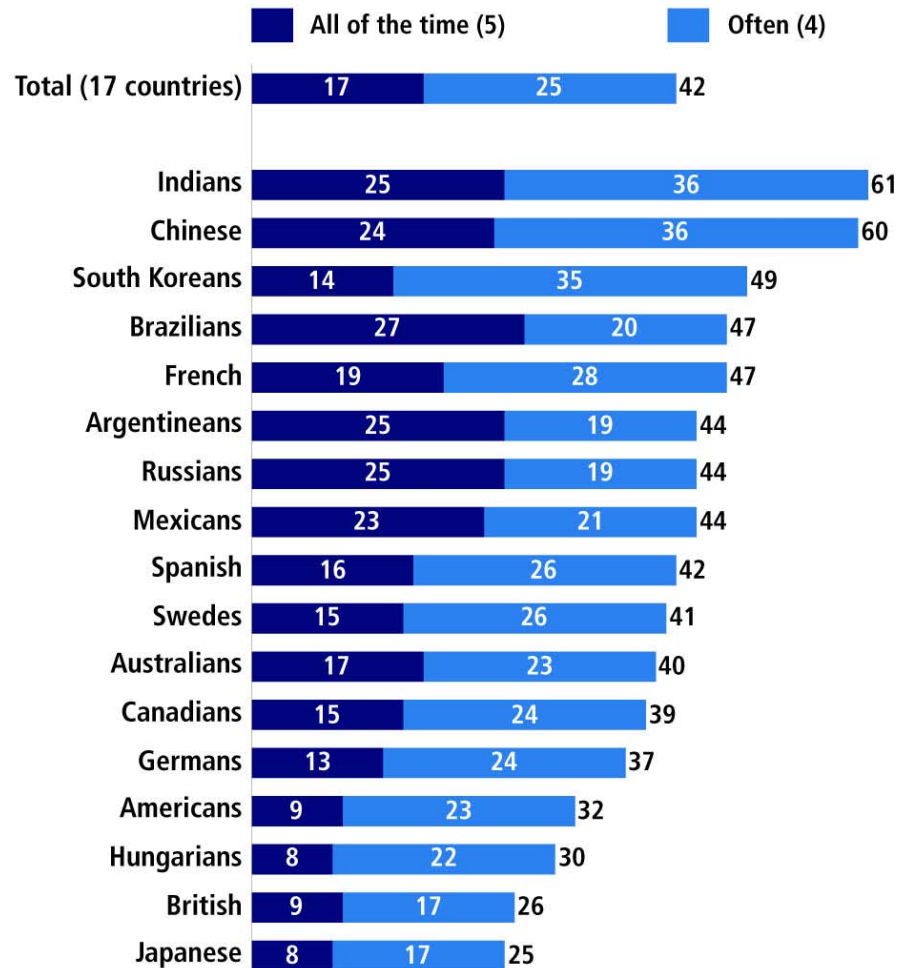
“All of the Time (5)” or “Often (4),” Percentage of Consumers in Each Country,
Trends: 2008–2010



Frequency of Avoiding Environmentally Unfriendly Products



“All of the Time (5)” or “Often (4),” Percentage of Consumers in Each Country, 2010



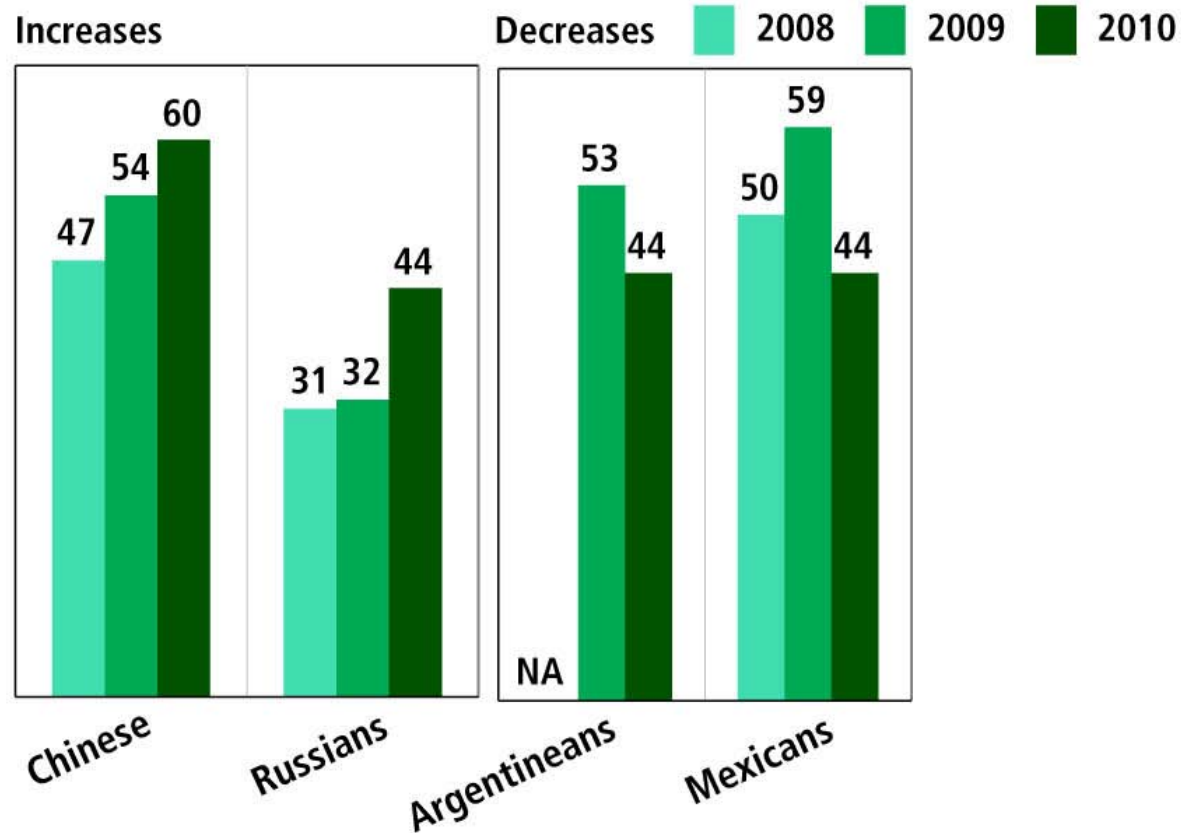
NGS10_15tmtb_avoid



Frequency of Avoiding Environmentally Unfriendly Products



“All of the Time (5)” or “Often (4),” Percentage of Consumers in Each Country, Trends: 2008–2010

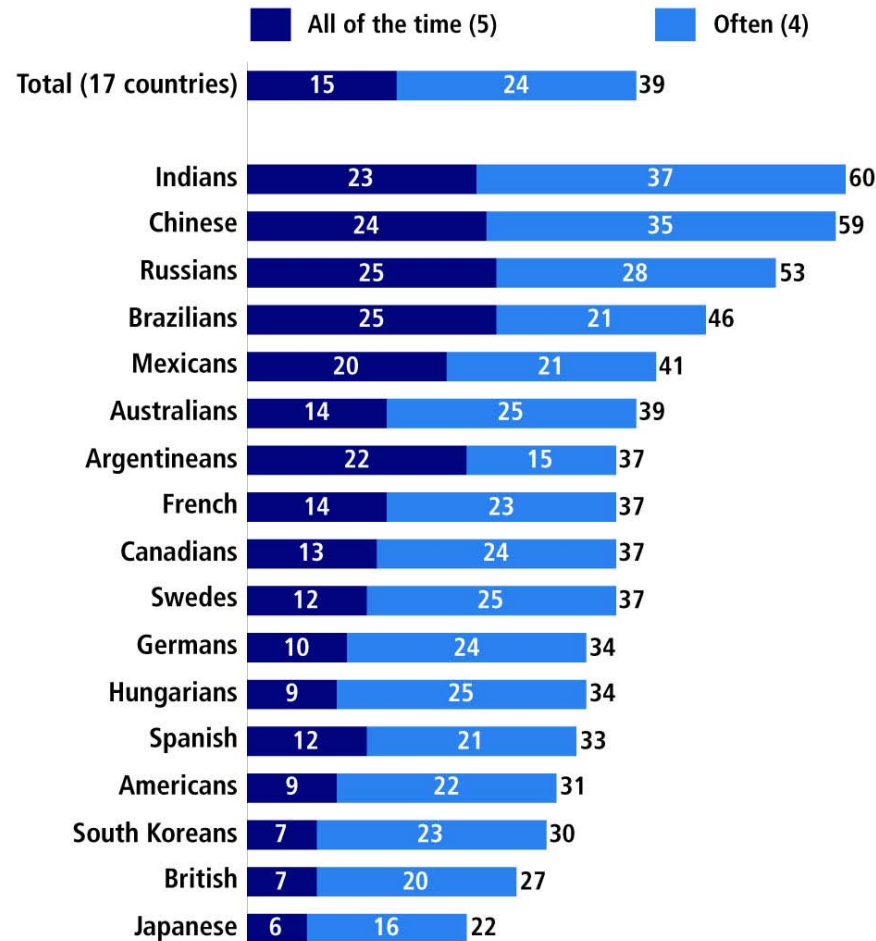


NGS10_15b_trk

Frequency of Buying Environmentally Friendly Products



“All of the Time (5)” or “Often (4),” Percentage of Consumers in Each Country, 2010



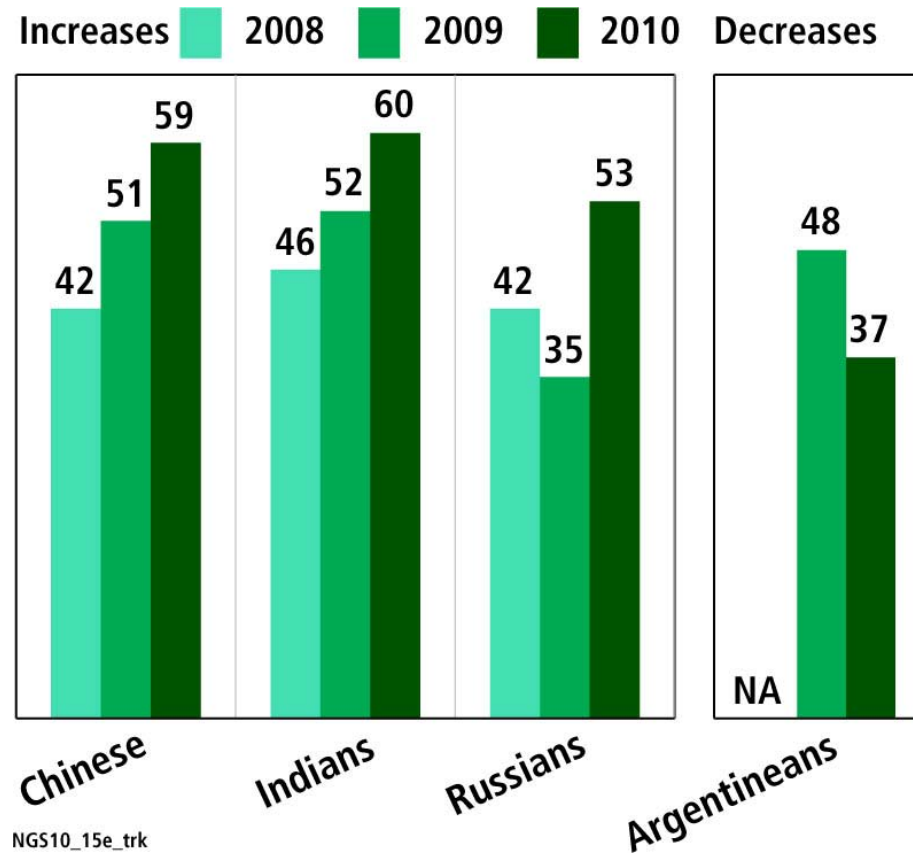
NGS10_15tmt_e_buy



Frequency of Buying Environmentally Friendly Products



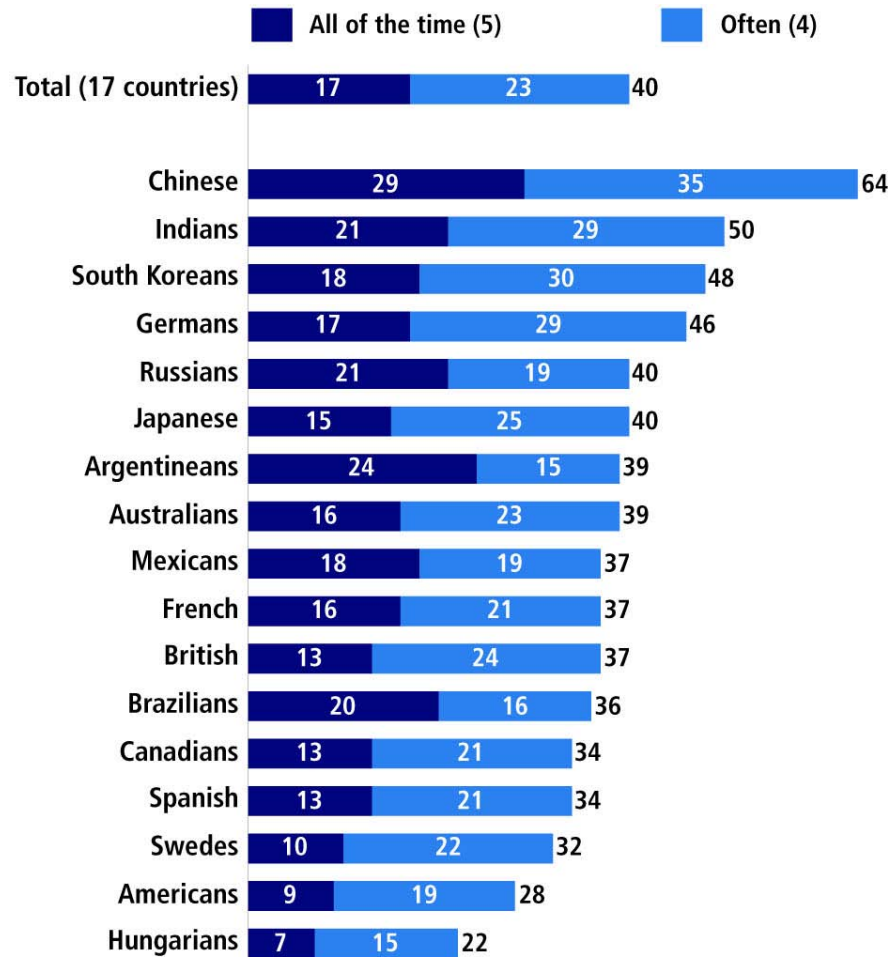
“All of the Time (5)” or “Often (4),” Percentage of Consumers in Each Country,
Trends: 2008–2010



Frequency of Avoiding Excessively Packaged Goods



“All of the Time (5)” or “Often (4),” Percentage of Consumers in Each Country



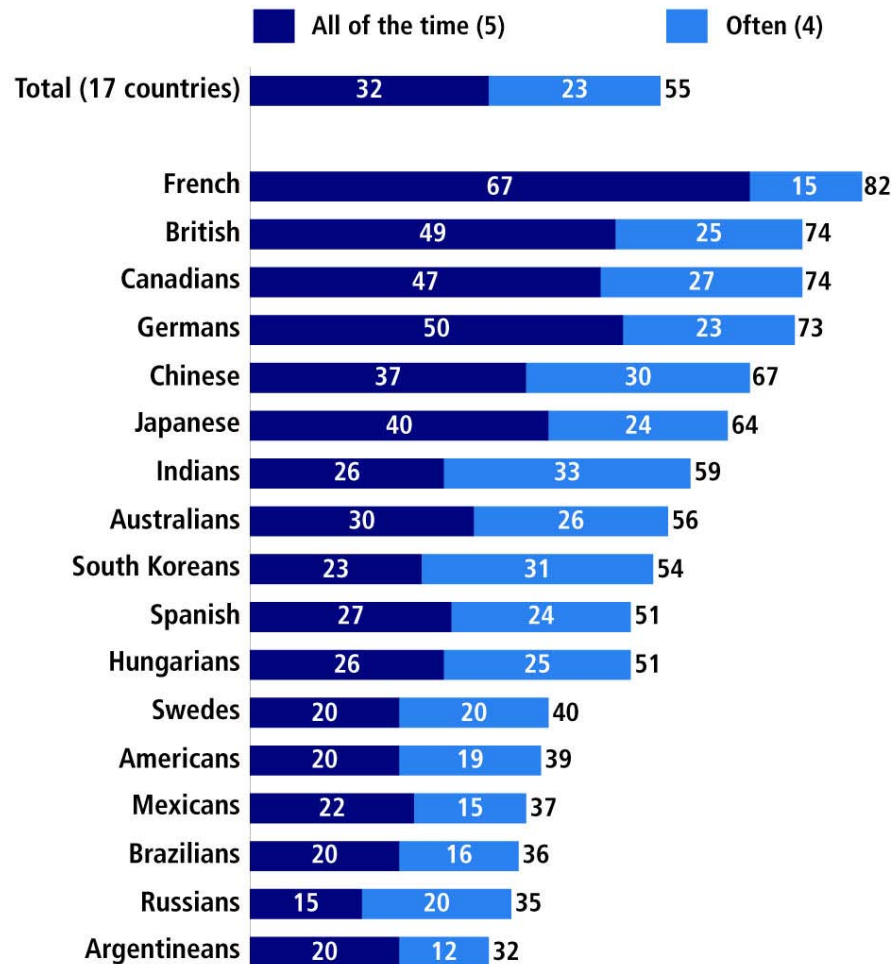
NGS10_15tmtc_excess



Frequency of Using Own Bag in Store/Market



“All of the Time (5)” or “Often (4),” Percentage of Consumers in Each Country



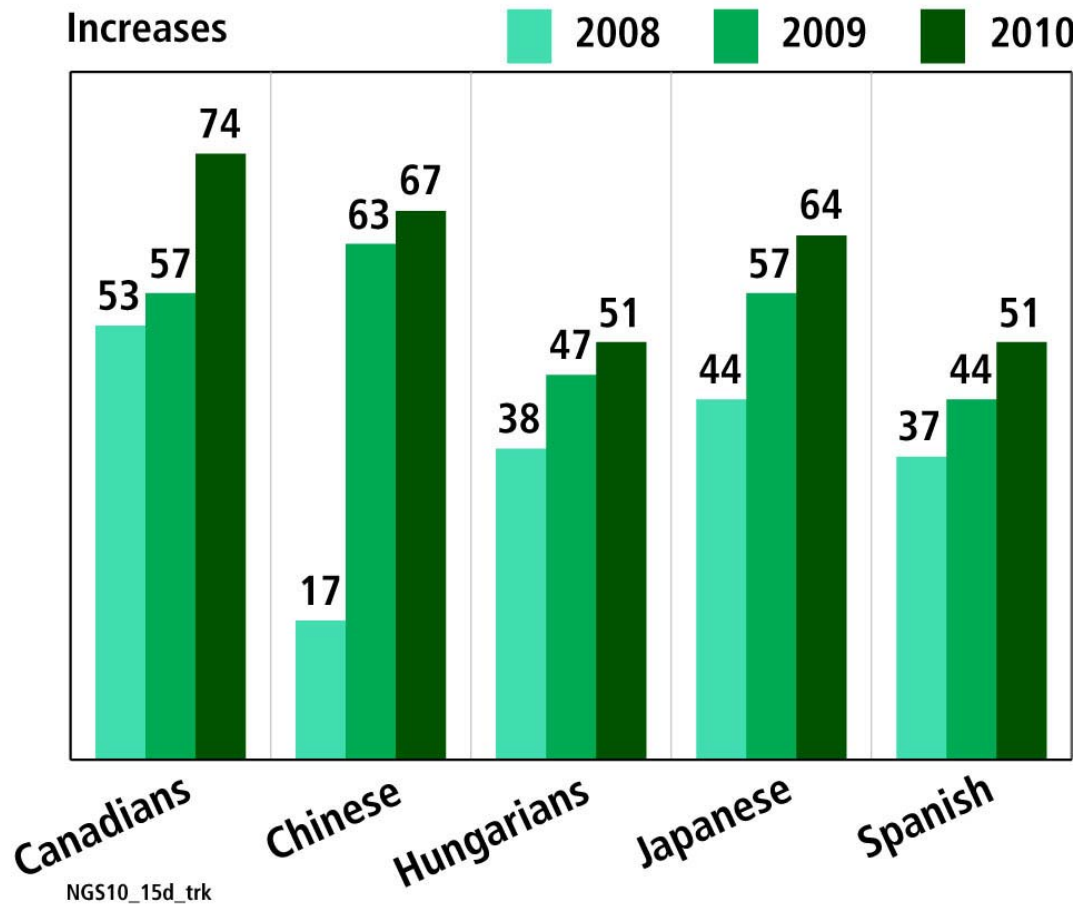
NGS10_15tmt_d_reusebags



Frequency of Using Own Bag in Store/Market



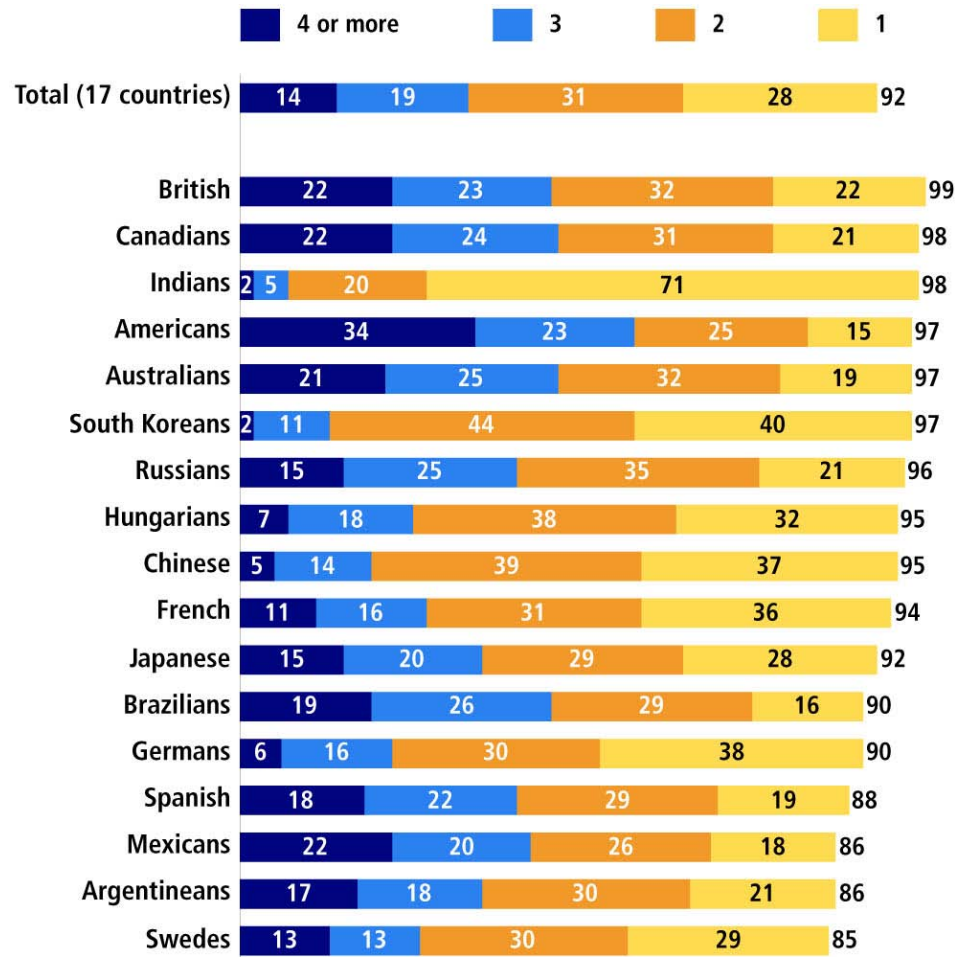
“All of the Time (5)” or “Often (4),” Percentage of Consumers in Each Country,
Trends: 2008–2010



Average Number of TV's Owned, Rented, or Leased by Household Members



Percentage of Consumers in Each Country, 2010



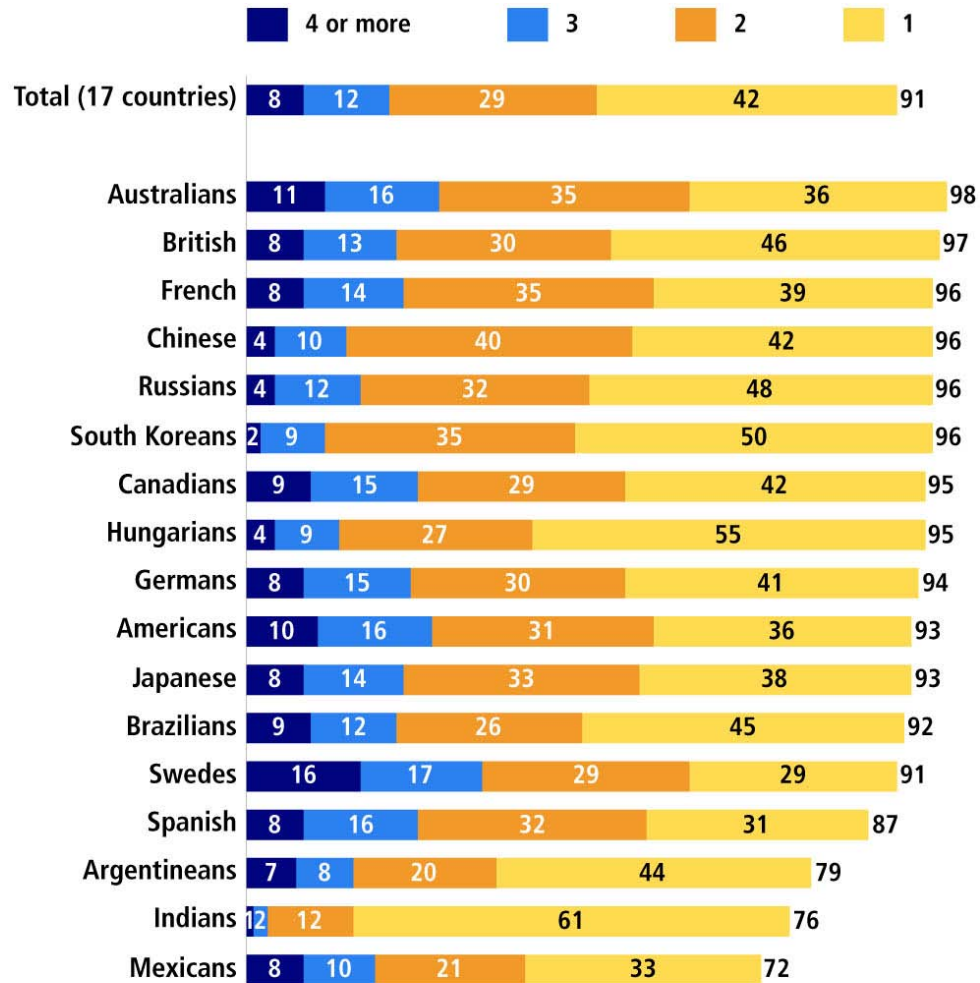
NG510_10tmte_tv



Average Number of Computers Owned, Rented, or Leased by Household Members



Percentage of Consumers in Each Country, 2010



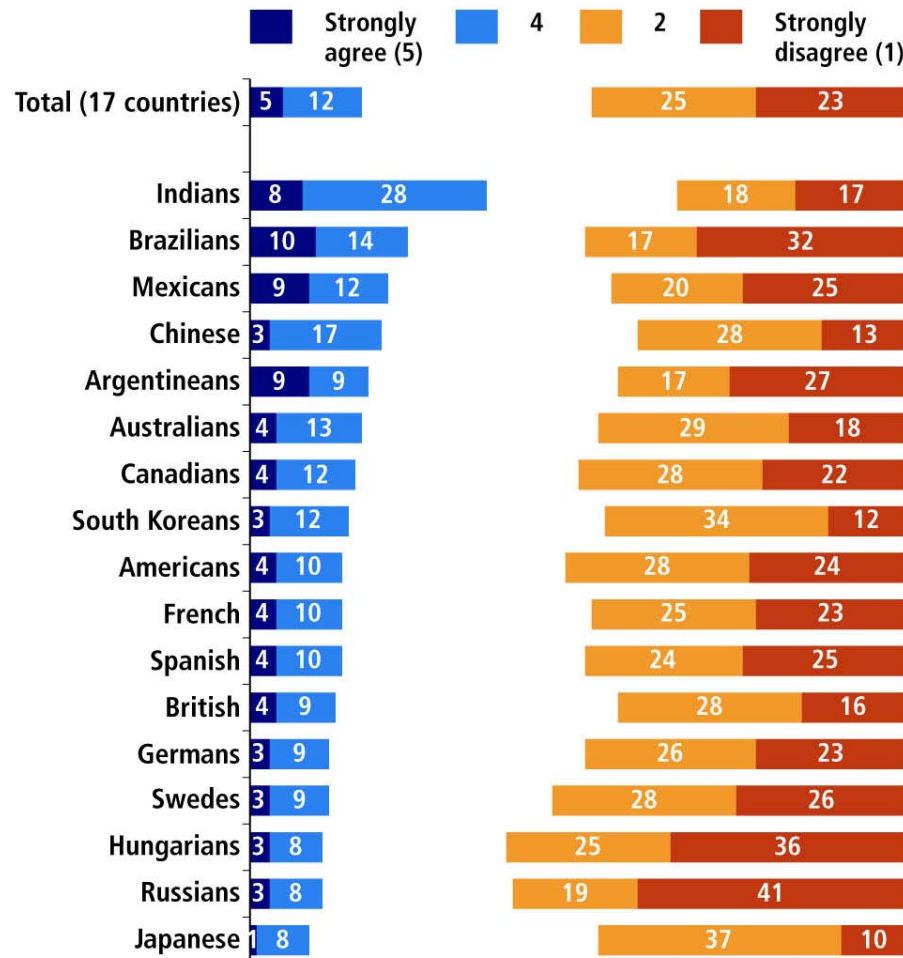
NGS10_10tmtf_comp



Additional Questions Not Included in Goods Sub-Index

Environmentally Friendly Products Do Not Work Well

Percentage of Consumers in Each Country, 2010



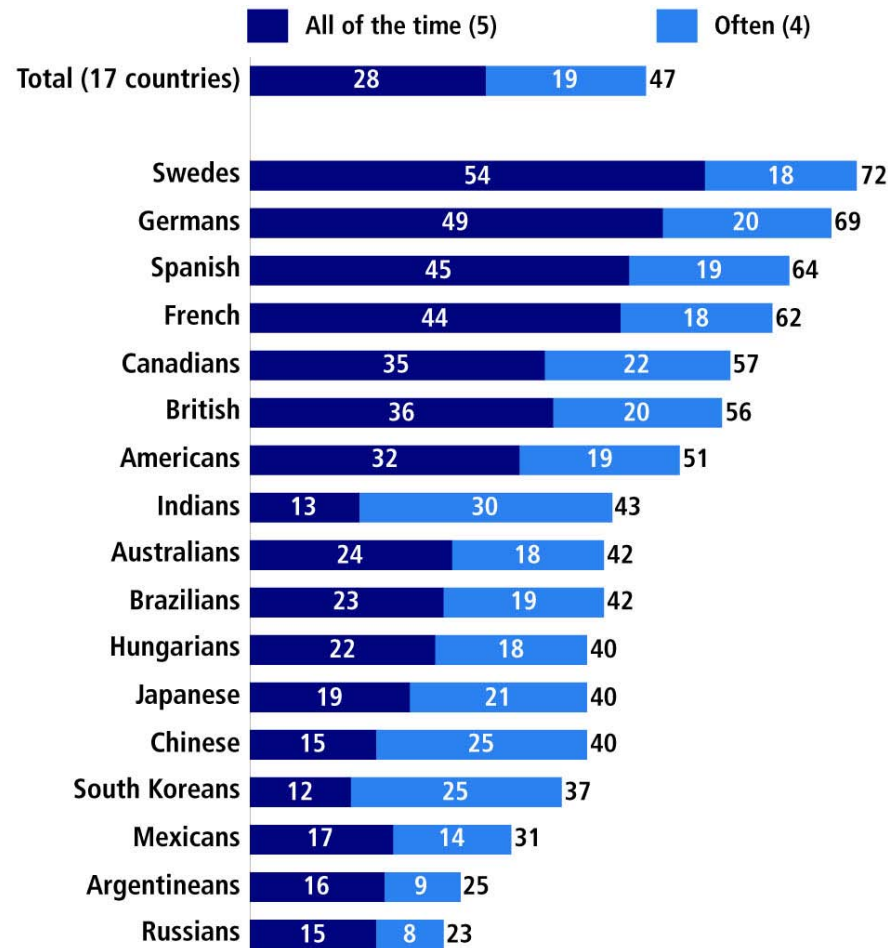
NGS10_17Btmf_envprod

The white space in this chart represents “3” (on a scale of 1 to 5 where 1 means “Strongly disagree” and 5 means “Strongly agree”) and “DK/NA.”

Frequency of Recycling Electronic Items



"All of the Time (5)" or "Often (4)," Percentage of Consumers in Each Country, 2010



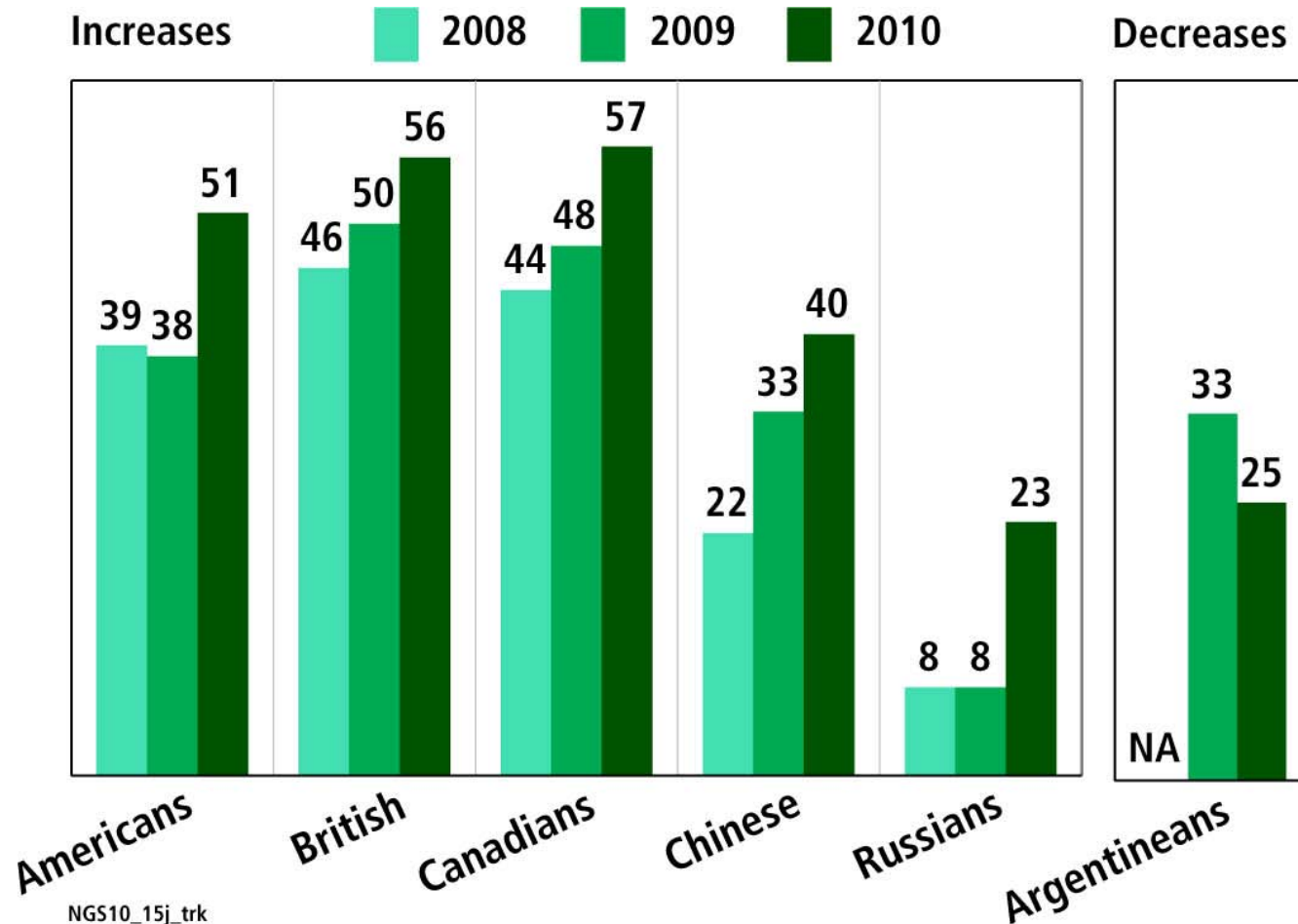
NGS10_15tmjt_relect



Frequency of Recycling Electronic Items



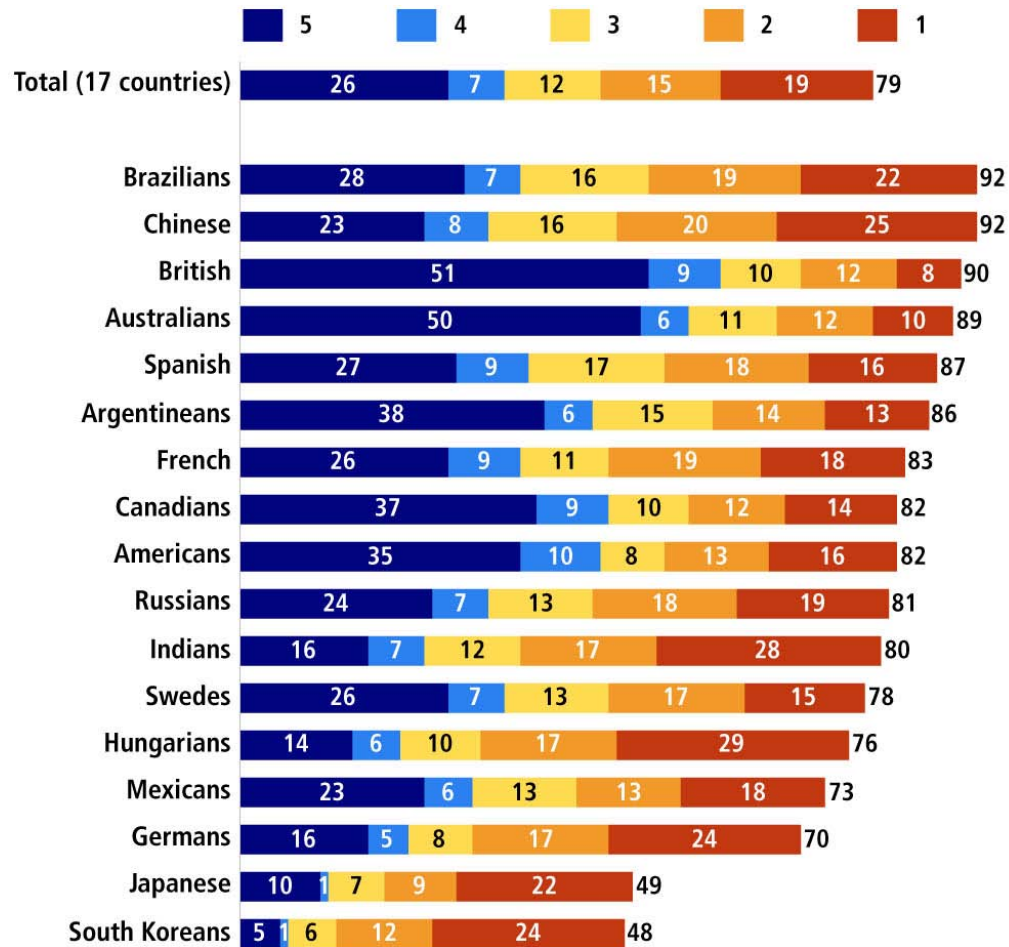
“All of the Time (5)” or “Often (4),” Percentage of Consumers in Each Country,
Trends: 2008–2010



Number of Purchases of Energy-Efficient Light Bulbs (out of Past Five Purchases)



Percentage of Consumers in Each Country, 2010



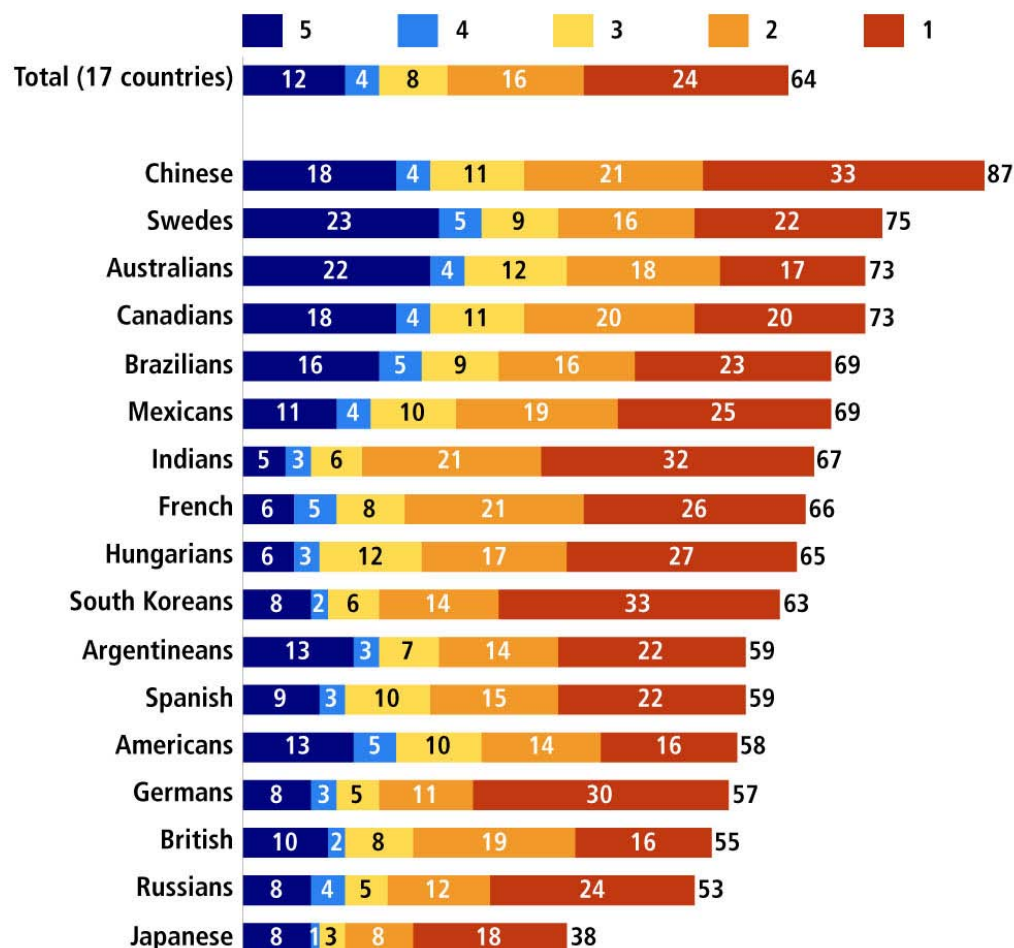
NGS10_13tmma_light



Number of Purchases of Environmentally Friendly Detergents / Surface Cleaners (out of Past Five Purchases)



Percentage of Consumers in Each Country, 2010

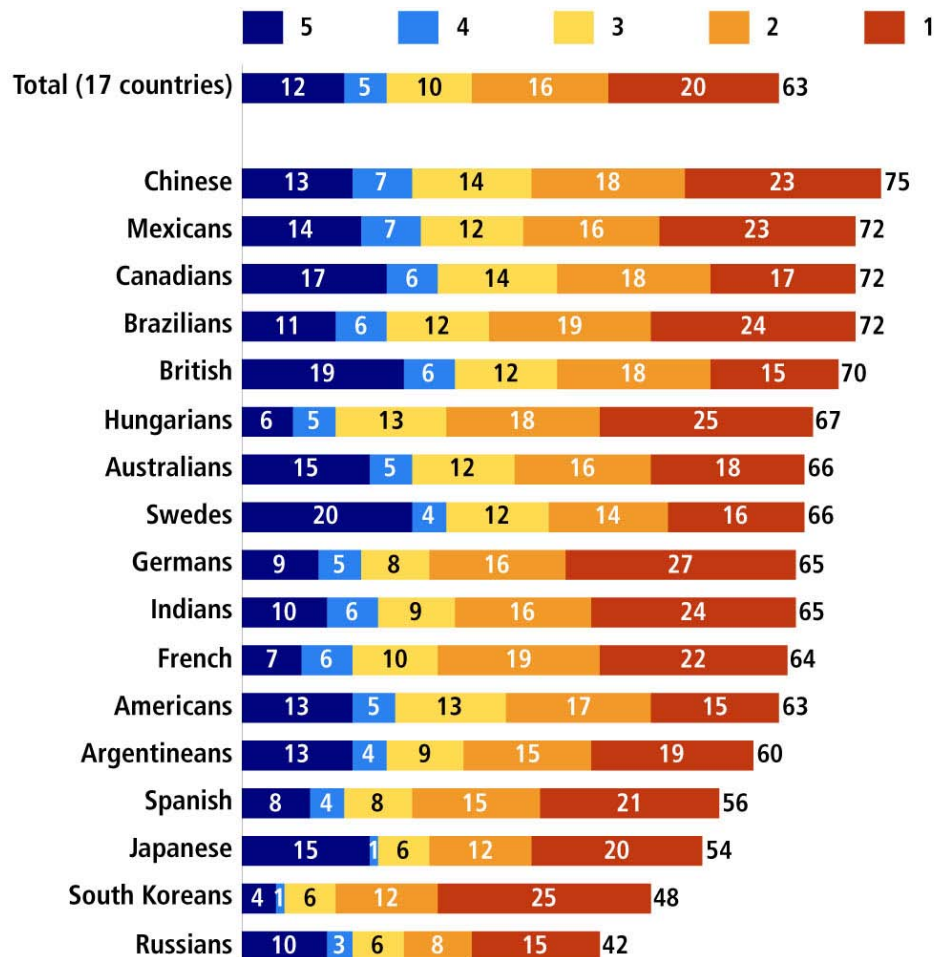


NGS10_13tmmb_dtrgnts

Number of Purchases of Recycled Paper Products (out of Past Five Purchases)



Percentage of Consumers in Each Country, 2010



NG510_13tmmc_paper



Attitudes and Perceptions

- A perceived lack of credibility of companies' environmental claims about their products and a lack of leadership by government and industry are the top two inhibitors of more environmentally friendly consumer behavior.
- For most Russians (65 percent), Hungarians (57 percent), and Chinese (57 percent), companies' lack of credible claims about their products discourages more environmentally friendly behavior. A lack of leadership by government, as well as companies, is also seen as an inhibitor by most Russian (61 percent) and Hungarian (56 percent) consumers.
- South Koreans, Russians, Chinese, and Indians are among the most likely to be discouraged from doing more for the environment because they think that it is too costly, that there is not enough information available, and that the information that is available is too confusing.

- Belief that people in other countries—and in their own country—are not doing their part to be environmentally friendly discourages more Russians than other consumers, with just over a majority citing these as inhibitors of green behavior. A majority of Russians also say they do not do more for the environment because there is a lack environmentally friendly options available to them.
- Majorities of consumers in each country surveyed feel that the current typical lifestyle in their country is not sustainable for future generations. The proportion of consumers in South Korea (45 percent), India (43 percent), Japan (43 percent), China (42 percent), and Canada (40 percent) who believe the opposite, however, is notably higher than the 17-country average of 33 percent.

What Discourages More Environmentally Friendly Consumer Behavior



“Discourage (4+5)” Percentage of Consumers, Total, 2010

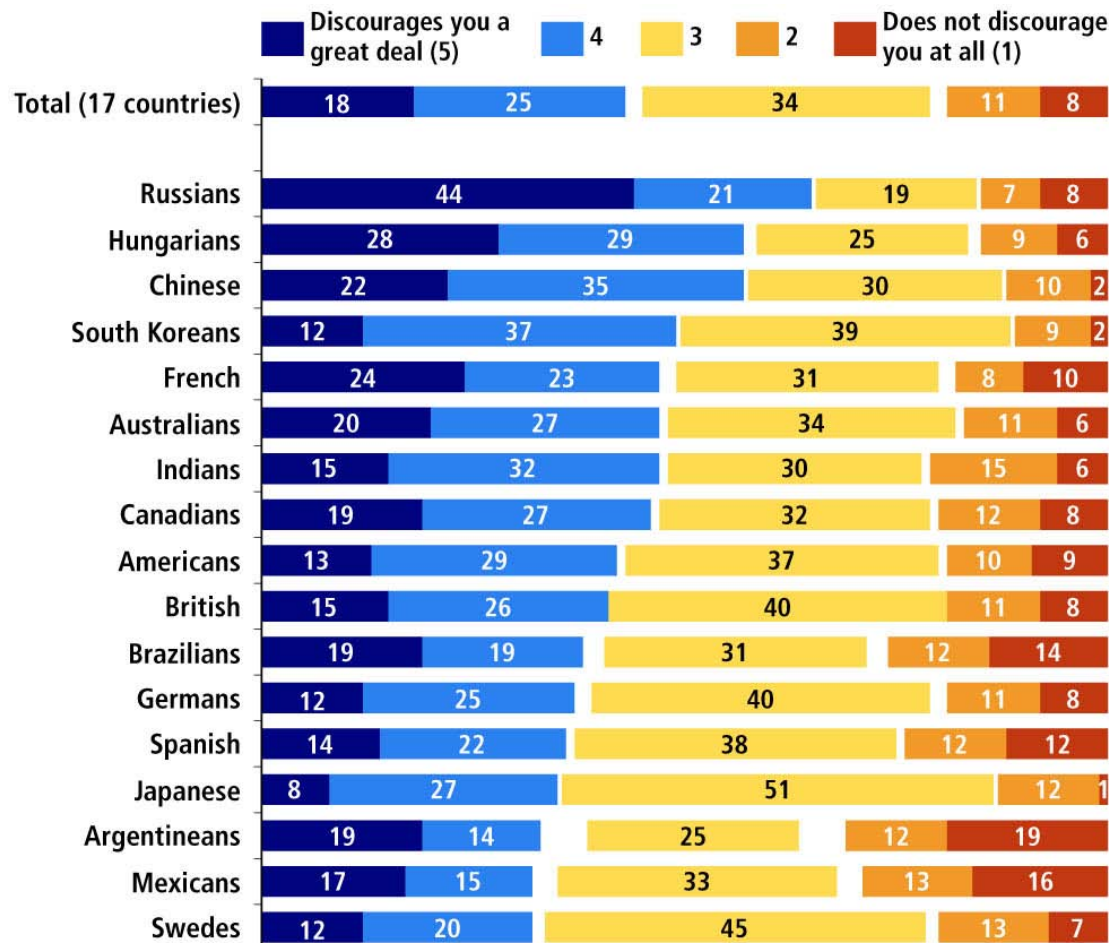


NGS10_18_summ

What Discourages Environmentally Friendly Consumer Behavior: Companies Make False Claims about the Environmental Impact of Their Products



Percentage of Consumers in Each Country, 2010

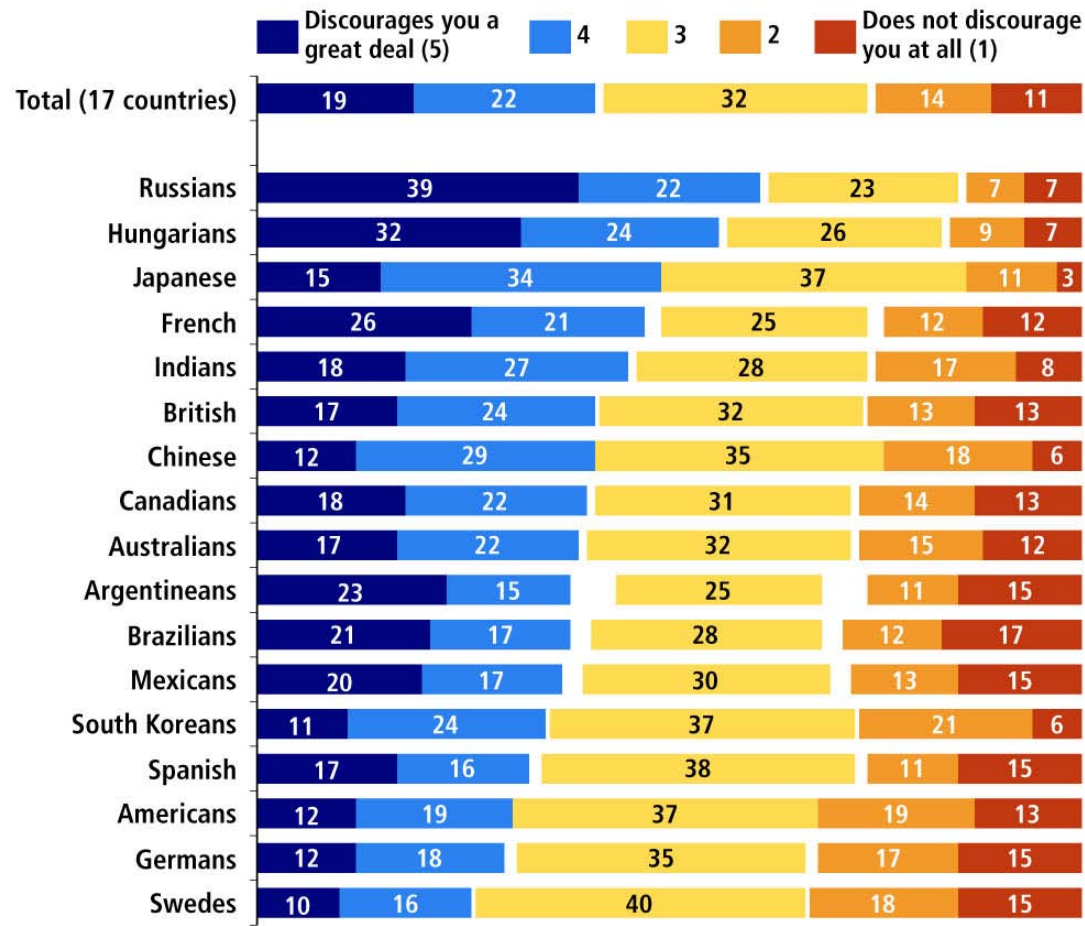


NGS10_18f_claims

What Discourages Environmentally Friendly Consumer Behavior: Individual Efforts Are Not Worth It If Governments and Industries Don't Take Action



Percentage of Consumers in Each Country, 2010



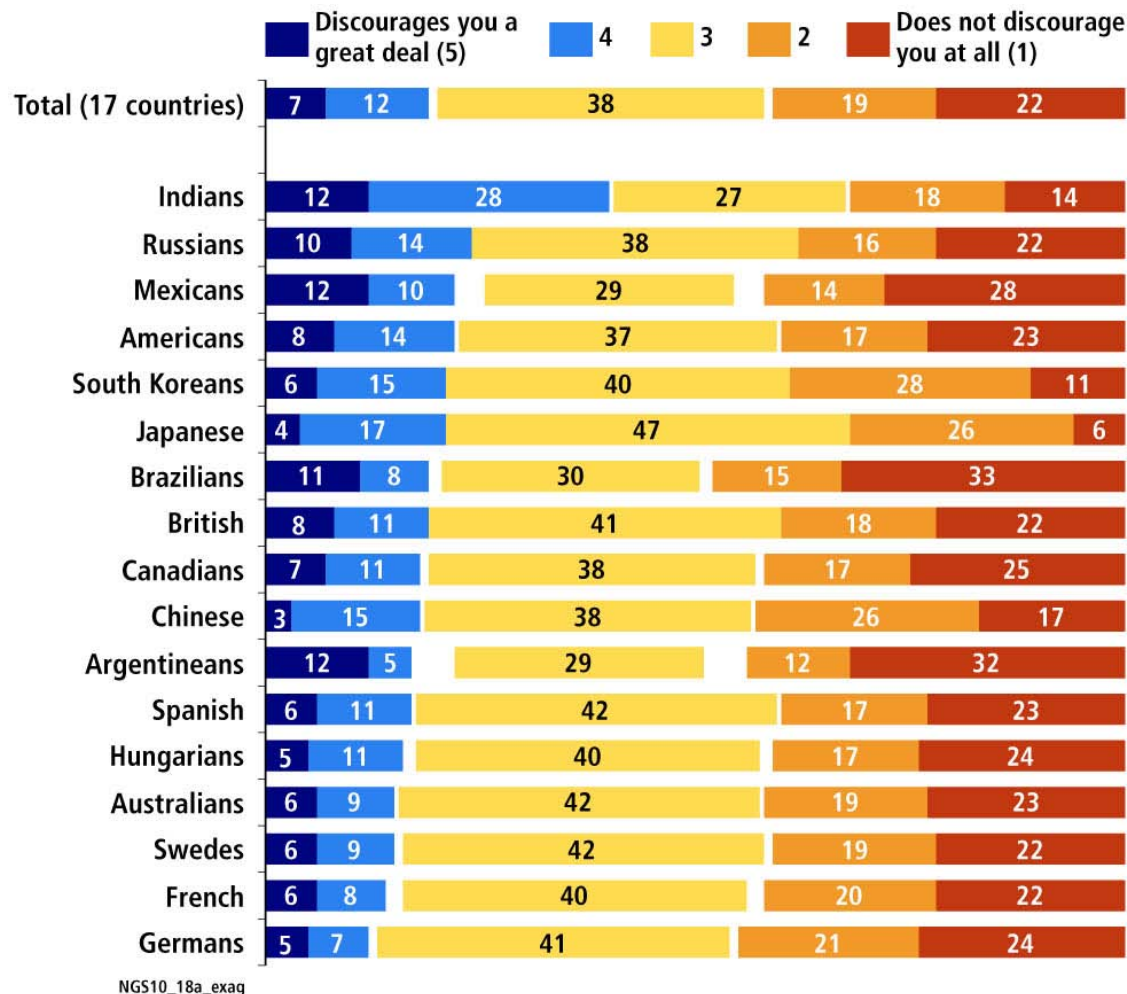
NGS10_18g_indiv



What Discourages Environmentally Friendly Consumer Behavior: Seriousness of Environmental Problems is Exaggerated

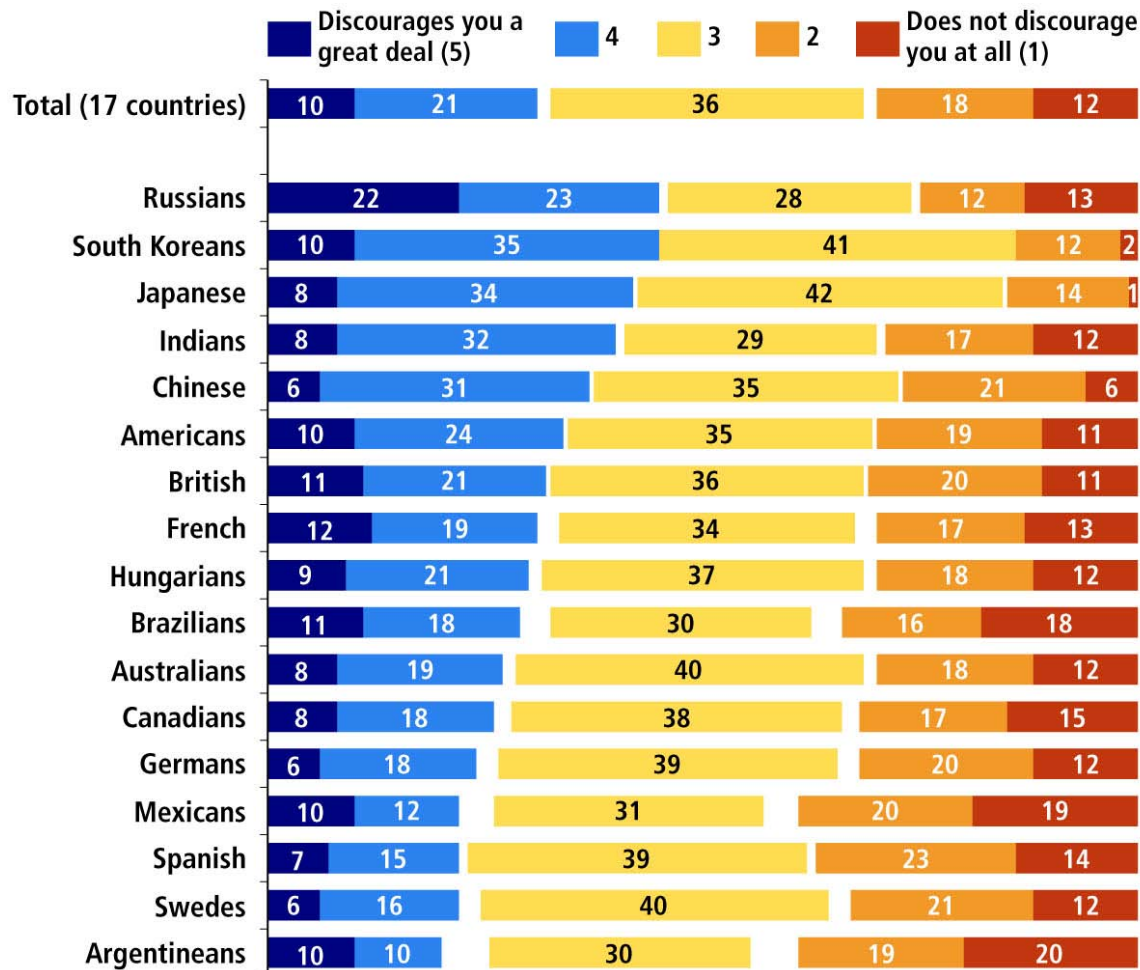


Percentage of Consumers in Each Country, 2010



What Discourages Environmentally Friendly Consumer Behavior: Costs Too Much to Help the Environment

Percentage of Consumers in Each Country, 2010

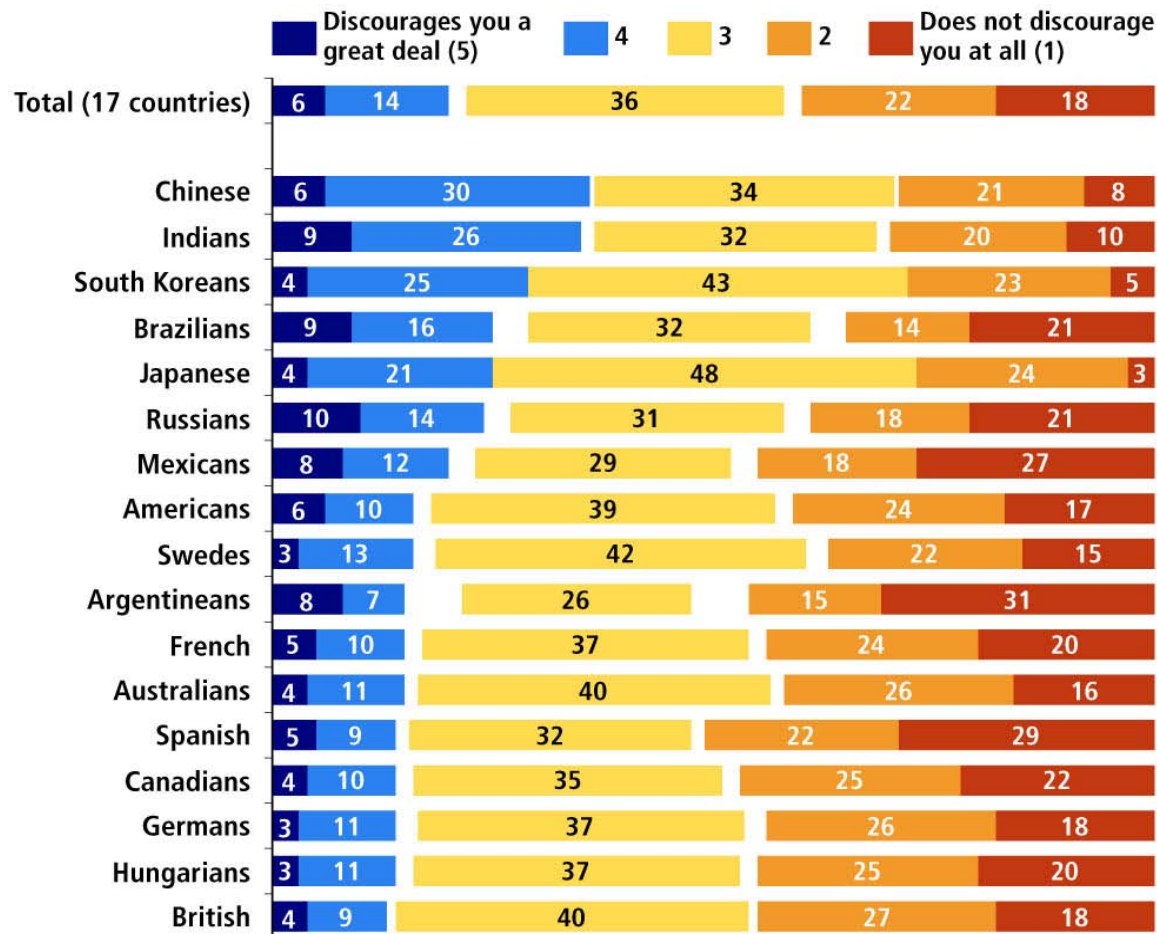


NGS10_18b_cost

What Discourages Environmentally Friendly Consumer Behavior: Inconvenient to Help the Environment



Percentage of Consumers in Each Country, 2010



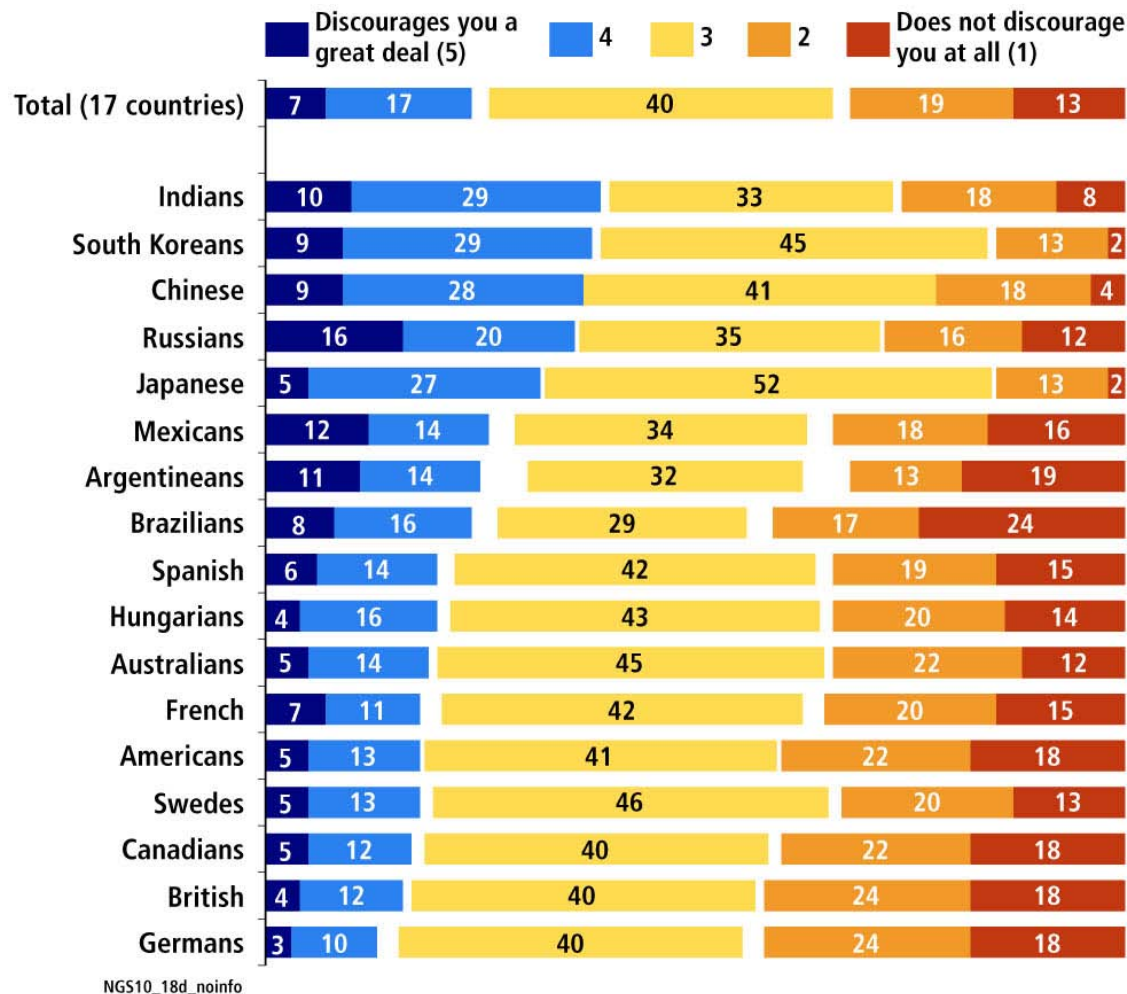
NGS10_18c_inconv



What Discourages Environmentally Friendly Consumer Behavior: Not Enough Information about How to Help the Environment



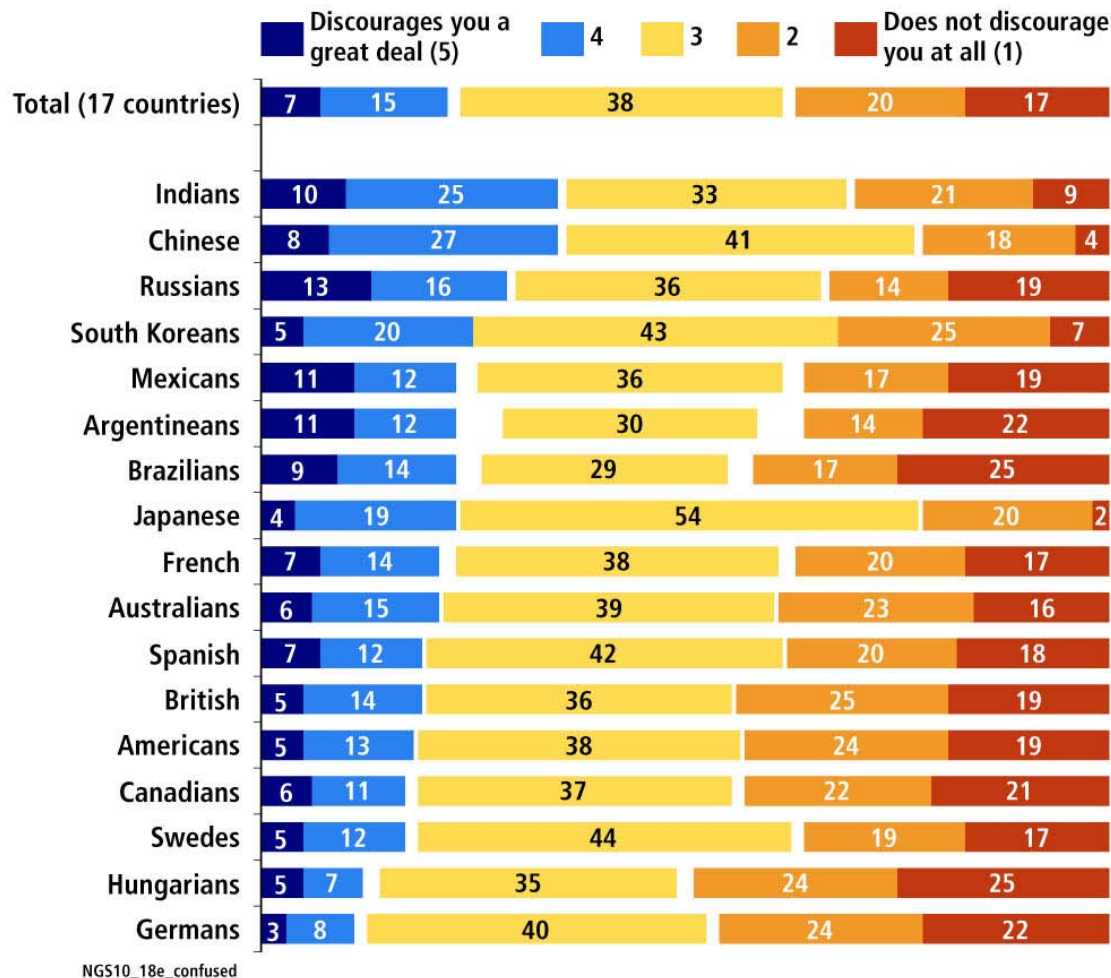
Percentage of Consumers in Each Country, 2010



What Discourages Environmentally Friendly Consumer Behavior: Confused by Too Much Information about How to Help the Environment



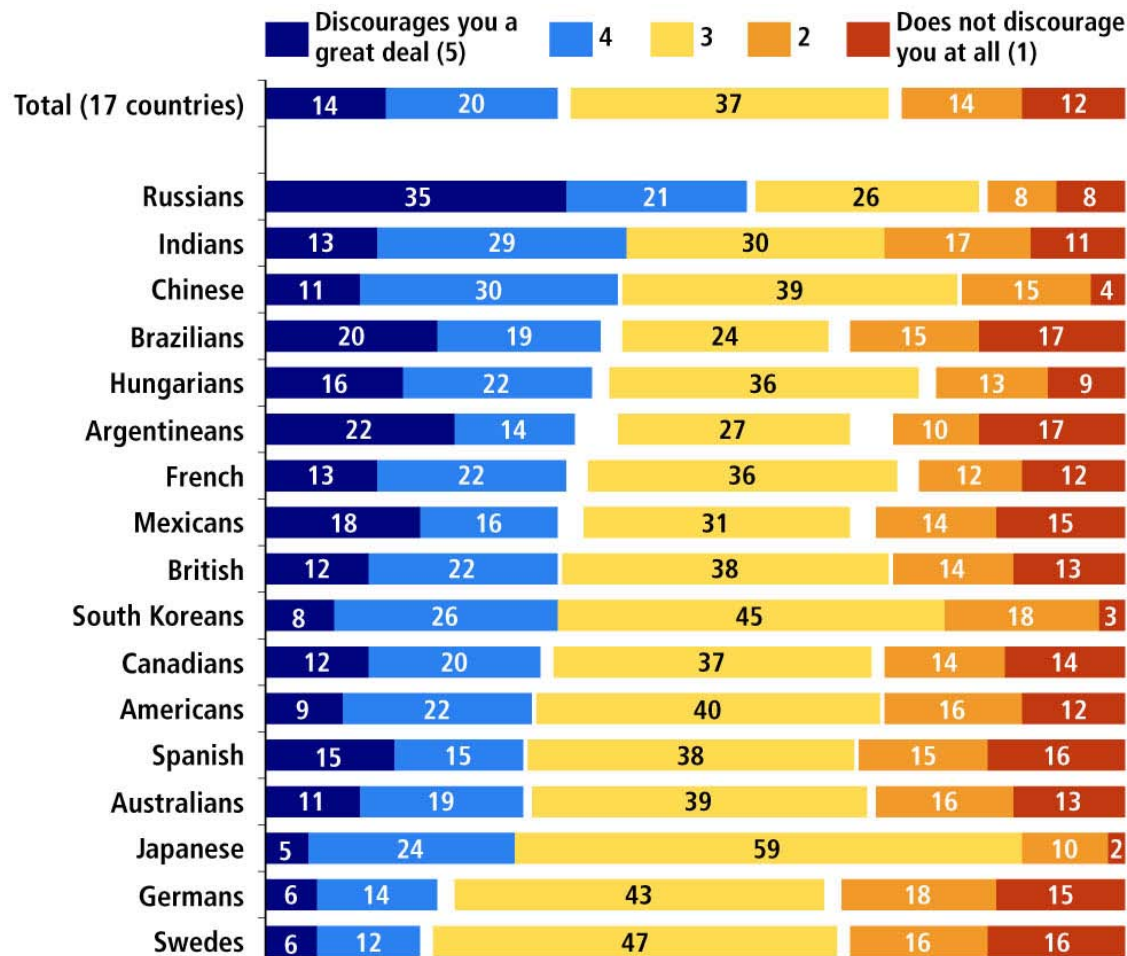
Percentage of Consumers in Each Country, 2010



What Discourages Environmentally Friendly Consumer Behavior: Other People in My Country Are Not Doing Their Part



Percentage of Consumers in Each Country, 2010



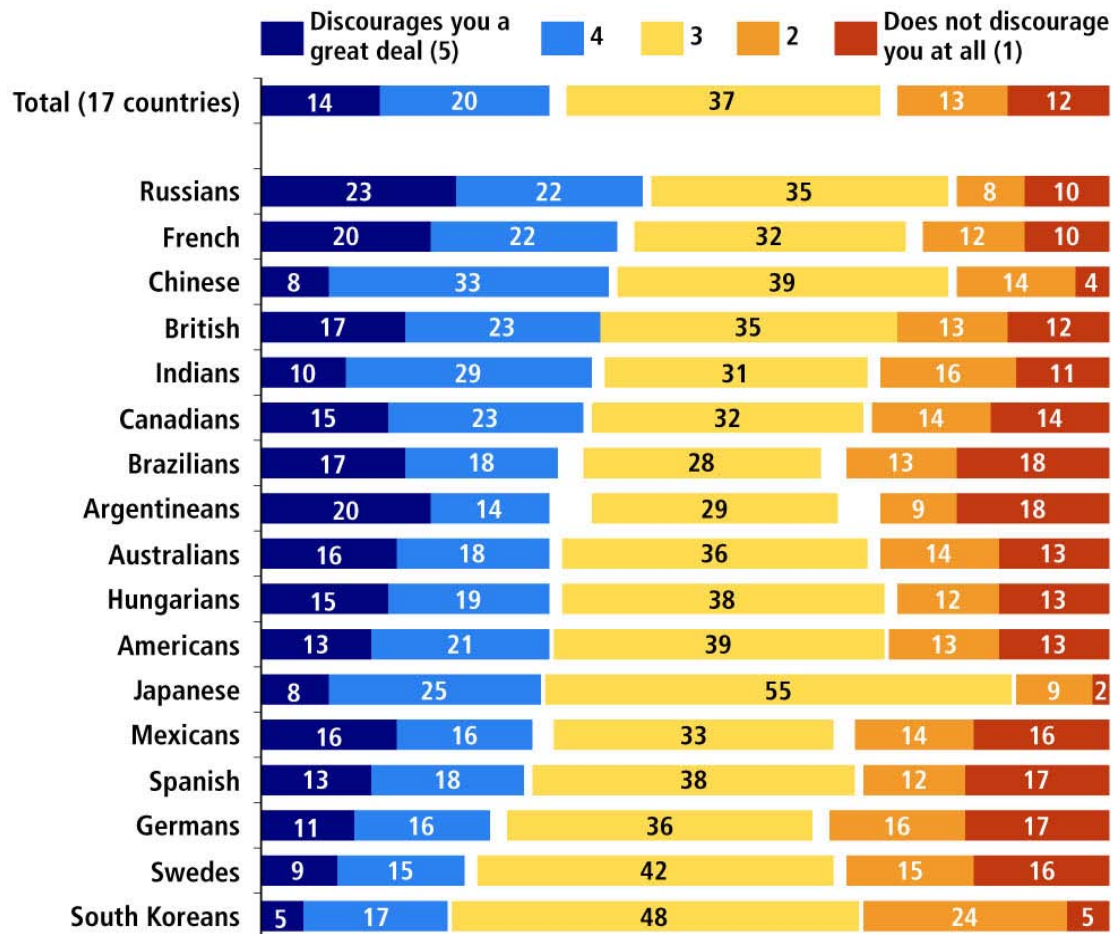
NGS10_18h_otherpeople



What Discourages Environmentally Friendly Consumer Behavior: People in Other Countries Are Not Doing Their Part



Percentage of Consumers in Each Country, 2010

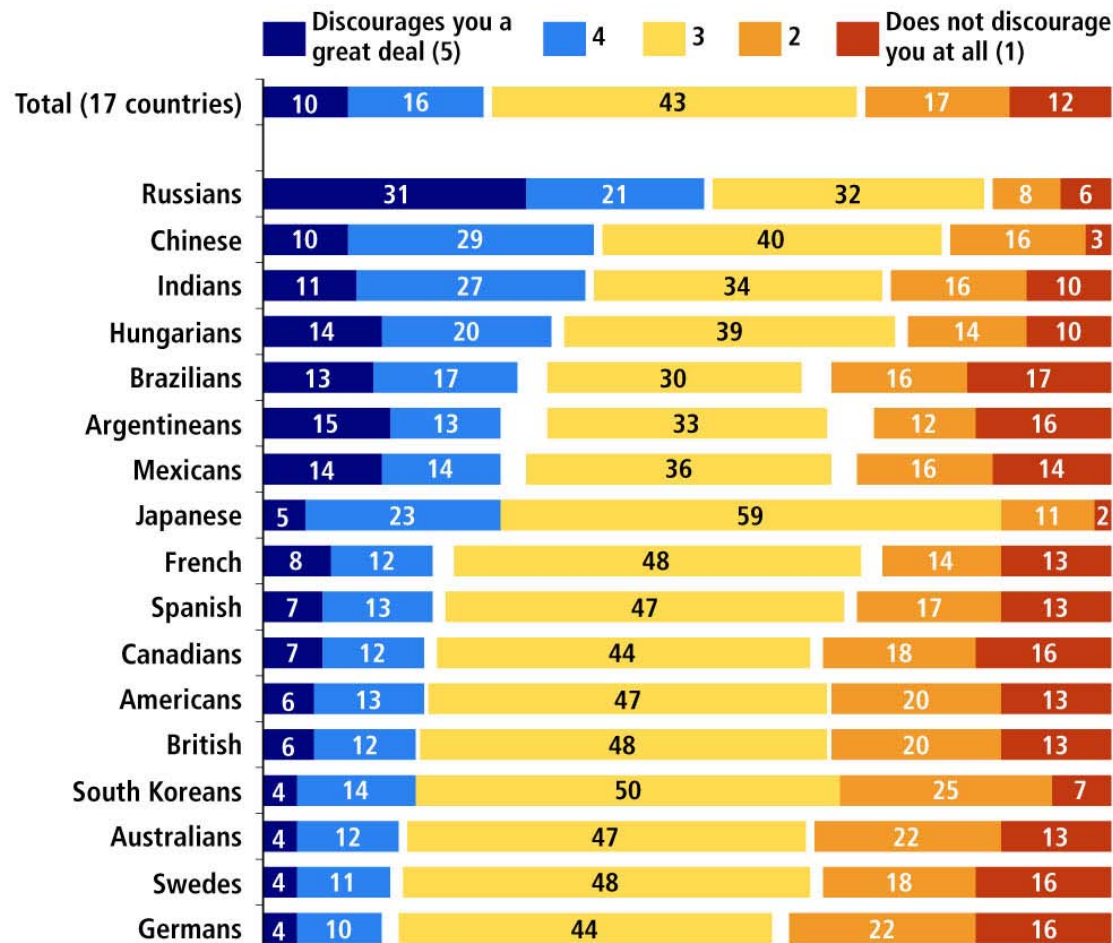


NGS10_18i_othercountry

What Discourages Environmentally Friendly Consumer Behavior: Few Environmentally Friendly Options Are Available for Me



Percentage of Consumers in Each Country, 2010



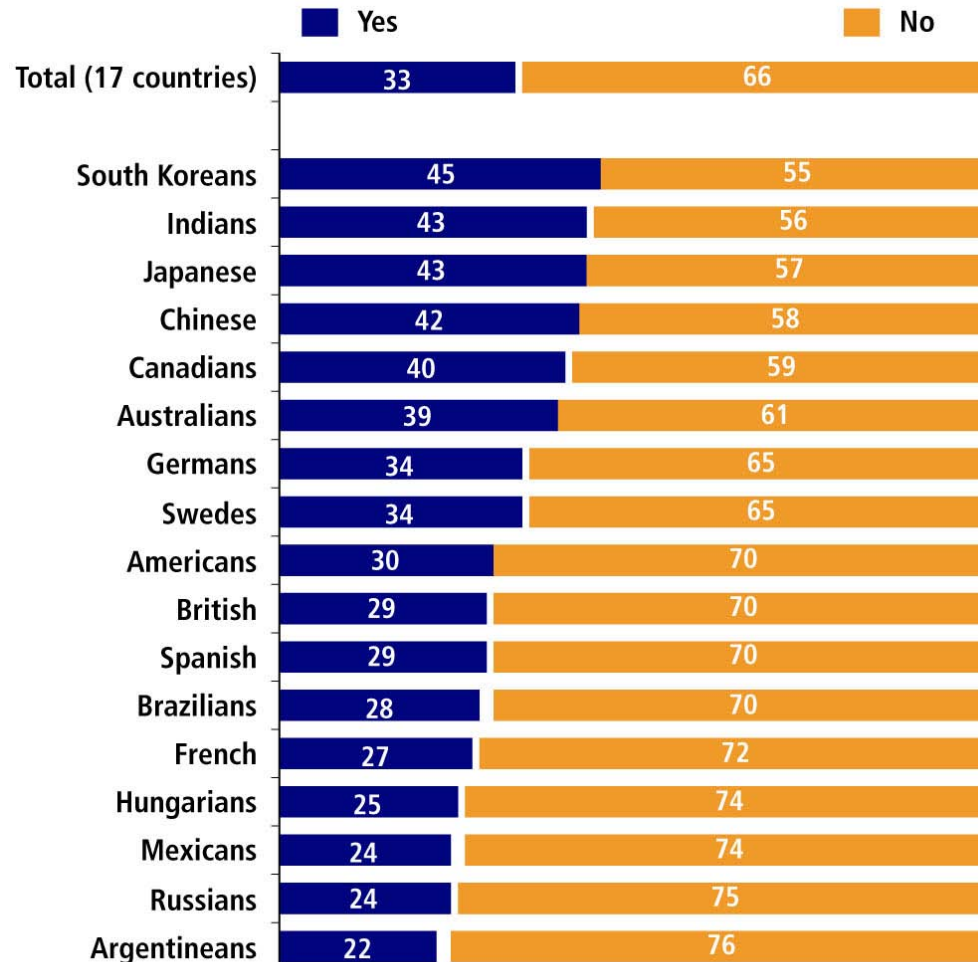
NGS10_18j_few



The Current Lifestyle in My Country is Sustainable for Future Generations



Percentage of Consumers in Each Country, 2010



NGS10_19_sustainable

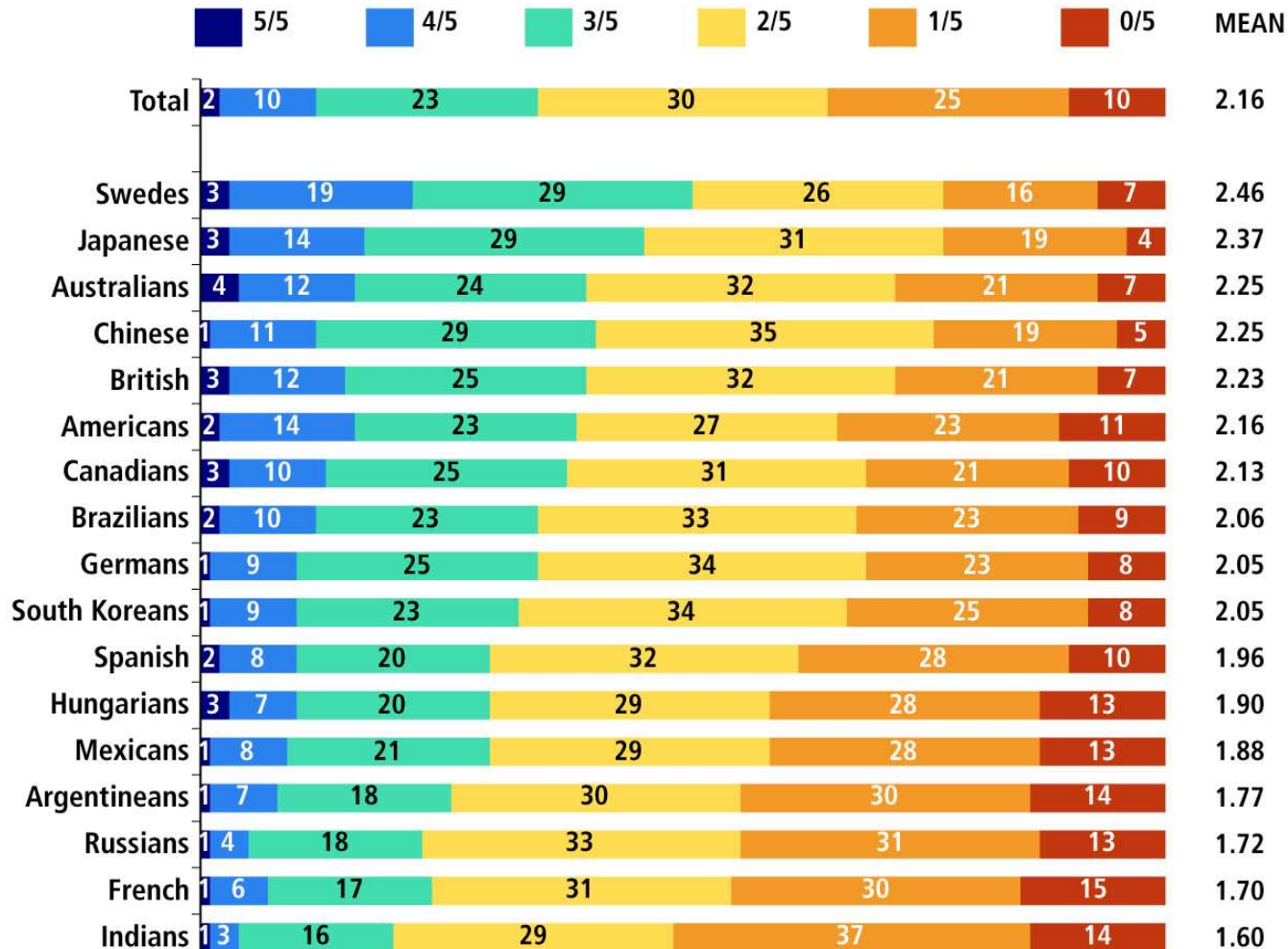


Knowledge

- On average, consumers failed to correctly answer most of a small number of environmental knowledge test questions. The average number of correctly answered questions across all 17 countries was 2.16 out of 5 questions.
- Swedes scored best, albeit with a mean score of 2.46 out of five, followed by the Japanese (2.37), Australians (2.25), Chinese (2.25), British (2.23), and Americans (2.16).
- Indians scored lowest on the knowledge quiz, with an average score of 1.60 out of five. Only 20 percent answered at least three questions correctly. Indians are the most likely to say that a lack of information about environmental issues (39 percent) limits more environmentally friendly behavior. Indians are also the second most likely to say that they have recently been paying more attention to news stories about the environment (65 percent), and to report having followed the events at the Copenhagen climate summit (54 percent).

Knowledge—Quiz Results

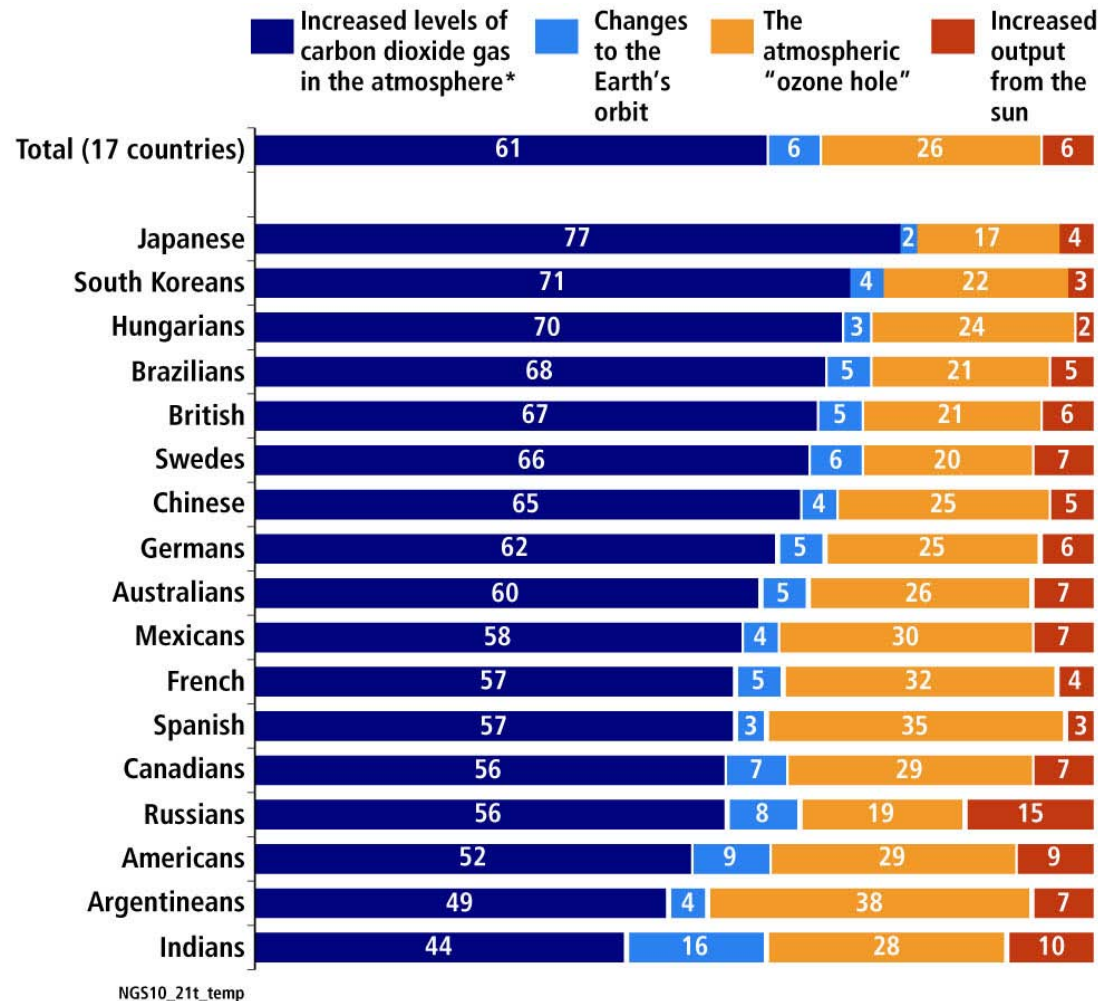
Percentage of Consumers in Each Country, 2010



NGS10_Quiz_Q21T_Q25N

What Is the Primary Cause of Recently Measured Increases in the Earth's Temperature?

Percentage of Consumers in Each Country, 2010



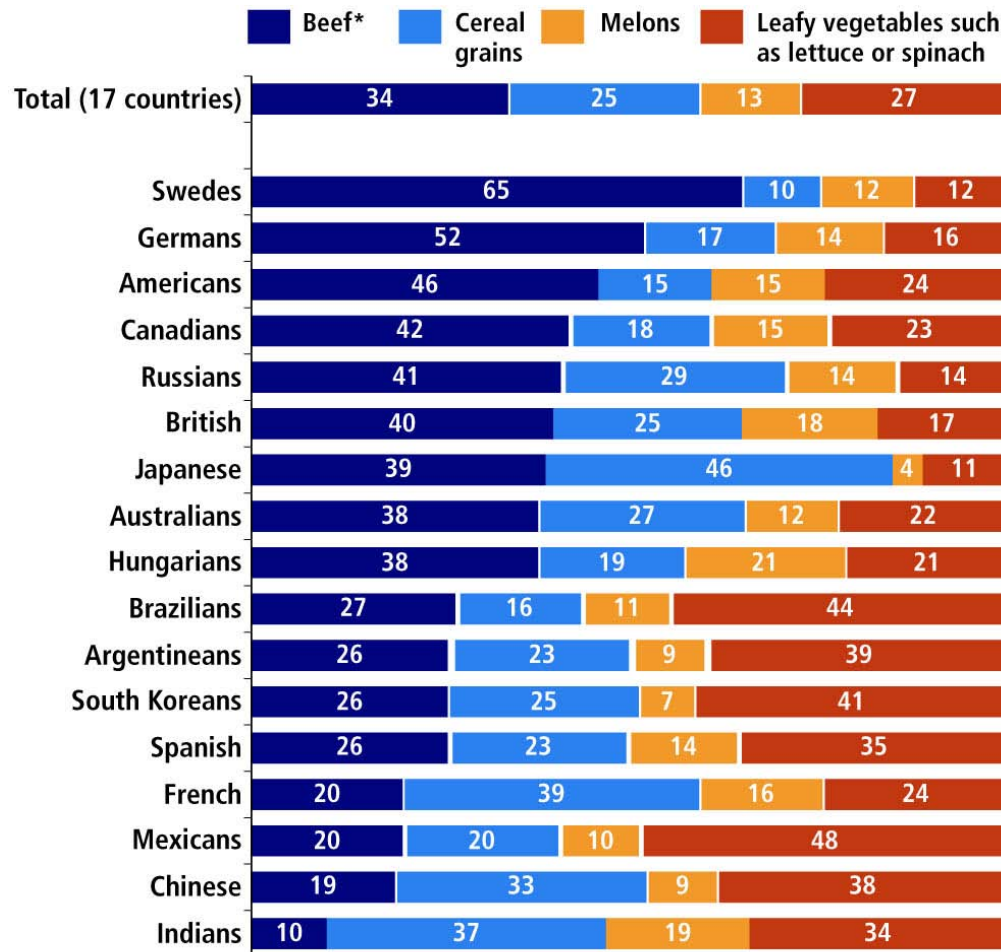
*Correct answer

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

Which of the Following Foods Requires the Most Water to Grow or Raise for a Typical Serving?



Percentage of Consumers in Each Country, 2010



NGS10_22t_water

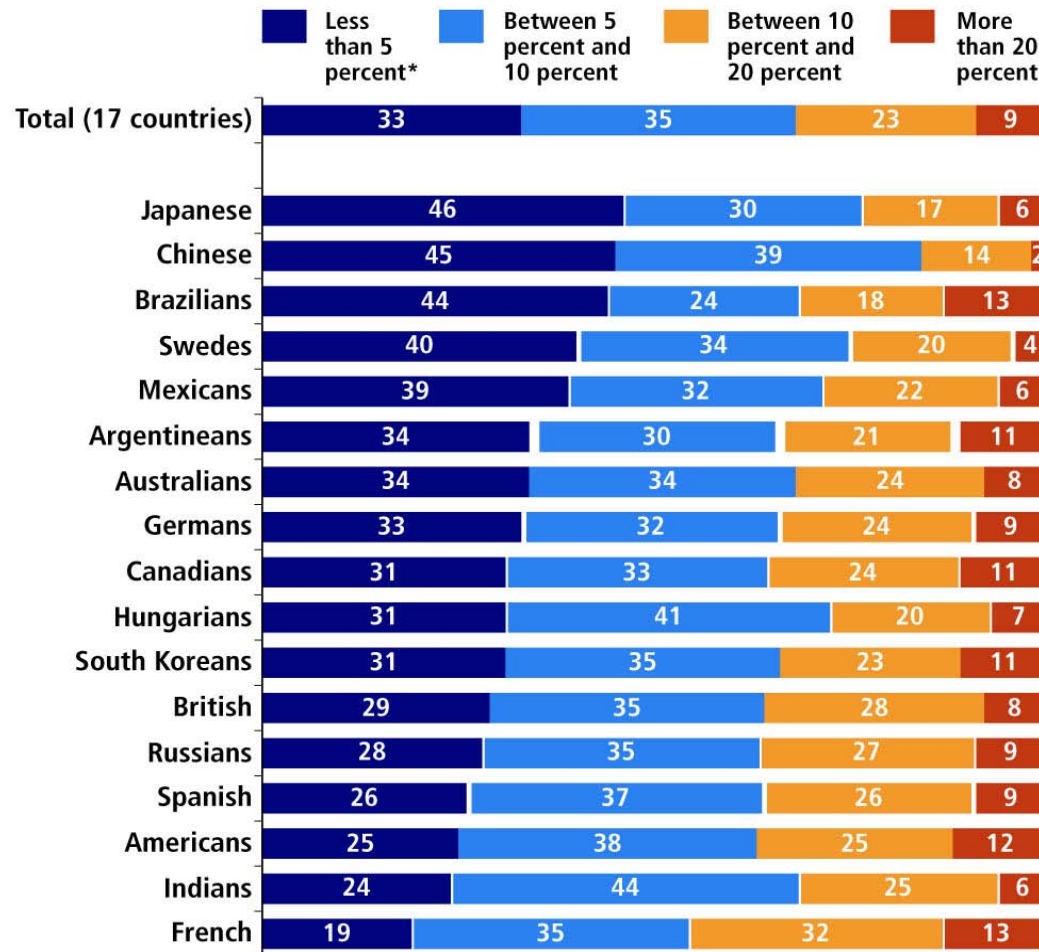
*Correct answer



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

Approximately How Much of the Water on Earth is Considered Freshwater?

Percentage of Consumers in Each Country, 2010



NGS10_23t_freshw

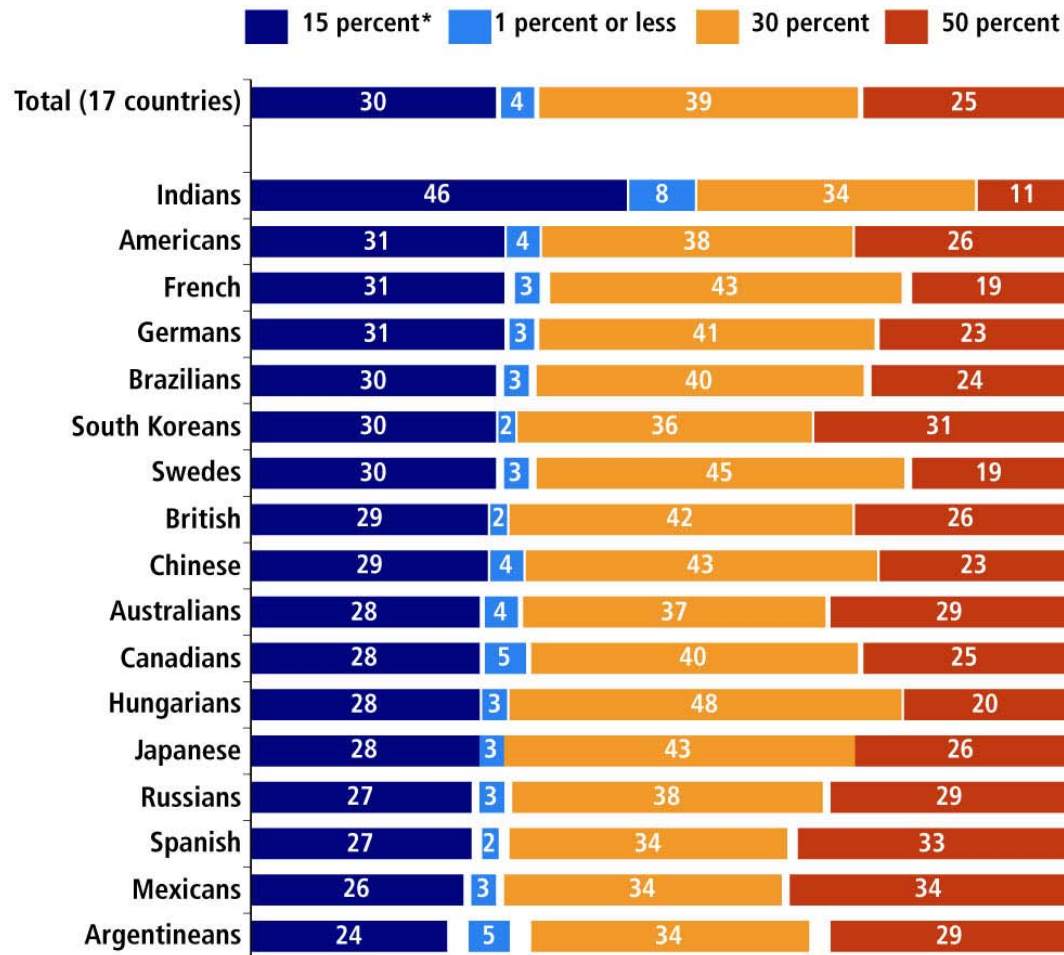
*Correct answer

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

In Conventional Gasoline-Powered Cars, Approximately How Much of the Energy in Gasoline is Used to Propel the Car?



Percentage of Consumers in Each Country, 2010



NGS10_24_gas

*Correct answer

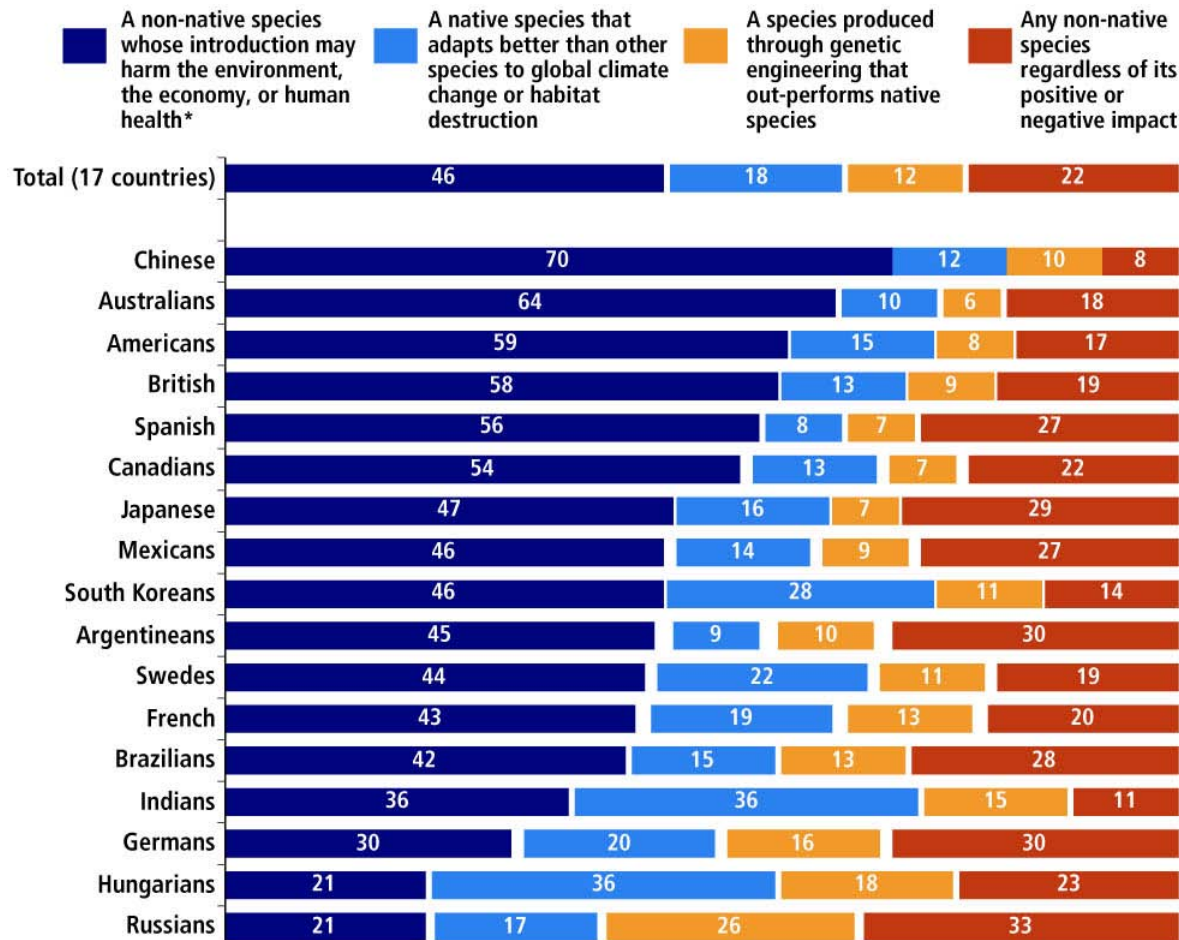


The white space in this chart represents "DK/NA "

Which One of the Following Is the Most Accurate Definition of the Term "Invasive Species?"



Percentage of Consumers in Each Country, 2010



NGS10_25_invasive

*Correct answer

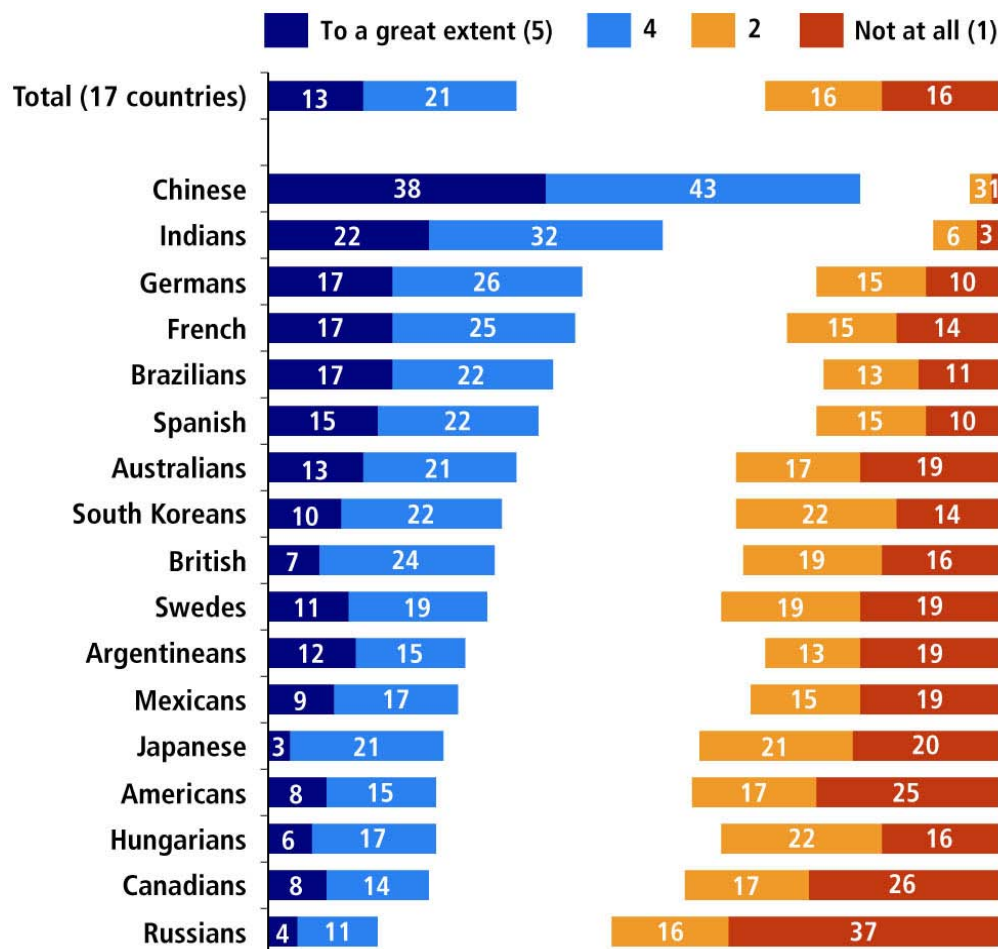


The white space in this chart represents "DK/NA "

Extent Consumers Followed the News about the UN Summit on Climate Change in Copenhagen



Percentage of Consumers in Each Country, 2010



NGS10_20_copenhagen



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