Greendex™

GREENDEX 2014:
Consumer Choice and the Environment –
A Worldwide Tracking Survey

INTRODUCING GREENDEX 2014: ENABLING BEHAVIOR CHANGE

A Research Project by National Geographic & GlobeScan

NATIONAL GEOGRAPHIC

GLOBESCAN

A PRESENTATION BY TERRY GARCIA & ERIC WHAN

WHAT IS THE GREENDEX?

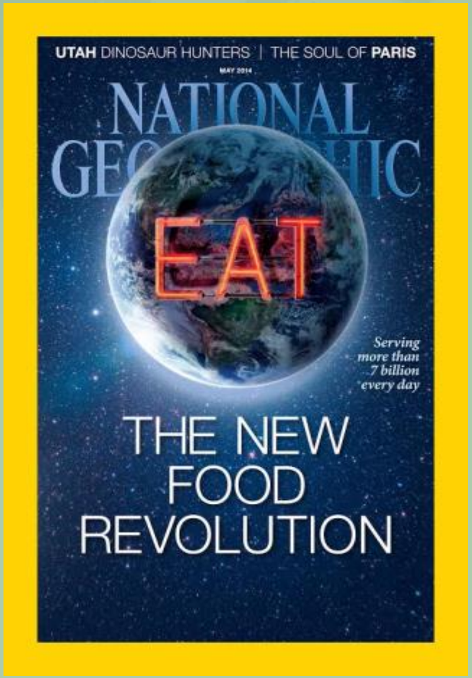

CONSUMER
GOODS


FOOD


TRANSPORTATION


HOUSING

FOCUS ON FOOD



THE NEW NUMBERS

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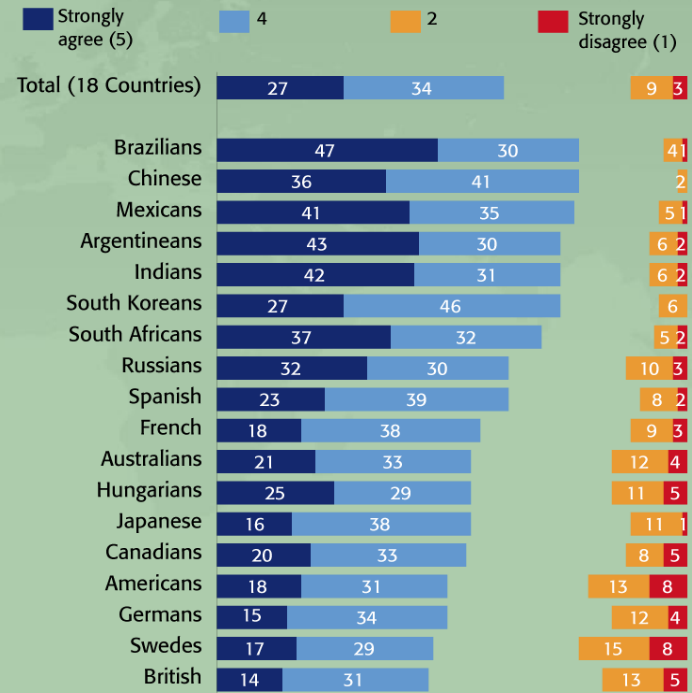
WIDESPREAD CONCERN:
I AM VERY CONCERNED ABOUT ENVIRONMENTAL PROBLEMS
PERCENTAGE OF CONSUMERS IN EACH COUNTRY, 2014



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."

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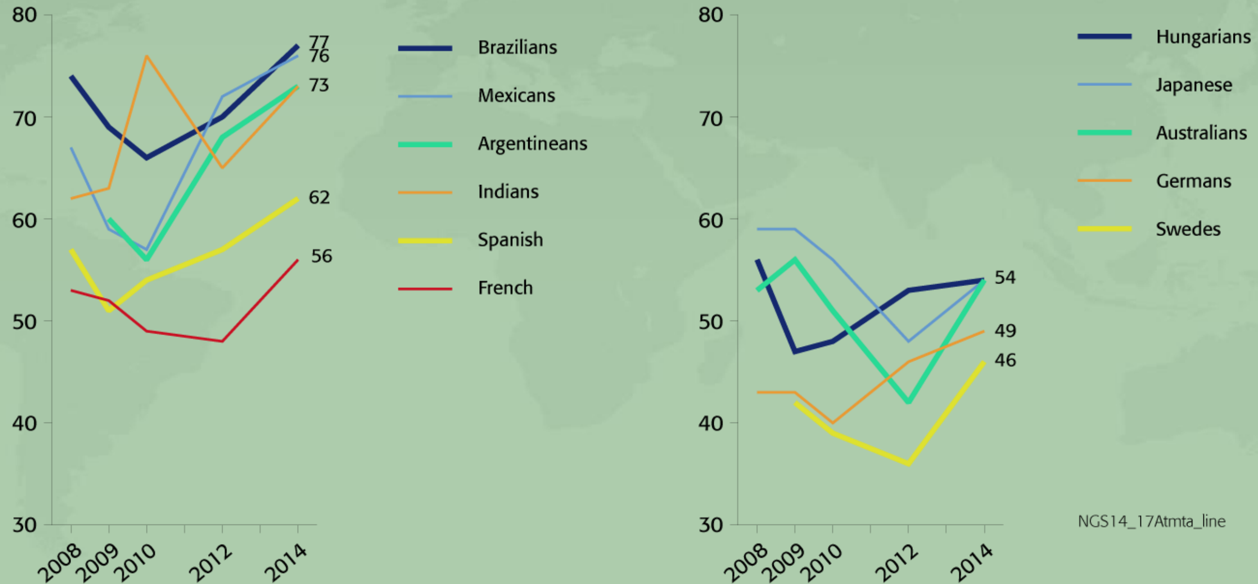
ANXIETY IS GROWING:
I AM VERY CONCERNED ABOUT ENVIRONMENTAL PROBLEMS

"AGREE (4+5)," PERCENTAGE OF CONSUMERS IN EACH COUNTRY, INCREASES: 2008–2014



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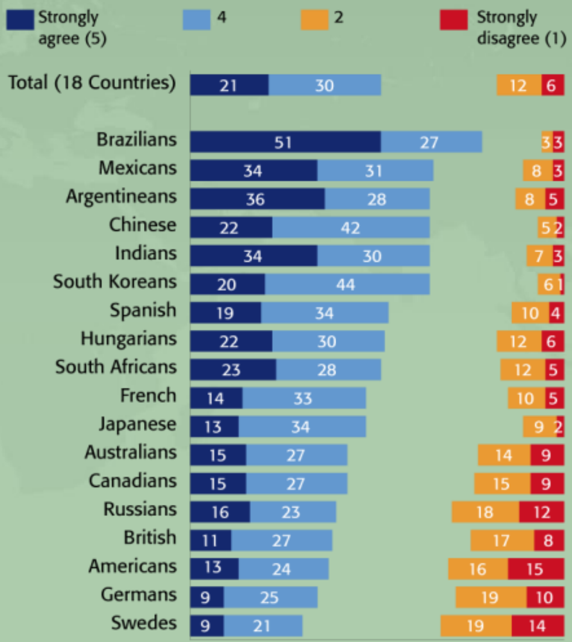
VULNERABILITY:
GLOBAL WARMING WILL WORSEN MY WAY OF LIFE WITHIN MY OWN LIFETIME

PERCENTAGE OF CONSUMERS IN EACH COUNTRY, 2014



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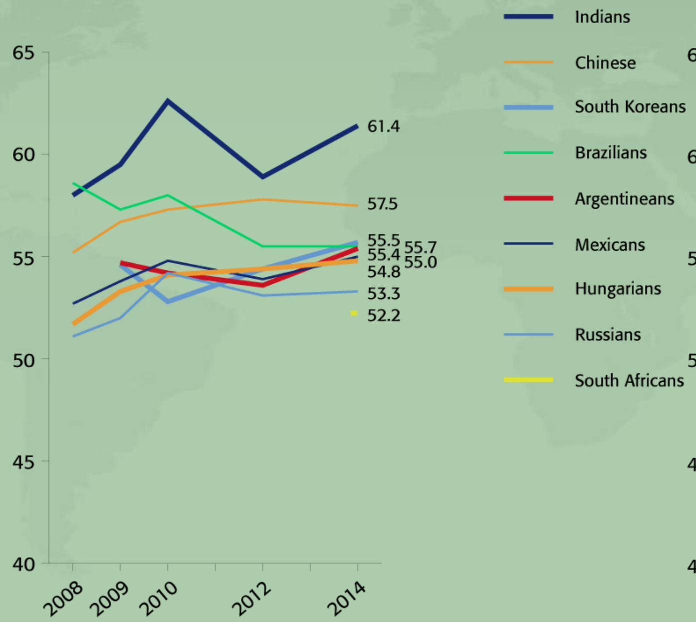
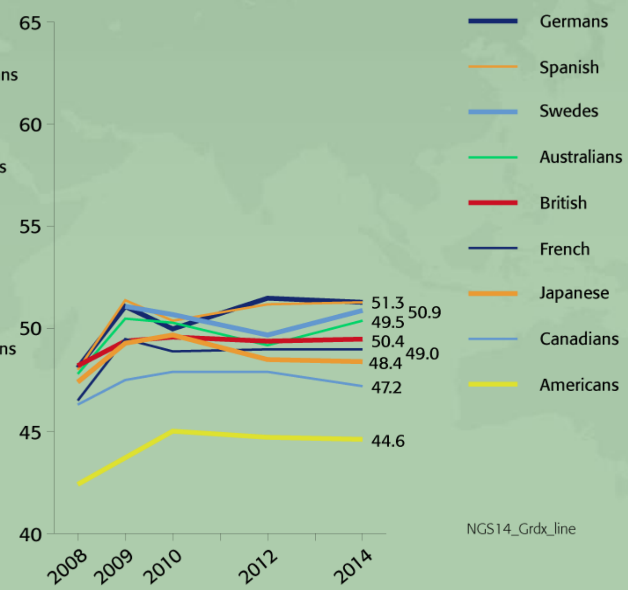
CONSUMER BEHAVIOR IS STUCK:

GREENDEX: OVERALL SCORES

TRENDS: 2008–2014





FOOD

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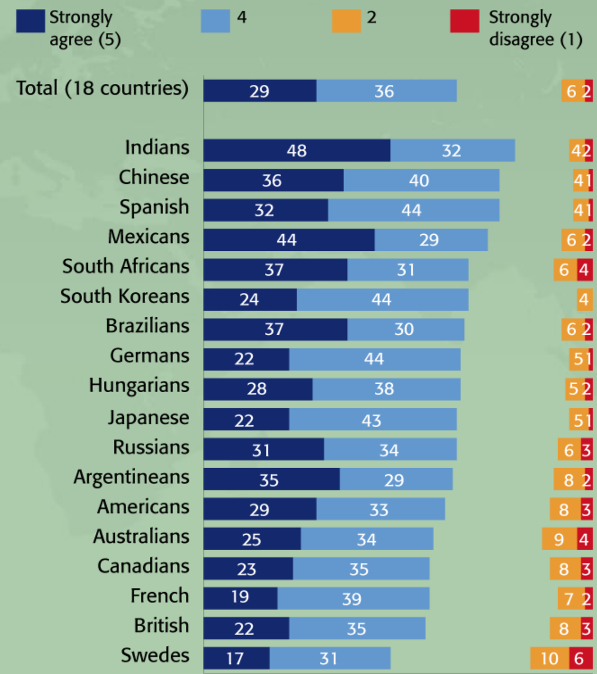
ATTACHED TO OUR FOODS:

FOOD IS AN ESSENTIAL PART OF MY CULTURE

PERCENTAGE OF CONSUMERS IN EACH COUNTRY, 2014



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" with the statement) and "DK/NA."

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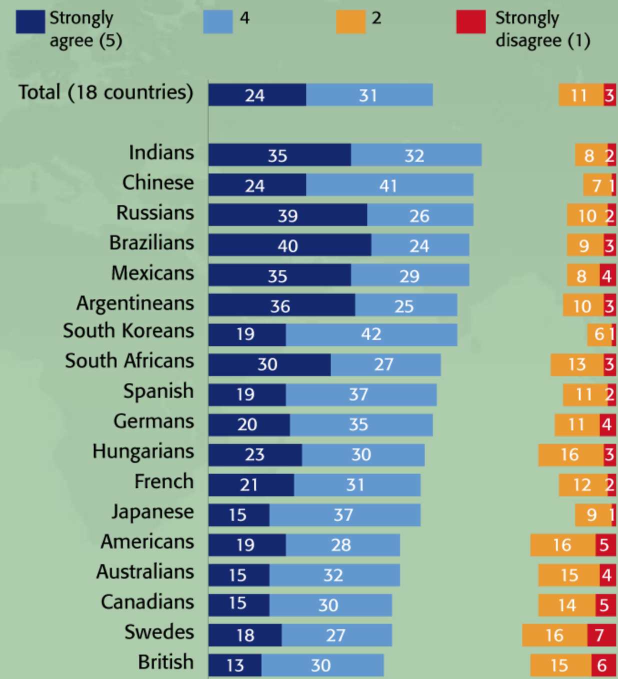
DEMAND FOR KNOWLEDGE:
IT IS VERY IMPORTANT TO KNOW HOW MY FOOD IS PRODUCED

PERCENTAGE OF CONSUMERS IN EACH COUNTRY, 2014

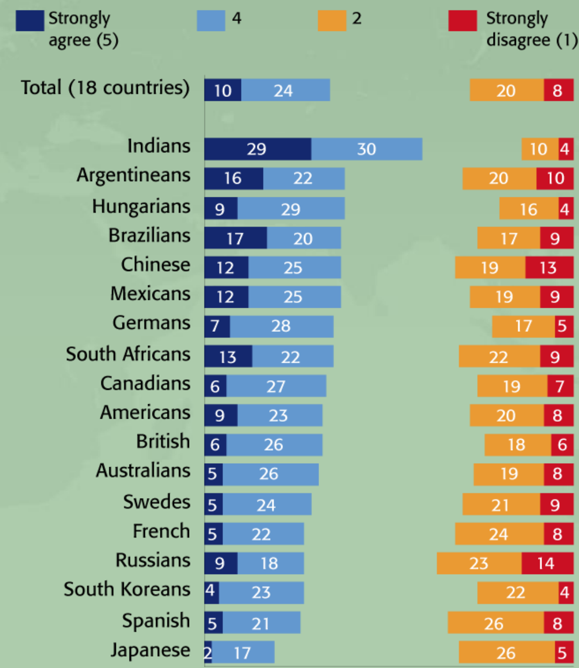


The white space in this chart represents "3" (on a scale of 1 to 5 where 1 means "Strongly disagree" and 5 means "Strongly agree" with the statement) and "DK/NA."

BUT, LACK OF TRANSPARENCY:

I FEEL WELL-INFORMED ABOUT THE QUALITY, SAFETY, AND ORIGIN OF FOOD I EAT

PERCENTAGE OF CONSUMERS IN EACH COUNTRY, 2014



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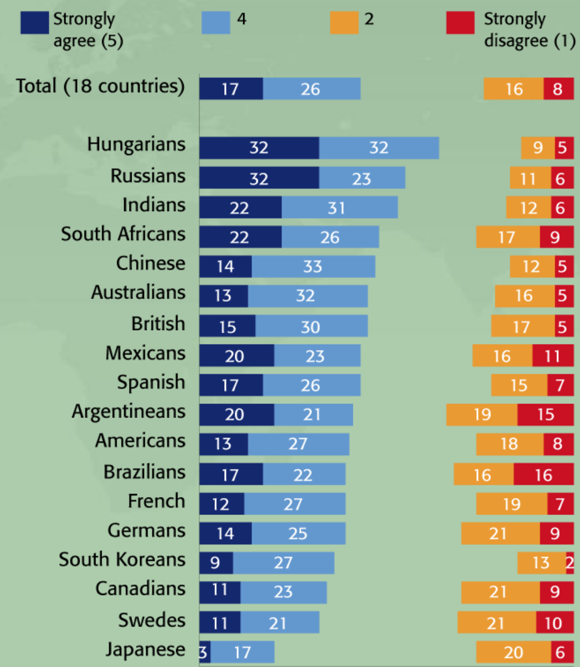
DISENFRANCHISED:
CONSUMERS HAVE LITTLE INFLUENCE OVER HOW FOOD IS PRODUCED

PERCENTAGE OF CONSUMERS IN EACH COUNTRY, 2014



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INFORMED CONSUMERS ARE...

- Empowered
- Connected
- Engaged
- Positive
- Willing to pay
  - Good for all stakeholders

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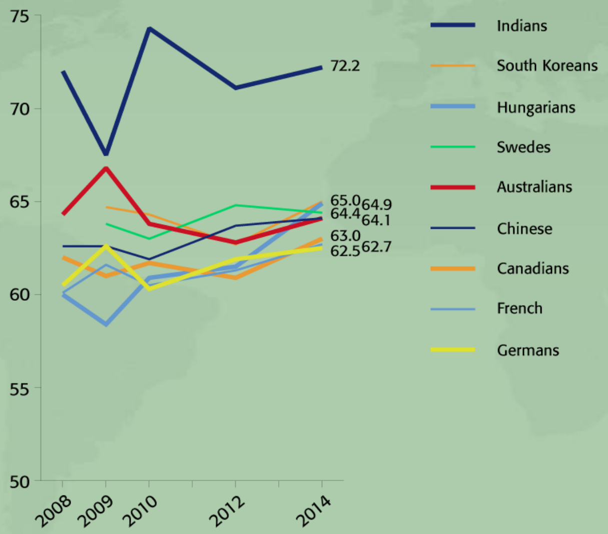
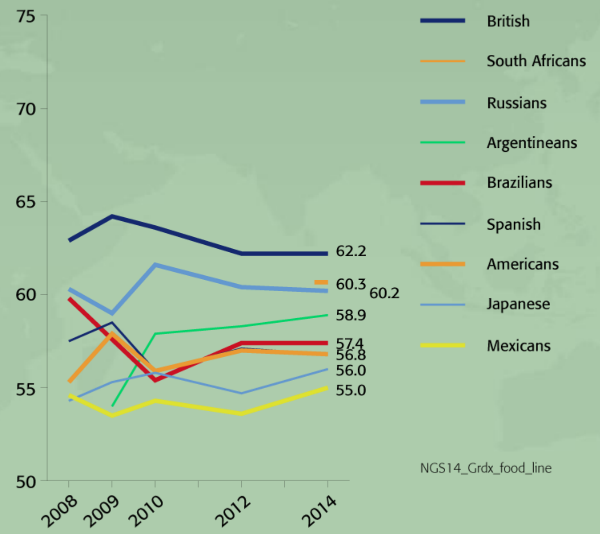
POSITIVE CHANGES

POSITIVE SIGNS OF CHANGE:

GREENDEX FOOD SCORES ARE UP IN MANY COUNTRIES

TRENDS: 2008–2014





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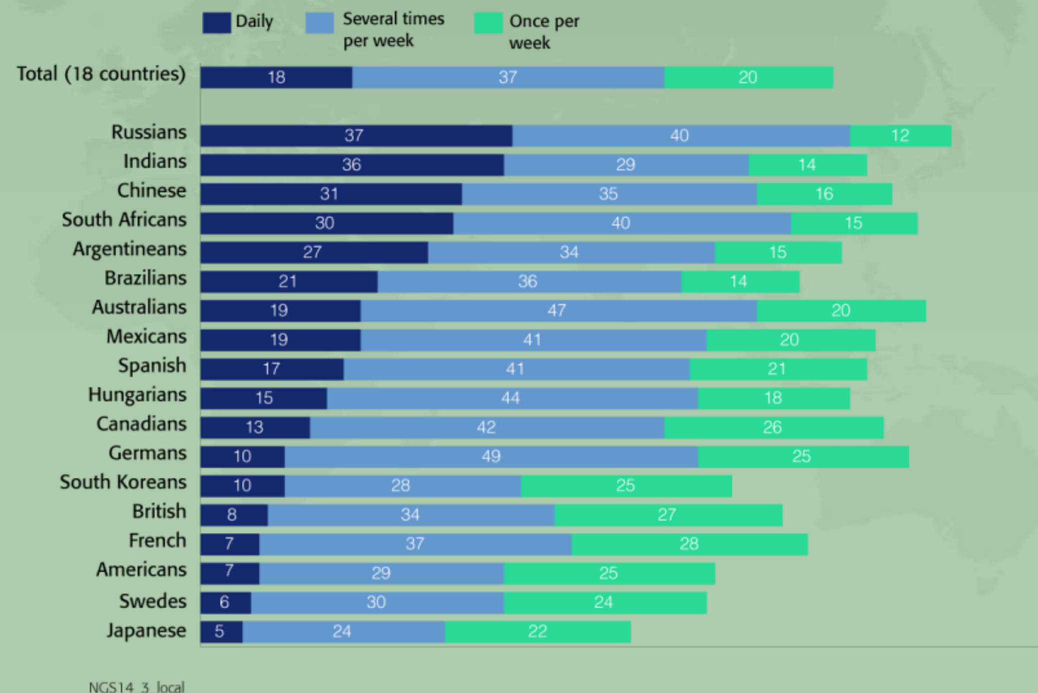
LOCAL:
FREQUENCY OF CONSUMING LOCALLY GROWN FOOD
PERCENTAGE OF CONSUMERS IN EACH COUNTRY, 2014

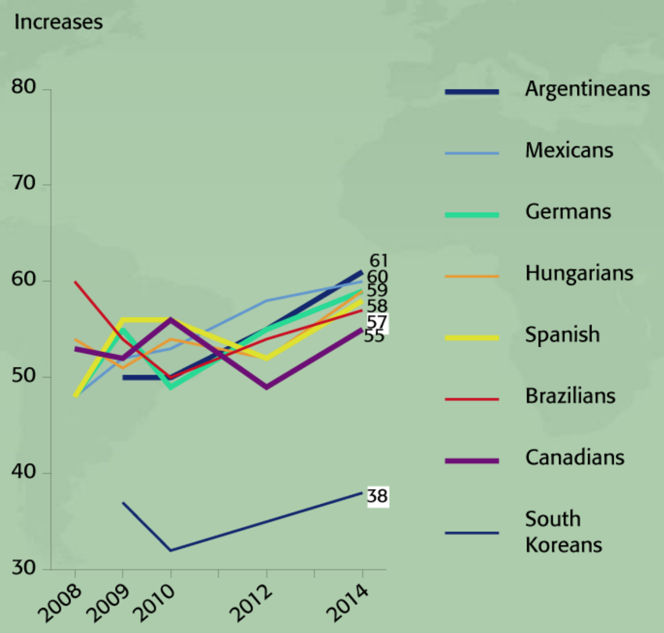


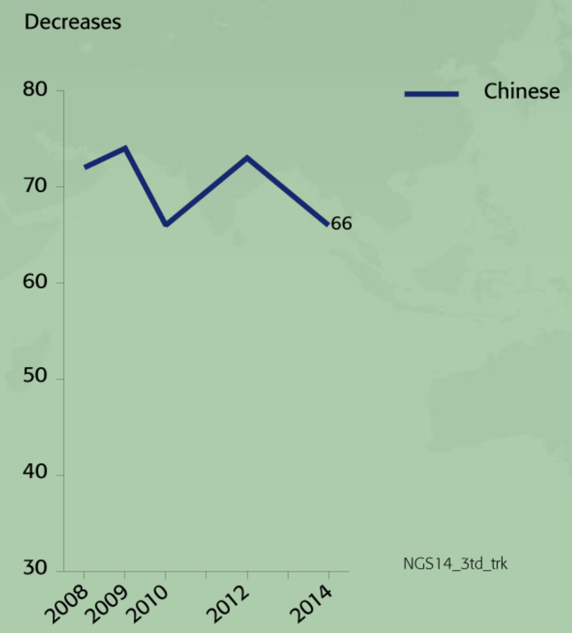
The white space in this chart represents "DK/NA."

LOCAL UP:

FREQUENCY OF CONSUMING LOCALLY GROWN FOOD

"DAILY" AND "SEVERAL TIMES A WEEK," PERCENTAGE OF CONSUMERS IN EACH COUNTRY, RECENT TRENDS: 2008–2014





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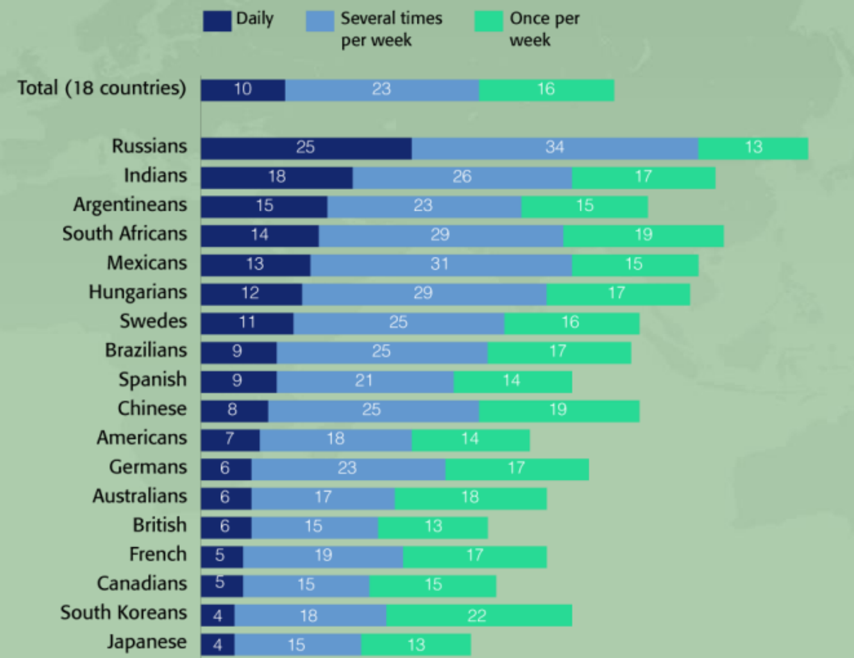
ORGANIC AND NATURAL:
FREQUENCY OF CONSUMING ORGANIC OR NATURAL FOODS
PERCENTAGE OF CONSUMERS IN EACH COUNTRY, 2014



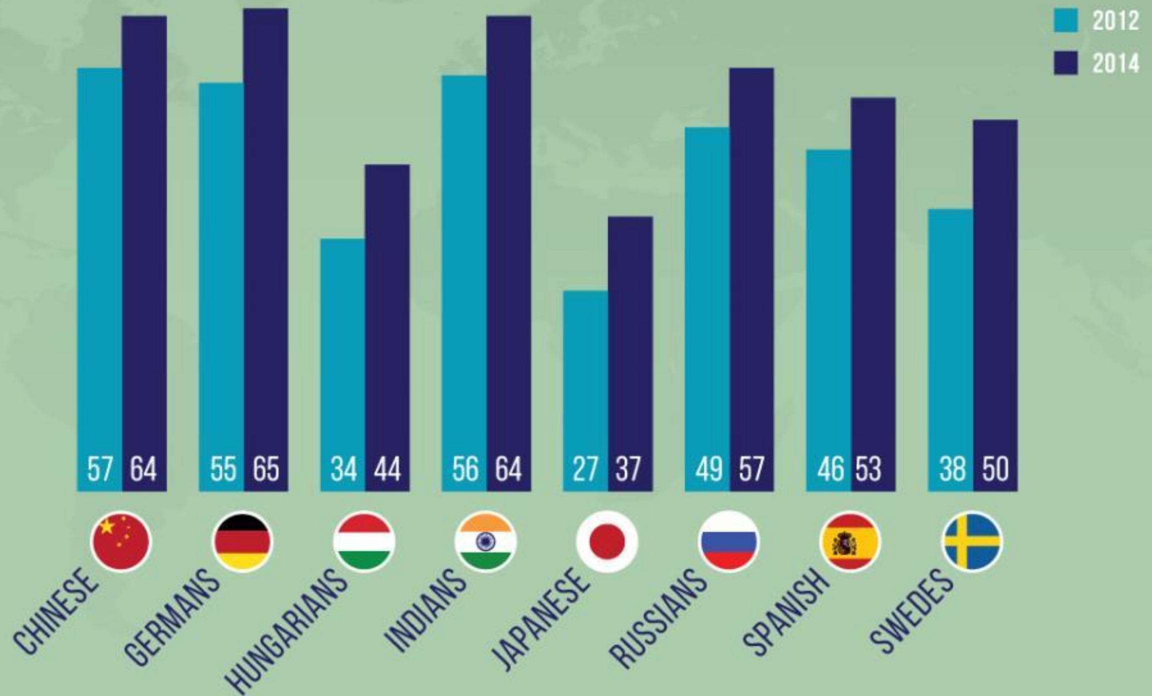
NGS14_3_organic

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

GROWING MARKET:

IT IS WORTH PAYING MORE FOR LOCALLY OR ORGANICALLY PRODUCED FOODS

"AGREE" (4+5), PERCENTAGE OF CONSUMERS IN EACH COUNTRY, TRENDS: 2012–2014

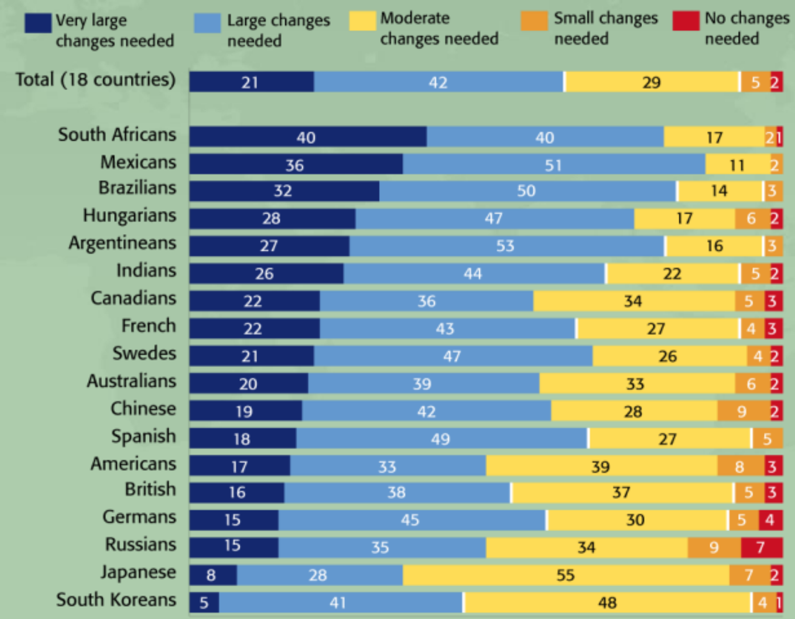


UNLOCKING FURTHER CHANGE

RECOGNIZED PROBLEM:

NEED TO CHANGE PRODUCTION/CONSUMPTION OF FOOD TO FEED GROWING GLOBAL POPULATION

PERCENTAGE OF CONSUMERS IN EACH COUNTRY, 2014



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

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LESS BAD, MORE GOOD:

CURRENT CONSUMPTION VS FUTURE INTENTIONS AFTER LEARNING OF ENVIRONMENTAL IMPACT

"DAILY" CONSUMPTION AND "SEVERAL TIMES PER WEEK," TOTAL CONSUMERS, 2014

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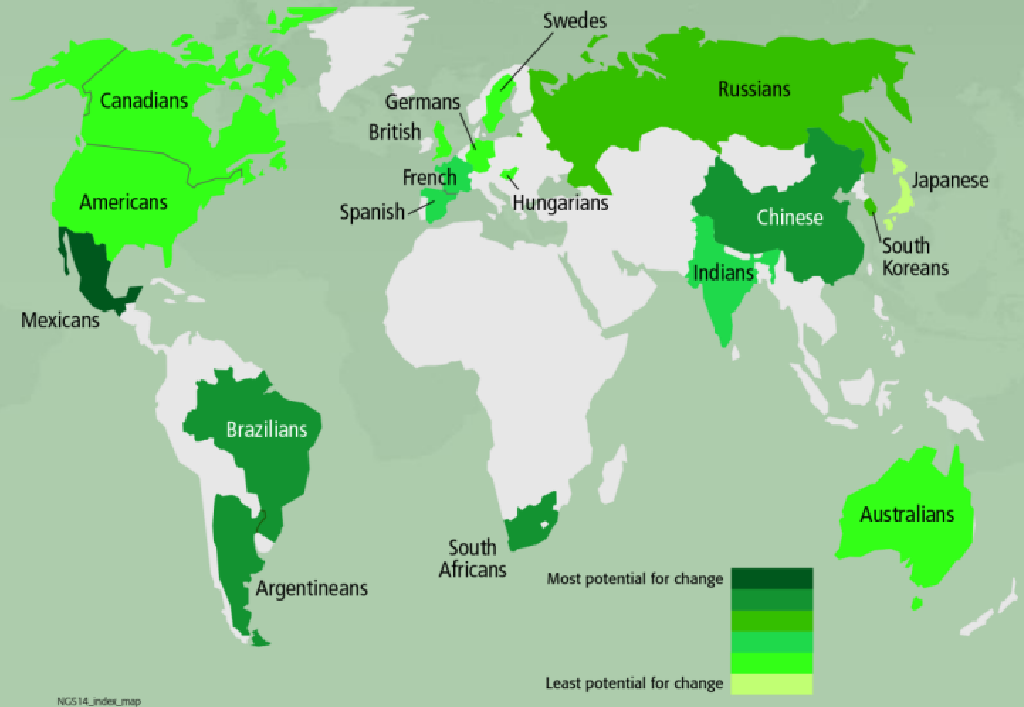
MAPPING POTENTIAL FOR CHANGE:

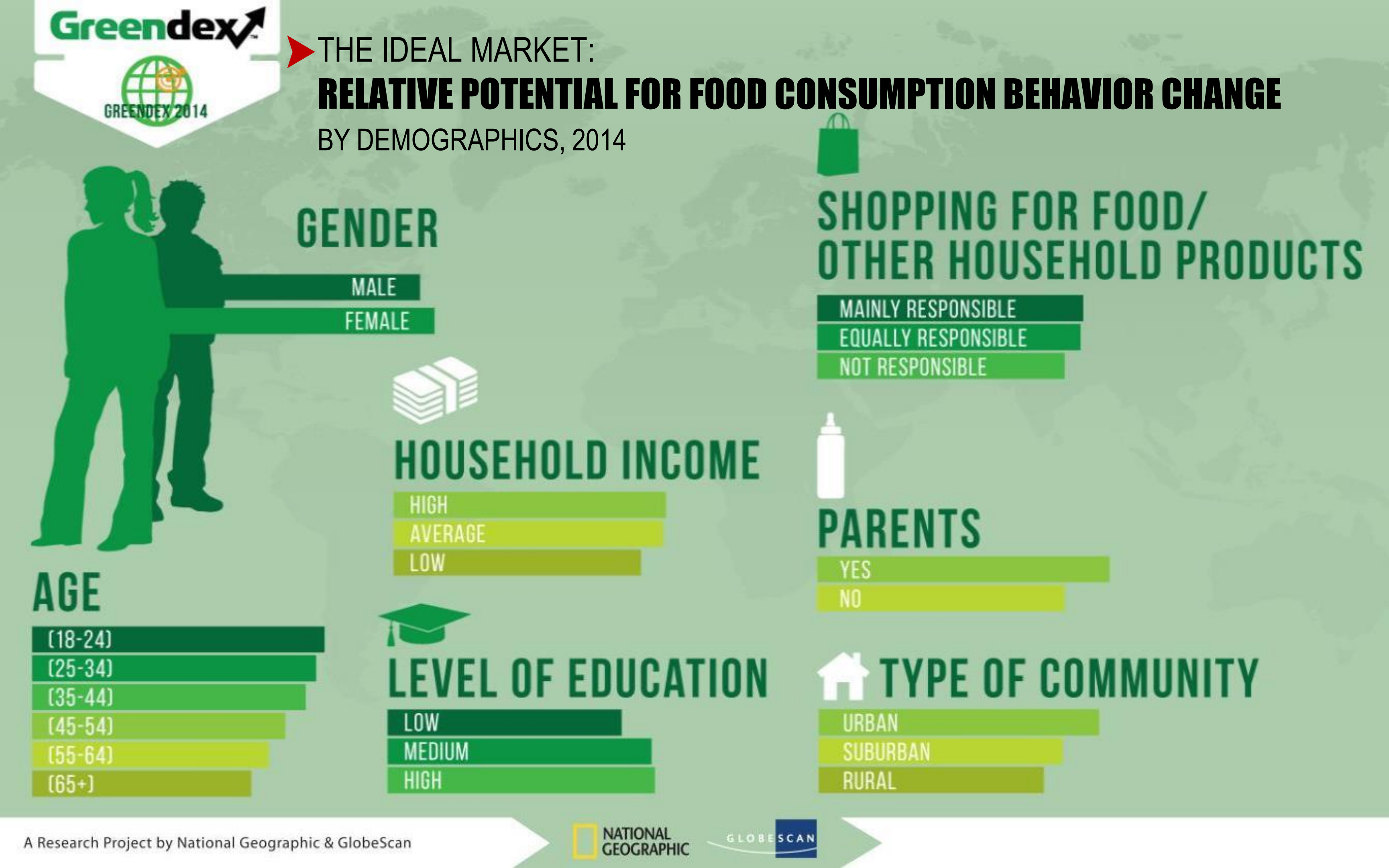
RELATIVE POTENTIAL FOR FOOD CONSUMPTION BEHAVIOR CHANGE IS GREATEST IN LARGE GROWING MARKETS

BY COUNTRY, 2014

1.8 billion people in top five countries



NATIONAL GEOGRAPHIC GLOBESCAN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THE IDEAL MARKET:
RELATIVE POTENTIAL FOR FOOD CONSUMPTION BEHAVIOR CHANGE
BY DEMOGRAPHICS, 2014
GENDER
MALE
FEMALE
AGE
(18-24)
(25-34)
(35-44)
(45-54)
(55-64)
(65+)
HOUSEHOLD INCOME
HIGH
AVERAGE
LOW
LEVEL OF EDUCATION
LOW
MEDIUM
HIGH
SHOPPING FOR FOOD/ OTHER HOUSEHOLD PRODUCTS
MAINLY RESPONSIBLE
EQUALLY RESPONSIBLE
NOT RESPONSIBLE
PARENTS
YES
NO
TYPE OF COMMUNITY
URBAN
SUBURBAN
RURAL
A Research Project by National Geographic & GlobeScan
NATIONAL GEOGRAPHIC
GLOBESCAN

MOST POWERFUL LEVERS:

DRIVERS OF FOOD BEHAVIOR CHANGE – WHAT THE STATS SAY

1. Peer influence (inbound and outbound)

- Leverage consumers' trusted tribes and networks for positive feedback loops

2. Connections between humans and environment

- Create cognitive linkages

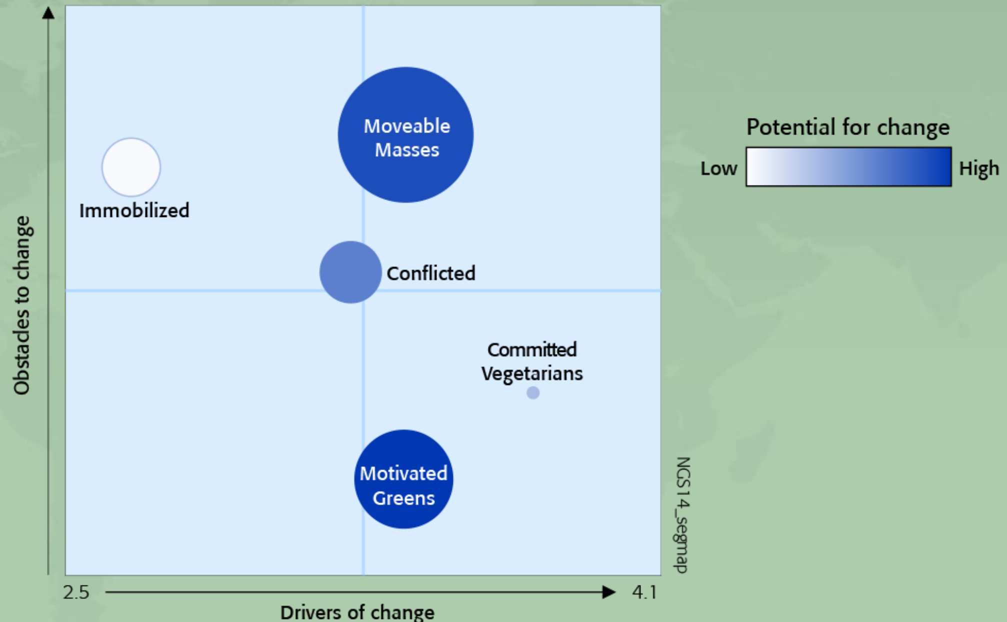
3. Concern about various environmental issues

- Establish the big picture

4. Other sustainable habits

- Take advantage of other conducive behavior patterns by inserting food into existing values equations

TARGETING THE RIGHT AUDIENCES:
FOOD BEHAVIOR CHANGE CONSUMER SEGMENTATION



Find out who and where they are, and how to motivate them at:
www.nationalgeographic.com/greendex

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MOVEABLE MASSES

HEAVY FOOD FOOTPRINT BUT OPEN TO CHANGE

GLOBAL SIZE OF SEGMENT 37%

THE LARGEST SEGMENT ACROSS THE 18 MARKETS SURVEYED, THE **MOVEABLE MASSES** SEGMENT CONSUMES A LOT OF FOOD WITH A HEAVY ENVIRONMENTAL FOOTPRINT, BUT IS OPEN TO CHANGING ITS BEHAVIOR AND HAS GOOD INTENTIONS TO START EATING MORE ENVIRONMENTALLY RESPONSIBLY.

DEMOGRAPHIC PROFILE:

(18-34) 37%
(35-54) 39%
(55+) 24%

MOST LIVE IN URBAN 62%
OR
SUBURBAN 25% AREAS

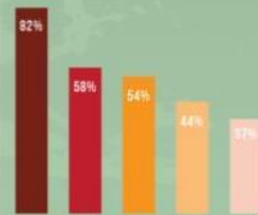
MOST HAVE AVERAGE (44%) OR HIGH (34%) INCOME

MOST HAVE MEDIUM (58%) OR HIGH (37%) LEVEL OF EDUCATION

MAJORITY (56%) HAVE NO CHILDREN (18 OR YOUNGER)

CHARACTERISTIC FOOD BEHAVIOR

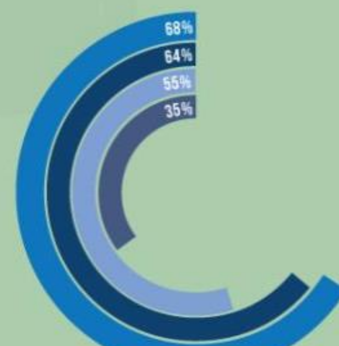
·GOOD INTENTIONS BUT NEED MORE INFORMATION·



- 82% THINK BUYING LOCALLY PRODUCED FOODS HELPS THE LOCAL ECONOMY
- 58% AGREE IT'S WORTH IT TO PAY MORE FOR LOCAL OR ORGANIC FOODS
- 54% UNDERSTAND WHAT "ORGANIC" MEANS WHEN REFERRING TO FOOD
- 44% THINK IT'S DIFFICULT TO TELL THE DIFFERENCE BETWEEN LOCALLY PRODUCED FOODS AND THOSE THAT COME FROM FAR AWAY
- 37% FEEL WELL INFORMED ABOUT THE QUALITY, SAFETY, AND ORIGIN OF THEIR FOOD

ATTITUDE TOWARDS ENVIRONMENTAL PROBLEMS

·ENVIRONMENTALLY CONSCIOUS·



- 68% ARE VERY CONCERNED ABOUT ENVIRONMENTAL PROBLEMS
- 64% AGREE THAT AS A SOCIETY, WE WILL NEED TO CONSUME A LOT LESS TO IMPROVE THE ENVIRONMENT FOR FUTURE GENERATIONS
- 55% SAY THEY ARE CURRENTLY TRYING VERY HARD TO REDUCE THEIR OWN NEGATIVE IMPACT ON THE ENVIRONMENT
- 35% FEEL GUILTY ABOUT THEIR IMPACT ON THE ENVIRONMENT

TAKEAWAYS

- People care
- They need help
- Brands can do that
- Connect them to their peers, their ecosystems and *you*

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Contact:
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