

NATIONAL GEOGRAPHIC'S 2009 GREENDEX™ SURVEY OF CONSUMERS IN 17 COUNTRIES  
FINDS INCREASE IN GREEN CONSUMER BEHAVIOR WORLDWIDE

*Consumers in India, Brazil Top Index; U.S. Consumers Rank Last*

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WASHINGTON—In their second annual survey to measure and monitor consumer behaviors that have an impact on the environment, the National Geographic Society and the international polling firm GlobeScan have found an increase in environmentally friendly consumer behavior in 13 of the 14 countries that were surveyed in both 2008 and 2009. Released today, “Greendex™ 2009: Consumer Choice and the Environment – A Worldwide Tracking Survey” is a comprehensive measure of consumer behavior in 65 areas relating to housing, transportation, food and consumer goods. Greendex 2009 ranks average consumers in 17 countries – up from 14 in 2008 – according to the environmental impact of their discretionary and nondiscretionary consumption patterns.

Like last year, the top-scoring consumers of 2009 are in the developing economies of India, Brazil and China; U.S. and Canadian consumers again score lowest. Consumers registering the best year-on-year improvement in environmentally sustainable consumer behavior are the Spanish, Germans, French and Australians, while Russians and Mexicans show the smallest increase. Brazilians are the only consumers measured in both 2008 and 2009 to show a decrease in their Greendex score.

Much of the increase in the overall 2009 Greendex scores was due to improvement within the category of housing, where the Greendex measures the energy and resources consumed by people’s homes. Changes within the categories of personal transportation, food and consumer goods were mixed, some up, some down. The results show that both cost considerations and environmental concerns were motivators in consumers adopting more environmentally sustainable behavior over the past year.

First conducted in 2008, the Greendex survey was expanded in 2009, with the addition of Argentina, South Korea and Sweden to Australia, Brazil, Canada, China, France, Germany, Great Britain, Hungary, India, Japan, Mexico, Russia, Spain and the United States. Seventeen thousand consumers were polled online (1,000 in each country), answering questions that measured their behavior in the areas of housing, transportation, food and consumption of goods. Each respondent earned a score reflecting the environmental impact of his or her consumption patterns within each of these four categories, and four corresponding “sub-indices” were created. Consumers were then assigned an overall Greendex score (a measure of the relative environmental sustainability of their consumption patterns) out of 100, based on their performance within the four sub-indices. By comparing this year’s scores with the

previous year, changes in environmentally sustainable consumption at both the global level and within countries can be monitored.

Consumption as measured by the Greendex is determined both by the choices consumers actively make – such as repairing rather than replacing items, using cold water to wash laundry, choosing green products rather than environmentally unfriendly ones – and choices that are controlled more by their circumstances – such as the climate they live in or the availability of green products or public transport. The initiative considers both of these types of factors, with 60 percent of the 65-variable index based on choice or discretionary behavior.

## Findings

Consumers in all 14 countries surveyed in both 2008 and 2009 show an increase in their Greendex scores this year, except Brazil, whose slight decrease dropped them from first to second place.

<b>Greendex Overall Scores</b>					
<b><u>Consumers</u></b>	<b><u>2009</u></b>	<b><u>2008</u></b>	<b><u>Consumers</u></b>	<b><u>2009</u></b>	<b><u>2008</u></b>
Indians (1)	<b>59.5</b>	58.0	Germans (10)	<b>51.1</b>	48.1
Brazilians (2)	<b>57.3</b>	58.6	Swedes (10)	<b>51.1</b>	NA
Chinese (3)	<b>56.7</b>	55.2	Australians (12)	<b>50.5</b>	47.8
Argentineans (4)	<b>54.7</b>	NA	French (13)	<b>49.5</b>	46.5
South Koreans (4)	<b>54.6</b>	NA	British (13)	<b>49.4</b>	48.2
Mexicans (6)	<b>53.8</b>	52.7	Japanese (13)	<b>49.3</b>	47.4
Hungarians (7)	<b>53.3</b>	51.7	Canadians (16)	<b>47.5</b>	46.3
Russians (8)	<b>52.0</b>	51.1	Americans (17)	<b>43.7</b>	42.4
Spanish (9)	<b>51.4</b>	48.0			

Not surprisingly, respondents in most countries named the economy as their No. 1 national issue, much more so than in 2008. But the results indicate that economic troubles may have worked to the environment's advantage in a number of instances: Among those who reported that they reduced energy consumption at home over the past year, some 80 percent say that cost was one of the top two reasons they did so. And of those who say they reduced their consumption of fuel for motorized vehicles in the past year, nearly three-quarters cite cost as one of their top two reasons. Furthermore, majorities in four countries – Argentines, Mexicans, South Koreans and Chinese – said that high fuel prices motivated them to change their transportation habits permanently due to fuel prices.

“Interestingly, the economic upheaval appears to have had a silver lining for the environment,” said Terry Garcia, National Geographic’s executive vice president, Mission Programs. “But will positive behavior changes survive when an economic recovery starts? We hope the green behaviors that consumers are adopting now to cut costs will become part of their permanent lifestyles and that environmental concerns will become increasingly important for consumers around the globe.”

While, overall, consumers felt the economy was the most important issue facing their countries, consumers in many countries registered strong concern about the environment. Many said this concern was one of the top two reasons for recent behavior changes. Fifty-five percent of consumers across the 17 countries agreed they are “very concerned about environmental problems”; only 14 percent disagreed.

Chinese, South Korean and Brazilian consumers were the most likely to register concern about the environment. Air pollution, climate change/global warming and water pollution ranked fourth through sixth on a list of 12 global concerns, just behind the economy, fuel costs and poverty. Roughly two-thirds of consumers said they were concerned about each of these environmental issues.

Six in 10 consumers across the 17 surveyed countries agree that people need to consume less in order to improve the environment for future generations (only 12 percent disagreed), showing that consumers recognize the connection between their actions and the environment.

When it comes to overall Greendex scores, consumers in the top-scoring developing countries generally showed smaller increases this year than those in developed countries, due in part to their adopting more consumptive behavior as they become more economically successful and aspire to higher material standards of living. However, in spite of fears their Greendex scores could drop with economic development, most of these countries have improved their scores.

“Both the powerful inertia of energy-intensive countries and the growing consumerism in large, rapidly developing economies present a challenge to governments and industry. It is critical for both to create more sustainable choices for consumers across the full spectrum of consuming behavior,” said Lloyd Hetherington, CEO of GlobeScan.

## 2009 Trends: Housing

Consumers in all surveyed countries registered significant improvements in their 2009 housing scores, with Brazilians, Indians and Mexicans again topping this sub-index. Countries in which the average consumer's housing score improved most notably were India, China, Mexico, Spain and France. U.S. consumers, who earned the lowest housing scores, also improved in 2009, but by a smaller margin than all other consumers surveyed. People in developing countries score higher in this area in part because they generally have smaller residences and use less energy in their homes.

This year's survey found that since 2008, consumers across many countries are now more likely to engage in energy-saving activities, such as adjusting thermostat settings, minimizing their use of fresh water, and washing laundry in cold water to save energy. This is due to both cost and environmental considerations.

Brazilians continue to be much more likely than other consumers to purchase renewable or "green" electricity, and this year consumers in two other emerging economies, India and Mexico, have shown increases in "green" electricity purchases. Argentineans, Russians and Mexicans are the most likely to report installing energy-saving appliances in the past year. Canadians, Russians and Argentineans are most likely to have sealed drafts in their homes, installed thermal windows, or installed or upgraded insulation this past year.

## Transportation

Transportation is an area where many consumers can choose behavior that makes a vital difference in protecting the environment. Overall, scores were flat or down in this sub-index from last year. Consumers who showed the biggest drop in transportation scores live in India, Brazil, China, Mexico, Russia, Canada and the United States. Despite this drop, Chinese consumers scored highest overall in the transportation sub-index, followed by Argentineans and Indians. Transportation-related behavior is generally more environmentally friendly in developing countries where consumers tend more than others to walk, cycle or use public transportation, or choose to live close to their most common destination. But transportation scores fell most sharply in developing countries in 2009, perhaps as a result of peak prosperity in early to mid-2008.

Many consumers also report decreased fuel consumption over the past year and say cost is the main reason. Among motorized vehicle drivers only, between three and eight in 10 across the countries surveyed agree that increased fuel prices caused at least a temporary change in their transportation habits. Among U.S. drivers who say they changed their transportation habits because of higher fuel prices, 85 percent say they have reduced how much they drive. Among Chinese consumers who have changed their transportation habits due to fuel prices, 85 percent have increased the amount they bike or walk. Sixty-four percent of Brazilians whose transportation habits have changed say they have increased the amount they carpool.

Asked why they don't take public transportation more often, consumers cite availability and efficiency as issues. Additionally, Indian and Russian consumers claim public transportation is too crowded, Japanese attribute low usage of public transit to the high cost and Mexican consumers point to safety considerations.

## Food

Indians, Australians and South Koreans top this index, though Indians' score dropped 4.5 points since last year. Countries in which the average consumer's food score improved the most were Germany, Australia and the United States; those whose scores dropped the most were in India, Brazil and Hungary.

Since 2008, consumers in seven surveyed countries, the United States, Australia, Great Britain, France, Japan, Mexico and Russia, decreased their consumption of bottled water – an encouraging sign that messaging around this environmental initiative is being heard. Swedes, at just 6 percent, are the least likely to drink bottled water every day. Germans remain the most likely to drink bottled water – 68 percent do so daily.

Indian consumers ate fewer local foods and fruits and vegetables in 2009 and increased their consumption of imported foods and bottled water. However, their Greendex score is boosted by the fact they eat the least amount of meat and seafood, while consumers in other countries tend to consume both meat and seafood at least once a week.

Americans, British, Germans and Spanish are more likely now than a year ago to consume locally grown foods several times a week or more. Brazilians and Indians are less so.

Argentineans are the top beef eaters, with 66 percent saying they eat it several times a week compared with 8 percent of South Koreans or Hungarians. Mexicans have increased their beef consumption this year; 48 percent eat it several times a week compared with 39 percent last year. Ninety percent of Japanese eat fish or seafood at least weekly; just 34 percent of Indians and 25 percent of Hungarians do.

## Goods

Topping this sub-index this year are Indians, South Koreans and Chinese. The biggest year-on-year improvement was recorded by Indians, Russians and French, while Brazilians recorded the biggest drop.

Consumers in South Korea, Australia, Canada, the United States and many of the European countries surveyed report a decrease in consumption of everyday household goods over the past year. While seven in 10 of those who have reduced consumption of household goods cite cost as one of their main reasons, one-third say environmental concerns were their primary motivating factor.

The frequency of recycling has substantially increased in nine of the 14 tracking countries this year. Consumers in developed countries such as Australia, Canada, France, Germany and Great Britain tend to recycle most often. South Koreans and Russians are least likely to recycle.

Since 2008, the number of consumers who prefer to fix broken items rather than buy new ones has risen in six of the countries, including Canada and the United States and in emerging economies such as Brazil, China and Mexico. There has been a rise in the number of consumers who prefer to buy second-hand items. This increase is seen in nearly half the countries surveyed.

Avoidance of environmentally unfriendly products is up among consumers in six countries, with Indians, Brazilians and Mexicans showing the biggest year-on-year improvement in this area. These consumers, along with Chinese, also are the most likely to say they buy environmentally friendly products all the time. Americans, Hungarians, British, Spanish and Japanese are least likely to do so.

The French remain the most likely to use their own shopping bags, with this behavior up among consumers in 12 of 14 countries where this question was asked last year. Nearly four times as many Chinese reported using their own shopping bags this year as last, though this is probably due in large part to the fact that free plastic shopping bags are no longer available in Chinese stores. Russians and Americans report the lowest use of their own bags, at one-third each.

Swedes are least likely to prefer disposable household products over reusable items, while Indians, Argentinians, Mexicans and Brazilians are most likely to prefer disposable products.

### **Discover Your Greendex Score**

Individuals around the world can find out where they rank on the Greendex scale by visiting [nationalgeographic.com/greendex](http://nationalgeographic.com/greendex) and taking an abbreviated survey. They can also examine the Greendex survey results by country, measure their knowledge of some basic green issues against what others around the world know and get tips on living a more environmentally friendly lifestyle.

### **Market Basket**

Providing context for the Greendex results, a “Market Basket” for each country was assembled using a set of independently collected macroeconomic indicators, gathered by the Economist Intelligence Unit, that mirror, in part, the consumer behavior measured by the Greendex survey. The purpose of the Market Basket is to provide an external estimate of the results of changes in consumer behavior over time. The Greendex, for example, measures things consumers are doing to save energy in a country; the Market Basket measures whether total energy consumption in the country is actually going up or down. The Market Basket is also a framework for comparing the relative environmental impact of each country’s size and growth rate, over time.

See [http://www.nationalgeographic.com/greendex/assets/Market\\_Basket\\_Report\\_May09.pdf](http://www.nationalgeographic.com/greendex/assets/Market_Basket_Report_May09.pdf) for more details.

### About National Geographic

The National Geographic Society is one of the world’s largest nonprofit scientific and educational organizations. Founded in 1888 to “increase and diffuse geographic knowledge,” the Society works to inspire people to care about the planet. It reaches more than 360 million people worldwide each month through its official journal, National Geographic, and other magazines; National Geographic Channel; television documentaries; music; radio; films; books; DVDs; maps; exhibits; live events; school publishing programs; interactive media; and merchandise. National Geographic has funded more than 9,000 scientific research, conservation and exploration projects and supports an education program combating geographic illiteracy. For more information, visit [www.nationalgeographic.com](http://www.nationalgeographic.com).

### About GlobeScan

GlobeScan Incorporated ([www.GlobeScan.com](http://www.GlobeScan.com)) is a global public opinion and stakeholder research consultancy with offices in London, San Francisco, Toronto and Washington. GlobeScan conducts custom research and annual tracking studies on global issues. With a research network spanning 75+ countries, GlobeScan works with global companies, multilateral agencies, national governments and non-government organizations to deliver research-based insights for successful strategies.

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