

Synovate Survey Reveals Latest Green Habits And Consumption Across The World

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A new study from top four global custom market research firm Synovate on 'green' behaviour shows that women and older consumers across the world are generally more environmentally conscious overall, and that how people feel about the future and their family, and which country they live in, are less important factors in determining their green habits.

Synovate interviewed approximately 22,000 people across 28 countries as part of its ongoing Global Trends study: Argentina, Belgium, Brazil, Canada, Chile, China, Colombia, Denmark, Egypt, France, Germany, Hong Kong, Indonesia, Italy, India, Japan, Mexico, Netherlands, Norway, Russia, Serbia, South Africa, South Korea, Spain, Sweden, UAE, UK and USA. Respondents were asked about their recycling habits, purchase of ecological products and purchase of organic foods, as well as their general beliefs on life, in order to also determine if there was a correlation between those beliefs and green behaviour.

Women around the world ranked higher than men across all green behaviour categories while people aged 56-65 years old ranked highest in recycling and buying ecological products, and those 46-55 years old led in organic food purchase. Those in the 16-25 age group scored lowest across all categories.

"We asked respondents to show agreement and disagreement with several topics related with basic needs and attitudes that anyone in the world would have in different life situations. We used these results to conduct a global segmentation framed under our Censydiam research model," said Peter Huijboom, Synovate CEO for Geographies.

"Those who showed the highest levels of agreement with statements related to concern about the future or the importance of family were actually the ones purchasing fewer ecological and organic products, and recycling less. This suggests green behaviour in many people may be borne from other convictions that aren't related to the health and well-being of family and the planet.

"For example, our segmentation demonstrates that those who recycle more are also more group-oriented while people who consume more organic products are more likely to be more individualistic," Huijboom said.

Recycling and buying green

Recycling waste at home was more popular with women, with 54% overall saying they had done this in the past week compared to 48% of men.

Respondents in Canada (88%), South Korea (86%) and Spain (84%) were most likely to have recycled waste at home during the past week, closely followed by those in Belgium (82%), Italy and the UK (81% each). Those least likely to have recycled at home were those in Indonesia, Russia and Egypt, where less than 15% of respondents said they had recycled in the last week.

"For the past few years city governments around Canada have made a huge push on recycling," said Rob Myers, managing director for Synovate in Canada. "Homes in all major cities are given a blue bin for recycling material, a green bin for biodegradable items such as food, and a black bin for items that don't fit into the first two categories. Effectively the job of sorting garbage has moved from the dump to the household and Canadians have been trained to recycle."

"Technologies for recycling waste were well developed and promoted by the government in the former USSR," said Elena Koneva, managing director for Synovate in Russia.

"Unfortunately most of that has been lost over the past ten years and, at the same time, consumption has grown strongly. Now we see some efforts to turn Russians back towards green living, but it's mostly from commercial companies that promote multi-use bags, try to reduce use of plastic bags, etc. Of course, that's not enough - we need to do a lot more to change people's mentality to cultivate more green habits in Russia. It's extremely important that every single individual understand the importance of it so that we don't turn the earth into a wasteland."

When it came to purchasing ecological products, Denmark and Sweden led the pack (59% and 52% respectively), while Serbia (8%) and China (9%) were lowest.

"Green habits and consumption is generally high on the priority list of Scandinavian consumers," said Ulf Andersen, CEO for Synovate Scandinavia.

"There is relatively easy access to a range of eco-friendly products in most major grocery stores, and Scandinavian consumers are increasingly conscious of how products are produced and what additives might be in them. The Scandinavian "outdoor" way of life and focus on local produce also increases consumers' desire for eco-friendly products

and behavior."

Denmark again led all the countries in organic food purchase (69%), while the next highest respondents were UAE, Mexico and Germany. Lowest purchasers of organic food were Indonesia (3%) and Japan (10%).

Robby Sutsayo, managing director for Synovate in Indonesia, said: "Indonesians are dealing with other huge issues right now, unfortunately. The impact of natural disasters is diverting people's attention from helping to improve ecology and the environment. Another disaster that has their attention is corruption by tax officials. Once these priorities are dealt with, there will likely be a little more attention to going green."

"A focus on organic food is going to take a long time to catch on among Japanese," said Rika Fujiki, managing director for Synovate Japan. "In 2008, there were some food security cases here, such as scams disguising food origin and food poisoning by imported processed food. People's understanding and attention to food security grew stronger, and organic products and natural food were in the spotlight. However, organic products are still expensive in Japan and accessibility is low. Price and convenience beat anxiety. In addition, the economy is not much improved after a prolonged recession. People would like to be green, but not with the extra cost."

Interestingly, the three green habits studied did not directly correlate with each other - meaning, if someone did one habit, it did not automatically mean they did the others. As shown in the chart below, mainly very different countries led for each green behaviour.

"Correlation of green habits likely has a lot to do with availability," said Huijboom. "For example, Germany is quite good at buying organic but could do better at recycling. That's because they don't have a good system for collecting recyclables, which helps explain this. So the results don't necessarily mean that people don't want to be greener - it may just be that they can't. On the opposite end, the UK buys few ecological products, but is very good at recycling. Governments could certainly help increase their population's ability to engage in more green behaviour, and in a multi-faceted way, if they made all of this more available to their citizens."

"We also found that green attitudes and habits are not necessarily linked to macro trends in particular countries. Instead, they depend more on the micro factors within them," said Huijboom. "For instance, there are examples in the media of communities that are skeptical about global warming and its scientific predictions, but they still embrace clean energy habits based on economic, patriotic or spiritual reasons."

Continued Huijboom:

"There are also no clear continent patterns. For example, whilst Germany ranks second in organic food consumption, their Dutch neighbors are in the mid-lower portion of all three green categories despite how geographically close the two countries are."

In its analysis, Synovate also mapped all the answers to determine which countries' respondents are doing all they can to be green.

Countries were divided into the following four categories: 1) consumers that do all they can, 2) consumers that do the most they can, 3) consumers that do not do the most they can and 4) consumers that don't do anything. While Europe, Canada and USA appeared to have the most active green behaviour overall, and India, Serbia and Indonesia appeared the most inactive, Synovate said that this isn't necessarily the case.

"Since the green habits we measured aren't showing much of a correlation with each other, we can't assume which markets are the greenest overall," said Huijboom. "Even the countries showing up on the lower end of the scale may be doing other activities that are green-friendly or that they perceive to be. Brands need to consider and understand what being actively green really means at the local level in order for them to be relevant in their communications on this issue."

About the survey

These survey results were taken from Synovate's Global Trends survey, an international research study that monitors and measures consumers' values and attitudes on a variety of topics and their impact on trends and other emerging insights. The survey asked respondents a series of questions about their recycling habits, purchase of ecological products and purchase of organic foods, as well as their general beliefs on life, in order to also determine if there was a correlation between those beliefs and green behaviour.

This study was conducted from July to September 2010 with people aged 16 to 65 years old. The chart below includes the markets that fielded the survey, the sample size, methodology, coverage area.

*Based on the population that the sample represents globally, the results have been weighted to obtain the most representative picture of consumers across the world.

Survey questions:

I'm going to read you a series of statements that relate to the way people feel about life in general. Thinking about yourself, please tell me the extent to which you agree or disagree with each of the following statements? 1 means you completely disagree with the statement, 7 means you completely agree with the statement

Life is full of wonderful things
Life is meant to be enjoyed, not endured
One should enjoy life to the fullest
You should always try to get the most enjoyment out of everything you do
You can make things happen and fulfill your dreams
You must overcome your own limits
You can make your dreams come true through hard work
Trying new things are worth the risk
Respect should be earned
You have to keep on achieving goals in life in order to be respected
Some people deserve more respect than others
I constantly aim to improve my (social) status
Ideas are the power of society
I'm proud of what I have achieved in my life
I always try and find ways to express my individuality
I strive to be different from others
You have to plan your future
My greatest ambition is to have a stable and secure future
I try to foresee obstacles as much as possible
We live in threatening times
I believe that something greater than ourselves protects us
It is essential to live a comfortable life
I need to have relaxed and stress-free surroundings
I prefer things that I know to new ones
I have to be there for those who matter to me
Your family always protects you
I have to protect my loved ones
My family helps me build my future
I pay attention to what others do
We are all the same
I want to share good times with others
I value close relationships and enjoy the company of my friends

Which of the following activities you have done within the last week? (Yes / No / Don't know / No answer)

I have purchased ecological products
I have purchased organic food products
I have recycled waste at home
I have bought an energy saving product (bulbs, detergent, electrical appliance...)

For more information on Synovate's Global Trends survey, visit www.synovate.com/globaltrends .

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