

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 more environmentally conscious overall. 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: South Africa, 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. In South Africa, 600 top metro consumers were interviewed.

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. South Africans stick to this trend, with more women (47%) recycling than men (40%).

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. South Africans fell somewhere in between with 44% of respondents saying that they have recycled at home within the last week.

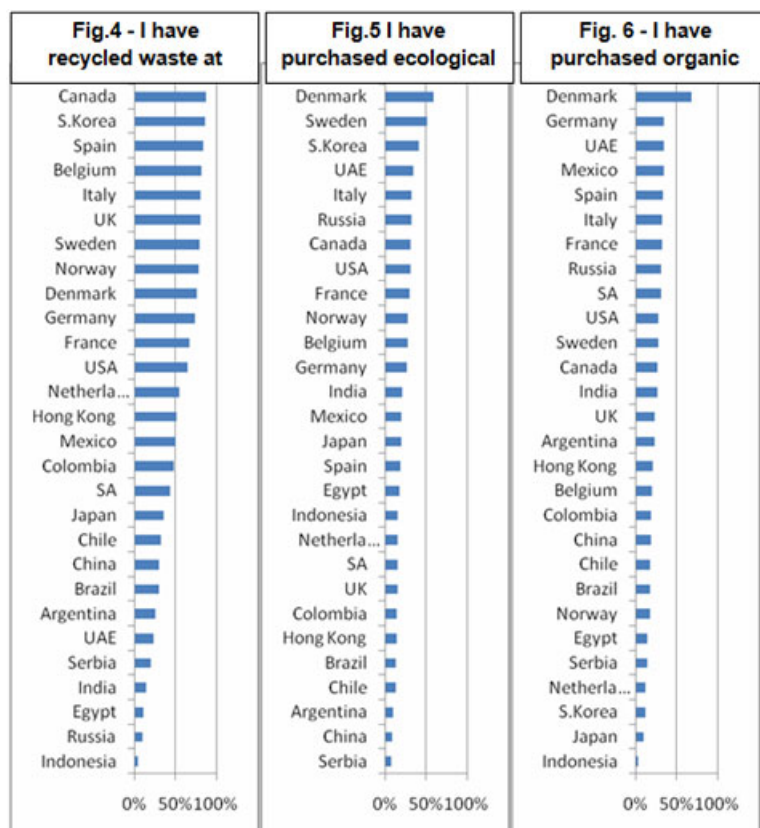
"Recycling from home is not very easy or accessible in South Africa," states Richard Rice, Sales and Marketing Director at Synovate. "At a home level, consumers are given one type of bin for all of their waste. Consumers that recycle do so proactively, using their own recycle bins and transporting these containers themselves, most typically to their closest grocery stores where you would find bigger recycling containers managed by external parties."

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. *16% of South Africans* state that they purchase ecological products - which is

globally below average. However South Africans are high up on the list in terms of buying organic products - with 31% stating that they had purchased these in the last week.

"Organic produce is becoming a lot more commonplace in South Africa in recent years," states Rice. "The challenge we have is making this more accessible and affordable to the market in its entirety in South Africa, as this is mostly limited to higher end retailers."

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, South Africa 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."

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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.

Country	Geography	Population	Sample	Data Collection	Sampling Method	Coverage	Age
Argentina	Latin America	41 343 201	600	CATI	Random	Top metro	16-65
Belgium	Europe	10 423 493	800	Online	Opt in panel	National	16-65
Brazil	Latin America	201 103 330	1000	CATI	Random	Top metro	16-65
Canada	North America	33 759 742	600	Online	Opt in panel	National	16-65
Chile	Latin America	16 746 491	600	CATI	Random	Top metro	16-65
China	Greater China	1 330 141 295	1200	CATI Asia	Random	Top metro	16-65
Colombia	Latin America	44 205 293	600	CATI	Random	Top metro	16-65
Denmark	Europe	5 515 575	1000	Online	Opt in panel	National	16-65
Egypt	Middle East	40 109 107	600	CATI	Street intercept	Top metro	16-65
France	Europe	64 057 792	1000	Online	Opt in panel	Top metro	16-65
Germany	Europe	82 282 988	1000	Online	Opt in panel	National	16-65
Hong Kong	Greater China	5 249 800	600	CATI Asia	Random	National	16-65
India	South Asia	1 173 108 018	1200	F2F	Random	Top metro	16-65
Indonesia	South Asia	242 968 342	1000	F2F Asiabus	Random	National	16-65
Italy	Europe	58 090 681	800	Online	Opt in panel	National	16-65
Japan	North Asia	126 804 433	1000	Online	Opt in panel	Top metro	16-65
Mexico	Latin America	112 468 855	1000	CATI	Random	Top metro	16-65
Netherlands	Europe	16 783 092	800	Online	Opt in panel	National	16-65
Norway	Europe	4 676 305	1000	Online	Opt in panel	National	16-65
Russia	CEE	139 390 205	1000	CATI	Random	National	16-65
Serbia	CEE	9 184 177	600	CATI	Random	National	16-65
South Africa	Africa	49 109 107	600	CATI	Random	Top metro	16-65
South Korea	North Asia	48 636 068	600	Online	Opt in panel	Top metro	16-65
Spain	Europe	40 548 753	600	CATI	Random & Opt in panel	National	16-65
Sweden	Europe	9 074 055	1000	Online	Random	National	16-65
UAE	Middle East	4 975 593	600	F2F	Street intercept	Top metro	16-65
United Kingdom	Europe	61 284 806	800	Online	Opt in panel	National	16-65
USA	North America	310 232 863	1200	Online	Opt in panel	National	16-65

**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.

About Synovate

Synovate, the market research arm of [Aegis Group plc](#), generates insights to help clients drive competitive brand, product and customer experience strategies. A truly borderless company with [offices in over 60 countries](#), our approach combines best in class global research capabilities with personalised service, local knowledge and the flexibility to create teams and processes that meet clients' specific requirements. At Synovate, our clients sit at the top of our organisational chart, driving us to continually develop more innovative research solutions that predict actual business outcomes. For more information, visit www.synovate.com.

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