



The Environment: Public Attitudes and Individual Behavior — A Twenty-Year Evolution





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Introduction

It has been two decades since SC Johnson commissioned the groundbreaking study, *The Environment: Public Attitudes and Individual Behavior*. Executed by the Roper Organization (now a part of GfK) in 1990, the SC Johnson research was the precursor to Green Gauge[®], the world's longest-running survey research program probing the appetite for green among consumers in the United States. Green Gauge still asks a number of the same probing questions from the original 1990 SC Johnson study.

The Environment: Public Attitudes and Individual Behavior was the very first large-scale survey to measure both green attitudes *and* behavior. As such, it provided rich insight into Americans' commitment to preserving and protecting the environment. In 2011, SC Johnson has revisited its original research, sponsoring a series of unique survey questions on the syndicated Green Gauge survey to illuminate American attitudes and behaviors with respect to the environment. These questions tap both current environmental issues, and also reprise seminal questions from the original 1990 research. This report provides a summary of the key findings from these questions and insights for working with Americans to move green consumerism into the decades ahead. These findings can be leveraged by business, government and non-profits to help understand how Americans' perceptions of environmental issues affect their behavior at the cash register, at the ballot box, and in their communities.



About the Research

This research was commissioned by SC Johnson and executed within the GfK Roper Consulting Green Gauge® US survey. The survey was fielded online among 2,000 adults age 18+ in the contiguous United States between June 9 and July 5, 2011.

The GfK Roper Consulting Green Gauge studies have been tracking consumer environmental attitudes and behaviors in the United States since 1992, inspired in large part by the original SC Johnson research conducted in 1990. Green Gauge explores issues related to consumers' interaction with the environment. This includes environmental concerns, specific environmental behaviors, sources of information on the environment, and views of specific industries.

A note on methodology: The survey methodology has changed since the original 1990 study. GfK Roper has moved from face-to-face interviewing among 1,400 respondents to online interviewing among 2,000 respondents. As a result of these methodological changes, results from the two surveys are not strictly trendable and comparisons over time should be made with some caution. Nonetheless, our analysis does include comparisons where we believe the response data are substantively comparable and illustrative of meaningful change in opinion, regardless of the change in survey methodology.



Executive Summary

Four important themes for business, governments and non-profits emerge from the 2011 analysis:

1. **Increased Knowledge, Decreased Confusion and a Tempering of**

Individual Expectations – According to the survey results, knowledge about environmental issues and problems is on the rise and Americans are less likely to be confused over what is good and bad for the environment. About seven in 10 now say they know a lot or a fair amount about environmental issues and problems, up from about five in 10 during the mid-1990's. Generally, the conventional wisdom has been that increased knowledge about the environment would lead to more action and empowerment on the part of Americans. However increased knowledge may have actually led to a tempering of expectations for some individuals. Compared to the 1990 survey, Americans are downplaying the role of the individual in protecting the environment. Americans are now more likely to say they can “do a little” across a number of environmental problems like air and water pollution and



fewer say Americans can do “a lot” or “nothing.” So, fewer Americans are saying they can take big steps to protect the environment, but more are saying they can at least take small steps.



2. **Environmental and Economic Uncertainty Hangs over Americans** – Many Americans are uncertain what the future holds for the environment and the economy. Nearly half (48%) are uncertain or don't know what the future holds when it comes to addressing environmental problems. One-third (33%) are optimistic, with 18% pessimistic. And an increasing number of Americans



think we should put economic security before environmental protection. Forty-one percent agree that economic security is a primary concern, followed by environmental problems – up 13 percentage points from pre-recession 2007.

3. **Influencing Positive Behavior Change is Possible** - One challenge over the past 20 years for businesses, governments, and non-profits has been influencing Americans to make lifestyle changes that have a positive environmental impact. However, behavior change is possible. Compared with 20 years ago, twice as many Americans recycle (58% in 2011 say they do so on a regular basis), buy green products (29%), and commute in an



environmentally friendly manner (18%). Individuals themselves cite financial incentives and disincentives as the most effective way of influencing behavior. Pressure from family and friends plays an important but lesser role.



4. **Americans Say Going Green Is (Still) Good Business** - In spite of rising economic concerns, Americans still want companies to “go green,” and there



is evidence that they give credit to companies that do so. About three in four (74%) agree “a manufacturer that reduces the environmental impact of its production process and products is making a smart business decision.”



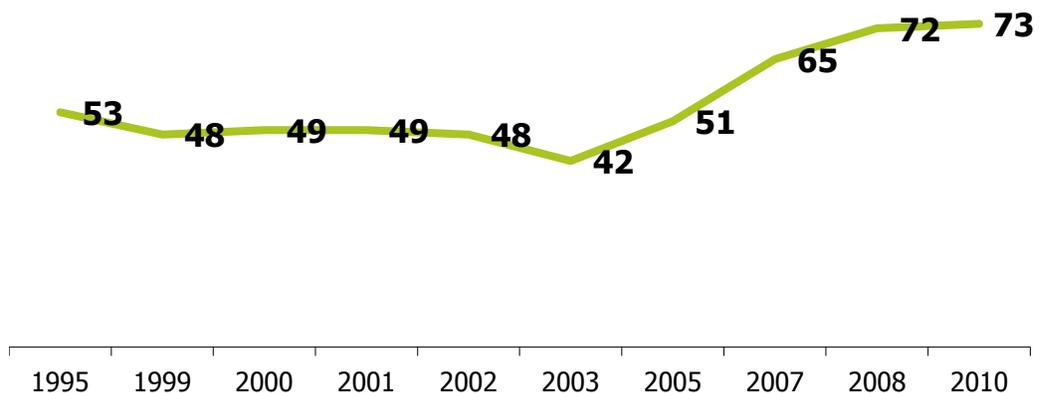
The Environment: Public Attitudes and Individual Behavior — A Twenty-Year Evolution



Americans have Increased Knowledge, Decreased Confusion and a Tempering of Individual Expectations

Typically, lack of environmental knowledge is one of the most cited barriers to personal engagement with protecting the environment. Also, the perception has been that consumers are confused by the large amounts of environmental information that is available. There is evidence that both of these ideas are true. However, when looking over the course of the past 20 years, Americans are in a much better place in terms of levels of environmental knowledge. Seventy-three percent of Americans say they know a lot or fair amount about environmental issues and problems – up 20 percentage points since 1995. In addition, fewer people now agree with the statement, “I am very confused about what's good and what's bad for the environment” (18% in 2011, down 21 percentage points since 1990).

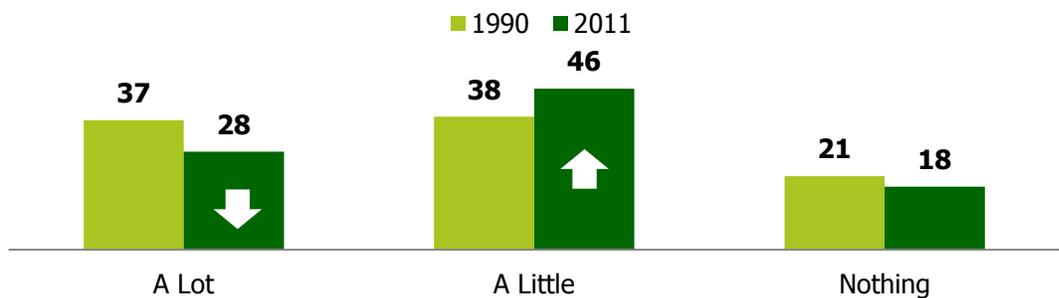
— % Who Say They Know A Lot/Fair Amount About Environmental Issues and Problems (Total US Population 18+)





Interestingly, as Americans have increased their environmental knowledge base, they may have become less exuberant about their potential to impact the environment. For all six environmental problems named in both 1990 and 2011 (including water and air pollution), the movement has been toward the center: The percentages saying that individuals can do *a little* have gone up, while fewer now say that individuals can either do *a lot* or *nothing* about these problems.

**Are Environmental Problems Something You Can Do
A Lot About, A Little About, Or Nothing About?**
(Average Across Six Environmental Problems*, Total US Population 18+)



*See Appendix For Full List Of Environmental Problems

Increased environmental knowledge may have contributed to a reduced sense that individual action holds the solution to environmental problems; that's the bad news. The good news is that the survey data suggests that government, business, and non-profits have a green light to continue to encourage and empower Americans to take small steps towards protecting the environment. Consumers increasingly feel they can at least take small steps to improve the environment as evidenced by the increase in those who say individuals can "do a little." Such calls to personal action are likely to be especially effective if consumers see that other key players – namely, government and business – are also doing their part to protect the environment.



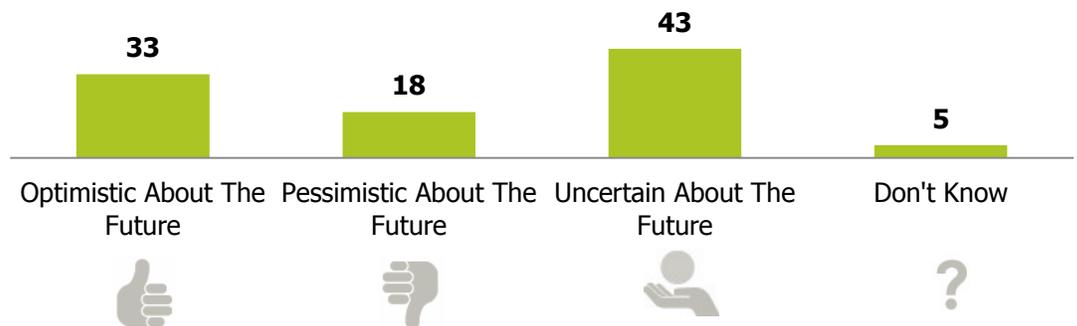
Environmental and Economic Uncertainty Hang Over Americans

Related to tempered individual expectations, Americans are also indicating they are uncertain about the future of environmental problems. In addition, economic woes are clouding the environmental landscape.

Optimists may out-number pessimists, but a plurality says that the future of the environment is in doubt: Nearly half (48%) are uncertain or don't know what the future holds when it comes to addressing environmental problems. One-third (33%) are optimistic, with 18% pessimistic.

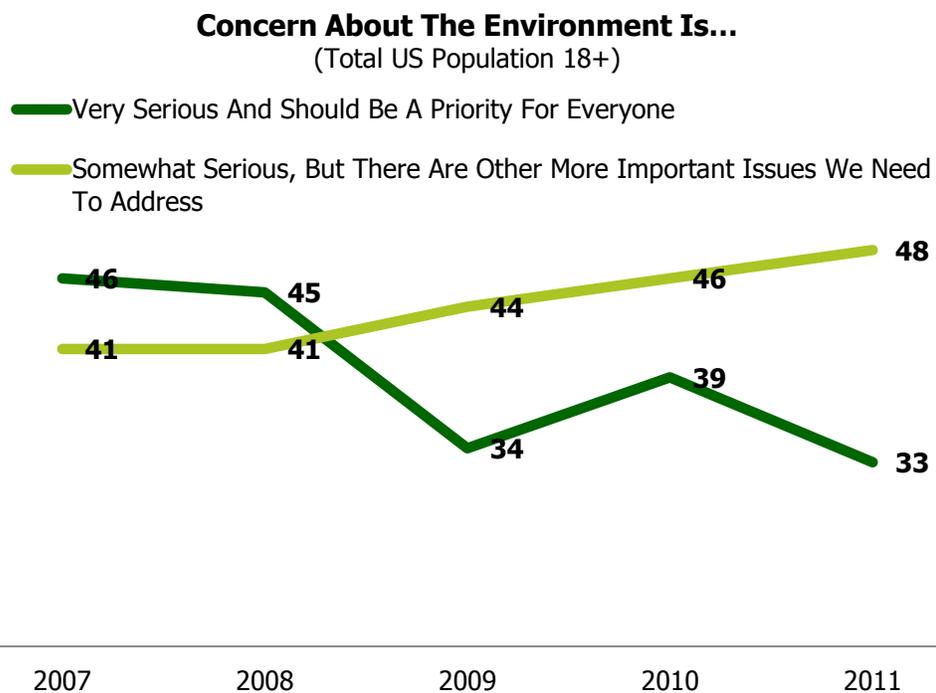
Men tend to be more optimistic than women about the future of addressing environmental problems (37% to 30%) and people with household incomes of \$100,000 or more are one of the few groups where a plurality is optimistic (42% vs. 20% pessimistic and 35% uncertain). Those in households with incomes under \$30,000 are generally more uncertain (49%) than optimistic (26%).

"When It Comes To Addressing Environmental Problems, Generally Speaking I Am..." (Total US Population 18+)





Compounding issues for Americans' view of the environment is the current economic malaise. Nearly half, 48%, say that “concern for the environment is somewhat serious, but there are other more important issues we need to address.” And 41% agree that first comes economic security, and then we can worry about environmental problems – up 13 points from pre-recession 2007.



A majority of Americans are also comfortable with a trade-off between environmental protection and economic development, with 52% agreeing “Some pollution is inevitable if we are going to continue to make improvements in our standard of living.”



Thus, Americans are concerned about protecting their personal finances and corporate bottom lines as well as the planet. There may be a limit to how much Americans are willing to sacrifice economically for the sake of the environment, but they are not saying that protecting the environment has no value to them. They want to understand the trade-offs so that they can strike the right balance and make informed decisions.



Influencing Behavior Change Is Possible

One challenge over the past 20 years for companies and governments has been influencing Americans to make positive environmental changes. Certainly most Americans are willing to make these changes, but putting these thoughts into action has been elusive for many. Furthermore, the current economic uncertainty and the notion that Americans can only “do so much” brings increased challenges to the table. But influencing behavior is possible.

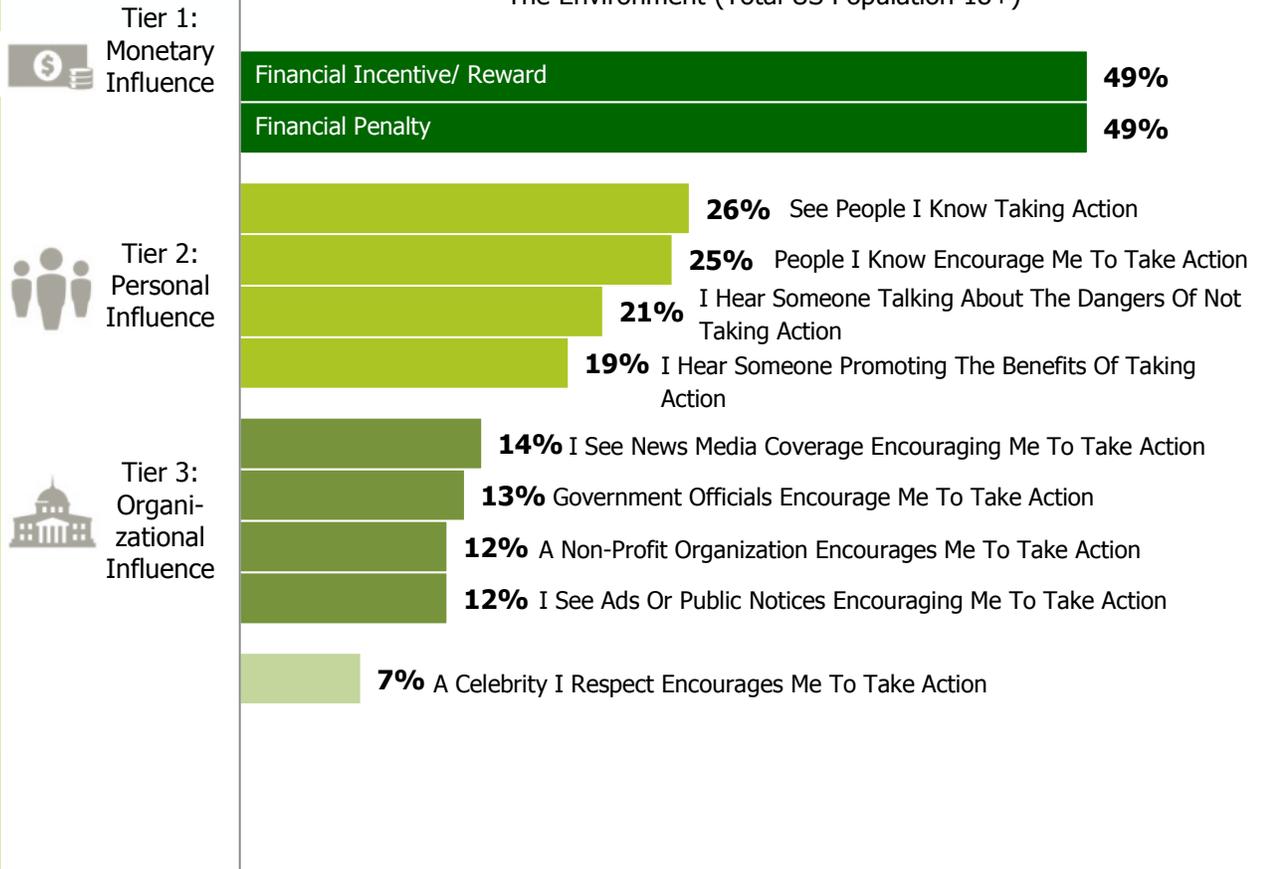
Interestingly, Americans say financial incentives and disincentives have a greater influence on their green behavior than pressure from family, friends and government. “Peer pressure” does not appear to be the dominant force driving personal environmental actions. An overwhelming majority say they feel good when they take steps to help the environment (75%), yet only one in three would be embarrassed if caught not recycling (33%).

For the population as a whole, Americans say that both financial incentives (49% say this is a major influence) and penalties (49%) have a greater influence on their green behavior than pressure from family, friends and government – with celebrities having the least reported impact on green behavior.



Three Tiers Of Influence

% Who Say The Following Is A Major Influence On his/her Behavior To Help The Environment (Total US Population 18+)



Digging a little deeper into the data reveals that Generation Y – younger Americans approximately aged 18-31 – is more likely to be influenced by the people around them; Thirty-Five percent of Generation Y says that seeing friends taking action is a major influence (+9 percentage points from the total public).

Generation Y is also an important group to target for environmental action because it is generally more engaged with environmental issues. According to the syndicated Green Gauge results, Generation Y is more likely to follow the



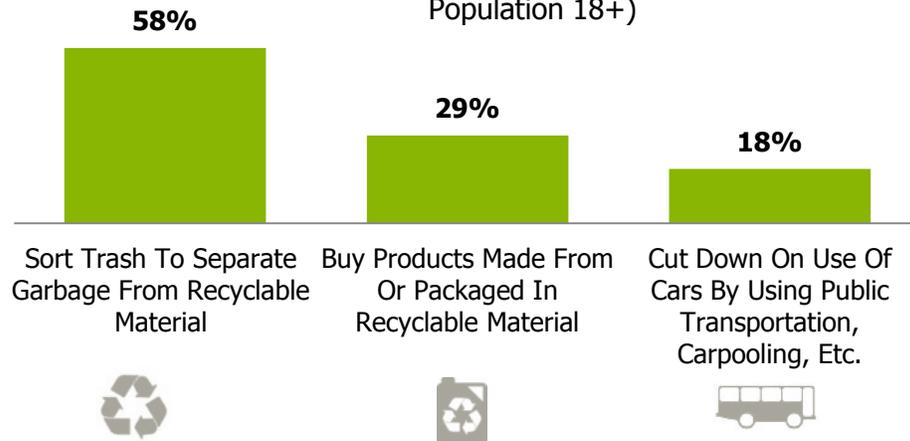


environmental records of large companies (45% of Gen Y follow the practices of companies, +5 percentage points from the total population) and less likely to put the economy in front of environmental issues (36% of Gen Y says first comes economic security and well-being, then we can worry about environmental problems, - 5 points from the total population).

Over the past 20 years, there have been significant changes in specific behaviors. When compared to 1990, Americans are now much more likely to sort trash to separate garbage from recyclable material – 58% say they now do so on a regular basis. They are also more likely to buy products made from or packaged in recycled materials – 29% now say they do so on a regular basis. Lastly 18% of Americans cut back on their automobile usage on a regular basis.

Behaviors Shift Dramatically Over Two Decades Based on 2011 Data*

(% Who Do The Following On A Regular Basis, Total US Population 18+)



*The Percentage Of Respondents In 2011 Are At Least Double As Compared To Earlier Observations.



These positive behavior changes were made possible by government and marketplace changes. Recycling rates have increased due to the development of curbside recycling programs as well as financial incentives (e.g., deposits for bottles and cans). The purchasing of green products has also increased due to rising awareness and increased marketplace offerings. In terms of green product offerings, fewer Americans say a major reason for environmental problems is, “Companies do not develop and make available environmentally sound products” (45% in 2011 down 14 percentage points since 1990). Thus, mass market behavior changes are possible.



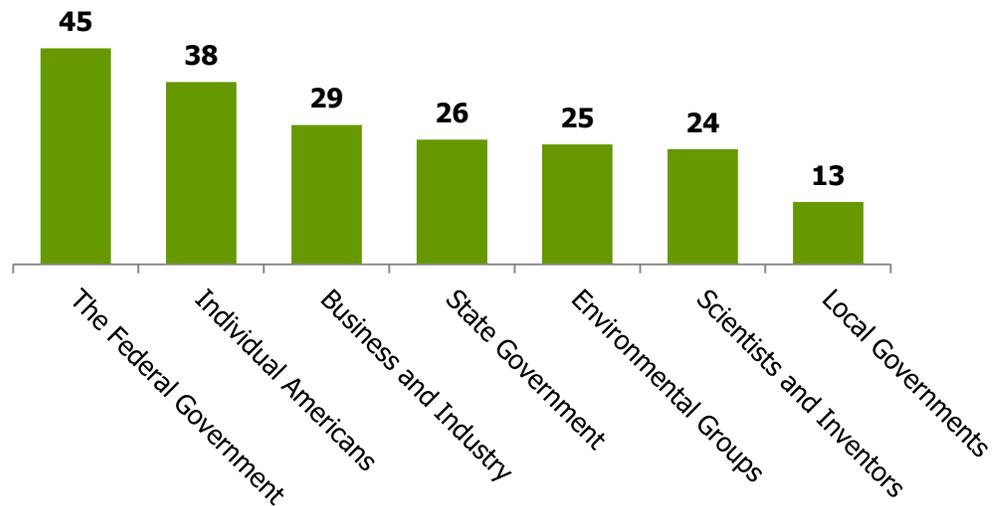
Americans Say Going Green Is (Still) Good Business

In spite of rising economic concerns, Americans still want companies to “go green,” and there is increasing evidence that they give credit to companies that do so.

According to the results from the syndicated Green Gauge survey, Americans want companies to take a leadership role in protecting the environment. When asked to rank seven groups on who should take the lead in addressing environmental problems and issues, Americans rank the “Federal Government” first followed by “Individual Americans,” and then “Business and Industry.” In fact, “Business and Industry” beats out state governments, environmental groups, scientist/inventors, and local governments.

Who Should Take the Lead In Addressing Environmental Problems?

(Ranked One Or Two, Total US Population 18+)



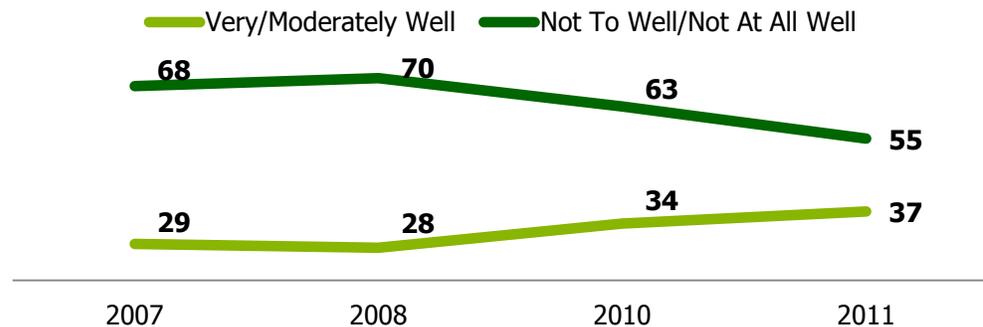


Not only do Americans want businesses to assume responsibility for protecting the environment but they also see going green as good business. About three in four (74%) agree “a manufacturer that reduces the environmental impact of its production process and products is making a smart business decision.”

In addition, 37% say business and industry are fulfilling their responsibility to the environment very or moderately well. While this is a minority of Americans, it does represent an 8 percentage point increase from 2007.

Americans Viewing Companies In More Positive Light

How Well Do Business And Industry Fulfill The Responsibility Of Protecting The Environment? (Total US Population 18+)



Americans are also shifting some responsibility away from companies and towards individuals. In 1990, the top reason cited for environmental problems were directed towards business; “Factories and plants cause pollution when manufacturing products we use.” And while factory/product pollution is still an important issue for consumers, the focus has shifted inwards. In 2011, the top reason cited for environmental problems is “Consumers are more interested in the convenience many products provide than in the effect they have on the



environment.” So while there has been an overall increase in Americans who report they are buying green themselves, Americans believe that consumers as a group are not willing to sacrifice for environmental protection. Americans have become savvier about both environment problems and solutions; they do not scapegoat business while letting consumers off the hook. Again, this suggests an opening for messages emphasizing shared responsibility between business and consumers.

Major Reasons for Environmental Problems

(Total US Population 18+)

	<u>1990 Rank</u>	<u>2011 Rank</u>	
Consumers More Interested In Product Convenience Than Environmental Impact	3	1	↑
Factories And Plants Cause Pollution When Manufacturing Products	1	2	↓
Countries Don't Cooperate On Solving Problems	4	3	
Products That Businesses Use Cause Environmental Problems	2	4	
Consumers Aren't Willing To Pay More For Environmentally Friendly Products	7	5	
Companies Do Not Make Available Environmentally Sound Products	5	6	
Some Technical Advancements Which Seem Like A Good Idea At The Time, But Cause Long-Term Problems Which Are Not Known For Years	6	7	

In addition, when thinking about the environmentally friendly products that businesses provide, product cost is a continued issue, while product availability is



less of a concern. Similar numbers say that “consumers aren’t willing to pay more” (53% said this was a major problem in 1990 and 51% in 2011), while fewer think that “companies do not develop and make available environmentally sound products” (59% said this was a major problem in 1990 vs 45% in 2011).

Of course it is also important to mention that despite some Americans’ continued concerns about the cost of environmentally friendly products, they are still more likely to purchase “green.” As seen in the survey and previously discussed, more consumers now say they buy products made from or packaged in recycled materials. Why? Increased product availability and knowledge have helped to increase green purchasing.



Conclusions

- Increased environmental knowledge has led fewer American consumers to believe they can take large steps towards environmental protection, but more now believe they can at least take some small steps to help protect the environment. Forty-six percent say they can at least “do a little” about environmental problems, up 8 percentage points from 1990.
- Americans still expect businesses to be environmentally friendly despite the current economic malaise. Three in four agree “a manufacturer that reduces the environmental impact of its production process and products is making a smart business decision.”
- Behavior change is possible, and Americans will continue to “green up” their lifestyles where it makes practical and financial sense. Compared with 1990, twice as many Americans are sorting their garbage (58% do so on a regular basis), buying products made from or packaged in recycled materials (29%), and cutting down on their automobile usage by taking mass transit (18%).



Appendix



Methodology

A sample of 2,012 adults 18 years of age or older in the United States was interviewed for this study using the GfK Online Consumer Panel. Interviews were completed June 9 - July 5, 2011.

Sampling Method

The sample design employs a disproportionate pre-stratified sample, where the strata are levels of several known demographic variables that are found in the database record of each survey community member who is sampled for the project. The starting point for the stratification is the distribution of these variables among the online population of the United States who are 18 years of age or older.

Besides accounting for demographics in the sample draw, sample invitations are sent out according to a pre-determined distribution that accounts for rates at which each stratum tends to accept the survey invitation, thereby at least starting the survey. The following are the strata and levels used for drawing sample:

Gender:	Male/Female
Age:	18-24, 25-34, 35-44, 45-54, 55-64, 65+ (Age is stratified within gender for pre-stratification purposes)
Region:	Northeast, Midwest, South, West conforming to four US Census regions
Education:	Less than 4 years of college, 4-year college graduate or higher
Race:	White, Hispanic, Black, Asian, Other
Household Income:	Less than \$25,000 annually, \$25,000-\$74,999, \$75,000 or more



Survey Results

3. When it comes to addressing environmental problems, generally speaking I am....

2011 Base: 2012 Total Respondents

	2011 %
Optimistic about the future	33
Pessimistic about the future	18
Uncertain about the future	43
Don't know	5



17. Now, how much do you agree or disagree with each of these statements regarding your lifestyle and attitudes toward the environment? (Please select one response per row)

2011 Base: 2012 Total Respondents

		Disagree completely %	Disagree mostly %	Neither agree nor disagree %	Agree mostly %	Agree completely %	Total Agree %
11	I am very confused about what's good and what's bad for the environment	19	31	32	14	4	18
12	New technologies will surely come along to solve environmental problems before they get out of hand	8	18	45	23	7	30
13	Some pollution is inevitable if we are going to continue to make improvements in our standard of living	4	11	33	40	12	52
14	If business is forced to spend a lot of money on environmental protection, it won't be able to invest in research and development to keep us competitive in the international market	11	23	37	21	8	29
15	I just don't have the time to worry about how all of my actions affect the environment	21	31	30	13	5	18
16	I feel good when I take steps to help the environment	1	3	21	40	35	75
17	I would be embarrassed if people I know caught me not recycling my trash	22	18	28	20	13	33
18	A manufacturer that reduces the environmental impact of its production process and products is making a smart business decision	1	2	22	43	32	74
19	Local governments should provide more incentives for people to recycle	3	4	20	38	35	73
20	We should wait until the economy gets better before we make the environment a major policy priority	18	23	29	19	11	30



23. Here are some more things that people can do for the environment. For each one please indicate if you or someone in this household makes a real effort to do it on a regular basis, or does it from time to time when it's convenient, or doesn't really bother about it?

2011 Base: 2012 Total Respondents

RANDOMIZE SELECT ONE PER ROW		2011			
		Do on a Regular basis %	Do from time to time %	Don't really bother about %	Don't Know %
1	Sort trash to separate garbage from recyclable material	58	18	21	3
2	Buy products made from or packaged in recycled materials	29	49	18	4
3	Cut down on use of automobile by using public transportation, carpooling, etc.	18	29	49	5
4	Buy things that are made of durable materials so they will last a long time	50	36	11	3
5	Avoid disposable or single-use items when multi-use items are available	39	40	17	4



40. Some of the things discussed so far are things individual citizens can help do something about. Others they can't. For each of the following items do you think it is something individuals can do a lot about, a little about, or is it something individuals can't do anything about?

2011 Base: 2012 Total Respondents

RANDOMIZE SELECT ONE PER ROW		2011			
		A Lot about %	A little about %	Nothing About %	Don't Know %
1	Water pollution from disposal of waste products by manufacturing plants	15	45	30	9
2	Air pollution from auto exhausts	32	49	12	7
3	Environmental contamination from chemical waste disposal	17	47	26	10
4	Solid waste from the disposal of garbage and trash	38	44	11	7
5	Indoor air pollution	43	40	9	8
6	The "greenhouse effect"	20	51	17	13



41. Most people agree that our country is faced with environmental problems, but there is little agreement about the reasons for these problems. For each of the following reasons, do you think it is a major, minor or not a reason for our environmental problems?

2011 Base: 2012 Total Respondents

RANDOMIZE SELECT ONE PER ROW		2011			
		Not a Reason %	Minor Reason %	Major Reason %	Don't Know %
1	Factories and plants cause pollution when manufacturing products we use	4	25	61	10
2	Products that businesses use cause environmental problems – pollution, disposal problems, etc.	4	28	56	12
3	There are many technical advancements which seem like a good idea at the time, but cause long-term problems which are not known for 10 or 20 years	7	35	41	17
4	Consumers are more interested in the convenience many products provide than in the effect they have on the environment	4	24	63	10
5	Countries don't cooperate on solving problems that require international cooperation (e.g. acid rain)	5	22	59	14
6	Consumers aren't willing to pay more for products that are environmentally sound	7	32	51	11
7	Companies do not develop and make available environmentally sound products	9	33	45	13



61. Here is a list of things that could influence people to change their behavior to help the environment. For each one would you say it has a major influence, a minor influence, or no influence at all on your behavior to help the environment?

2011 Base: 2012 Total Respondents

RANDOMIZE SELECT ONE PER ROW		2011			
		A major influence %	A minor influence %	No influence at all %	Don't Know %
1	I see my friends and people I know taking action	26	42	26	6
2	My friends and people I know encourage me to take action	25	44	24	7
3	Government officials encourage me to take action	13	37	43	7
4	A non-profit organization encourages me to take action	12	39	41	7
5	A celebrity I respect encourages me to take action	7	24	62	7
6	I see news media coverage encouraging me to take action	14	44	36	6
7	I see advertisements or public notices encouraging me to take action	12	45	36	7
8	I hear someone promoting the benefits of taking action	19	45	29	7
9	I hear someone talking about the dangers of not taking action	21	42	29	7
10	I am rewarded with a financial incentive for taking action	49	30	15	7
11	I am penalized with a financial penalty for not taking action	49	25	17	9