

Sustainable Efforts &  
Environmental Concerns  
Around the World

A Nielsen Report  
August 2011

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# Global unease over the use of pesticides, packaging waste and water shortages overtake global warming as top concern

- **Global warming cools off as a top concern**
- **Pesticide use, packaging waste and water shortage concerns are growing fastest**
- **The gap between concern and the cash register is significant**

Concern about climate change/global warming among online consumers around the world took a back-seat to other environmental issues such as air and water pollution, water shortages, packaging waste and use of pesticides, according to Nielsen's 2011 Global Online Environment & Sustainability Survey of more than 25,000 Internet respondents in 51 countries.

The latest findings, which were compared to 2007 and 2009 results, show that while 69 percent of global online consumers say they are concerned about climate change/global warming (up from 66 percent in 2009, but down from 72 percent in 2007), concern for other environmental issues are taking a higher priority in the minds of consumers and are rising with greater intensity. Three out of four global consumers rated air pollution (77%) and water pollution (75%) as top concerns, both increasing six percentage points compared to 2009. But the areas where concern is mounting fastest among 73 percent of global online consumers is worry over the use of pesticides,

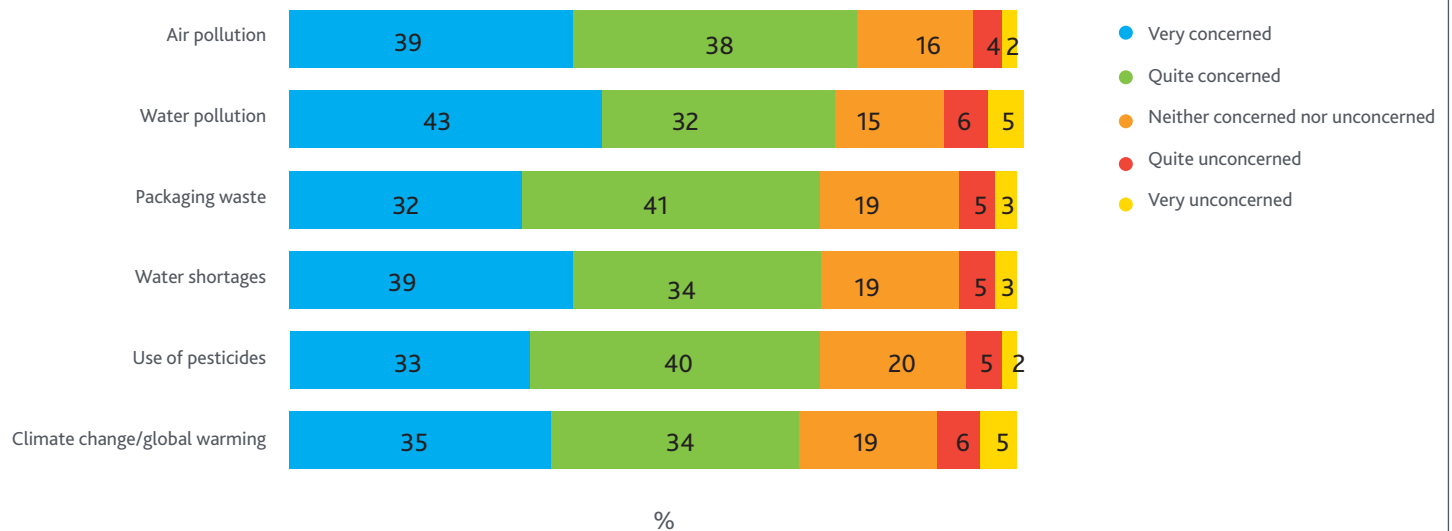
packaging waste and water shortages, with reported concern increasing 16, 14 and 13 percentage points, respectively.

"There are many possible reasons for declines in concern about climate change/global warming. Focus on immediate worries such as job security, local school quality, crime and economic well-being have all diminished media attention for climate stories in the past two years. In the face of other pressing concerns, a public "caring capacity" for climate change has been tested," said Dr. Maxwell T. Boykoff, Senior Visiting Research Associate, Environmental Change Institute, University of Oxford. "Without continued attention paid to global warming/ climate change in the media, such concerns may have faded from the collective public conscience."

Top environmental concerns among Asia Pacific consumers include water shortages and air pollution, while water pollution was the main concern for Latin Americans, Middle Eastern/ Africans, Europeans and North Americans.

## How concerned are you about the following environmental issues:

### Global Average



Source: Nielsen, Global Online Survey, Q1 2011.

## The Big Three: Concerns Falling in U.S., Uneven in China, and Rising in India

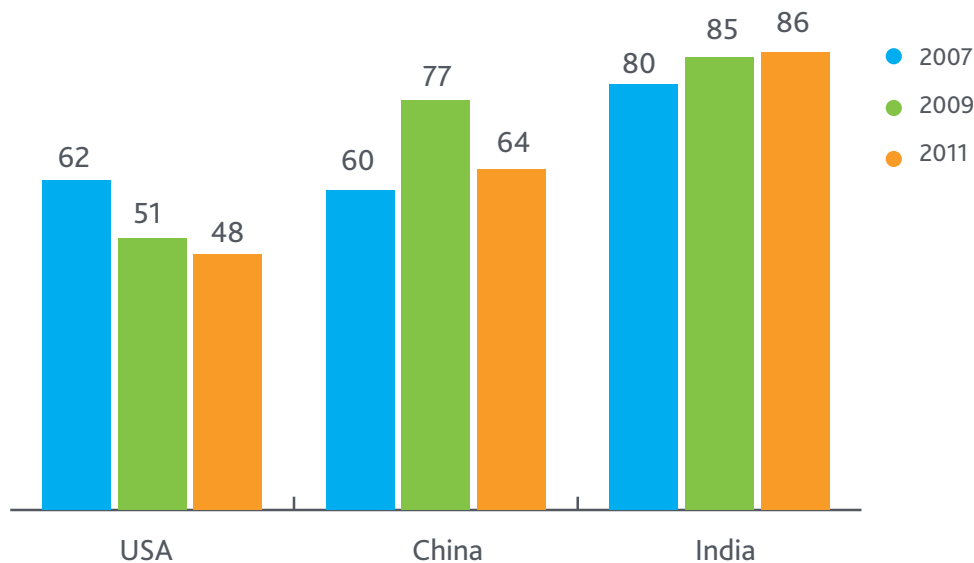
With their large populations and high carbon dioxide emissions, many consider the United States, China and India instrumental to any potential international climate change agreements. Yet, concern is falling in the U.S., which recorded one of the steepest declines in concern about climate change/global warming among global markets from 2007 to 2011, with reported concern dropping 14 percentage points.

Today, less than half of Americans (48%) say they are concerned about climate change, which contrasts sharply with reported concern across the regions of the world: Latin America (90%), Middle East/Africa (80%), Asia Pacific (72%), and Europe (68%). Among the 21 percent of Americans who are decidedly not concerned, 63 percent indicated they believe natural variation—and not people—causes climate change/global warming.

“During this period, Nielsen’s Global Online Consumer Confidence Survey found heightened American consumer concern around the economy, rising gas prices, and debt,” said Todd Hale, SVP Consumer & Shopper Insights, Nielsen U.S. “With financial concerns still on the minds of many Americans, they’re indicating less and less concern about climate change and other environmental issues.”

In China, concern about climate change/global warming is higher than in the U.S., but dropped 17 percent in the last two years from 77 percent in 2009 to 64 percent in 2011. Meanwhile, concern in India has gradually risen in the past four years, and with 86 percent of Indians currently worried, it remains one of the markets most concerned about climate change in the world.

Climate change/global warming concerns falling in U.S., uneven in China, and rising in India



Source: Nielsen, Global Online Survey, Q1 2011.

## Concerns Run High in Coastal Countries and Latin America

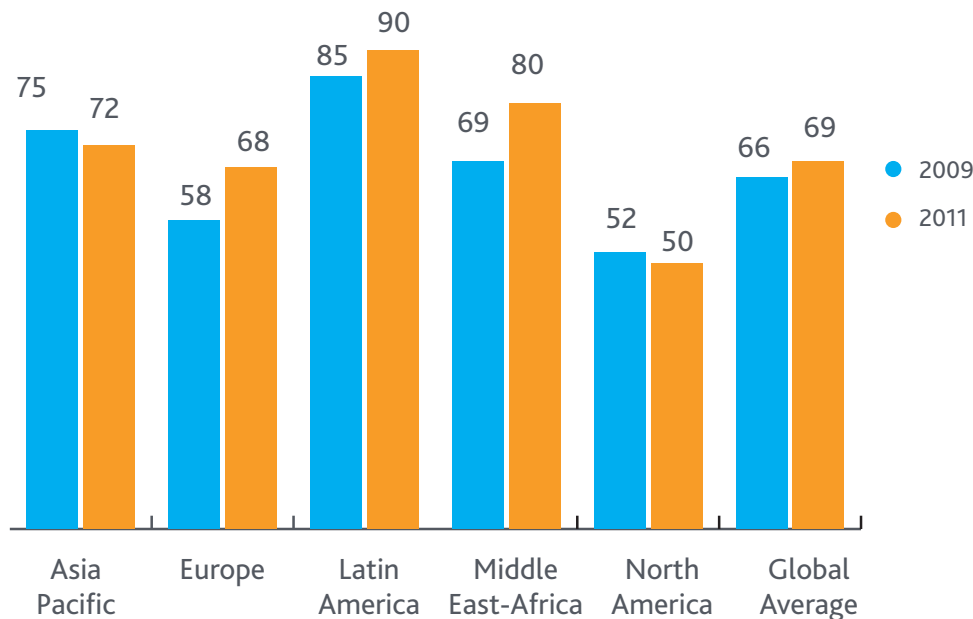
Among the countries most concerned about climate change are several island-nations and other countries with high percentages of coastal borders. In many of these countries, the percentage of consumers concerned about climate change almost reaches 100, including Thailand and Portugal (93%), Indonesia (92%), Philippines and Vietnam (91%), Malaysia (90%), Greece (89%), Taiwan (88%), and Singapore (84%).

Regionally, Latin Americans remain the most concerned about climate change/global warming, at 90 percent up from 85 percent in 2009, while Middle East/Africa consumers posted the highest increase as concern grew from 69 to 80 percent in the two year span. "Latin America has experienced a number of distressing and impactful environmental events over the last several years, and the region's consumers are increasingly attributing these events to broad climate change," said Arturo García, President, Nielsen Latin America. "People are expressing clear concern about unusual weather patterns including increased rainfall, hurricanes, and floods in some parts of Latin America, and severe droughts in others."

As for the sharp rise in concern in the Middle East/Africa, "The hot and dry climates in many Middle Eastern and African countries and the widely held perception that temperatures are rising every summer has likely led to an increased concern about climate change and weather variation," said Ram Mohan Rao, Managing Director, Nielsen Egypt.

Climate change/global warming concern increased 10 points in Europe to 68 percent, fell three points in Asia Pacific to 72 percent, and North America was the least concerned region with a two point decline to 50 percent.

Concern for climate change/global warming is highest in Latin America and Middle East/ Africa



Source: Nielsen, Global Online Survey, Q1 2011.

## Extreme Weather Conditions Heighten Awareness

Thailand, Mexico, and Portugal were the world's most concerned countries about climate change, with 93 percent of respondents from each market indicating concern. Portugal and Mexico were also the world's most concerned countries about water shortages and air and water pollution. "In Portugal, severe weather patterns of extreme and uncharacteristic heat waves in the summer and snow in the winter over the past few years have heightened consumer concern and awareness over global warming and climate change issues," said Luís Bio, Marketing Director, Nielsen Portugal.

"In Mexico, as in the rest of Latin America, the media has been an influential force in raising awareness about the environment, with extensive coverage of environmental issues," said Paola Fonseca, Strategy and Innovation VP, Nielsen Latin America. "And, having recognized vast consumer concern, manufacturers, retailers and service companies are increasingly implementing environmentally-friendly social responsibility programs."

Poland and New Zealand consumers, who were among the top 10 least concerned about climate change/global warming in 2011, show the sharpest declines since 2007, dropping 27 and 18 percentages points, respectively. Since 2009, concern increased the most in the Ukraine (+27 percentage points), Portugal and Israel (+26), Sweden (+22) and Saudi Arabia (+18).



## Top 10 most / least concerned about climate change/global warming

Levels of concern in the markets most worried about climate change are higher than the levels of unconcern in countries least worried about climate change.

Most Concerned			Most Unconcerned		
	Percent Concerned	Percent Unconcerned		Percent Concerned	Percent Unconcerned
Thailand	93%	1%	Estonia	33%	36%
Portugal	93%	2%	Norway	47%	22%
Mexico	93%	2%	New Zealand	50%	22%
Indonesia	92%	1%	United States	48%	21%
Turkey	92%	2%	Latvia	50%	21%
Philippines	91%	4%	Czech Republic	47%	21%
Vietnam	91%	5%	Poland	54%	19%
Colombia	91%	8%	Netherlands	48%	19%
Malaysia	90%	1%	Lithuania	45%	19%
Argentina	90%	5%	Australia	61%	17%

Source: Nielsen, Global Online Survey, Q1 2011.

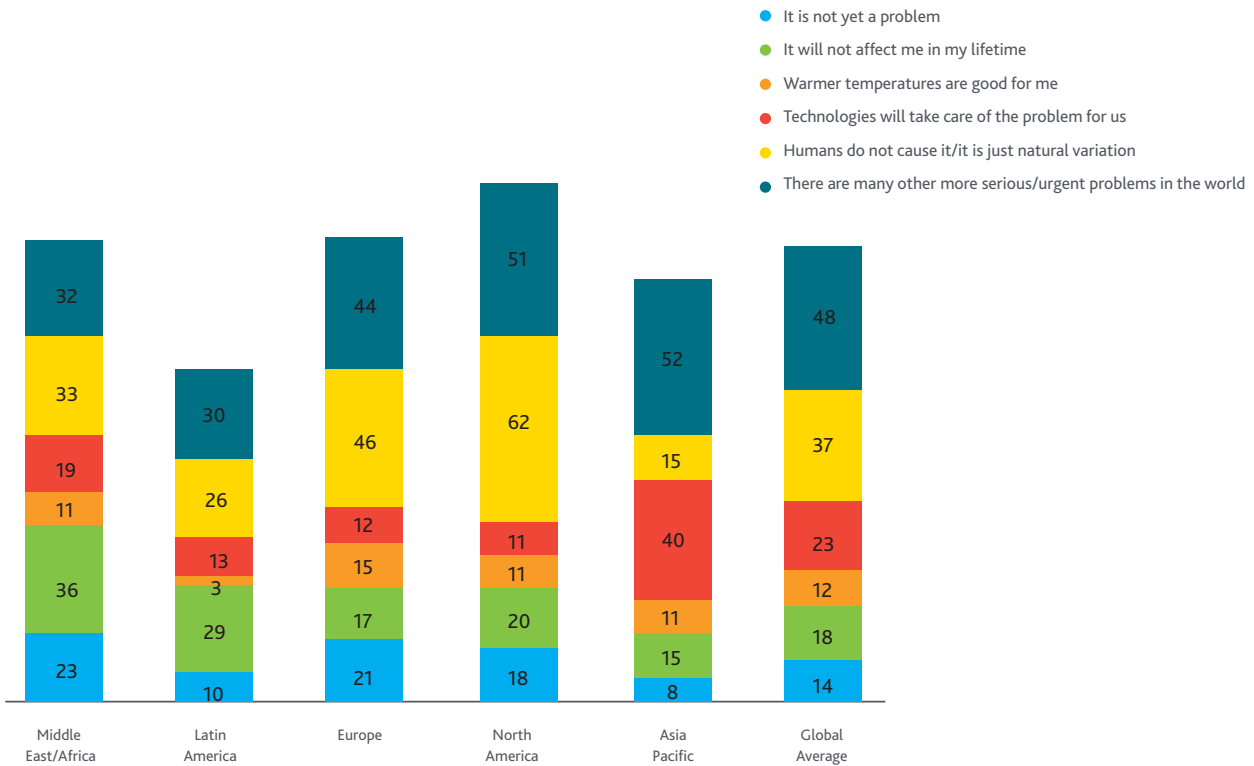
## Global Warming Apathy is Growing

The study found that there are a number of consumers who are either indifferent or not concerned about this issue. One-in-five global online consumers say they are neither concerned nor unconcerned about climate change/global warming and one-in-ten are not concerned at all.

The global economic recession (and its lingering effects on the job market and inflation) appears to have misplaced climate change as a big worry for many. But while half (48%) of unconcerned global online consumers cite "more urgent and serious matters in the world today" as the main reason for climate change apathy, 37 percent believe that climate change is not the result of human behavior and 23 percent believe future technologies will solve the problem.



### Why are you NOT concerned about climate change/global warming?



Source: Nielsen, Global Online Survey, Q1 2011. Percentages equal more than 100% because respondents could choose all choices that apply.

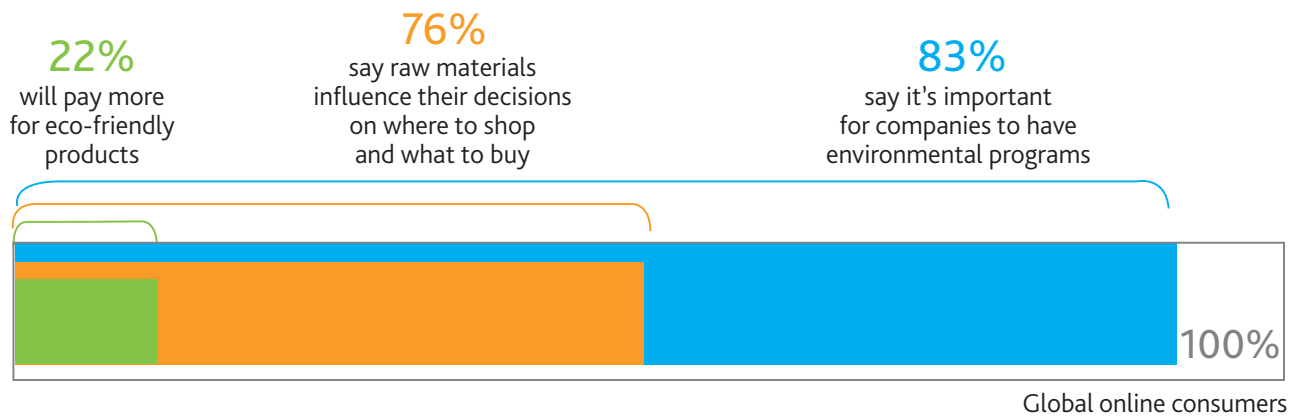
## Gap Between Concern and the Cash Register

Overall, 83 percent of global online consumers say that it is important that companies implement programs to improve the environment, but only 22 percent say they will pay more for an eco-friendly product. Willingness to pay extra for environmentally-friendly goods is highest in the Middle East/Africa, where one-third of consumers are willing and lowest in North America, where only 12 percent of both Canadians and Americans say they will pay extra for eco-friendly products. Many consumers reported a personal preference for eco-friendly goods, but large percentages of respondents report setting aside this preference and buying whichever product is cheapest, including 48 percent in North America, 36 percent in Middle East/Africa, 35 percent in Europe, 33 percent in Asia Pacific, and 27 percent in Latin America.

Global consumers have mixed feelings about the environmental impact and benefits of particular sustainable practices. While 64 percent of consumers, globally, indicated they believe organic products are good for the environment, there is wide regional disparity of opinion. Eighty percent of Latin Americans and 72 percent of Asia Pacific respondents think organic products are environmentally-friendly, but fewer people are convinced in Europe (58%), Middle East/Africa (57%), and North America (49%).

### Less than one-fourth are willing to pay more for eco-friendly products

Global Online Consumers Q1 2011



Source: Nielsen, Global Online Survey, Q1 2011. Percentages equal more than 100% because respondents could choose all choices that apply.

## Sustainable Efforts Making a Positive Difference

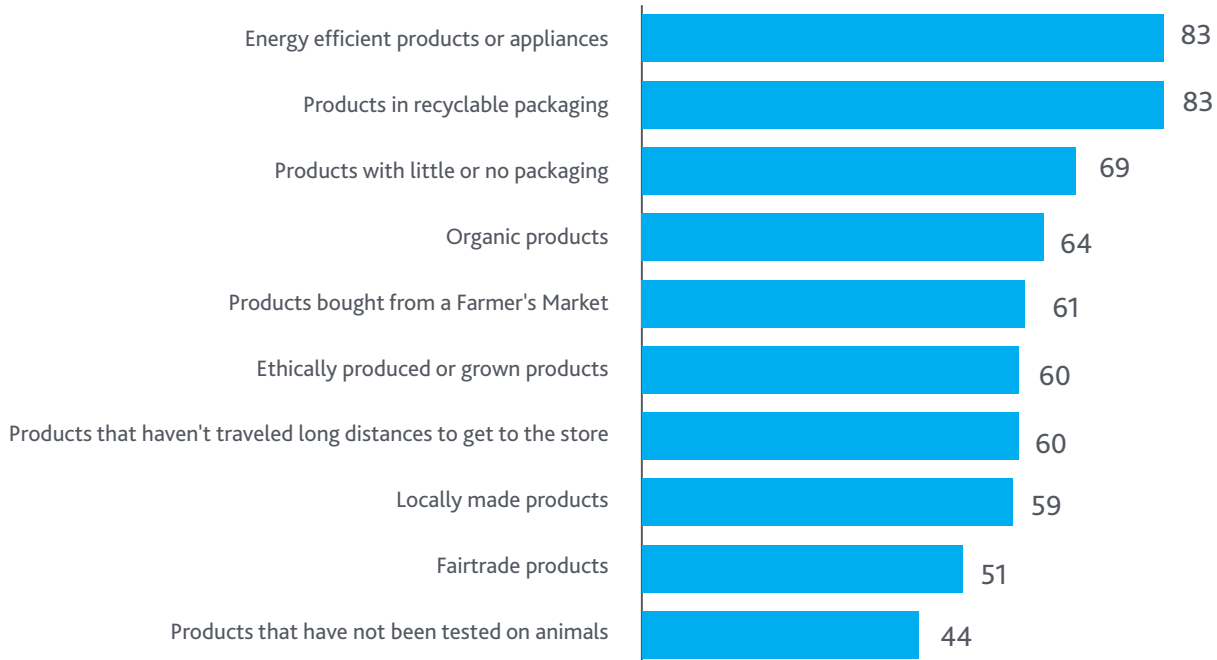
Among other environmental and sustainability efforts manufacturers have taken, recycled packaging and energy efficient products are seen as the most broadly helpful. Fully 83 percent believe that manufacturers using recycled packaging and producing energy efficient products and appliances have a positive impact on the environment. Fewer consumers are convinced of the environmental impact of local products (59%), fair trade products (51%) and products not tested on animals (44%).

Belief in the impact of "local" products is highest in North America, where 65 percent of consumers believe these products have a positive impact on the environment.

Three quarters of global online consumers say they take raw materials into account when deciding where to shop and what to buy. Latin American consumers are most likely to take materials into account: nearly 9 out of 10 say that the use of raw materials harmful to the environment influences where they shop and what they buy. North American consumers are the least influenced by the use of harmful raw materials (59%).

### Do you believe the following sustainable products are having a positive impact on the environment?

Global Average



Source: Nielsen, Global Online Survey, Q1 2011. Percentages equal more than 100% because respondents could choose all choices that apply.

## Countries in the Study:

Argentina	Hong Kong	Romania
Australia	Hungary	Russia
Austria	India	Saudi Arabia
Belgium	Indonesia	Singapore
Brazil	Ireland	South Africa
Canada	Israel	South Korea
China	Italy	Spain
Colombia	Latvia	Sweden
Croatia	Lithuania	Switzerland
Czech Republic	Malaysia	Taiwan
Denmark	Mexico	Thailand
Egypt	Netherlands	Turkey
Estonia	New Zealand	United Arab Emirates
Finland	Norway	Great Britain
France	Philippines	Ukraine
Germany	Poland	United States
Greece	Portugal	Vietnam

## About the Nielsen Global Online Survey

The Nielsen Global Online Environmental Survey was conducted between March 23 and April 12, 2011 and polled more than 25,000 consumers in 51 countries throughout Asia Pacific, Europe, Latin America, the Middle East, Africa and North America. The sample has quotas based on age and sex for each country based on their Internet users, and is weighted to be representative of Internet consumers and has a maximum margin of error of  $\pm 0.6\%$ . This Nielsen survey is based on the behavior of respondents with online access only. Internet penetration rates vary by country. Nielsen uses a minimum reporting standard of 60 percent Internet penetration or 10M online population for survey inclusion. The Nielsen Global Online Survey, which includes the Global Online Consumer Confidence Survey, was established in 2005.

## About Nielsen

Nielsen Holdings N.V. (NYSE: NLSN) is a global information and measurement company with leading market positions in marketing and consumer information, television and other media measurement, online intelligence, mobile measurement, trade shows and related properties. Nielsen has a presence in approximately 100 countries, with headquarters in New York, USA and Diemen, the Netherlands. For more information, visit [www.nielsen.com](http://www.nielsen.com).

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