



VeraGreen: A Look at American Attitudes and Behaviors on Environmental Issues

Prepared by: VeraQuest, Inc.

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Introduction & Research Design



Background / Objectives

To be a marketing researcher, one typically needs to have a natural curiosity about the world in which we live, which is probably why so many marketing researchers have academic backgrounds in psychology, anthropology or public policy. We at VeraQuest are in a unique position to access and share the attitudes and opinions of people nationally and abroad. Thus the ability to report on the evolution of certain social phenomena such as VeraGreen is not only professionally relevant but personally rewarding as well.

The VeraGreen report touches on how Americans view the emphasis society places on environmental issues such as global warming and the involvement of government in the private sector when environmental issues are at stake. We examine feelings and behaviors regarding recycling, purchasing automobiles that use alternative fuels, the food we eat, and various types of alternative therapies such as chiropractic and nutritional-based programs.

When relevant, we drill down into various demographics to better understand how differences vary by cohorts such as age, income, education and geography. One can assume that where we don't show demographics, the results are probably not newsworthy. That said, the data tables are available to anyone who is interested.



About VeraQuest

VeraQuest occupies the “white space” between omnibus research and custom research. That means we’re able to exploit the cost, timing and sample advantages of omnibus research, while maintaining the creativity, flexibility and strategic orientation of custom research. VeraQuest’s online omnibus furnishes responses from at least 1,500 completed interviews in approximately three business days.

We are committed to making every client experience easy and enjoyable, providing total consultative support from the very beginning of the survey process to the very end. Our keen understanding of how to leverage an omnibus survey enables our clients to maximize their research investment. Our goal is to make our clients look smart. We do that by staying engaged at every turn.



Research Design

Sample

Respondents were recruited from the uSamp panel (www.usamp.com). This panel has over 2 million members in the U.S. who have been recruited through a number of different panel enrollment campaigns. Panelists are required to double opt-in to ensure voluntary participation in the surveys they are invited to complete.

Respondents receive points for the surveys they complete, which can be accumulated and redeemed for a variety of products.

Adult respondents were randomly selected from the uSamp panel to be generally representative of the age, sex, region, race/ethnicity, income, and education strata of the U.S., based on Census proportions. Once selected, respondents were sent an invitation to a protected web-based survey which ensured that only the intended recipient could complete the survey and that the survey could only be completed once. There were 3,506 U.S. respondents 18 or older who completed the survey. Quotas were established for the demographic groups (age, sex, income, education, race/ethnicity) to ensure sufficient diversity of the sample in proportions resembling that of the United States population.

Computing Weights

Since all samples can diverge from the intended population due to non-response bias and sampling bias, we also demographically weight the data. We use a common raking weighting technique (i.e., iterative proportional fitting) that adjusts sample proportions in order to resemble the proportions of the general U.S. population. By demographically weighting the data for key variables (age, sex, region, income, education, and race/ethnicity), we can examine experimental effects in the sample 'as if' it were randomly drawn from the U.S. population. The estimated sampling error for the sample of 3,506 respondents is +/-1.67% at a 95% confidence level. These statements conform to the principles of disclosure of the National Council on Public Polls.



Summary Findings



Summary Findings

- A greater percentage (36%) of Americans think we as a society do not place enough emphasis on environmental issues versus those who believe we currently place too much emphasis on the environment (21%). It is worth noting that older Americans are more inclined to believe society places too much emphasis on environmental issues than their younger counterparts.
- Assuming they are not already aware, Al Gore and other environmental advocates would likely be distressed to learn that half (51%) of all respondents still do not believe that global warming is an issue today, with 16% saying it won't be a problem in the future either. The silver lining for these advocates is that the younger generations are less skeptical than older Americans.



Summary Findings (continued)

- Only about one-in-three Americans are legally required to recycle. In most communities recycling is optional. When it comes to voluntary recycling there are several demographic stories. For example, older Americans are more definitive about their recycling habits, recycling either as often as possible or not at all (though mostly the former). The percentage of Americans who seem less committed to their recycling behavior shrinks consistently as age increases. Whereas 30% of those in the 18-29 year range say they “occasionally” recycle, only 10% aged 65+ are likely to respond that way.
- The Northeast is all by itself when it comes to mandatory recycling – about twice as many people in the Northeast are required to recycle, compared to other regions of the country. Voluntary recycling is strongest in the West, where more than three-out-of-four respondents say they recycle whenever possible even though they are not required. By contrast, only about half the people in the South voluntarily recycle whenever possible.



Summary Findings (continued)

- When it comes to all the factors considered when buying a car, pocketbook matters are not limited to the sticker price alone. When looking at Americans' "top two" most important factors for consideration when buying a car, price is clearly most important at 68%, followed by fuel efficiency at 49%. By comparison, safety is mentioned as a "top two" most important factor by only 34% of respondents.
- When we spoke to those respondents who are responsible for making decisions about automobile purchases/leases, we found that more are likely to consider buying/leasing vehicles that use alternative fuel the next time they are in the market (36%), versus those who are not likely to consider them (25%). While just over a third of decision-makers feel that cars fueled by alternative energy will be in their consideration set the next time they're in the market, 44% agree that they are likely to buy one some time in their lifetime.
- We found the data show a variety of demographic skews when it comes to which decision-makers definitely/probably will consider an alternative energy car for their next purchase/lease. They are younger, better educated, and have higher incomes. They are also more likely to be living in the West.



Summary Findings (continued)

- Age: Older Americans have the least amount of interest. Only 24% of those age 65+ will definitely/probably consider buying/leasing such a vehicle, compared to 50% of those aged 30-39.
- Income: There is a positive correlation between income and buying a car that uses an alternative energy source. Thirty percent of those earning under \$35K would consider it, compared to 42% earning \$100K or more.
- Education: The more education one has, the greater their likelihood of considering a vehicle that uses alternative fuel (29% of those earning a high school degree will consider this vehicle type, versus 46% that have a graduate degree).
- Geography: The West represents the area with the highest level of consideration for buying/leasing cars that utilize alternative energy sources (43%) compared to the Midwest (31%) and Northeast (31%).



Summary Findings (continued)

- The issue of government regulation was an oft-debated theme during the 2012 presidential election; however, when it comes to who should be responsible for setting fuel efficiency standards, there is no ambiguity about how most Americans feel. Almost two-thirds of all respondents believe that the government should be responsible for setting the standards, compared to 37% who think it should be left to the marketplace.
- Not only are the majority of Americans in favor of government regulation when it comes to fuel efficiency standards, but about the same amount (nearly two-thirds) go a step further and say that the government should be involved in subsidizing private companies that produce renewable forms of energy. Although younger Americans (those under age 40) are the strongest proponents of these government subsidies, with nearly three-quarters in favor of the idea, a strong 60% of those aged 50-64 support the notion of government involvement as well. Only adults 65+ years of age are split on the matter (48% are in support, with 52% opposed to these government subsidies).



Summary Findings (continued)

- Which foods we consume and the way we consume them reflects another facet of how Americans interact with their environment.
- The notion of buying organic food is popular among Americans...as long as it doesn't hurt their wallets. While an overwhelming majority of Americans (74%) like the idea of buying organic foods, fewer than one-in-ten (8%) are willing to pay “a lot more”, while another 25% are willing to pay “a little more”. Organic foods may be the wave of the future, however, as willingness to pay at least “a little more” is much stronger among people under age 40 versus those 40 and older. In fact, willingness to pay more for organic food is about twice as high among younger people than among their older counterparts.
- Whether organic or not, having food we grow ourselves is a popular American past-time. More than a third of all home-owners (single family or town house) have a fruit or vegetable garden, while another 47% would like to have one but don't due to lack of time, knowledge or a good location.



Summary Findings (continued)

- Consuming locally grown food has gained increased visibility over the last few years with books such as *Animal, Vegetable, Miracle*, by Barbara Kingsolver. When it comes to buying locally grown food, more than one-fifth (21%) of all Americans indicate they always try to do so. Another 18% say they would be interested in buying locally grown food, and would be willing to pay a premium and put up with some inconvenience (shop at a different location than they normally shop) to do so.
- Community Supported Agricultural programs (CSA's as they're known) are programs that enable consumers to buy local, seasonal food directly from a farmer. Typically, consumers pay an annual subscription to the CSA and in exchange receive delivery of farm-fresh fruits and vegetables often picked that same day. Participation in such programs is minimal, but the opportunity is big. Only two percent (2%) of those surveyed belong to a CSA, though another 39% would be interested in joining one if the cost were reasonable.



Summary Findings (continued)

- Avoiding certain foods due to food allergies or religious purposes is nothing new; however, some foods long thought to be completely safe have come under increased scrutiny recently. For example, in the book *Wheat Belly*, Dr. William Davis expounds on the deleterious effect of wheat-based products, particularly genetically engineered wheat. In our study, we found that 19% of people now often or always avoid seek to avoid gluten. Americans also report avoid consuming processed foods (37%), soy (31%), and caffeine (23%).
- The percentage of Americans who use alternative forms of therapy is relatively low – the most popular alternative treatments being nutritional and chiropractic therapies, followed by massage therapies (all of which are in the mid-30% range). That said, only a minority of Americans reject the notion of alternative therapies. For example, 80% and 81% would consider nutritional therapies and massage therapies, respectively, and more than half would consider yoga, bio-feedback and homeopathic remedies. Very few users of alternative therapy users would choose not to use the therapy again.



Detailed Findings



General Attitudes on Environmental Issues

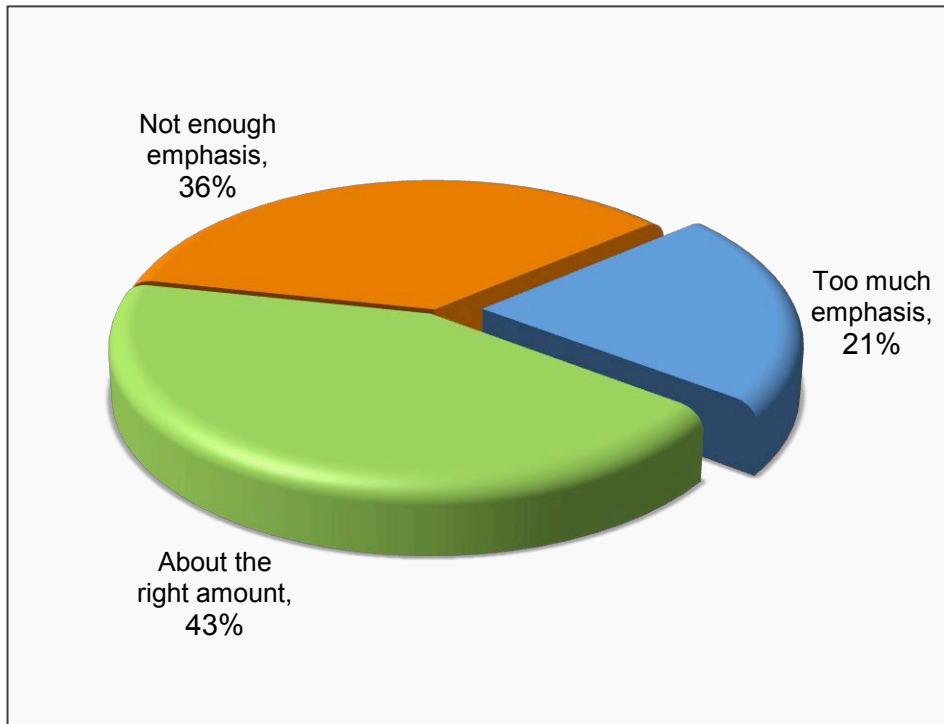


Emphasis Society Places on Environmental Issues

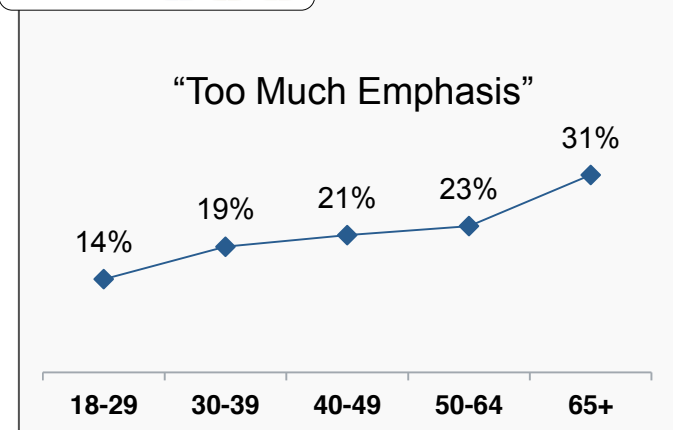
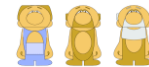
More than four-in-ten Americans (43%) feel society places “about the right amount” of emphasis on environmental issues. That said, over one-third (36%) say the current level of emphasis is “not enough”, while about one-in-five (21%) feel society places “too much” emphasis on environmental issues.

The percentage of Americans who think society places “too much” emphasis on environmental issues increases with age, from a low of 14% among 18-29 year-olds to a high of 31% among those aged 65 and older.

General Population



By Age

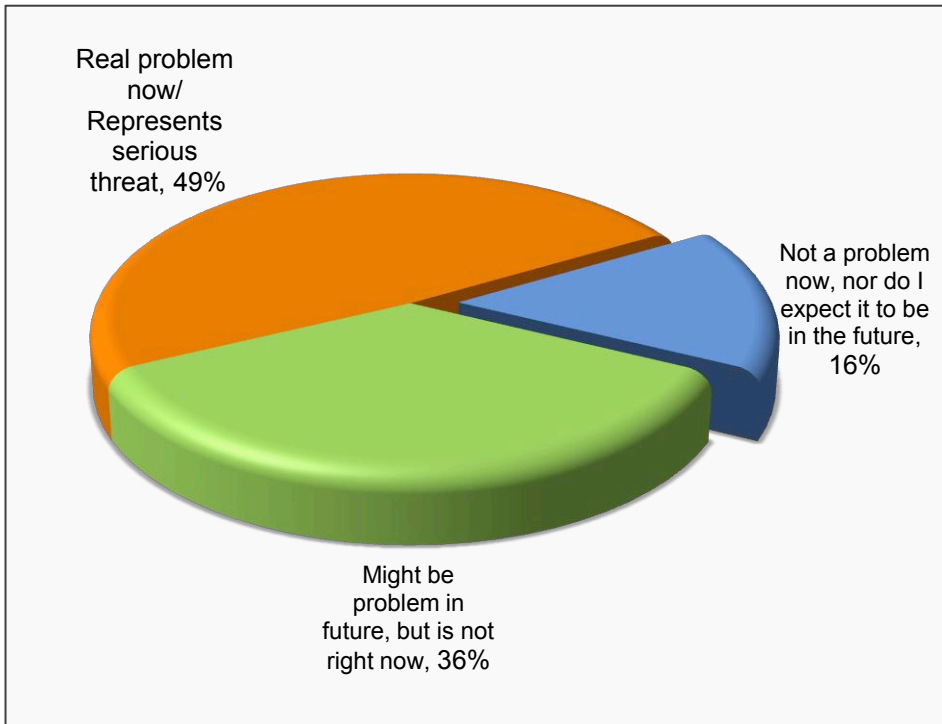


View on Global Warming

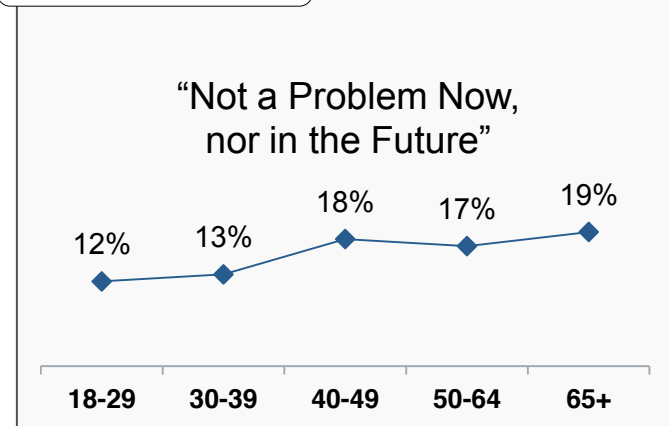
When it comes to global warming, half of Americans (49%) believe it's a real problem now, while over a third (36%) say it's not, but could be in the future. About one-in-six respondents (16%) say global warming is neither a problem now nor will it be in the future.

While the age skew isn't as strong as was seen for the broader environmental results, there is an age skew nonetheless. The percentage saying they do not believe global warming is a problem now or in the future increases with age.

General Population



By Age



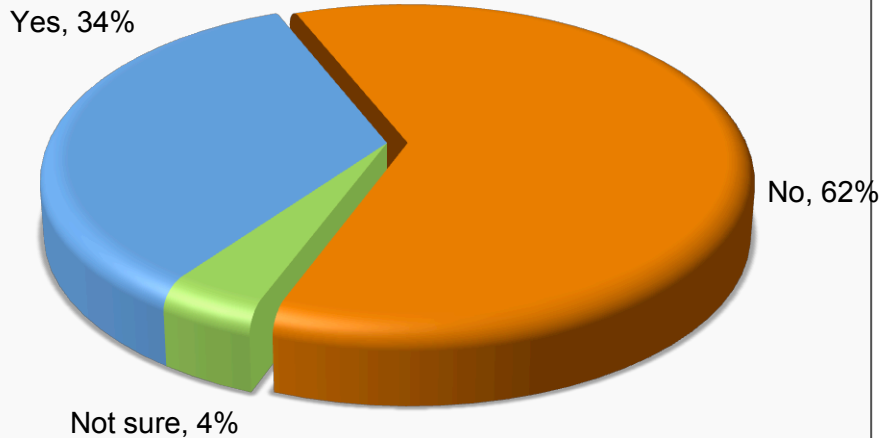
Recycling

Recycling Requirements & Practices

Only about one-third of Americans (34%) are required by law to recycle bottles and cans. That said, many more who are not required, actually do. Two-thirds (64%) of those who don't have to recycle do so anyway (whenever possible), while another 22% recycle occasionally.

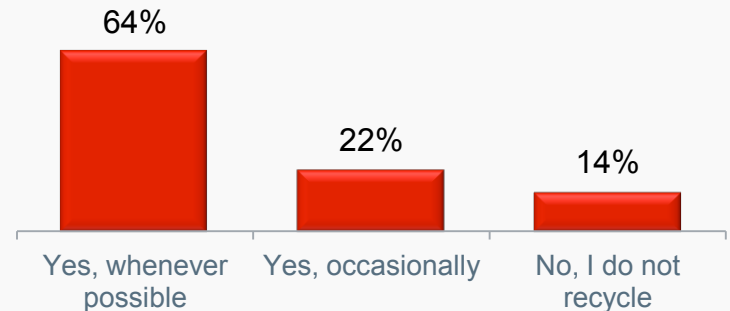
General Population

Required to Recycle Bottles/Cans Where Live



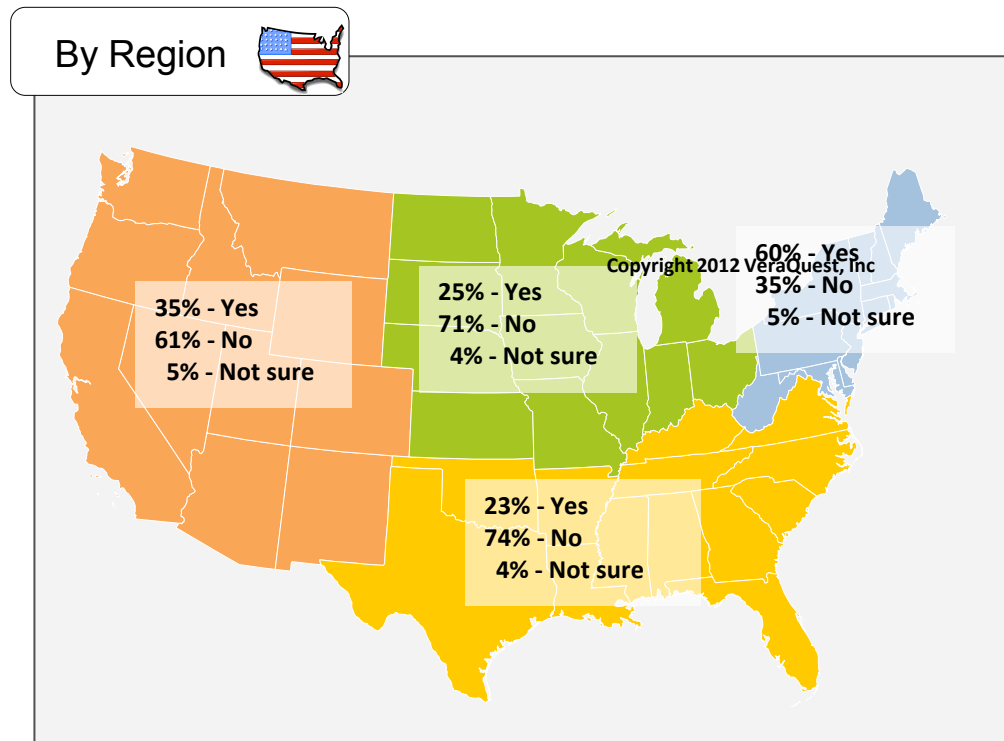
Not Required to Recycle

Recycle Anyway



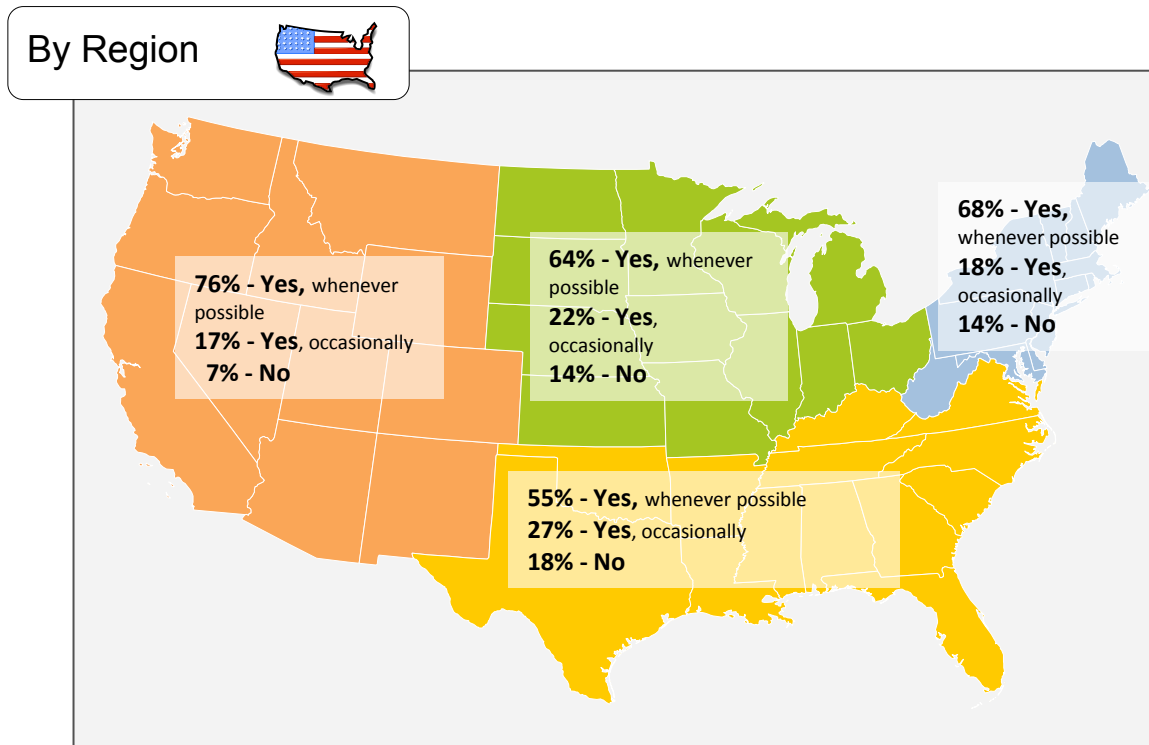
Required to Recycle Bottles/Cans Where Live

Recycling laws are much more common in the Northeast than in the rest of the country. Three-out-of-five respondents in the Northeast are required to recycle versus only one-fourth of those living in the Midwest and South.



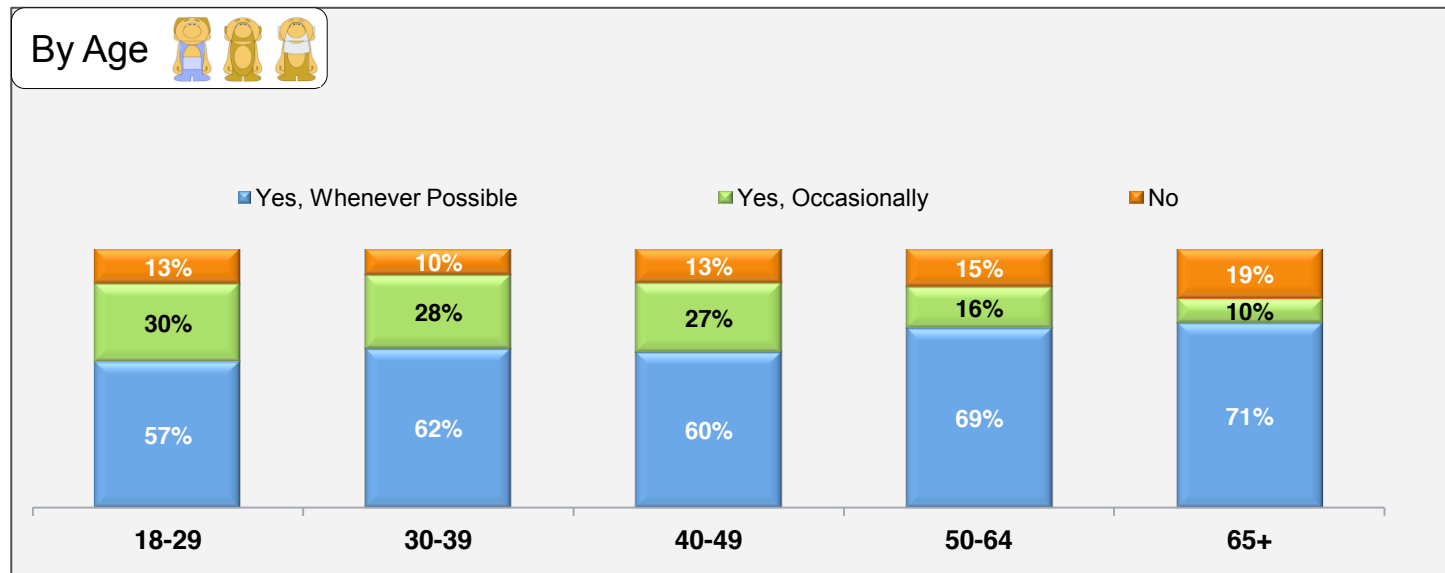
Though Not Required, Recycle Anyway

Regionally, the West exhibits the greatest propensity for voluntary recycling with 76% who recycle “whenever possible”. By comparison, only 55% of those in the South who don’t have to recycle do so whenever possible. The Northeast comes in at 68%, while the Midwest is at 64%.



Though Not Required, Recycle Anyway

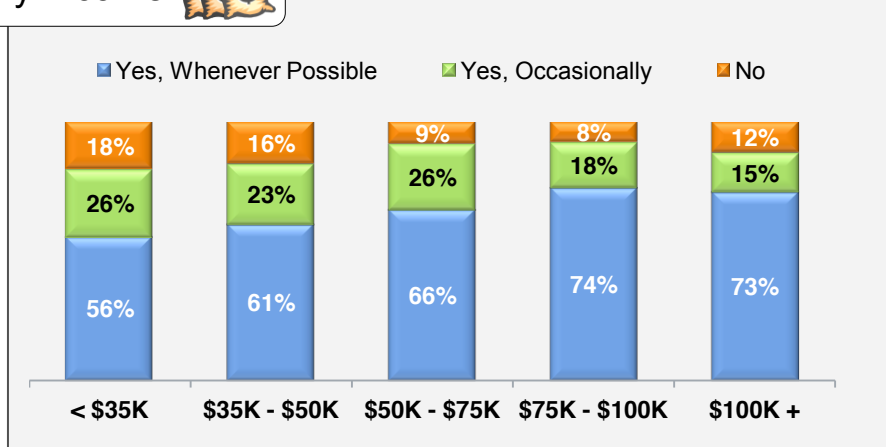
The vast majority of all age groups choose to voluntarily recycle when not required to do so by law. That said, older Americans 65+ come across as more “all or nothing” when it comes to voluntary recycling, showing both the largest resistance to the practice (19% do not recycle) as well as the largest consistent adoption of the practice (71% recycle whenever possible). Younger adults 18-29, on the other hand, are overall more likely to voluntarily recycle, but they are less committed – 57% recycle whenever possible, with 30% indicating they recycle only occasionally.



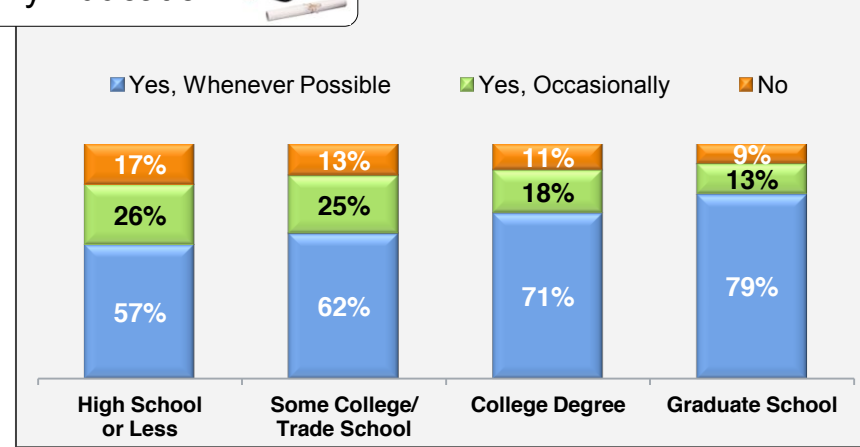
Though Not Required, Recycle Anyway

There is a positive correlation between income level and commitment to recycling – wealthier Americans are more likely to voluntarily recycle than those who are less affluent. There is also a strong relationship between education and recycling – the more educated people are, the more likely they are to voluntarily recycle whenever possible.

By Income



By Education

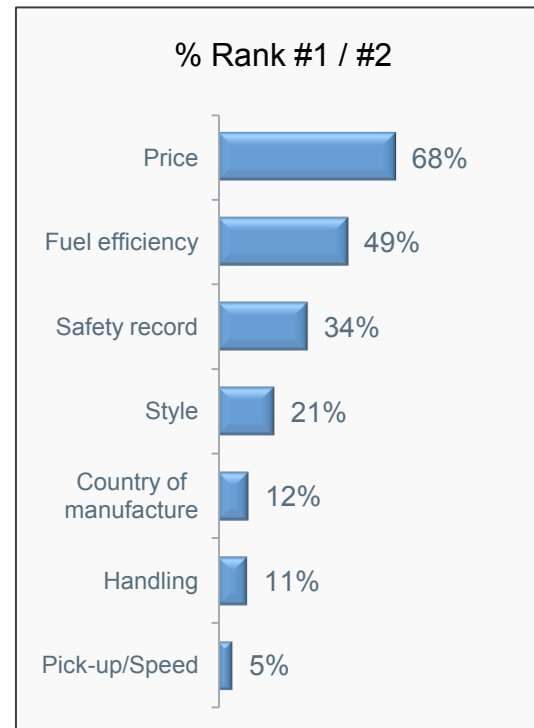
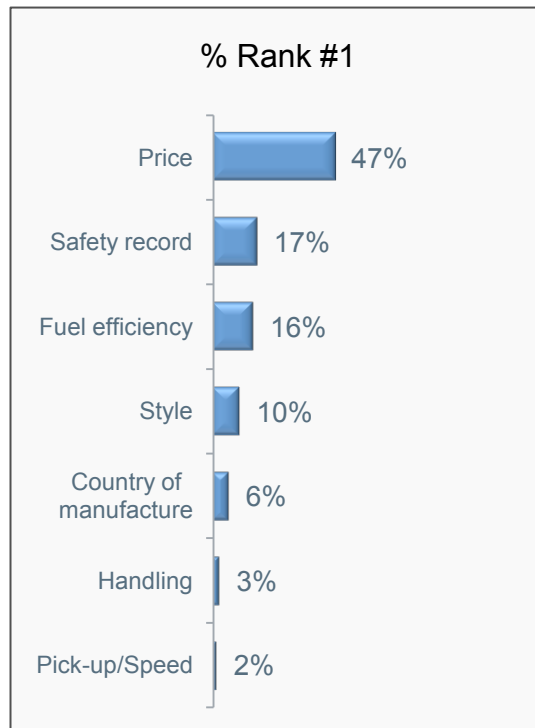


Alternative Sources of Energy for Cars

Ranking of Factor Importance when Considering Buying a Car

Price is by far the most important factor to consumers when making a car purchase decision, with nearly half (47%) naming it as the single most important factor and over two-thirds (68%) naming price within their top two considerations. Fuel efficiency and safety record are also very important factors, with 49% and 34% of consumers (respectively) identifying these factors as among their top two most important considerations when buying a car.

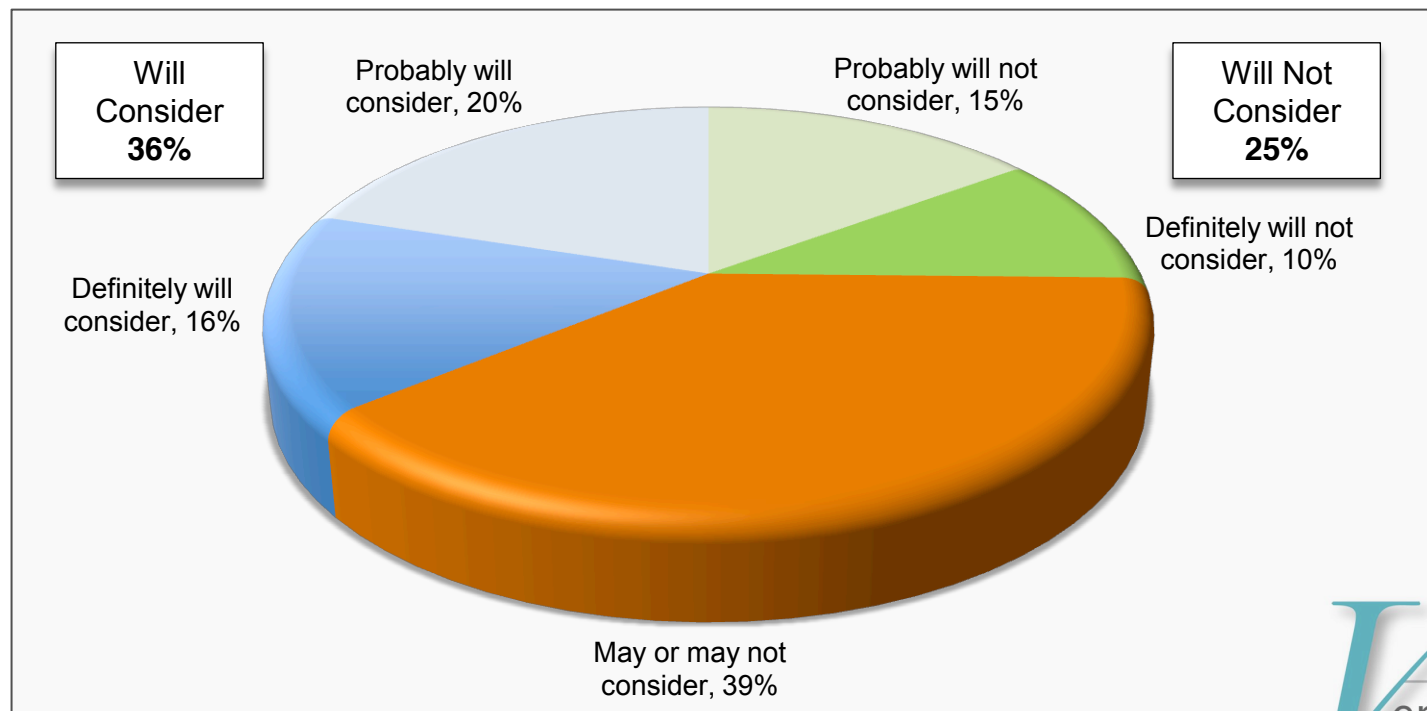
Among Purchase Decision Makers For Car



For Next Car, Likelihood to Consider Buying/Leasing a Vehicle that Uses Alternative Sources of Energy

When it comes to the next time they buy/lease a car, about one-third (36%) of decision-makers indicate they will probably or definitely consider a vehicle that uses alternative sources of energy. One-in-four say they probably or definitely will not. A large faction (39%) remain undecided.

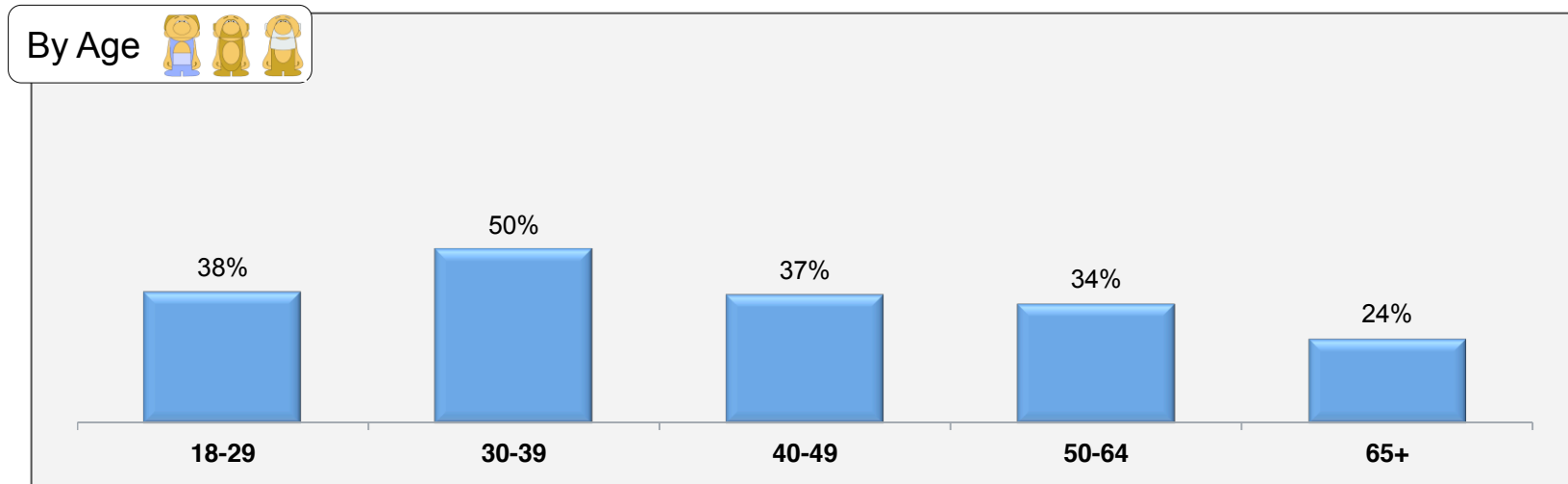
Among Purchase Decision Makers For Car



For Next Car, Likelihood to Consider Buying/Leasing a Vehicle that Uses Alternative Sources of Energy

Older Americans have the least amount of interest in buying/leasing a vehicle that utilizes alternative sources of energy the next time they are in the market for a car. Only 24% of those age 65+ will definitely/probably consider buying/leasing such a vehicle. One group, however, stands out as a strong potential target – half of decision-makers aged 30-39 will definitely/probably consider buying a vehicle powered by an alternative energy source the next time they go to buy/lease a car.

Definitely / Probably Will Consider Among Purchase Decision Makers For Car




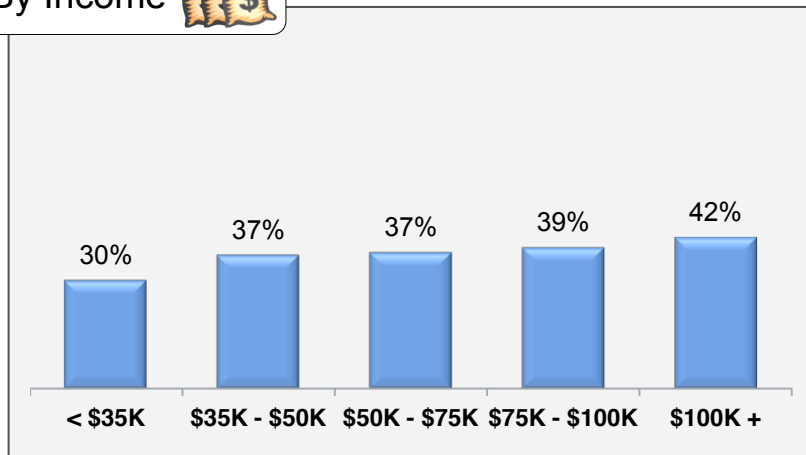
For Next Car, Likelihood to Consider Buying/Leasing a Vehicle that Uses Alternative Sources of Energy

Although the relationship isn't overwhelming, there is a positive correlation between income and interest in buying/leasing a car that uses an alternative energy source. Thirty percent (30%) of those earning under \$35K would consider it compared to 42% earning \$100K or more.

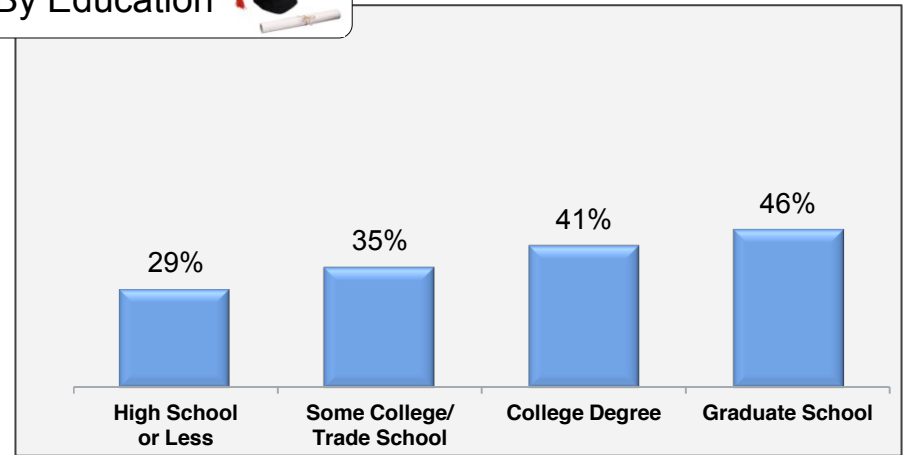
As education and income are related, it comes as no surprise that the more education one has, the greater probability that one will consider buying a vehicle that uses alternative sources of energy.

Definitely / Probably Will Consider Among Purchase Decision Makers For Car

By Income 



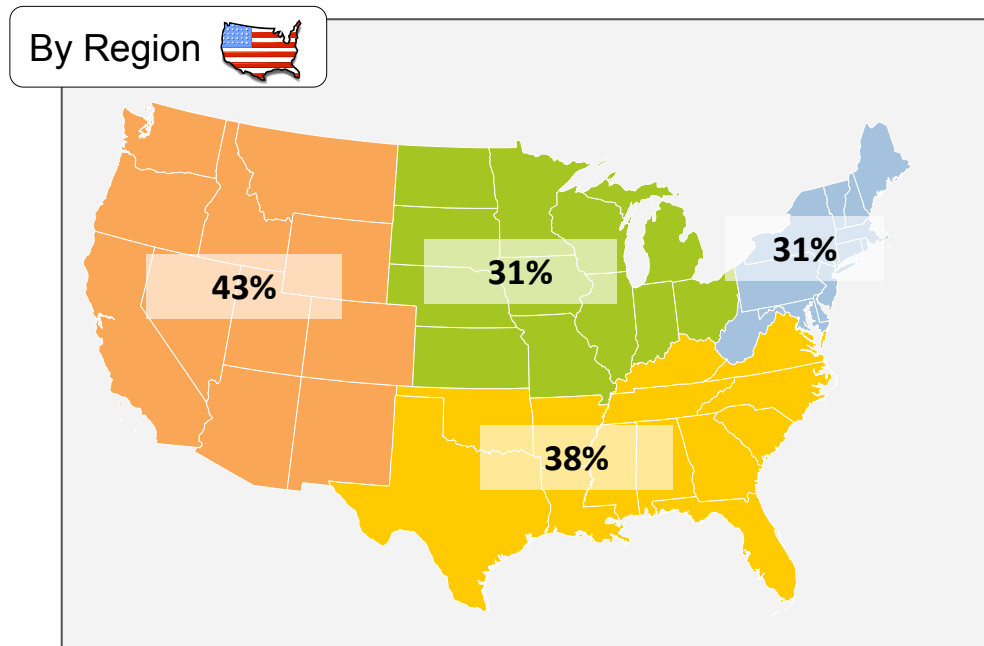
By Education 



For Next Car, Likelihood to Consider Buying/Leasing a Vehicle that Uses Alternative Sources of Energy

Regional differences are noteworthy as well. The West represents the area with the highest level of consideration for buying/leasing cars that utilize alternative energy sources (43%), compared to the Northeast and Midwest at 31% each.

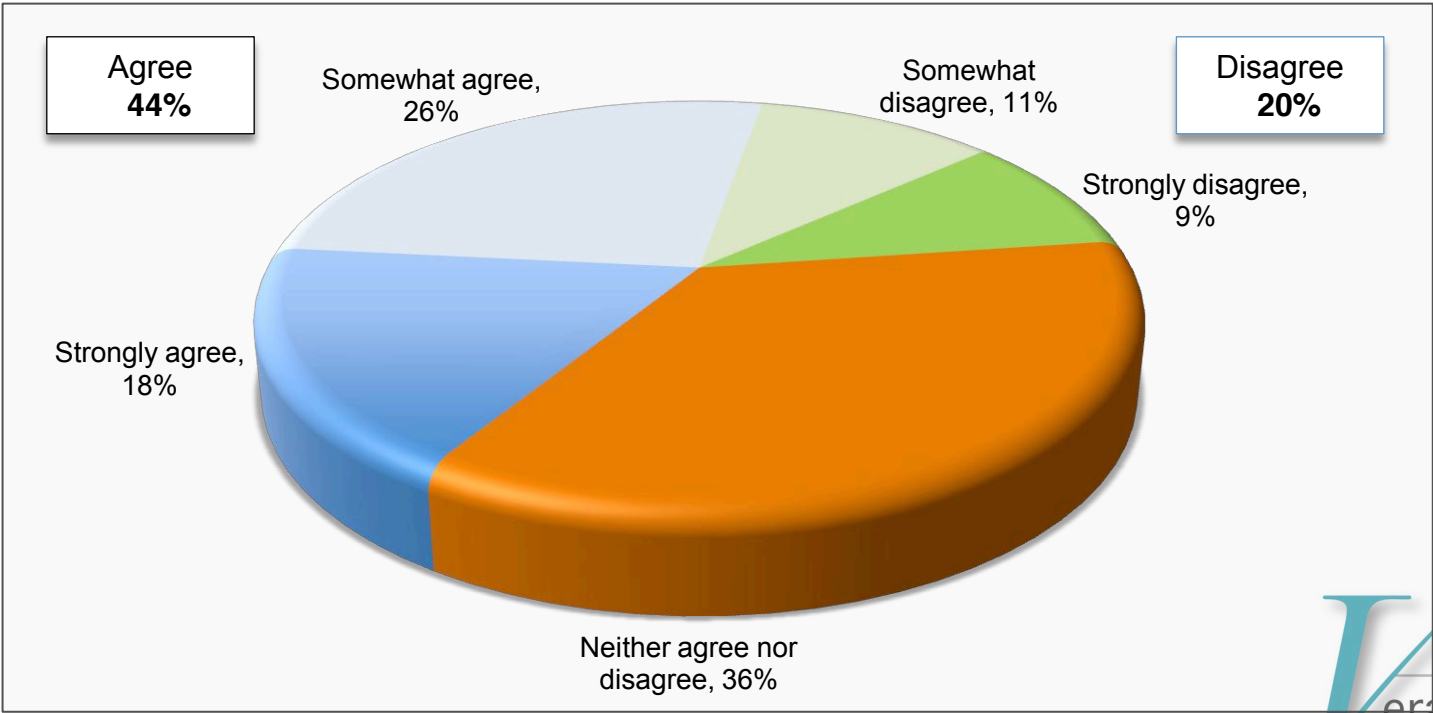
Definitely / Probably Will Consider
Among Purchase Decision Makers For Car



Agreement with Statement: *“I am probably going to buy a car powered by an alternative fuel/energy source sometime in my lifetime”*

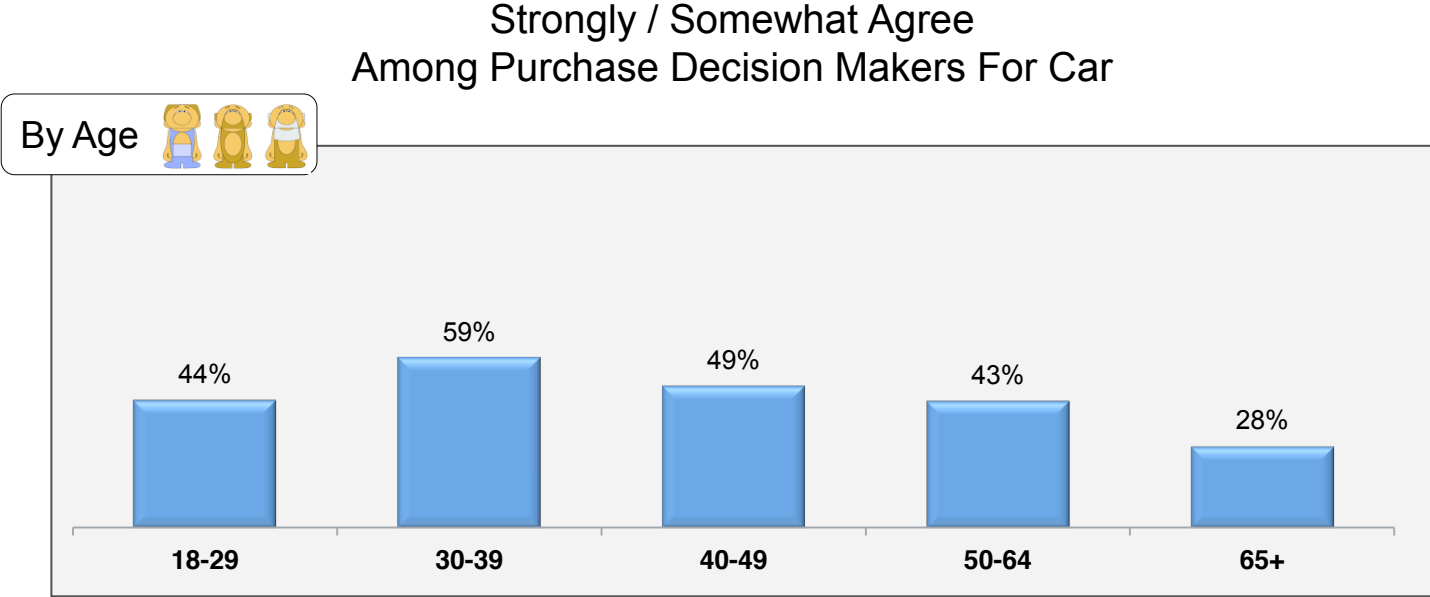
While just over a third of decision-makers feel that cars fueled by alternative energy will be in their consideration set the next time they're in the market, 44% agree that they are likely to buy one sometime in their lifetime.

Among Purchase Decision Makers For Car



Agreement with Statement: *“I am probably going to buy a car powered by an alternative fuel/energy source sometime in my lifetime”*

Almost six-out-of-ten decision makers (59%) in the 30 – 39 year old age range agree that they will probably buy an alternative energy car sometime in their lifetime. That’s ten percentage points higher than the next closest group (40 – 49 year olds) and 15 percentage points higher than 18 – 29 year olds.



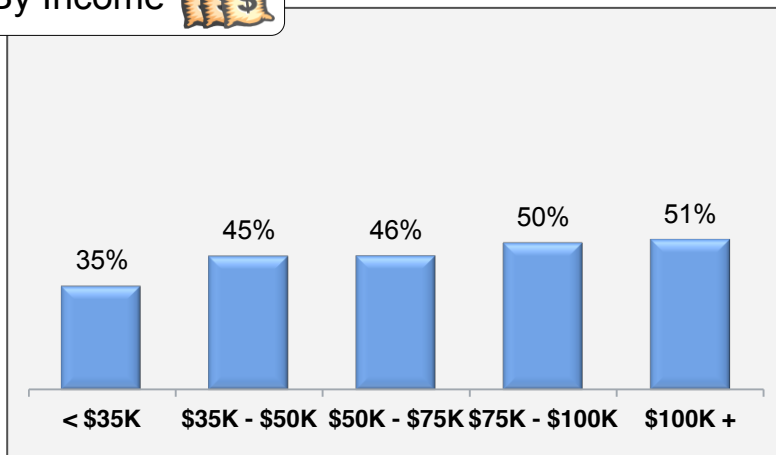
Agreement with Statement: *“I am probably going to buy a car powered by an alternative fuel/energy source sometime in my lifetime”*

The percentage of decision-makers who believe they will own an alternative energy car sometime in their lifetime increases with income level, though the largest jump occurs above \$35K.

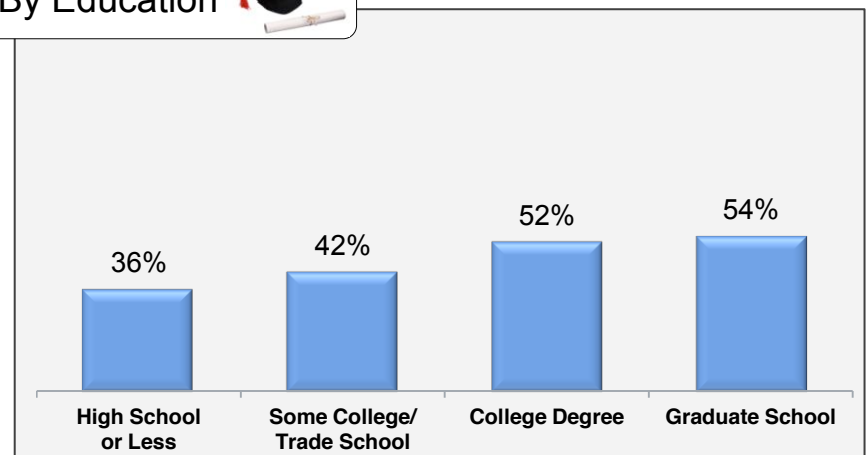
Education level is an even stronger indicator of who will likely purchase an alternative energy car in the future. More than half of those who hold a college or post-graduate degree believe that owning a car powered by alternative fuel will happen in their lifetime.

Strongly / Somewhat Agree Among Purchase Decision Makers For Car

By Income



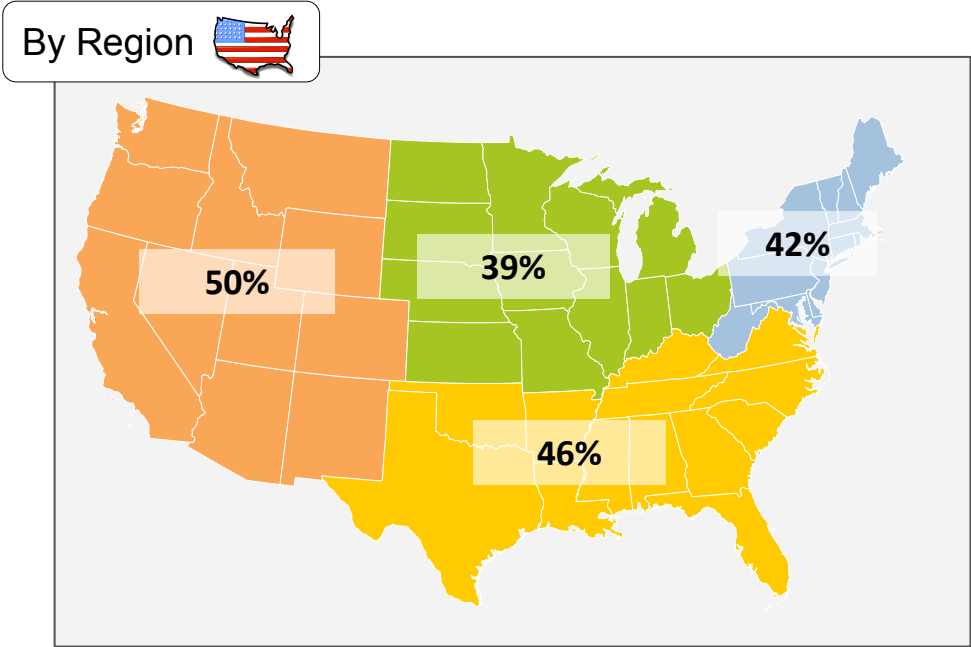
By Education



Agreement with Statement: *“I am probably going to buy a car powered by an alternative fuel/energy source sometime in my lifetime”*

The inevitability of owning an alternative energy vehicle appears strongest in the West, where one out of every two respondents believes they will own such a car one day. By contrast, only 39% of those in the Midwest believe they will someday own one.

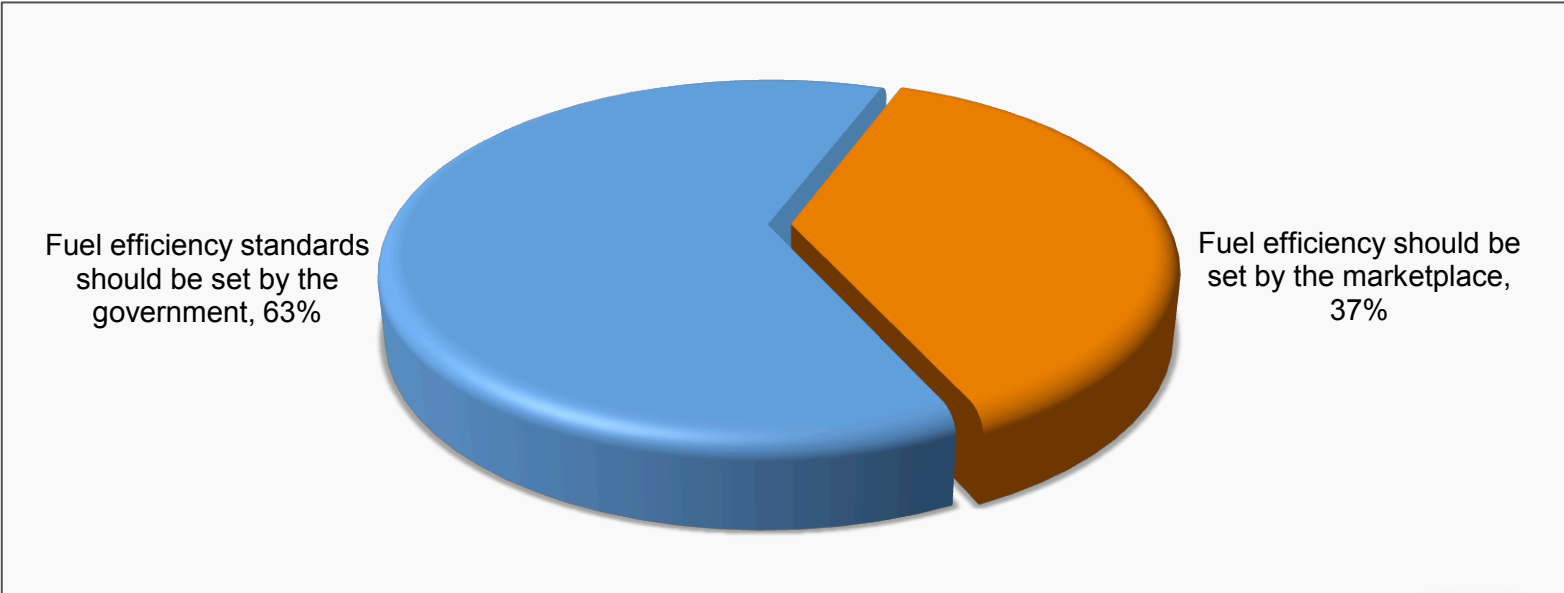
Strongly / Somewhat Agree Among Purchase Decision Makers For Car



Best Description of Personal Views about Automotive Fuel Efficiency

The issue of government regulation was an oft-debated theme during the 2012 presidential election; however, when it comes to who should be responsible for setting fuel efficiency standards, there is no ambiguity about how most Americans feel. Almost two-thirds of all respondents believe that the government should be responsible for setting the standards, compared to 37% who think it should be left to the marketplace.

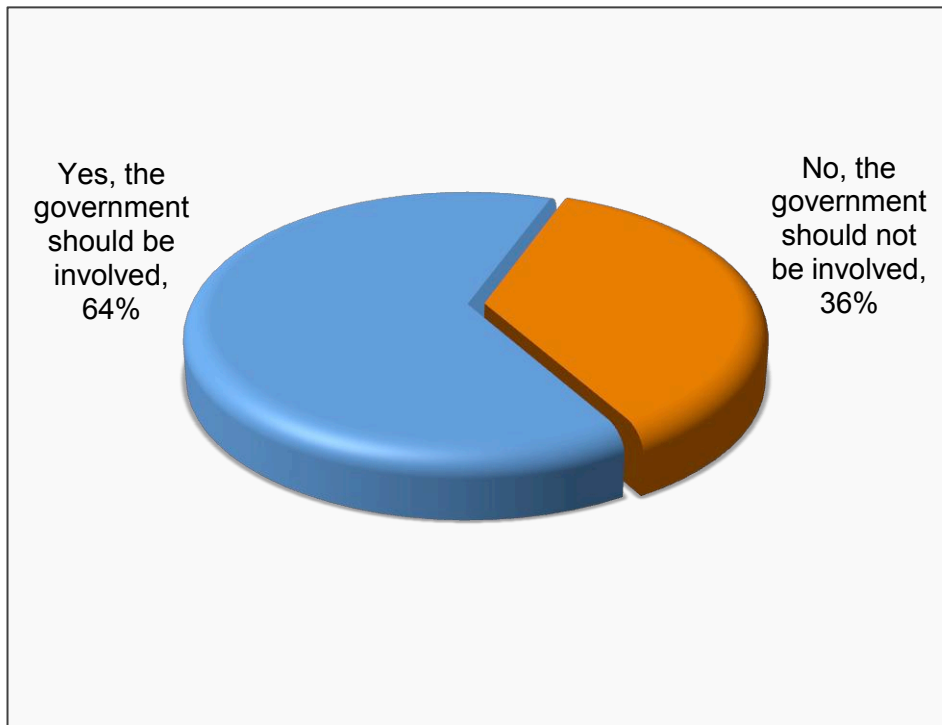
Among Purchase Decision Makers For Car



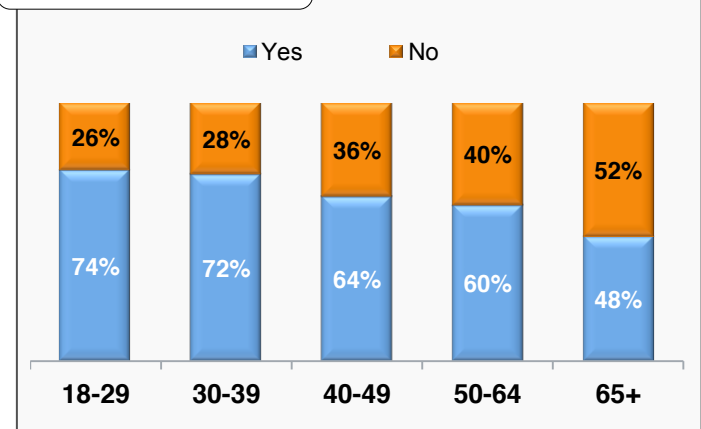
Believe that Federal Government Should Subsidize Private Companies that Produce Renewable Energy Products

Not only are the majority of Americans in favor of government regulation when it comes to fuel efficiency standards, but about the same amount (nearly two-thirds) go a step further and say that the government should be involved in subsidizing private companies that produce renewable forms of energy. Although younger Americans (those under age 40) are the strongest proponents of these government subsidies, with nearly three-quarters in favor of the idea, a strong 60% of those aged 50 - 64 support the notion of government involvement as well. Only adults 65+ years of age are split on the matter (48% are in support, with 52% opposed to these government subsidies).

General Population



By Age



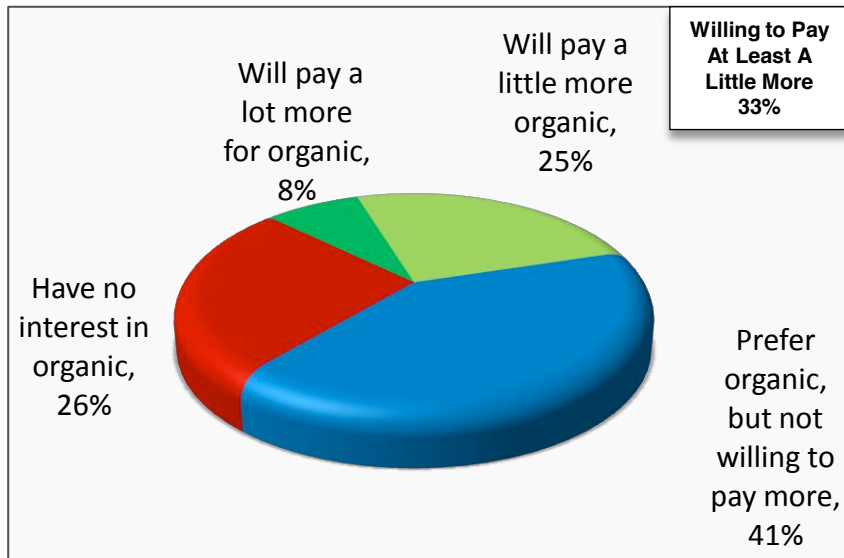
Food - Organic, Gardening, Locally Grown and Foods Avoided

Willingness to Pay More for Organic Foods

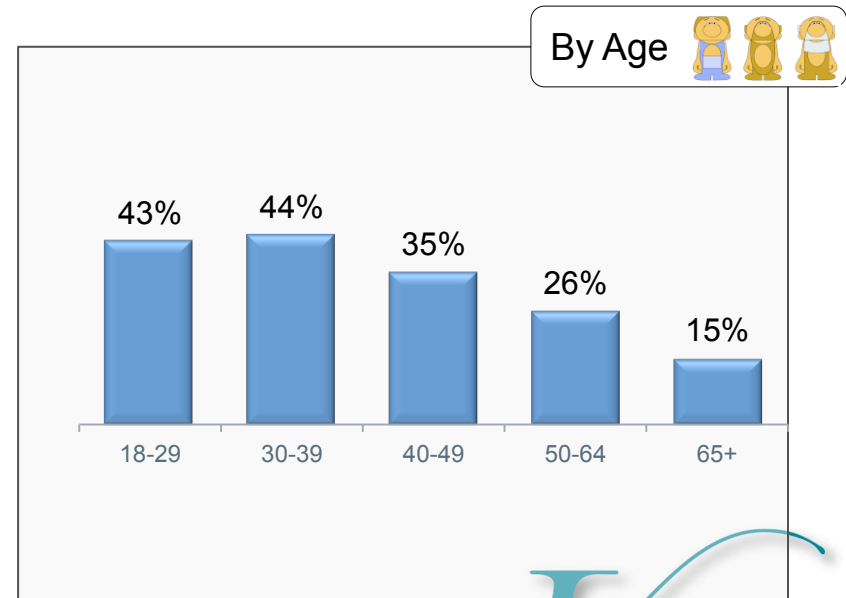
Nearly three-quarters (74%) of all those surveyed have some interest in buying organic goods; however, only about a third of consumers are actually willing to pay more – 8% are willing to pay “a lot more” and 25% are willing to pay “a little more”. Another 41% express interest in organic food, but are not willing to pay more.

Willingness to spend more for organic foods is more prevalent among the younger population. A little less than half (44%) of those under age 40 say they’re willing to spend at least a little more for organic food. That number drops to one-in-four (26%) among 50 – 64 year olds and 15% among those aged 65+.

General Population



Would Spend At Least A Little More for Organic Foods

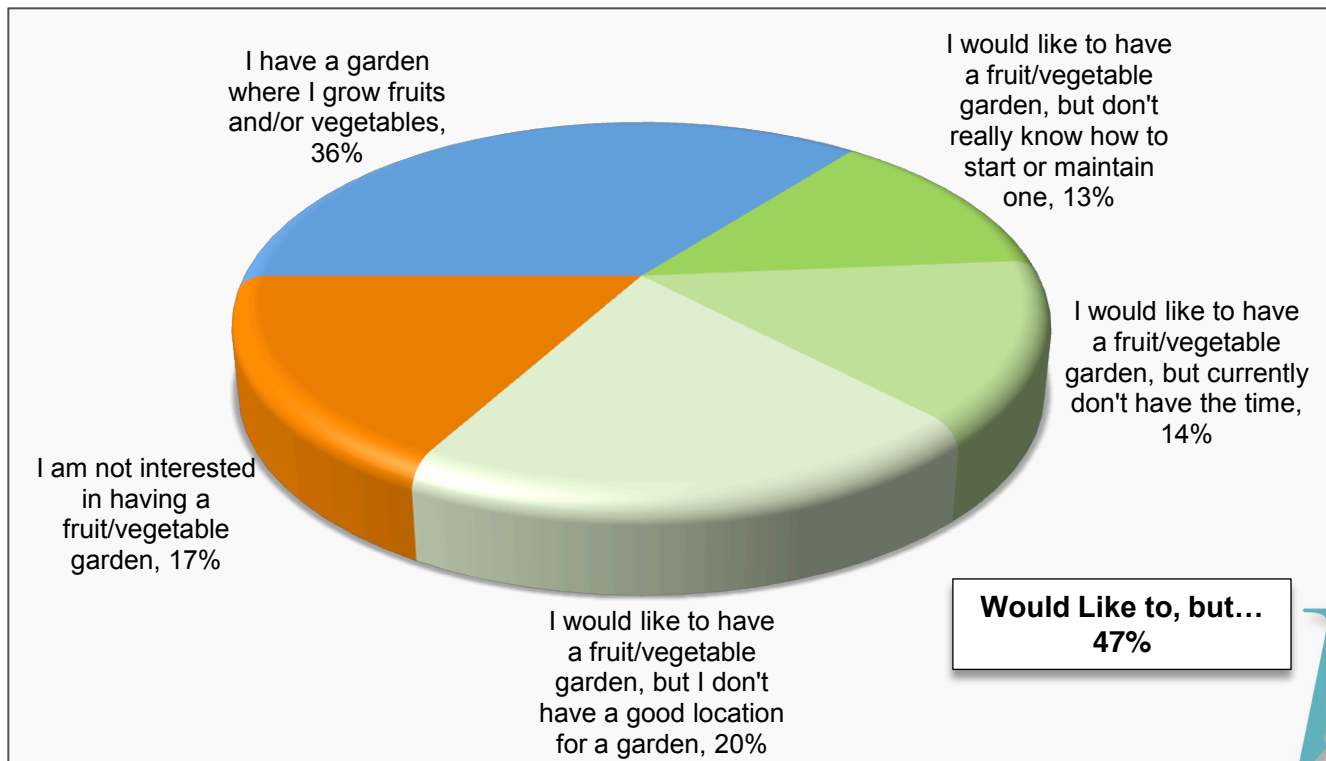


Interest in Having a Fruit/Vegetable Garden

More than one-third (36%) of Americans who own their own home (single-family or townhouse) have a garden where they grow fruits or vegetables. Another 47% would like to have a garden but:

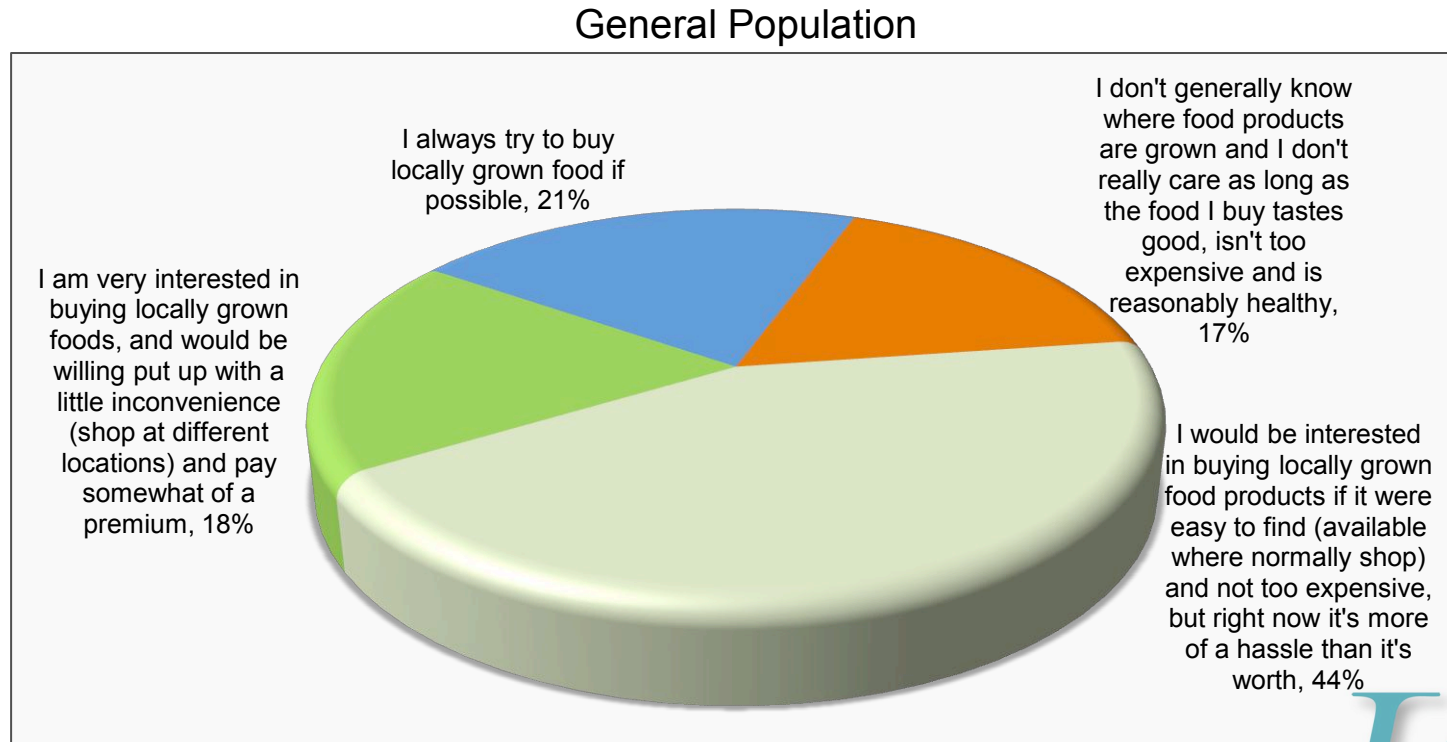
- Don't know how to start or maintain one (13%)
- Don't have a good location (20%)
- Don't have the time (14%)

Among Owners of a Single-Family Home or Townhouse



Best Description of Feelings About Locally Grown Food Products

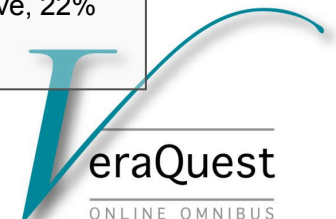
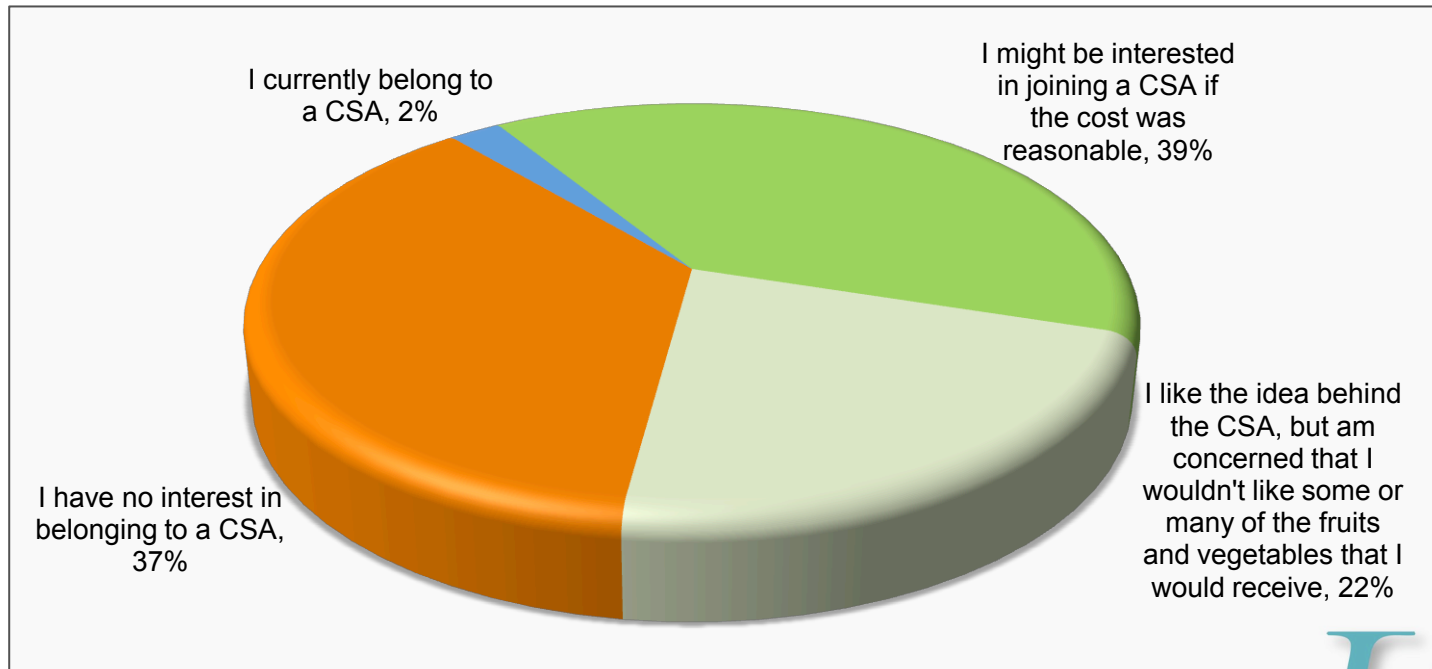
When it comes to locally grown food, more than one-fifth (21%) of all Americans indicate they always try to buy locally grown food if possible. Another 18% say they would be interested in buying locally grown food, would be willing to pay a premium and would put up with some inconvenience (e.g., shop at a different location than they normally shop).



Best Description of Feelings About Joining a CSA

Only 2% of those surveyed belong to a Community Supported Agriculture (CSA) program, though another four-in-ten (39%) would be interested in joining one if the cost were reasonable. About one-in-five (22%) like the idea behind a CSA but are concerned that they might not like many of the fruits and vegetables they would receive, while 37% of respondents have no interest in belonging to a CSA.

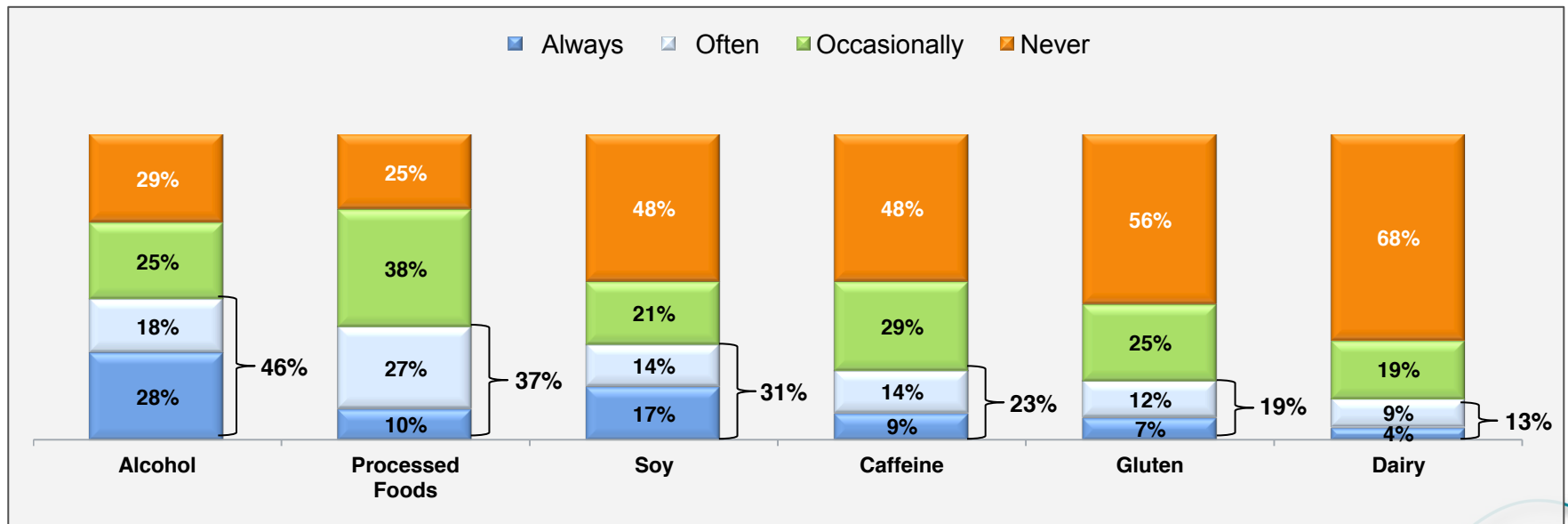
General Population



Extent to which Avoid...

Avoidance of certain types of foods or beverages is nothing new. It's not surprising, for example, that 28% of Americans don't drink alcohol at all and another 18% don't drink it often. However, some other types of products have garnered attention recently as well. For instance, many Americans indicate that they are "often" or "always" avoiding processed foods (37%), soy (31%) and caffeine (23%) and gluten (19%).

General Population



Alternative Therapies



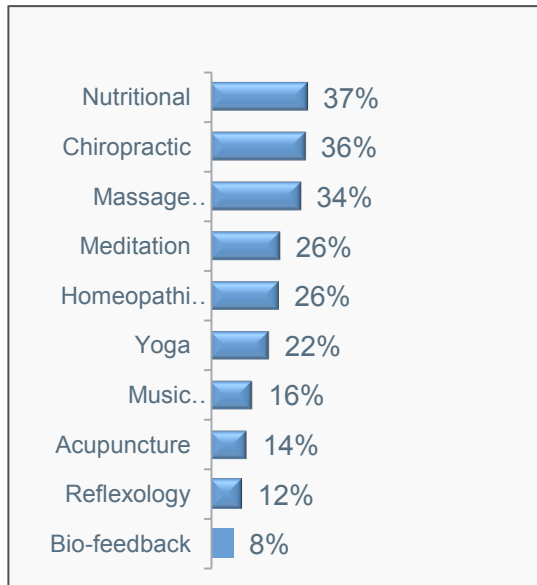
Alternative Treatments/Therapies Usage & Consideration

The percentage of Americans who use alternative forms of therapy is relatively low – the most popular alternative treatments being nutritional and chiropractic therapies, followed by massage therapies (all of which are in the mid-30% range). That said, only a minority of Americans reject the notion of alternative therapies. For example, 80% and 81% would consider nutritional therapies and massage therapies, respectively, and more than half would consider yoga, bio-feedback and homeopathic remedies.

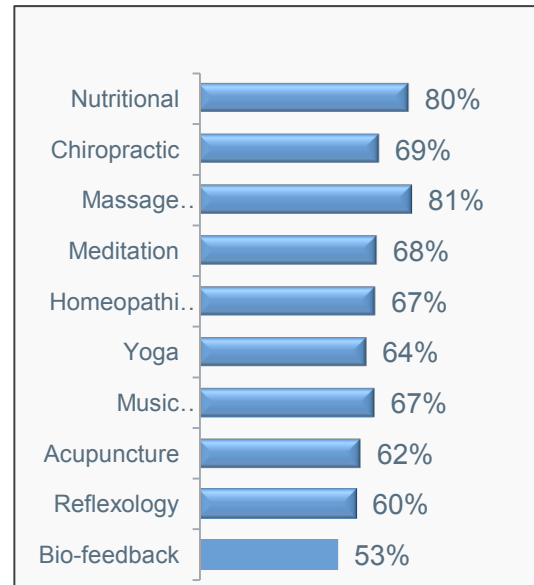
Very few users of alternative therapy users would choose not to use the therapy again.

General Population

% Who Have Used



% Who Would Consider



% Who Have Used, Would Not Use Again

