



Yale School of Forestry
& Environmental Studies

The GfK Roper Yale Survey on Environmental Issues

**Summer, 2008: Consumer Attitudes Toward
Environmentally-Friendly Products and Eco-labeling**

July, 2008

About the GfK Roper Yale Survey on Environmental Issues

The GfK Roper Yale Survey on Environmental Issues is a series of quarterly national telephone surveys on a variety of environmental topics. Each survey is a collaboration between survey researchers at GfK Roper Public Affairs & Media and scholars at the Yale School of Forestry and Environmental Studies. Designed to give voice to the American people on vital issues of today, the survey measures the environmental knowledge, attitudes, policy preferences, and behavior of the American public.

How the survey was conducted

U.S.

Findings in this report are culled from two national telephone surveys of Americans, ages 18 and over, conducted from March 28-30 (n=1,004) and April 4-6 (n=1,006) as part of GfK Roper's weekly OMNITEL telephone omnibus service. The sample is drawn from random digit dialing (RDD) probability sample of all telephone household in the continental United States. Data were weighted to match national norms (derived from the Current Population Survey) on sex, age, region, and education. Topline findings are projectable at the 95% confidence level to the total adult continental U.S. population within an average +/- percentage point margin of error.

Canada

For comparison purposes, an identical telephone survey was conducted concurrently (April 4-6; all questions were asked in one wave) among 1,000 Canadians ages 18 and over. The sample was generated from a database of all published Canadian telephone numbers; almost 9 million records nation-wide. Randomizing the final digits of the telephone number ensures full coverage of Canadian households for any sample drawn from the database. This includes unlisted numbers and numbers not allocated at the time of the database's compilation. On a sample of 1000 adults, interviewing is disproportionately allocated by region as follows: Atlantic (125 interviews), Quebec (250), Ontario (250), Manitoba/Saskatchewan (125), Alberta (125), and British Columbia (125).

Within the regional quotas of Quebec, Ontario and British Columbia, CMA (Census Metropolitan Area) quotas are assigned to ensure a proportionate number of interviews are completed in Canada's three largest markets; Montreal, Toronto and Vancouver. The sample is then weighted in tabulation to replicate actual population distribution by sex and age within region. The Yukon, Nunavut and Northwest



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Territories are excluded from the sample selection. Demography available upon request.

More than ever before, consumers face a plethora of labels making claims about the environmental-friendliness of products. The use of labels is promoted in hopes of ameliorating diverse environmental harms – from pesticide use and fish-stock depletion. They are sponsored by various organizations, including government agencies, industry groups and environmental groups.

The GfK Roper Yale Survey sought to understand the perceptions of eco-labels and environmentally-friendly products held by Americans and Canadians. Are American and Canadian consumers interested in purchasing environmentally-friendly products? Do they prioritize environmental concerns over price and quality? Do they know much about existing labels? How trustworthy are labels endorsed by different groups? Examining four different products, Americans and Canadians were asked for their attitudes on these important questions.

Key Findings

Most Americans are willing to purchase environmentally-friendly products, but other considerations such as price and quality often take priority.

A majority of Americans say that it is important that the products they purchase be environmentally-friendly — such as automobiles (66% say it is important or essential to them), clothes detergent (62%), and computer printer paper (51%).

However, when asked whether environmental friendliness, price, or quality is most important when buying particular products, only one in four or fewer Americans say eco-friendliness is the most important when it comes to:

- Computer printer paper (26% say environmental friendliness is most important vs. 41% that say price)
- Clothes detergent (23% vs. 41% say quality)
- An automobile (17% vs. 44% say quality)
- Wood furniture (11% vs. 51% say quality)

Still, many Americans say they are willing to pay more for “green” products. Half responded that they would “definitely” or “probably” pay 15% more for eco-friendly clothes detergent (51%) or an automobile (50%). Four in ten say they would spend 15% more on “green” computer printer paper (40%) or wood furniture (39%).

Perhaps surprisingly, Americans who perceive their current financial situation as either “fair” or “poor” indicated they are just as willing as those more confident of their current finances to spend 15% more on detergent and wood furniture.

However, fewer cash-strapped Americans say they are willing to spend 15% more for an environmentally friendly car or paper.

Americans are familiar with some, but not all eco-labels. The sponsors of eco-labels are not trusted equally.

Americans say they want additional information about environmental impacts on product labels. Large majorities say that it is either important or essential to have eco-labels that describe the environmental impacts caused by product manufacture (73%), use (73%), and disposal (79%).

When asked how familiar they are with five different eco-labels, over half of Americans say they are “very” or “somewhat familiar” with the USDA organic label (e.g., QAI certified organic) and the Energy Star label (62% and 58%, respectively). Only about one in three say they are familiar with the Fairtrade label (36%), one in five with the Sustainable Forestry Initiative (19%), and one in ten with the Forest Stewardship Council label (12%).

Eco-labels are often sponsored by different organizations, including environmental groups, industry groups, and government agencies. When asked how trustworthy labels from each of these groups are, Americans show a clear preference for *environmental groups* when it comes to eco-label sponsors (75% say such groups are “very” or “somewhat trustworthy”). Fewer say government agencies or industry groups are trustworthy (55% and 51%, respectively).

In an aggregate, a greater percentage of Canadians than Americans place a high priority on eco-friendly products.

The GfK Roper Yale Survey was run concurrently in the United States and Canada and comparisons reveal that a higher percentage of Canadians expressed “green” preferences in their consumer mindset. Key findings include (see the comparison chart on page 11):

- A greater percentage of Canadians report that environmental friendliness is more important in their purchasing decisions compared to the percentage of Americans that reported such preferences — often by close to a two-to-one margin. For example, nearly twice as many Canadians say environmental friendliness is their top priority when choosing clothes detergent (44% versus 23% of Americans), computer printer paper (41% versus 26%, respectively), an automobile (30% versus 17%), and wood furniture (22% versus 11%).

- A greater percentage of Canadians, compared to the percentage of Americans, express willingness to pay a 15% premium for eco-friendly clothes detergent (65% versus 51% of Americans), computer printer paper (56% versus 40%, respectively), and wood furniture (49% versus 39%).
- While roughly the same proportion of Canadians as Americans trust eco-labels sourced by environmental groups (79% versus 75%, respectively, are considered “very” or “somewhat trustworthy”), a greater percentage of Canadians place somewhat more trust in their government than do Americans (61% versus 55%), and less trust in industry groups (44% versus 51%).

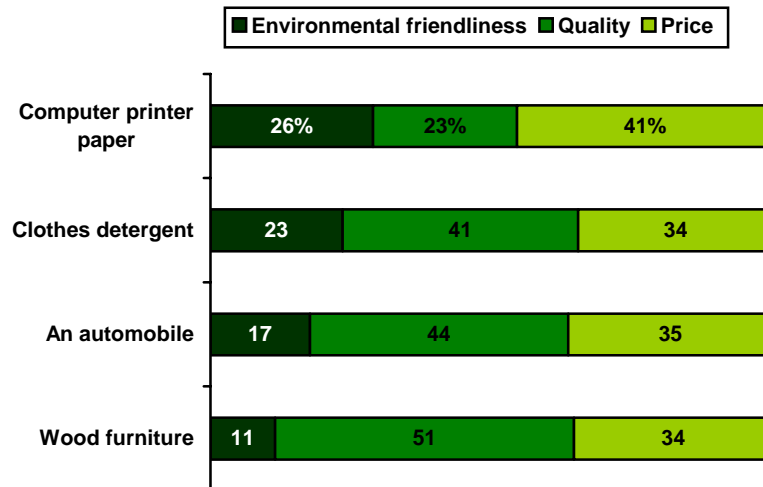
The survey responses indicate strong support from key populations in both Canada and the United States regarding the use of eco-labels to address enduring environmental challenges. Many in both countries would use information from a label to inform their purchasing decisions. However, their knowledge of existing labels is mixed, which appears to be limiting the effectiveness of current labels.

Overall, a majority of Canadians and Americans also feel that it is important for products they purchase to be environmentally-friendly. Price and quality, nevertheless, took priority for the majority of consumers across the products examined. Moreover, trust for label sponsors vary, with environmental groups being more trusted than government agencies and industry groups.

Though there were differences within both countries, a striking finding between the two countries is that a greater percentage of Canadians – by a two to one margin - report that environmental friendliness is more important in their purchasing decisions.

Relative importance of environmental-friendliness, price, and quality when making a purchase decision

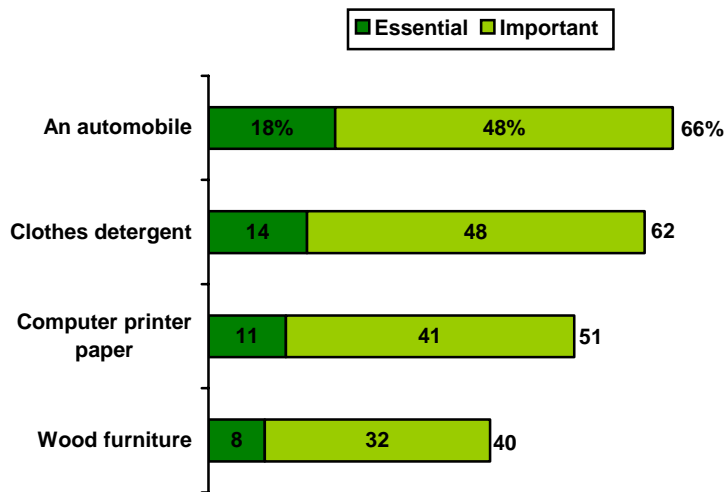
Base: Total respondents (n= 1,004).



As you may know, sometimes there can be a tradeoff between a product's price, quality, and friendliness to the environment. For example, environmentally-friendly products are sometimes more expensive than regular products while quality can vary. For each of the following products, please tell me, which one of the following is most important to you when you buy it – the price, quality, or environmental friendliness? First...

Importance to consumers that products they purchase be environmentally friendly

Base: Total respondents (n= 1,004).



As you may know, there are many “green” or environmentally-friendly products now available, such as recycled paper products, energy efficient appliances, and fuel efficient cars. I am going to read a list of products and, for each one, please tell me how important it is to you, when making a purchase, that the product be environmentally friendly – essential, important, not so important, or not important at all. If you never buy that product, just let me know.



Likelihood of spending up to 15% more on next purchase for environmentally-friendly product
- % who say they definitely or probably would spend 15% more -

Base: Total respondents.

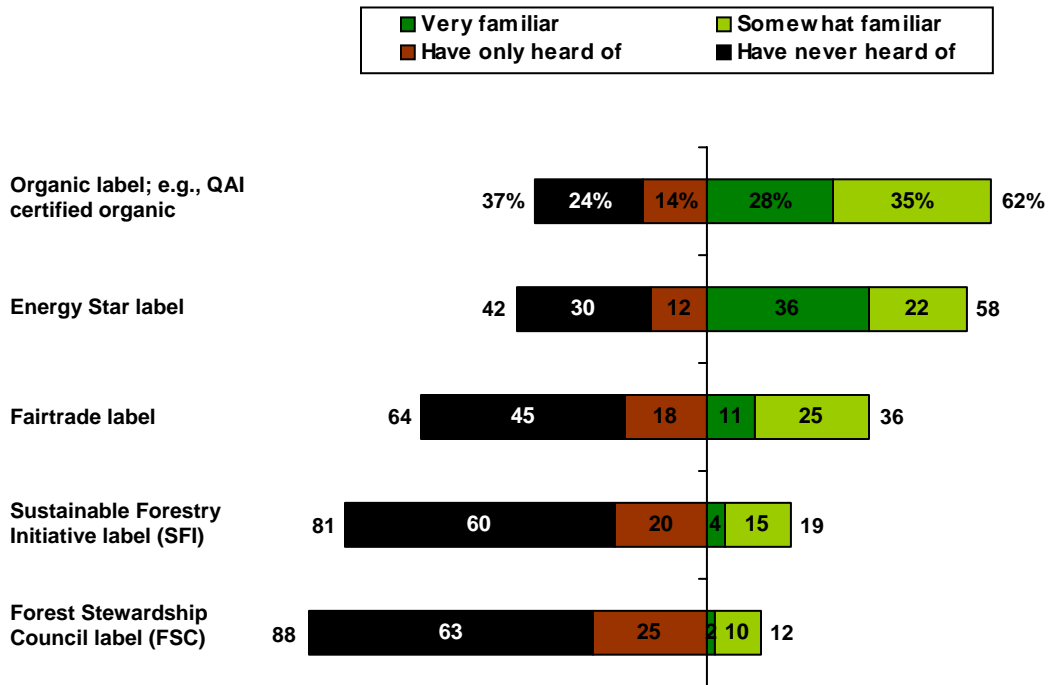
	<u>Total</u>	Self-rated current financial situation	
		Excellent/ <u>good</u>	Fair/ <u>poor</u>
		(490)	(500)
(Unweighted base)	(1,004)		
	a	b	c
	%	%	%
Would definitely/probably pay 15% more for products			
Clothes detergent	51	52	50
An automobile	50	55 ^c	46
Computer printer paper	40	46 ^c	35
Wood furniture	39	40	38
Would definitely/probably <u>not</u> pay 15% more for products			
Clothes detergent	48	48	49
An automobile	48	43	52 ^b
Computer printer paper	57	50	63 ^b
Wood furniture	59	58	60

I'm going to read the same list of products and this time, thinking about your current financial situation, please tell me whether, the next time you make a purchase, you would definitely, probably, probably not, or definitely not pay up to 15% more for an environmentally-friendly product. First...

*Superscript indicates proportion is significantly higher (at 95% confidence level) from proportion in adjacent column.

Familiarity with various eco-labels

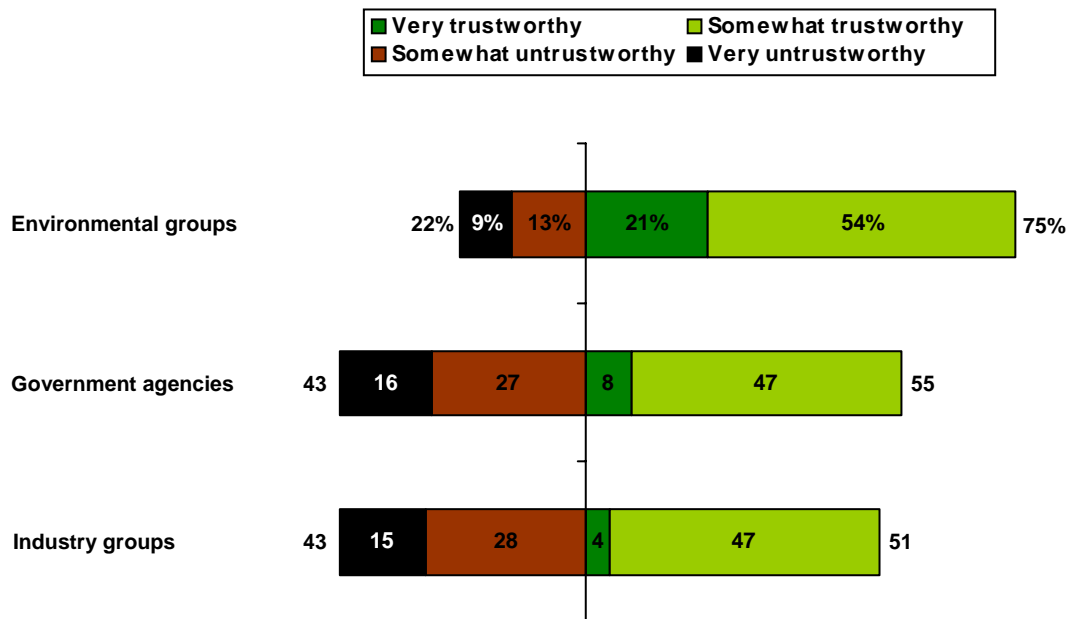
Base: Total respondents (n= 1,006).



In order to let consumers know that their product is “environmentally friendly,” manufacturers often put a seal of approval or eco-label on their packaging. I am going to read you a list of eco-labels that you may have seen on products you’ve purchased recently. Please tell me whether you are very familiar, somewhat familiar, have heard of but are unfamiliar with, or if you’ve never heard of each of the following eco-labels. First...

Perceived trustworthiness of various eco-label sources

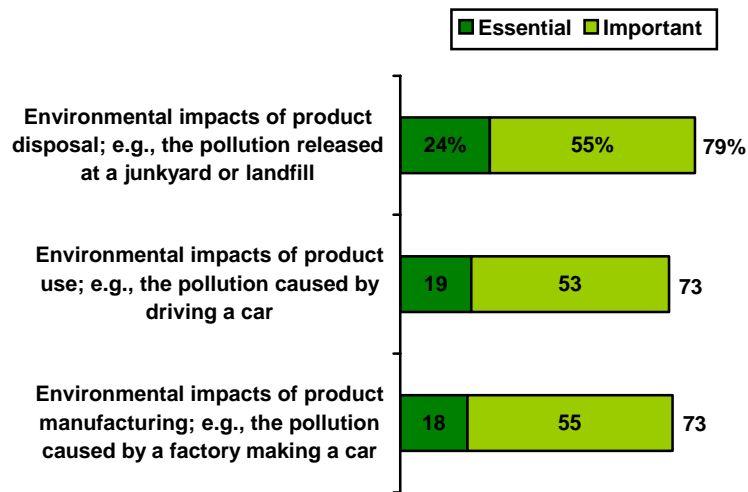
Base: Total respondents (n= 1,006).



Seals of approval or eco-labels can have different sponsors. I am going to read a list of three possible sponsors and, for each one, please tell me if you find the sponsor to be very trustworthy, somewhat trustworthy, somewhat untrustworthy, or very untrustworthy. First...

Importance of eco-label information

Base: Total respondents (n= 1,006).



Eco-labels or seals of approval may provide information about a variety of ways products can have an impact on the environment. When you are making a purchase, is it essential to you, important but not essential, not so important, or not important at all that a product's eco-label contain information about ...

Differences between public attitudes in the U.S. and Canada

	<u>U.S.</u> (1,004/*1,008) %	<u>Canada</u> (1,000) %	<u>Difference</u> NA pt. diff.
(Unweighted base)			
Essential/important that products purchased by eco-friendly			
Automobile	66	77	-11
Clothes detergent	62	80	-18
Computer printer paper	51	66	-15
Wood furniture	40	55	-15
Eco-friendliness more important than quality or price when purchasing			
Computer printer paper	26	41	-15
Clothes detergent	23	44	-21
An automobile	17	30	-13
Wood furniture	11	22	-11
Would definitely/probably pay 15% or more for eco-friendly products			
Clothes detergent	51	65	-14
Automobile	50	51	-1
Computer printer paper	40	56	-16
Wood furniture	39	49	-10
Very/somewhat familiar with eco-label*			
Organic label (e.g., QAI certified organic)	62	71	-9
Energy Star label	58	73	-15
Fairtrade label	36	48	-12
Sustainable Forestry Initiative (SFI)	19	17	2
Forest Stewardship Council (FSC)	12	17	-5
Canadian Standards Association Sustainable Forestry Initiative	NA	34	NA
Very/somewhat trustworthy sponsors of eco-labels*			
Environmental groups	75	79	-4
Government agencies	55	61	-6
Industry groups	51	44	7
Essential/important eco-label information*			
Environmental impact of product disposal	79	86	-7
Environmental impact of product use	73	82	-9
Environmental impact of product manufacturing	73	80	-7



Appendix 1: Sample Demography – March 28-30, 2008 (Wave 1)

	%	N
	<u>(Weighted)</u>	<u>(Unweighted)</u>
	100	1,004
Sex		
Male	48	482
Female	52	522
Age		
18-24	13	30
25-34	18	99
35-49	27	232
50-64	22	314
65+	16	273
Household income		
<\$20,000	19	141
\$20,000-\$29,999	11	100
\$30,000-\$39,999	8	81
\$40,000-\$49,999	12	102
\$50,000+	35	408
\$75,000+	23	273
Region		
Northeast	19	190
Midwest	22	225
South	35	365
West	22	224



Appendix 2: Sample Demography – April 4-6, 2008 (Wave 2)

	%	N
	<u>(Weighted)</u>	<u>(Unweighted)</u>
	100	1,006
Sex		
Male	48	482
Female	52	524
Age		
18-24	13	46
25-34	18	98
35-49	28	246
50-64	23	307
65+	16	272
Household income		
<\$20,000	15	135
\$20,000-\$29,999	15	126
\$30,000-\$39,999	10	90
\$40,000-\$49,999	8	79
\$50,000+	40	437
\$75,000+	27	301
Region		
Northeast	19	191
Midwest	22	225
South	36	366
West	22	224



Appendix 3: Survey Instruments

Wave 1: March 28-30, 2008

- As you may know, there are many “green” or environmentally-friendly products now available, such as recycled paper products, energy efficient appliances, and fuel efficient cars. I am going to read a list of products and, for each one, please tell me how important it is to you, when making a purchase, that the product be environmentally friendly – essential, important, not so important, or not important at all. If you never buy that product, just let me know.

[RANDOMIZE]	Essential	Important	Not so important	Not at all important	N/A	DK	REF.
Clothes detergent	4	3	2	1	0	X	Y
Computer printer paper	4	3	2	1	0	X	Y
An automobile	4	3	2	1	0	X	Y
Wood furniture	4	3	2	1	0	X	Y

- As you may know, sometimes there can be a tradeoff between a product's price, quality, and friendliness to the environment. For example, environmentally-friendly products are sometimes more expensive than regular products while quality can vary. For each of the following products, please tell me, which one of the following is most important to you when you buy it – the price, quality, or environmental friendliness? First... [READ EACH ITEM]

[RANDOMIZE]	Price	Quality	Environmental friendliness	DK	REF.
Clothes detergent	1	2	3	X	Y
Computer printer paper	1	2	3	X	Y
An automobile	1	2	3	X	Y
Wood furniture	1	2	3	X	Y

- I'm going to read the same list of products and this time, thinking about your current financial situation, please tell me whether, the next time you make a purchase, you would definitely, probably, probably not, or definitely not pay up to 15% more for an environmentally-friendly product. First... [READ EACH ITEM.]

[RANDOMIZE]	Definitely would	Probably would	Probably would not	Definitely would not	DK	REF.
Clothes detergent	4	3	2	1	0	X
Computer printer paper	4	3	2	1	0	X
An automobile	4	3	2	1	0	X
Wood furniture	4	3	2	1	0	X



Wave 1: March 28-30, 2008 (Cont'd.)

4. How convinced, if at all, are you that global warming is happening? Would you say you are completely convinced, mostly convinced, not so convinced, or not at all convinced?

Completely convinced	4
Mostly convinced	3
Not so convinced	2
Not at all convinced	1
Don't know	X
Refused	Y

5. How convinced, if at all, are you that global warming is happening? Would you say you are completely convinced, mostly convinced, not so convinced, or not at all convinced?

	Excellent	Good	Only fair	Poor	DK	REF.
National economy	4	3	2	1	X	Y
Personal financial situation	4	3	2	1	X	Y



Wave 2: April 4-6, 2008

1. In order to let consumers know that their product is “environmentally friendly,” manufacturers often put a seal of approval or eco-label on their packaging. I am going to read you a list of eco-labels that you may have seen on products you’ve purchased recently. Please tell me whether you are very familiar, somewhat familiar, have heard of but are unfamiliar with, or if you’ve never heard of each of the following eco-labels. First... [READ EACH ITEM]

[RANDOMIZE]	Very familiar	Some-what familiar	Unfamiliar	Never heard of	DK	REF.
Energy Star label	4	3	2	1	X	Y
Fairtrade label	4	3	2	1	X	Y
Organic label (for example “QAI certified organic”)	4	3	2	1	X	Y
Forest Stewardship Council label (also known as FSC)	4	3	2	1	X	Y
Sustainable Forestry Initiative label(also known as SFI)	4	3	2	1	X	Y
[ASK IN CANADA ONLY:] Canadian Standards Association sustainable forestry program label	4	3	2	1	X	Y

2. Eco-labels or seals of approval may provide information about a variety of ways products can have an impact on the environment. When you are making a purchase, is it essential to you, important but not essential, not so important, or not important at all that a product's eco-label contain information about ... [READ EACH ITEM]

[RANDOMIZE]	Essential	Important	Not so important	Not at all important	N/A	DK	REF.
The environmental impacts of product manufacturing, for example, the pollution caused by a factory making a car	4	3	2	1	0	X	Y
The environmental impacts of product use, for example, the pollution caused by driving a car	4	3	2	1	0	X	Y
The environmental impacts of product disposal, for example, the pollution released at a junkyard or landfill	4	3	2	1	0	X	Y



Wave 2: April 4-6, 2008 (Cont'd.)

3. Seals of approval or eco-labels can have different sponsors. I am going to read a list of three possible sponsors and, for each one, please tell me if you find the sponsor to be very trustworthy, somewhat trustworthy, somewhat untrustworthy, or very untrustworthy. First... [READ EACH ITEM.]

[RANDOMIZE]	Very trustworthy	Somewhat trustworthy	Somewhat untrust.	Very untrust.	DK	REF.
Environmental groups	4	3	2	1	0	X
Industry groups	4	3	2	1	0	X
Government agencies	4	3	2	1	0	X

4. How convinced, if at all, are you that global warming is happening? Would you say you are completely convinced, mostly convinced, not so convinced, or not at all convinced?

Completely convinced	4
Mostly convinced	3
Not so convinced	2
Not at all convinced	1
Don't know	X
Refused	Y

5. How convinced, if at all, are you that global warming is happening? Would you say you are completely convinced, mostly convinced, not so convinced, or not at all convinced?

	Excellent	Good	Only fair	Poor	DK	REF.
National economy	4	3	2	1	X	Y
Personal financial situation	4	3	2	1	X	Y

