



GREEN CONFIDENCE INDEX

Attached is your sample issue of the Green Confidence Index, the monthly metric on responsibility, information, and purchasing in the green economy. The Green Confidence Index is the first monthly marketplace survey to focus specifically on environmental beliefs and behaviors. It helps businesses gain insights and make better decisions by:

- Tracking and flagging changes in marketplace perceptions.
- Gauging future consumer intentions by highlighting shifts in market confidence as bellwethers of future intentions.
- Providing an ongoing, real-time analysis of the evolving green economy.

Until December 31, 2009, subscribe to the Green Confidence Index at the Charter Rate of \$299. You'll get 12 information-packed issues featuring monthly insights on Americans' attitudes about and confidence in their leaders and institutions.

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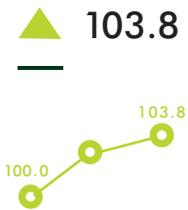




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October 2009

Consumer purchasing drives uptick in U.S. green confidence



THEIR OWN COMPANIES, POLITICANS AND HABITS ARE GREENER THAN THOU

As environmental issues move from the margins to the mainstream, there's a growing need to better understand public confidence in the emerging green economy. With companies and governments, from Walmart to Washington, ramping up their environmental initiatives and investments, key questions remain unanswered: Is the public listening, convinced, supportive, engaged? Do they believe in their leaders, their companies, their neighbors, themselves?

These are nontrivial questions. For companies, brand managers, public officials, and many others, billions are being spent on green products and services, and billions more are being invested in new technologies, regulatory schemes, and public campaigns. But nudging the masses toward sustainability can be a faith-based initiative — like trying to drive to an unknown destination without a dashboard or a map.

The Green Confidence Index is designed to help provide direction. It measures attitudes on three dimensions: the public's sense of who is, and isn't showing responsibility for environmental challenges; whether they're getting the information they need to make sound decisions; and their plans to make green purchases going forward.

The Index won't necessarily tell you which direction to steer, but will offer the lay of the landscape, helping you to forge your own route. Its goal is to provide a clear, concise, and consistent measurement of a complex dynamic: consumers, companies, and institutions moving in a green direction, but often without a clear sense of where they're going, how they'll get there, or what barriers lie ahead.



RESPONSIBILITY ▼ 102.4

How leaders and institutions are perceived to be addressing environmental issues



INFORMATION ▲ 104.1

The adequacy of information available to make informed decisions



PURCHASING ▲ 105.1

Past and future purchases of green products both large and small



The components of green confidence

	2009	Jul.	Aug.	Sep.
COMPOSITE INDEX				
Green Confidence Index (GCI)	100.0	103.3	103.8	
GCI Component Scores				
- Responsibility (40% weight)	100.0	102.7	102.4	
- Information (20% weight)	100.0	102.9	104.1	
- Purchasing (40% weight)	100.0	104.3	105.1	
- Past	100.0	107.5	105.4	
- Future	100.0	101.0	104.9	
RESPONSIBILITY				
U.S. Government	24.7%	26.5%	26.6%	
State Government	25.1%	25.9%	25.9%	
Local Government	29.5%	30.8%	30.2%	
Major companies and manufacturers	19.6%	21.6%	22.7%	
The company you work for ¹	47.0%	48.7%	46.9%	
Your neighbors ²	NA	NA	32.0%	
You	53.0%	51.5%	52.0%	
Responsibility Score	33.0%	33.9%	33.8%	
INFORMATION				
Groceries	48.3%	49.5%	49.6%	
Personal care products	41.1%	42.8%	43.0%	
Apparel	33.0%	35.0%	35.8%	
Household care products	49.5%	53.2%	52.8%	
Household appliances	52.2%	55.1%	56.6%	
Electronics	36.6%	38.5%	39.6%	
Car or other vehicle	55.0%	57.8%	58.7%	
Office supplies (among employed) ¹	44.3%	44.7%	44.3%	
Candidates to vote for (voters) ³	42.8%	40.5%	40.5%	
Investing your money (investors) ⁴	28.6%	26.5%	28.0%	
Information Score	43.1%	44.4%	44.9%	
PURCHASING				
<i>Past Purchases</i>				
Groceries	40.6%	42.4%	41.2%	
Personal/household care products	40.0%	42.1%	41.1%	
"Big ticket" items ⁵	12.3%	15.3%	15.5%	
<i>Future Purchases</i>				
Groceries	76.8%	76.4%	79.4%	
Personal/household care products	77.3%	76.0%	79.2%	
"Big ticket" items ⁵	23.8%	27.4%	28.1%	
Purchasing Score (Past and Future)	45.1%	46.6%	47.4%	

Footnotes: 1. Asked only of those currently employed; 2. Question not asked before September 2009; 3. Omits those who say they do not vote; 4. Omits those who say they do not invest; 5. "Big ticket" items were: house, apartment, remodeling, vehicle, major household appliance.

The Green Confidence Index is published 12 times a year via e-mail in PDF format (requiring Acrobat Reader). Annual subscriptions: US\$499 a year. Single copies: US\$99. Discounts available for site licenses. Visit www.greenconfidenceindex.com to subscribe or download a sample issue. Please contact us if you are interested in reprints or customized editions for your organization. E-mail: info@greenconfidenceindex.com

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	Responsibility Score (Average)	Information Score (Average)	Purchasing Score (Average)	GCI
Break it down for me				
<i>Age</i>				
18 - 34	34.2%	45.2%	46.8%	109.3
35 - 54	32.5%	44.9%	47.8%	100.9
55+	34.9%	44.5%	47.6%	103.2
<i>Green confidence and its components by key demographic groups</i>				
<i>Female</i>				
Female	31.7%	45.3%	49.8%	104.3
<i>Male</i>				
Male	35.8%	44.5%	45.0%	103.4
<i>Household income</i>				
<\$25K.....	30.9%	42.9%	42.9%	101.9
\$25K - \$49K	33.9%	45.3%	46.3%	102.8
\$50K - \$99K	33.4%	44.2%	48.5%	99.1
\$100K+.....	36.8%	47.5%	52.0%	114.2
<i>Census Region</i>				
Northeast	32.8%	44.0%	48.7%	103.9
Midwest	34.3%	42.2%	45.3%	101.9
South	32.1%	44.7%	46.8%	102.6
West.....	36.5%	48.3%	49.4%	107.4

To read this chart, compare data within columns, not across rows. For example, in September 2009, women gave lower Responsibility ratings (31.7%) than men (35.8%); people living in the West gave higher Information ratings than other regions; and green Purchasing was highest among high-income households. The GCI column shows progress (or lack thereof) from the July 2009 baseline: for September, younger adults set off at a faster pace (GCI 109.3) than their older counterparts, and high-income households (GCI 114.2) led the pack compared to other income groups. (Other demographic cuts are available; contact us to inquire.)

Can you name a green company?

Relative rankings of top 20 companies mentioned

64% couldn't name a single green company



Every month we ask more than 2,500 Americans a simple but profound question: "What company, if any, do you think of as being 'green'?" It's an unaided question, meaning no list is provided. Respondents simply name companies that are front of mind.

For all the marketing dollars being spent to promote products and corporate images, 64% of Americans came up blank — they couldn't name a single company they perceived to be green. But of the companies mentioned, Walmart and Clorox were far in front.

Such rankings tend to favor the first movers, though we are only at the early stages of the green marketplace. For example, among retailers, where Walmart and Whole Foods have mindshare today, in the next year or two Trader Joe's and Publix could eclipse them. The same applies to the automotive companies as they jockey to capture growing interest in green vehicles. And this is not strictly a billionaire's list: both Seventh Generation and Method made it onto the Top 20 list.

As we see a new wave of green product launches and campaigns, awareness and consumer perceptions of leadership companies will likely shift. Expect surprises.

Information, please!

Which information sources people use, and which ones they trust



Where do Americans get environmental information, and which sources do they trust most? Backyard fence chats? Government studies? Twitter? When they need information to guide them, consumers turn to those they know the best — their friends, family members or office colleagues — or to objective arbiters of consumer ratings, whether in print or on the Web. Word-of-mouth channels are the ones most trusted and most used by consumers making everyday decisions about what to buy, who to for vote for, or how to invest in “green.”

The biggest opportunity? Only half of those who trust “green” blogs and websites are actually making use of them. The biggest mystery? Americans trust green blogs and websites for more than they use them, the biggest Trust-Use gap of all 13 sources examined.

The biggest challenge? The corporate voice: Company blogs and websites are the least used – and least credible – medium. There are subtle differences by demography: Men are more trusting than women, Asians more than Caucasians, fully-employed more than the disabled. Clearly, companies have an uphill battle and will need a mix of media to get their green messages heard, particularly given the marketplace’s increased use of word of mouth. One untapped source: their own employees, who recognize their employers’ initiatives (when they exist) and give them far more credence than they give companies in general.

Green Confidence Index Methodology

The U.S. Green Confidence Index (GCI) and its component scores are obtained through the Green Confidence Survey conducted each month by Earthsense. This online survey is completed by approximately 2,500 adults 18+ from Survey Sampling International’s panel. Survey results are weighted by demographics to be representative of the U.S. adult population. The maximum margin of sampling error for a sample size of 2,500 is +/- 2 percentage points (at the 95 percent confidence level), meaning that 19 times out of 20 the data will fall within 2 percentage points of the stated numbers. To calculate GCI, answers from three questions are summarized and weighted to create the Responsibility, Information and Purchasing scores. From these three scores, the index is calculated to compare current month results with the July 2009 baseline by dividing the current month by the baseline and multiplying by 100. An index of 100 indicates no difference; above 100 means the current month is higher than the baseline; below 100 means the current month is lower than the baseline. For more detail, see www.greenconfidenceindex.com.