

Get going with Green Insights; Focus on the Middle Class in China



Global research regularly places China in the top 5 in terms of sustainable consumers.

The Reality: There is a yawning gap between people's claimed and actual sustainable behavior.

Put the question in a survey, and respondents will tick the answers that make them look good.
Green is the politically correct thing to say.

The Reality: A lot of traditionally 'sustainable' behaviour occurring but it is not recognised as such and considered as the behaviour of low income families



“China must ensure everyone has enough to eat first, before we can be too concerned about sustainability.”

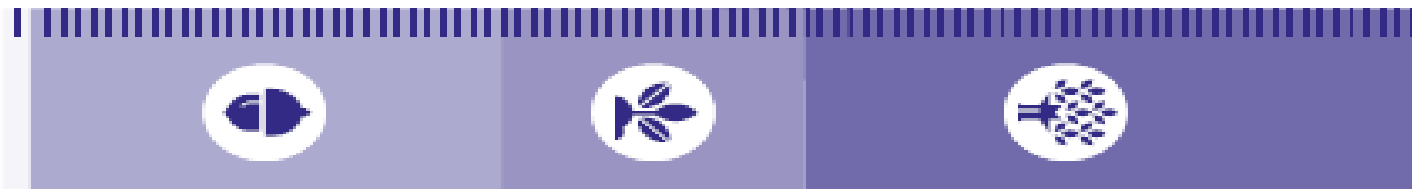


Misguided materialists



Flexible progressives

‘We are aware of the problems facing the environment and are willing to act more sustainably without sacrificing the quality of our life’



Green Rejectors
2%

Lower Middle Greens
31%

Upper Middle Greens
19%

Super Greens
48%

Common Motivators

- Family unit very important, **health and safety** big concern
- Driven by **convenience & comfort**
- **Arrival of a baby** changes outlook



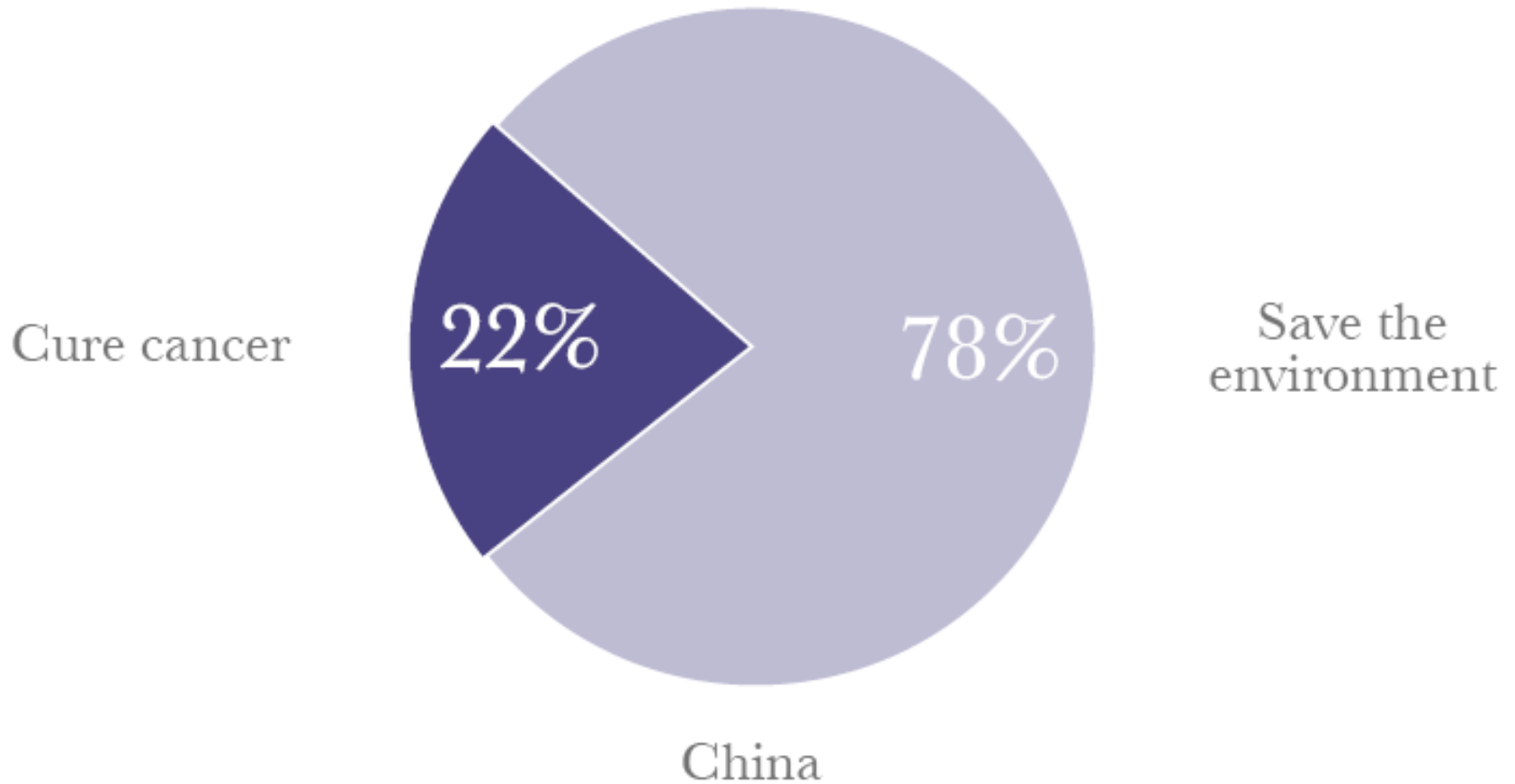
Misguided Materialists

The 'good life'
Peer recognition

Flexible Progressives

Poverty in their personal background
maximizing resources & efficiency

Would you rather ...



Common Barriers

- 53% of respondents said that the green options in the marketplace **were too expensive**
- **Lack of knowledge** around the need for change or how to do so
- 55% of our respondents are driven by **convenience** for their purchases
- Only 18.6% said they would limit consumption



A sense of entitlement:

“We’re only beginning to enjoy the fruits of our prosperity, and you want us to stop?”

Whose Responsibility?



%	Power	Obligation	Action
Government	65.8	56.7	42.7
Corporations	10.6	25.8	15.8
Individuals	23.5	17.5	41.3

Quantitative study amongst 1300 respondents across China.

China's green stimulus, announced in 2009, is simply the largest in the world, with USD 221 billion - 34% of the total stimulus package - committed until 2020.

*“A green lifestyle starts from **individuals** and families who want to make their environment green and sustainable, then the community and finally, the whole city.”*

*‘Government should **educate** on benefits and how to do in the best way’*

The opportunity : A willingness to act



- 67% believe that their **efforts did count**
- 69% said that if environment friendly products were available at the same price point, they would purchase them and they are not entirely closed to the idea of paying a **small premium** - 71% are happy to pay up to 10% more
- 90.7% believe that the sustainability movement is on the upswing
- 78% said they would rather be given **guidelines** on how to live a sustainable life & do it themselves, than it be legislated
- 80% would like to **receive recognition** from their peers for their positive green behaviors
- 17% of Chinese consumers consider themselves **LOHAS consumers** (from Asia-Pacific LOHAS & NMI study 2009)

Relevant target groups

- Middle Class – Misguided Materialists
- Middle Class – Flexible Progressives
- Emerging Middle Class

