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TNS Global Study “The Green Life” Reveals Spectrum of Environmental Attitudes Across United States and the World

Wide Range of Concern Presents Challenges, Possibilities for Marketers

(New York, April 30, 2008) – TNS, a world leader in market insight and information, today released results of “The Green Life,” a groundbreaking global study assessing how consumers around the globe are responding to the challenge to “go green.” The study takes an in-depth look at global consumers and how environmental issues have impacted their lifestyles, attitudes and purchase behaviors.

Global Responses

TNS research experts compared consumer responses from 17 different countries across 5 continents. Survey questions were designed to gauge respondents’ level of concern for the environment, their willingness to seek out and pay a premium for environmentally-friendly products and their activism.

Responses from the developed nations (the United States, the United Kingdom, France, Japan, Germany, Hong Kong and Korea) were invariably clustered at the least environmentally conscious and responsible end of the spectrum. Developing nations (Mexico, Thailand, Brazil and Malaysia) showed the highest concern for the environment and greatest willingness to take action and seek out ‘greener’ products. Global highlights include:

- The vast majority of respondents from developing nations believe in the threat of global warming (positive responses ranged from 84 percent to 94 percent, dependent on country), whereas those from industrialized nations are not yet convinced (only 49-64 percent believe)
- Developing nations’ respondents also claim to be willing to pay more for eco-friendly products. A staggering 94 percent of Thai respondents and 83 percent of Brazilians were willing to pay more for environmental friendliness, while only 45 percent of British and 53 percent of American respondents were willing to dig deeper to help the environment.

Shades of Green Segmentation

In order to better understand the diverse environmental sentiments across the United States, TNS experts identified eight distinct segments among U.S. consumers. The segments range from highly environmentally motivated and active segments (The Respectful Stewards and Eco

Centrics), which make up 23 percent of consumers, to total non-believers (Eco Villains), who constitute seven percent of consumers.

Interestingly, the two segments showing the highest levels of concern and environmental activism are also two of the most diverse. The segment dubbed The Respectful Stewards (Madre de Tierra Verde) makes up seven percent of the total U.S. population and is 86 percent Hispanic – it is also the segment most concerned about the environment. Members of this segment are characteristically less educated, lower-income Hispanics living in large urban households. Not at all cynical, they are inclined to believe in a company's green credentials.

Conversely, the other highly-concerned and active segment, the Eco Centrics, is comprised of well-educated, high-income individuals in the urban South and West. Members of this segment work actively to protect and improve the environment through green activities, such as vegetarianism and recycling, and are willing and able to pay more for eco-friendly products. They are generally scornful of companies' green efforts, viewing corporate green initiatives as nothing more than marketing tactics.

The largest distinct groups of U.S. consumers are environmentally conscious for practical reasons. Frugal Earth Mothers, the largest segment of U.S. consumers at 18 percent, are thrifty females in lower-income rural households who embrace environmentally friendly activities to reduce day-to-day costs. While they are likely to take steps such as buying used items, washing clothes in cold water, turning off appliances and installing insulation, they are only somewhat willing to pay for green products. Proud Traditionalists, typically Midwesterners in rural markets, make up 14 percent of the population. These consumers are environmentally responsible in order to keep the household running smoothly – investing in insulation, water-efficiency and clean-air filters – and seek out environmental products with long-term cost savings.

It is also worthwhile to note which segments will not respond well to green messaging. Eco Villains are the least environmentally-friendly segment of U.S. consumers. Predominantly Midwestern, middle-income family-men in small to mid-sized metro areas, Eco Villains do not believe in global warming, disdain eco-conscious products and suspect that environmental media coverage is propaganda.

“This wide range of concern for the environment among U.S. consumers, from those fervently passionate to those convinced it is a gimmick and everyone in between, presents marketers with both challenges and possibilities,” said Robert Tomei, President U.S. Areas of Expertise & Marketing, Global Head 6th dimension Access Panel. “In segmenting consumers by their demographics, attitudes, lifestyles and behaviors, we are able to help marketers better match the aspirations of potential green consumers. TNS will be profiling its 6th dimension Access Panel of 900,000 US households with the ‘Shades of Green’ Segmentation.”

This segmentation also clearly uncovers a paradox in the U.S. responses. Although U.S. consumers reported that they would like to help others (76 percent) and seek to provide a better life for their children (69 percent), they have not connected that inclination to the state of the environment, as only 26 percent report that they actively seek environmentally friendly products. Additionally, 44 percent of U.S. respondents are skeptical that global warming exists or don't believe it at all. Illogically, over 90 percent also say that the environment influences their day-to-day purchasing decisions. This apparent disconnect poses an undeniable challenge for marketers attempting to create an effective environmental marketing strategy.

“The Green Life’ reveals a clear intent from U.S. consumers, at least hypothetically, to be environmentally conscious,” said Kimberly Bastoni, SVP, Head of US Custom Marketing & Development, TNS. “Businesses have an opportunity to capitalize on these good intentions, given they provide affordable and convenient options. By taking into consideration consumers’ different shades of green, fast movers can gain a share with appropriate products, messages and distribution strategies, to the benefit of both business and the environment.”

Methodology

The Green Life study was conducted amongst 23,000 consumers over the course of two months in Q1 2008. The study was administered using an online survey of the TNS 6th dimension Access Panel in 17 countries.

TNS's proprietary Multidomain Segmentation approach identifies groups that differ on needs, attitudes, and behaviors, as well as lifestyle and demographic characteristics.

About TNS Online Access Panels

TNS operates online access panels in 26 countries capturing insights from over 3.5 million consumers and business customers. Additionally, TNS recently announced an alliance with the third party company – Livra – that operates online access panels throughout Latin America. This provides TNS with the most extensive global network of online access panels in the industry.

About TNS

TNS is a global market insight and information group.

Our strategic goal is to be recognized as the global leader in delivering value-added information and insights that help our clients to make more effective decisions.

As industry thought leaders, our people deliver innovative thinking and excellent service to global organizations and local clients worldwide. We work in partnership with our clients, meeting their needs for high-quality information, analysis and foresight across our network of over 70 countries.

We are the world's foremost provider of custom research and analysis, combining in-depth industry sector understanding with world-class expertise in the areas of Retail and Shopper Insights, Stakeholder Management, New Product Development, and Brand and Communications. We are a major supplier of consumer panel, media intelligence and internet, TV and radio audience measurement services.

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