



Flash Report 3

The different faces of sustainability in
China, US and Europe

The hidden potential for a breakthrough in China



About Glocalities

The world is constantly changing. Technologies that grow exponentially and new media mean a continuously faster distribution of knowledge and products. The challenges for companies and governments are greater than ever in the year 2014. It is crucial for organisations to have the best understanding possible of future developments. A necessary condition for success is knowledge of fundamental trends and how these can differ from each other locally and relate to each other worldwide.

In the context of the Glocalities project, Motivaction surveyed more than 48,000 respondents in 20 countries and 12 languages in December 2013 and January 2014. The study was conducted in the US, Canada, Mexico, Brazil, Australia, Japan, China, South Korea, India, Russia, Turkey, South Africa, Italy, Poland, Germany, France, Spain, Belgium, the Netherlands and the United Kingdom. This selection of countries contains 58% of the world population and represents 75% of the world economy.

With unique Glocalities knowledge of what drives people and gets them moving, Motivaction International offers a fact-based navigation system for the future.

Executive summary:

A hidden, but revolutionary potential, is present among the Chinese population to achieve a breakthrough in environmental sustainability. This is the main conclusion of a survey about environmental sustainability in China, Europe and the US. The findings make clear that popular support for environmentalism is Highest in China, followed by Europe and the US. Concerns about the environment have been rising in China over the last years as a result of rapid economic and industrial growth. Chinese believe that companies and technological innovation can lead the way to solutions for their environmental problems. Europeans and to a lesser extent Americans are more critical about companies and sceptical about the benefits of technological progress than the Chinese.

Furthermore, the research shows that the supporters of environmental sustainability differ substantially in China, Europe and the US. In Europe and the US environmental supporters tend to be part of the progressive political and cultural elites. Their support for the environment is rooted in a cosmopolitan lifestyle and post-materialist values. In China environmentalism however is more connected with conservative Chinese values, but is also supported by an ambitious and technological savvy vanguard of Chinese business and political life.

Bypassing the polarisation between sustainability supporters and opponents in the West and unleashing the revolutionary potential in China are the main challenges identified in this report. The findings from this survey suggest a number of strategies that businesses, governments and NGO's can employ to enforce a breakthrough in environmental sustainability in China, Europe and the US.





Environmental threats and new business opportunities

Industrialisation, technological progress and economic globalisation have brought enormous progress for billions of people. In China alone it has lifted over 500 million people out of poverty since introduction of market reforms in 1978. At the same time problems associated with economic growth have also globalised. Climate change, water pollution and shortages, a loss of biodiversity and other forms of environmental degradation are threatening the lives of millions of people and the existence of nations. During the Western industrial revolution in the 19th and 20th century pollution was one of the issues that propelled the development of the Welfare State. But with today's interconnected economies and cross-border threats to the environment, national responses are no longer sufficient. The 3 largest emitters of carbon dioxide (CO₂) are China (emits 29%)¹, the United States (16%) and the European Union (EU27) (11%)². Developing countries show the steepest rise in CO₂ emissions in the past years. The interconnectedness of the issue is obvious, as we share the same atmosphere.

While global action is required in many fields to ensure sustainability³ for future generations the three largest economies in the world - China, Europe and The United States – are restrained in their policy responses because of different economic circumstances and priorities. Leaders in China try to balance economic growth with sustainability policies, while in Europe and the US paradoxical, economic stagnation puts constraints on environmental policy ambitions. This Flash Report will elaborate on these three large economies and the values and attitudes of their respective populations as a case study.

As governments are struggling with conflicting policy agenda's, companies have increasingly become active in the global debate over environmental sustainability. For them sustainability is about risk management and cost reductions, but increasingly businesses become to realize the potential of sustainability initiatives as a way to achieve innovation, to engage employees, to win supply contracts and to tap into new markets⁴.

1. <http://ipcc.ch/report/ar5/wg2/>

2. <http://www.pbl.nl/en/publications/2012/trends-in-global-co2-emissions-2012-report>

3. For sustainability, this report uses the definition of 'sustainable development' derived from the UN Report 'Our Common Future' United Nations World Commission on Environment and Development (WCED) in 1987: "Development that meets the needs of the present without compromising the ability of future generations to meet their own needs".

4. Sustainability insights, learning from Business Leaders, Coca Cola Enterprises report written by the Economist Intelligence Unit, October 2013

China: Poverty or clean air

In China there is an increasing worry about the environmental impact of the rapidly growing economy, especially about the pollution of air, water and soil. The worries are reflected in the words of Chinese Prime Minister Li Keqiang at his inauguration in March 2013: “It is no good having prosperity and wealth while the environment deteriorates”. But Li Keqiang added to his words that is just as bad to have “poverty and backwardness in the midst of clear waters and verdant mountains”⁵. The following numbers can be seen as a reality check: in order to keep its economy growing the Chinese economy currently already consumes between 40% and 50% of all the world’s coal, copper, steel, nickel, aluminium and zinc⁶. Together India and China are planning 900 new coal plants in the coming years (figures from 2012)⁷. The keyword therefore is balancing: the need for continued economic growth with environmental sustainability. Next to being the largest greenhouse gas emitter in the world⁸, China also holds the title of the largest global investor in green technology.⁹ The key words in China are: balancing economic growth and the environment.

Europe: The moral Highground

In Europe the EU and national governments have been trying for years to take the moral High ground on environmental policies in the international arena. The EU unilaterally decided to implement the Kyoto protocols and currently the EU wields an ambitious sustainability agenda for 2020. The ambition of the 20-20-20 climate strategy is a 20% reduction in EU greenhouse gas emissions (from 1990 level), raising the share of renewable energy sources to 20% and to improve EU’s energy efficiency with 20% as well.¹⁰ Partly thanks to the global economic crisis the EU seems to be on schedule in meeting these ambitious goals.¹¹ However, the economic crisis has done much harm to the perceived importance of the environment on the European policy agenda. Governments throughout Europe are under siege by populist movements, who often regard environmentalism as a hobby of European elites.¹² The keywords in Europe therefore are: High ambitions, but public support is no longer evident.

5. <http://www.economist.com/news/briefing/21583245-china-worlds-worst-polluter-largest-investor-green-energy-its-rise-will-have>

6. <http://www.economist.com/news/briefing/21583245-china-worlds-worst-polluter-largest-investor-green-energy-its-rise-will-have>

7. <http://www.theguardian.com/environment/2012/nov/20/coal-plants-world-resources-institute>

8. <http://www.theguardian.com/environment/2007/jun/19/china.usnews>

9. <http://www.bbc.co.uk/news/business-14201939>

10. http://ec.europa.eu/clima/policies/package/index_en.htm

11. <http://www.rtcc.org/2013/10/09/eu-closing-in-on-20-emissions-reduction-target/>

12. <http://www.motivaction.nl/content/staying-power-eurosceptic-voter-rebellion>





US: More debate, less action

In the US the situation is generally comparable to Europe, although environmental policies are even more politicised. When Obama took office in 2008 one of his election promises was to combat climate change. After his re-election in 2012 Obama acknowledged that his government “hadn’t done as much as we need to” to address climate change, while promising to make up for this in his second term.¹³ Nevertheless, a lot of the initiatives on environmental policies have instead come from US State and City level. A successful example of this are 63 cities that work together under the Clinton Climate Initiative (CCI) Cities program.¹⁴ While some progress has been made, there is also large scepticism about the need for and the effectiveness of environmental policies. Post 9/11 concerns about energy security have mostly trumped concerns about the environment (leading for example to the shale gas revolution). Climate scepticism is common among Tea Party Activists, a view that found its way in the White House under the Bush administration. The key word for the environmental debate in the US therefore is: polarisation.

13. <http://www.rollingstone.com/politics/news/obamas-climate-challenge-20130117>

14. <http://www.clintonfoundation.org/our-work/clinton-climate-initiative/programs/c40-cci-cities>

Multinationals: global involvement

At the same time corporations have increasingly become involved in the field of environmental sustainability. Multinationals are less concerned about borders and are more directly involved in the industrial processes and technology that impact the environment. Many international companies now have departments dealing with sustainability or have integrated sustainability practices as part of their whole business model. In 2013 the Economist Intelligence Unit, commissioned by Coca-Cola Enterprises, published a report¹⁵ about sustainability practices among large corporations. Based on a survey of 334 business executives in Europe they concluded that companies have continued their push ahead with sustainability initiatives despite of the economic crisis. 66% of all companies engaged in reduction of waste, 54% in increasing energy efficiency and carbon reduction and 48% are developing more sustainable products and services. The report further shows that companies who managed to build partnerships with NGO's and universities were most successful in establishing sustainability initiatives. Two-thirds recognized sustainability as a source of competitive advantage and 60% of them were offering more sustainable products and services.

According to a report by Robeco¹⁶, companies that invest in sustainability have a competitive advantage. By measuring the stock market value of 465 companies over a period of 10 years they found that the 20% of the companies who ranked High on sustainability indicators, by far outperformed the 20% sustainability laggards. Robeco gives 4 possible reasons to explain this positive relation between sustainability and financial performance. Firstly, addressing concerns and expectations from stakeholders increases confidence and thus stock value. Secondly, sustainability practices spark reputational benefits. This can bring in new customers and investors, but it is also a tool to retain High quality employees. Thirdly, there is often a cost cutting result of sustainability policies which enhances operational efficiency. And lastly, by adding a long term sustainability perspective companies are prioritizing long term corporate objectives over short term profits. In time this leads to greater value and profits.

15. http://www.cokecce.com/system/file_resources/93/report_-_ACTUAL_FINAL.pdf

16. http://www.robecosam.com/images/Alpha_from_Sustainability_e.pdf





Case: The Unilever Sustainable Living Plan¹⁷

In 2010 Unilever introduced the Unilever Sustainable Living Plan, within which the company committed itself to three goals of sustainable growth for 2020. In 2012 the company first published about its initial findings. The first goal is to help more than 1 billion people take action to improve their health and well-being. By 2012, already 224 million people were reached through programs such as reduction of diarrhoeal disease through hand washing with soap. The second goal is to have 100% sustainable agricultural raw materials as a source for Unilever products. By 2012 Unilever stood had reached 36%, with particular progress in palm oil, sugar, cocoa, vegetables and sunflower oil. For example 450,000 tea farmers have been trained in sustainable practices. The third goal – halving the footprint of products across the value chain of Unilever products – proves to be the most difficult goal to meet. Unilever is well on its way to meet these standards in the factories owned by itself, but recognizes that 96% of the total footprint of its products depends on behaviour of its suppliers and end consumers. Through coalitions with other companies, governments, NGO's and consumers Unilever tries to achieve large scale change in this field as well. For example, Unilever expresses the intention to get more involved into the issue of deforestation as a result of the cultivation of soy.¹⁸

17. <http://www.unilever.com/sustainable-living/uslp/>

18. <http://www.theguardian.com/sustainable-business/unilever-sustainable-living-plan-progress>

19. The average internet penetration in the European countries from the survey was 78% (2012). For the US this number was 81%. The internet penetration in China was 44% last year according to The China Internet Network Information Centre. The internet penetration in Chinese urban areas at the end of 2012 was considerably Higher (60%) than in rural areas (24%) and both areas show strong growth. The Chinese SSI panel contains more than 900.000 Chinese from all regions and socio-demographic backgrounds.

Methodology - Study of values differences between China, USA and Europe

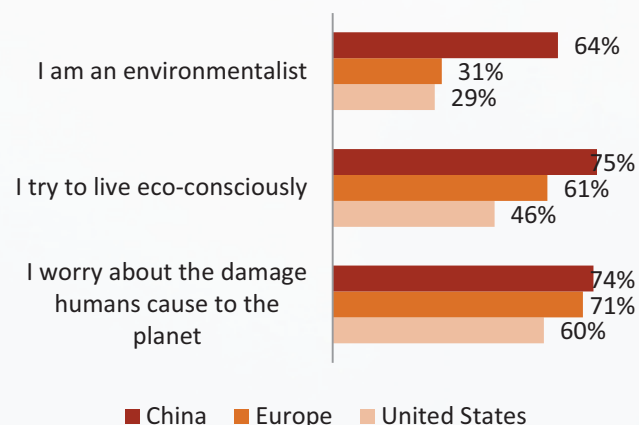
Motivaction International conducted, on its own initiative, an in-depth study into the values, motivations, lifestyle and behaviour of more than 48,000 consumers in 20 large economies. The study was conducted through the online research panels of SSI, an agency that is specialised in international fieldwork in 18 countries. In the Netherlands the fieldwork was conducted by Motivaction and in Belgium by Ivox. The survey samples were weighted according to census data regarding education, age, gender and region and are representative for the populations from 18 to 65 years.

For this report, a first analysis was made of a number of striking differences in attitudes between citizens of China, USA and Europe. For the study in Europe, respondents were surveyed in Poland, Germany, the Netherlands, Belgium, France, Italy, Spain and the United Kingdom. The population of these eight large EU member states covers 75% of all EU inhabitants. The study compared the online survey samples of 2,622 Chinese, 2,251 Americans and 17,606 Europeans.¹⁹ Many differences arise that are of critical importance for policy makers, marketers and communications professionals in the field of sustainability. In the next two paragraphs analyses are presented based on the relative scores of these Chinese, European and American citizens when compared to each other. Later in this report additional analyses are made based on the 20% people in each population that score Highest on environmental values (the so-called environmental supporters). The report also includes a strategic analysis of different Globalities values segments in China, US and Europe and their different perspectives on environmentalism.

More environmentalism in China

A first analysis of support for environmental statements (identification as environmentalist, living eco-consciously and worry about human damage to the planet) quickly shows some interesting results: the Chinese score Highest. This is not only true in absolute terms, but also relatively compared to Europeans and Americans. On all three environmentalist statements Chinese agree between 64% and 75%. Europeans and Americans identify themselves substantially less often as environmentalists. Europeans are worried most about human damage to the planet and also try to live eco-consciously. Americans score Lowest on all three statements.

Environmental attitudes



The High support for environmentalism in China is also present in other data from the survey. Respondents for example have also been asked about their support for the eight UN Millennium Goals. 78% of Chinese support Millennium goal 7 (ensuring environmental sustainability), compared to 38% of Europeans and 40% of Americans.

How can the High level of environmentalism in China be explained? The main reason is that Chinese feel much more urgency about

environmental problems. They are directly confronted by it in their daily lives as a side-effect of the rapid economic growth that they are experiencing. The fact that Chinese, Europeans and Americans share a relatively High level of worry about human damage to the planet, shows that on a global level they are in agreement about environmental threats. However, for Chinese the threat is also much more felt on a local scale: through pollution of their soil from which they eat, the water that they drink and the air that they breathe.

Pew Research recently found that especially environmental concerns in China have been rising steeply in the last years. Between 2008 and 2013 the number of Chinese who consider air pollution a very big problem went up from 31% to 47%, while concerns regarding water pollution went up from 28% to 40%. Concerns over food safety went up even more, from 12% to 38%. Environmental problems now are in the top list of concerns by Chinese citizens.²⁰

While the urgency about environmental problems is Highest among Chinese, in US and to a lesser extent, Europe the term 'environmentalist' arouses polarisation. Only around 30% of Europeans and Americans identify themselves as an environmentalist, while 64% of Chinese do. Further in this report additional analysis will be made about this polarisation in the West.

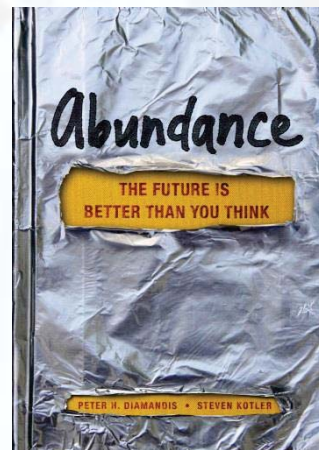
20.
<http://www.pewglobal.org/2013/09/19/environmental-concerns-on-the-rise-in-china/>





Chinese believe in technological solutions and new leadership

When thinking about environmental problems, Chinese also have a fundamentally different way of looking at solutions for environmental problems compared to Europeans and Americans. Chinese have more trust in technological progress. 65% of Chinese believe that 'many problems in the future will be solved through technology'. 48% of Americans share this opinion, and 57% of Europeans do. This trust in technological progress of Chinese seems to be driven by the technological progress they see all around them, which is helping to raise their standards of living, connect to others, get access to the labour market and to information. 62% of Chinese find that 'the rapid spread of advanced technologies will lead to a significant increase in global standards of living in the next decade' (compared to 36% of Europeans and 44% of Americans, who are more pessimistic in this respect). These findings are in line with the notions of Peter Diamandis in his book 'Abundance, the future is better than you think' ²¹, in which he argues that the lives of the world's poorest people are being improved substantially because of technological breakthroughs in computing power, energy, medicine and many other areas.



Case: Hewlett Packard Living Progress ²²

Hewlett Packard is an example of a multinational employing its expertise in technique and innovation in its environmental sustainability programmes. By actively engaging suppliers, consumers and other stakeholders in HP product use and innovation they are looking for ways to reduce environmental impact and expand opportunities for business. This has already lead to innovations of products, such as the 'closed-loop' ink cartridges which can be recycled. Particularly interesting is the way HP makes use of data analysis to set environmental goals and to measure the impact. Not only do they measure their own production process very closely (60% of their carbon footprint), but they also measure the environmental performance with partners throughout their supply chain, from sourcing, manufacturing, and shipping all the way through to return and recycling (36% of their carbon footprint). In December 2013 HP announced a collaboration with the NGO Conservation International to dramatically improve the accuracy and speed of analysis of data collection in environmental science. In this project HP employs its expertise in big data to build an early warning system for threatened species ²³.

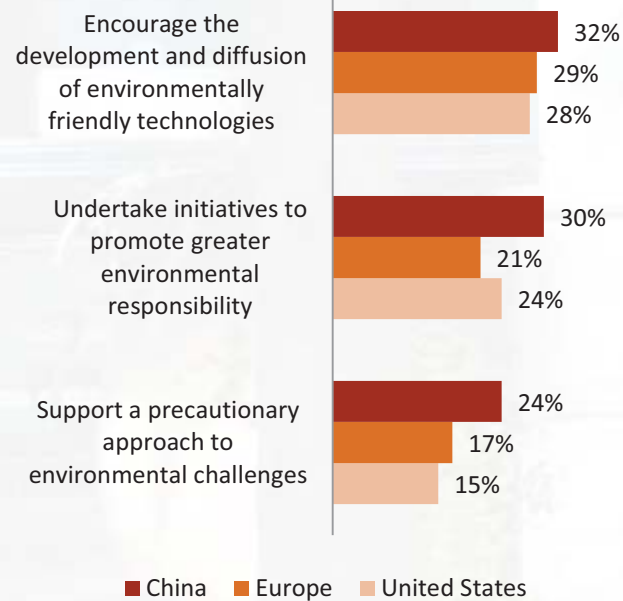
This worldview of Chinese on technological progress results in a Higher expectation from companies and governments to deliver on environmental sustainability. 46% of Chinese believe that a new generation of leaders will be able to solve humanity's greatest challenges in the next decade. Only 24% of Europeans and 30% of Americans share this opinion. Again the Europeans and Americans are most pessimistic about the leadership potential, while Chinese are optimistic.

Chinese expect business engagement

Apart from their leadership, Chinese also expect business engagement in the environmental debate. In the survey questionnaire the UN Global Compact goals for companies were included. The Chinese expect companies to step in to contribute to a better environment more than Europeans and Americans do. They are expecting companies to take initiatives to promote greater environmental responsibility and to support a precautionary approach to environmental challenges.

Support for Global Compact goals

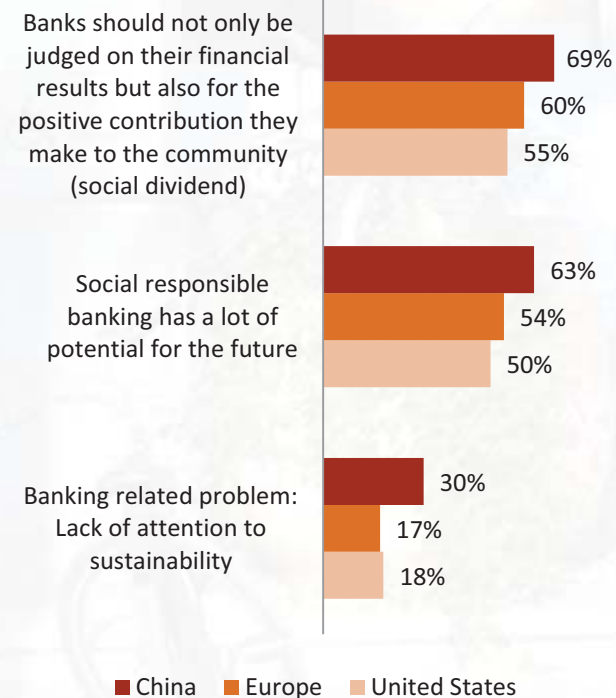
Companies should...



Banking sector key facilitator for sustainability breakthrough

Incomes in China are very Low compared to European and American standards. This limits the possibility for the average Chinese consumer to choose for environmentally friendly alternatives as they are often more expensive. In the survey we also looked into the role and function of the banking sector that plays a key role in launching companies and initiatives. There is a lot of support for sustainable banking in the population. Also in this area the Chinese stand out with a Higher level of demand for banks to act in a socially responsible way.

Banking attitudes



21. http://en.wikipedia.org/wiki/Abundance:_The_Future_Is_Better_Than_You_Think

22. <http://www8.hp.com/us/en/hp-information/environment/index.html#.U0-Tm9GKDmL>

23. <http://www8.hp.com/us/en/hp-news/press-release.html?id=1536855#.U0-Td9GKDmJ>





The demand for sustainable policies is also visible with respect to energy companies. Again, the support for energy companies to invest in new sources of energy in order to protect the environment is Higher in China (57%) than in the US (50%) and Europe (51%). This can partly be explained by the presence of smog that results from conventional methods of energy production that pollutes the Chinese environment (burning coal).

The data presented so far show the **revolutionary potential** of environmentalism in China. Chinese feel the urgency to do something against the treats to the environment that they are experiencing in their personal lives. Not only do they feel more urgency regarding the problems of threats to the environment, they are also more open minded and optimistic about solutions. In addition they put more trust in technological innovation as an important tool to combat environmental problems in comparison to Europeans and Americans . The Chinese expect action from their leaders, but also from businesses and the banking sector, which is crucial for financing sustainability initiatives. All these data show that the potential for a sustainability breakthrough in China, based on support in the population, is Higher than in Europe and the US.

The circumstances for a sustainability breakthrough in China show a serious downside at the same time. Firstly, while there is a lot of public support for more sustainable policies, this support does not get organised in democratic ways because of the Highly authoritarian system that Chinese government still is.

Secondly, in Europe and the US there are a lot of regulations that prohibit pollution and in China these regulations are less strict. As a result, In China companies rather risk to pay the fine than change their behaviour. Only recently Chinese environmental laws have been strengthened.²⁴ Thirdly, in China there is a lot of corruption, which seriously undermines the effectiveness of policies and trust. To conclude, the current system stands in the way of a sustainability breakthrough. But the popular support for environmentalism and the wish for more sustainable policies, in the long run will be a strong motivator for policy change by the ruling elites which cannot be ignored. A strategy of neglect would seriously undermine public support for the Chinese leadership and policies. Chinese leaders are increasingly becoming aware of the environmental problems. Expats are fleeing from the socalled *Airpocalypse* of smog.²⁵ The BBC recently reported that following a wave of indignation on internet forums and social media, the new Premier, Li Keqiang, has repeatedly vowed to “fight a war on pollution”, and that a monitoring system has been launched in all of China’s primary cities. Companies and government bodies are obliged to be transparent about environmental issues and reports about, for example soil pollution, are no longer “top secret”.²⁶

24. <http://thedi diplomat.com/2014/04/china-revises-environmental-law-for-the-first-time-since-1989/>

25. <http://www.bbc.com/capital/story/20140321-expat-exodus-from-beijing>

26. NRC Handelsblad, april 25 2014

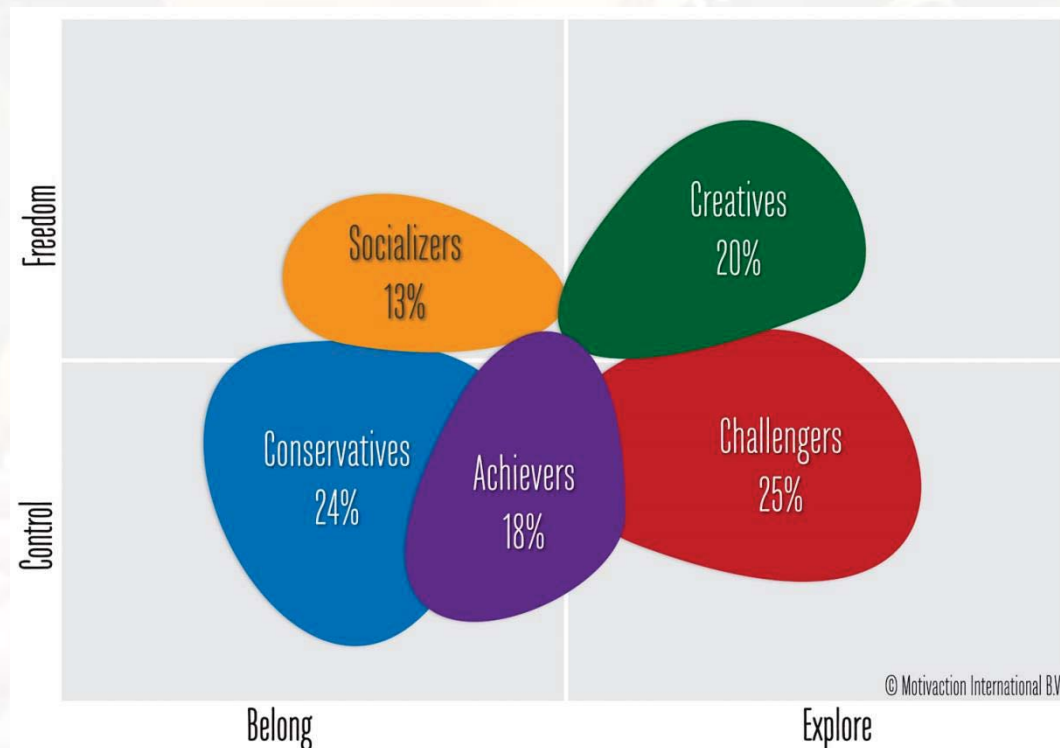
Understanding sustainability supporters in China, US and Europe

The differences between China and the West become even more apparent when comparing the sustainability supporters in China, Europe and the US. To isolate this group in the survey data the 20% most environmental minded people in each country have been selected based on the three value statements presented before (identification as environmentalist, living eco-consciously and worry about human damage to the planet). The results show that not only Europeans and Americans are much more sceptical about the blessings of technological progress (in which Europeans are the most sceptical), the scepticism is mostly felt among sustainability supporters in Europe. In the following paragraphs the sustainability supporters in China, US and Europe will be further analysed and compared.

Glocalities values segments

In the last paragraphs already some differences of perceptions within the 3 large economies were described. This paragraph goes one step further by taking a deeper look within each population. By analysing different groups of citizens and their attitude towards environmentalism it becomes possible to identify supporters and opponents in the environmental sustainability debate.

Based on a series of statements about norms and values, Motivaction developed the Glocalities segmentation model, which distinguishes between 5 values segments: Challengers, Conservatives, Socializers, Creatives and Achievers. The basic values and preferences of the segments are visualized in the infographic boxes below. The relevant segments will be described in more detail for each of the contents later on. To best understand the results in China, the analysis starts with the findings for EU and the US.





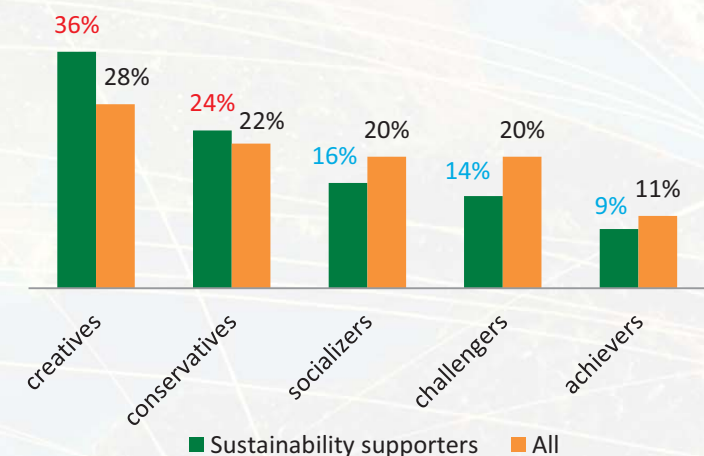
Europe: Creatives, slowed down by socializers and challengers

The largest values segment in Europe is comprised of the creatives (28%), followed by the conservatives (22%). Together they make out 50% of the population in Europe. Challengers and socializers span 40% of the European population. Achievers are the smallest segment. Socializers (20%) in Europe mostly belong to the middle and Lower income groups. They like their life to be structured and organised, feel ill at ease with globalisation and are mostly locally oriented. Their goal in life is to have fun and to enjoy themselves. Material values are important for them. In contrast, creatives are Higher educated and participate actively in European cultural and political life. Most of the cultural and political elites in Europe belong to this group. They are internationally oriented and are interested in other cultures and countries. They are driven by post-materialist values. Conservatives tend to be older, adhere to traditional values and discipline and are mostly Christians.

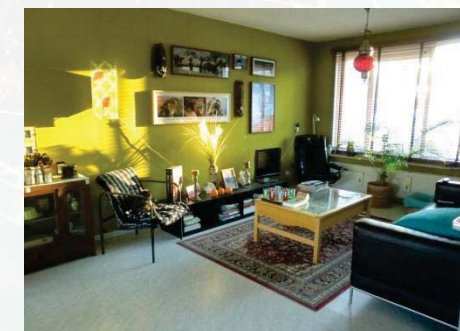
Socializers and challengers in Europe in many aspects stand opposite to the creatives. This is particularly so when we look at environmental values. Among the environmental supporters creatives can be identified as the largest group, followed by the (mostly Christian) conservatives. Because of its size and the influence of the creative segment they are the strongest ambassadors of environmental values in Europe. Although they are successful in pushing through many initiatives, they are slowed down by the socializers and challengers, who stand sceptical, if not hostile towards environmentalism. In a list of 11 issues of concern creatives rank 'nature and environment' as fifth most important. In comparison, socializers and challengers have 'nature and environment' on the 10th place of the 11 listed concerns. The environmental concerns of the creatives are very much driven

by their liberal and post-materialist philosophy of life. Because of their international orientation they are generally more worried about global problems. It is especially in this light that their concerns about global warming have to be seen. Creatives in Europe are more critical towards technological progress and often distrust companies, especially multinationals.

Glocalities values segments in Europe



Reading example: 20% of all Europeans belong to the segment 'challengers'. Of the sustainability supporters (20% of the population) only 14% belong to this group. Figures in blue mean that the finding is significantly Lower ($\alpha > 0.05$) than the finding for all. Figures in red mean the finding is significantly Higher ($\alpha > 0.05$) than the finding for all.²⁷



Interior picture uploaded by respondent from creatives segment in Europe

27. An analysis of the mean scores on the sustainability scale of the segments based on all interviewed Europeans shows a similar pattern. The European ranking of segments on the sustainability scale is: 1. **creatives** 2. **conservatives** 3. **achievers** 4. **socializers** 5. **challengers**. Red means a significantly Higher score, blue means Lower.

US: Creatives, slowed down by conservatives

In the USA the two largest groups in society are the conservatives (26%) and the socializers (21%). The socializers are comparable to the description of the same group in Europe. They are also comparable in size. But conservatives form a larger group in American society compared to Europe. This group is primarily driven by conservative values. They are more often religious (Christian), family oriented and are attached to values of soberness and spirituality. In the US they vote Republican and are overrepresented among the Tea Party Movement.²⁸

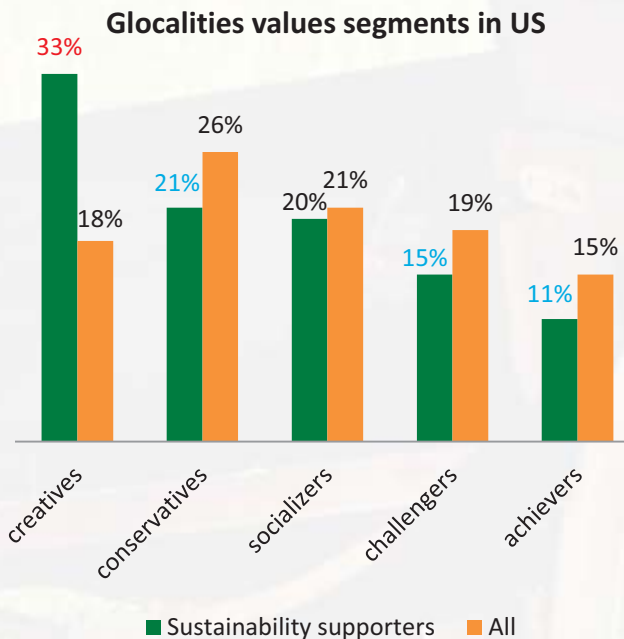
However – similarly as in Europe - among the environmental supporters creatives are the largest group, even though in the general population this group is much smaller as in Europe. And while in Europe the group of conservatives tends to be more supportive of environmental values, in the US this group is considerably less environmental friendly.

One of the main reasons for these differences in attitude seems to be the deep polarisation in the US, where creatives and conservatives represent different sides. Of the creatives 40% voted for the Democratic Party in the latest elections and only 16% for the Republican Party. When we look at the Conservatives the numbers are reversed: 44% of them voted Republicans, and only 12% for the Democrats. This polarisation plays out on many issues in the survey, about income equality (bad according to creatives, acceptable for conservatives), international orientation (High for creatives, Low for conservatives), traditional

28. An analysis of the mean scores on the sustainability scale of the segments based on all interviewed Americans shows a similar pattern. The US ranking of segments on the sustainability scale is: 1. **creatives** 2. achievers 3. challengers 4. **conservatives** 5. **socializers**.

29. <http://www.economist.com/blogs/democracyinamerica/2014/04/ri-se-right>

values (important for conservatives, not for creatives) etc. Environmentalism seems to be caught up in this polarising debate between creatives and conservatives in US society. With regard to the global issue of climate change it is notable that conservatives have very Low levels of trust in the United Nations (compared to a favourable attitude by the US creatives).



Reading example: 19% of all Americans belong to the segment 'challengers'. Of the sustainability supporters (20% of the population) only 15% belong to this group. Figures in blue mean that the finding is significantly Lower ($\alpha > 0.05$) than the finding for all. Figures in red mean the finding is significantly Higher ($\alpha > 0.05$) than the finding for all.²⁸



Interior picture uploaded by respondent from creatives segment in US





China: Achievers and conservatives with breakthrough potential

Creatives and socializers who make up 39% of the European and 48% in the American population constitute only 15% of the population in China. Especially socializers are a very small group in China (3%). The segments that form the majority in China are the achievers, conservatives and challengers (85%). Challengers and achievers can be characterised by materialism and a High work ethic. But while achievers form the group in society that is happiest and feels connected with others, the challengers struggle to find their place in society. Achievers and conservatives both have a strong orientation towards tradition and family, while achievers are more status oriented and embrace change more than conservatives do.

Achievers in China are Higher educated and are among the Higher income groups. They are more cosmopolitan and more politically engaged. But they also like their lives to be organised and predictable and have a strong sense of national pride about their country.

Challengers are overrepresented in the Lowest income group and mostly identify themselves as part of the working class. They are working hard to make ends meet. Because of their hard lives they tend to be more pessimistic about their future.

Among the sustainability supporters in China the conservatives make up the largest group, followed by the achievers. The creatives are a minor group and are not overrepresented among the sustainability supporters, in contrast to the situation in the US and EU. The debate over the environment, moreover, is far less developed and polarised in China, than in the West. The sustainability supporters in China are not mainly progressives like in the

US and Europe (where also conservatives join in), but overtly conservatives. These findings are consistent with earlier studies from Henk Vinken from Tilburg University and others³⁰ who point out that an environmental way of thinking conforms to traditional Asian values. Nevertheless, for a number of reasons achievers in China seem best positioned to become ambassadors for environmental sustainability, next to the Chinese conservatives. Firstly, because they adhere to traditional values almost as much as the conservatives, which is a driver for a sustainable orientations in Asia. Secondly, achievers are the most supportive of the combination of factors that could make environmentalism a success in China: they are more concerned than average about the issue of nature and environment among other policy priorities, have a positive stance towards environmental values, have a strong belief in technological innovation and a willingness to engage with businesses to achieve results. Thirdly, the achievers have a natural front role position in political, culture and business life in China. They are Highly educated, most engaged on all these levels and feel closely linked with the success of their country. This means they are status sensitive, but also that they have the relevant networks to push through change among Chinese elites.

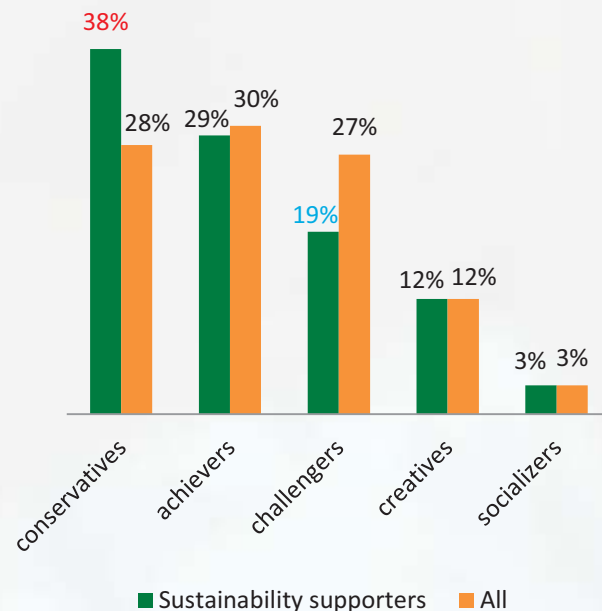


Interior picture uploaded by respondents from achievers and conservatives segment in China

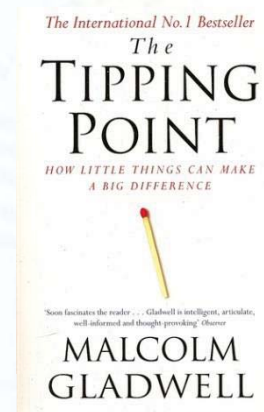
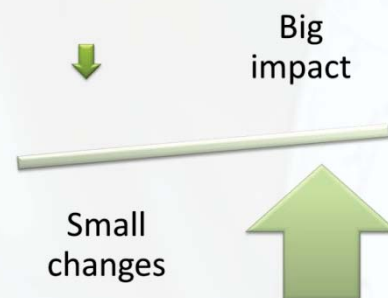
30.
<http://www.humanecologyreview.org/pastissues/her101/101aoyagietal.pdf>

Interestingly enough the achievers in China score Higher than other segments on 'giving people more of a say in government decisions'. The conservatives in China are Lower educated and less influential than the achievers. They are also poorer on average, and incomes in China are very Low, compared to the US and Europe, so the possibilities for them to choose for environmentally friendly alternatives are more limited. However, the conservatives are a very important group to support change in a more sustainable direction, but need support from the leadership, banks and businesses to do so.

Glocalities values segments in China



Reading example: 27% of all Chinese belong to the segment 'challengers'. Of the sustainability supporters (20% of the population) only 19% belong to this group. Figures in blue mean that the finding is significantly Lower ($\alpha > 0.05$) than the finding for all. Figures in red mean the finding is significantly Higher ($\alpha > 0.05$) than the finding for all.³¹



Tipping point potential

Malcom Gladwell, editor of the New Yorker describes in his famous book The Tipping Point³² three types of people that are crucial in the creation and spread of social tipping points: Connectors, Mavens and Salesmen. Connectors are the key hubs with large, diverse networks and reach out to many people. Mavens are experts who are continuously looking for new solutions and driven to help others with their latest insights. The persuasiveness and charisma of Salesmen sets people in motion to act. These three competences can play an important catalytic role in the spread of knowledge of sustainable alternatives and influencing attitudes and sustainable behaviour in the population. In the Glocalities survey indicators were included to determine how people score of the different aspects necessary for creating change. As it turns out, the segment of achievers scores Highest of all segments. So, interestingly enough, this also adds to the earlier conclusion that in China the achievers are in a unique position to push sustainability towards a tipping point. In contrast to the situation in Europe and the US in China the achievers are directly confronted with the problems and in a strategic position to generate momentum for a breakthrough in sustainability, backed by Chinese conservatives.



31. An analysis of the mean scores on the sustainability scale of the segments based on all interviewed Chinese shows a similar pattern. The Chinese ranking of segments on the sustainability scale is: 1. conservatives 2. achievers 3. creatives 4. socializers 5. challengers. Red means a significantly Higher score, blue means Lower.

32. http://en.wikipedia.org/wiki/The_Tipping_Point



Comparing Glocalities results to other values surveys

In the Glocalities study we see three large groups in China: achievers, challengers and conservatives. The overrepresentation of these groups corresponds with Hofstede's findings on China's national culture. According to Hofstede³³ China's national culture distinguishes itself with a High score on masculinity and a Low score on individualism. A High score on the masculinity dimension indicates that a society will be driven by competition, achievement and success, which are key values for achievers and challengers. At the same time family is important for achievers and conservatives, according to Hofstede the importance of family is a characteristic of all collectivistic societies. These findings also correspond with results from Schwartz³⁴ value survey in which China scores High on mastery (ambition and success) and High on embeddedness/conservatism (family, traditions).

In the US the Glocalities segments are more evenly distributed, the largest group in the US are the conservatives who attach much value to family and tradition (corresponds with USA's High score on

conservatism/embeddedness). The relatively large group of socializers in the USA also attaches value to traditional values and, furthermore, corresponds with USA's High score on Hofstede's indulgence dimension (the extent to which people try to control their desires and impulses).

Values of Europe's largest group, the creatives, such as an open mind and self-expression correspond with findings from Schwartz' value survey. According to Schwartz, Europe scores High on Affective (pleasure, exciting life, varied life) and Intellectual autonomy (curiosity, broadmindedness, creativity). The values 'an open mind' and 'social commitment' are also a reflection of the more feminine culture that can be found in many European countries according to Hofstede. The small size of the achievers segment is also found Europe's relatively Low scores on mastery (Schwartz) and masculinity (Hofstede).

33. Hofstede: <http://geert-hofstede.com/>

34. S.H. Schwartz (1994) Beyond Individualism-Collectivism: New Cultural Dimensions of Values

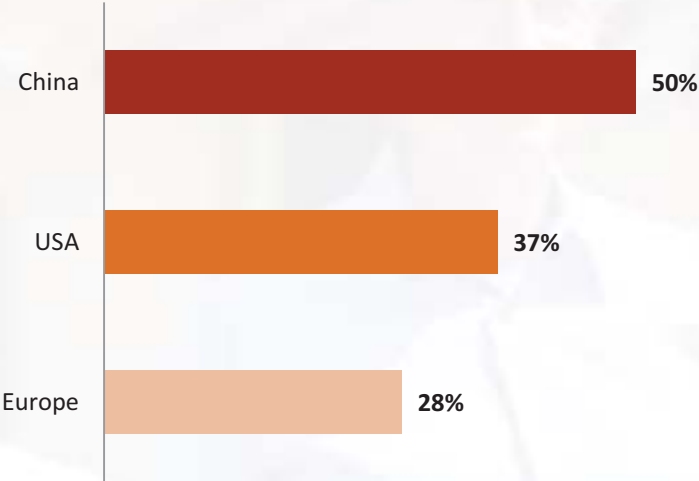
Case: Bill and Melinda Gates Foundation³⁵

The Bill and Melinda Gates Foundation is another example of an NGO that has revolutionized business techniques in its charity and philanthropic work. The impact of the Gates Foundation is, also due to its financial impact, with an endowment of over 38 billion euro's in 2013, an NGO to reckon with. The activities of the foundation are well known through its program on health care and poverty reduction in the developing world. In the survey of this report we asked respondents about their appeal for Bill Gates as a person (among other personalities). In China his appeal is 50%, the Highest of the whole list of international personalities. In Europe his appeal is 28%, and in the US 37%. Within China, Bill Gates is especially popular among the group of Achievers (63%). This result underlines the High potential in China to communicate about environmental sustainability in a new way. The image of Bill Gates as a leader in business, technological innovation AND philanthropy, makes him very attractive for this group of Chinese who strongly identify with status, economic power and environmental causes.



35. <http://www.gatesfoundation.org/>

Appealing person: Bill Gates





Conclusions and recommendations

Chinese demand solutions to unleash the supporters for environmental sustainability

Popular support for environmental sustainability is currently stronger in China than in the West. While posing the largest threat to the environment with its growing economic and industrial power, China also has the Highest potential for solutions. In China there is a growing awareness about the threats of environmental degradation and a High sense of urgency to do something about it. Chinese demand solutions from their government, and also from companies operating in China. They feel beneficiaries of the economic growth and technological progress in their country over the last decades and demand that the same powers of innovation are employed to solve environmental problems. The combination of a High sense of urgency about environmental problems and the strong support for different ways to solve these, reveal the revolutionary potential for change on environmental sustainability in China.

Recommendations for China: support conservatives, facilitate achievers

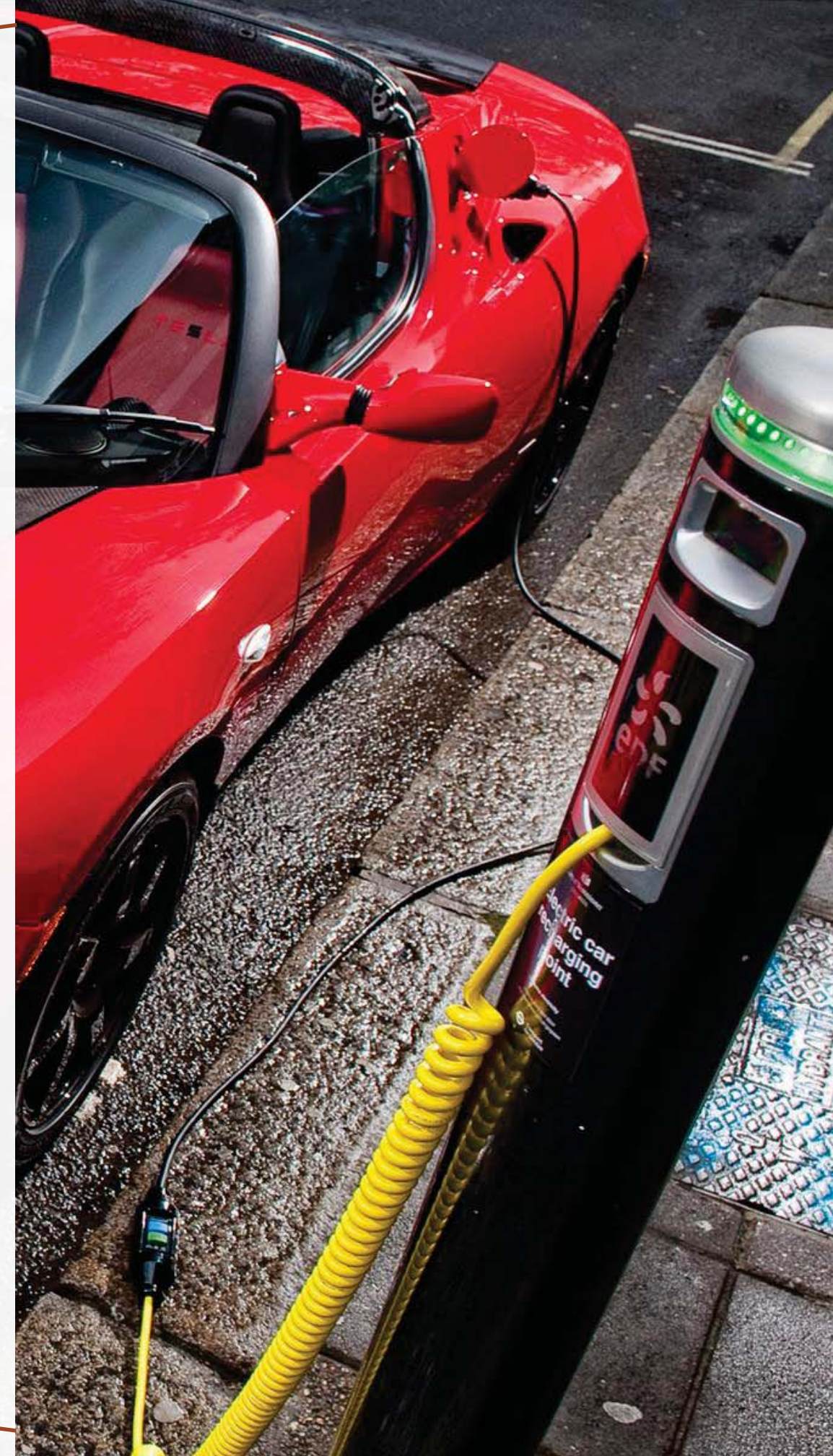
The Chinese government increasingly acknowledges the problems of environmental degradation, although the system still has a long way to go. The potential for environmental change is a unique opportunity for businesses and the banking sector to solve problems and unleash sustainable business. For companies it is interesting to see that supporters for environmental sustainability can be found among the urban and influential 'achievers'. Chinese achievers believe in the benefits of technology and are willing and able to invest in it. Achievers have the potential to create a tipping point in sustainability, when they are in the position to align their competences, contacts and concerns. The second natural ambassador group for environmental sustainability in China are the conservatives. They value traditions and ways of the past, therefore problem solving must be done locally and with precaution and respect. For this group innovation and technological solutions are not the way to go. It is imperative to seek coalitions with NGO's and local environmental parties to resonate with the needs of the conservatives and to avoid counterproductive sentiments. This takes time. The progressive route ideologically led by the creatives that has been followed in the West will not work in China, because of the small size of this group and because support for sustainability in China mostly comes from achievers and conservatives. To conclude, in China a two-track strategy is needed to unleash the sustainability potential: helping conservatives and facilitating achievers. In this challenge of course the cooperation of the Chinese government and multinational companies can make a huge impact.

Recommendations for USA: build grassroots support and business opportunities

In the US conditions for change on environmental policies seem less favourable. Environmentalism has become part of a deep polarisation between Democrats and Republicans. Scepticism about environmentalism runs high among a core support base of Republicans (who are mainly present among the values segment of conservatives). A core constituency of the Democrats (overrepresented among creatives) embrace environmentalism. These ambassadors for environmental sustainability come ideologically from 'another' planet in the eyes of the conservatives. This polarisation, that currently extends to many policy domains in Washington, means that no miracles should be expected from the US federal government for a breakthrough in the field of sustainability. The best strategy that can be employed is to build grassroots support on a local and regional level. Indeed, conservative republicans in rural areas are facing environmental issues as well, and they expect solutions from their local leaders. In West Coast states like Oregon and cities like Seattle, regional taskforces are formed in order to tackle regional challenges and environmental issues. Every time a local disaster happens in America, for example a hurricane, the region itself takes initiatives by seeking help from companies to prevent future damage. Alliances with local and regional leadership are therefore essential.

For the long term the potential lies in involving achievers more strategically in the process of sustainable growth. So far this segment in US society has been less supportive of environmental values, but they do have faith in the potential of technology to solve global challenges. Achievers are status oriented and fascinated by innovative technologies.

Once they see practical opportunities for business and improvements beyond the current ideological debates between conservatives and democrats, and new sustainable technologies are starting to pay off they might be more on the topic. To enforce the spread of sustainability in society supporters from the creatives segment have to appeal to drivers and motivations of other values segments and initiatives. To conclude, in the US a two-track strategy is recommended: bottom-up initiatives combined with state of the art technology to bypass the deadlock on a federal level.





Recommendations for Europe: enforce sustainability coalitions with companies and NGO's

At the moment Europe is still recovering from a recession and environmental sustainability is not a hot topic on a governmental level, as other issues are regarded more pressing. Controversies between a political elite dominated by creatives and a surge of right-wing populist parties slow down sustainability policies. In comparison however, support for environmentalism in Europe is higher than in the US and Europeans are also less fearful of state-intervention than Americans. Because of these two elements there is still potential in Europe for sustainability policies to take hold. The biggest threat to environmentalism in Europe lies in some deep rooted orientations among environmental supporters themselves. Unlike in the US or China, the environmental supporters in Europe are sceptical about the potential of technological progress. Also businesses, especially multinationals, are often seen as the 'enemy' in environmental causes, instead of as a potential partner to achieve results.

For all these reasons it is imperative for sustainability supporters in Europe to broaden their support base. Governments and NGO's already frequently co-operate in environmental sustainability programs. Government and NGO employees, mostly belonging to the segment of creatives themselves, too often shun cooperation with companies out of cultural distrust. Companies follow their own course and are similarly hesitant to interact with NGOs and governments. These cultural barriers between businesses on the one hand and governments and environmentalist activist on the other, have to be broken down to achieve real progress on environmental policies in an European context. To speed up creative sustainability supporters have to align with drivers and motivations of other population segments. Environmental sustainability in an European context has the best chance of succeeding when companies, NGO's and governments collaborate.

Summarising table: Environmental sustainability in China, USA and Europe

	China	USA	Europe
Environmental problems			
Perceived urgency	High	Low	Medium
Polarisation in debate	Low	High	Medium
	China's revolutionary potential		
Trust in solutions			
Technology	High	Medium	Medium
New leadership potential	High	Medium	Medium
Business engagement	High	Medium	Medium
Target audiences			
Ambassadors	Achievers Conservatives	Creatives	Creatives
Opponents	Challengers	Conservatives Socializers	Socializers Challengers
Sustainability strategies			
China	Unleash revolutionary potential for sustainability by a focus on conservatives + achievers, solving urgent problems with technological progress , business and banking engagement and governmental leadership		
USA	Circumvent polarisation by local and bottom-up sustainability initiatives + push for technological solutions and business engagement . Supporters from the creatives segment have to appeal to motivations of other segments.		
Europe	Broaden sustainability movement by building effective coalitions between companies, NGO's and governments. To speed up supporters from the creatives have to appeal to motivations of other Glocalities segments.		



Interested in Glocalities?

This flash report only gives a glimpse of the data and knowledge that is available. The full Glocalities data-set consists of hundreds of variables, throughout 20 countries and covering all continents. In a tailor made presentation or report it is possible to zoom in on specific issues, segments or countries and to build a comprehensive profile of target groups and trends. Hereby you could think about socio-demographic background, attitudes towards political and social issues, media use, brand use, activities, cultural values, competitive analysis, etc.

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