



Green Brands,
Global Insight
2009



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Green Brands, Global Insight

Findings from the 2009 ImagePower Green Brands Survey

Since 2006, Cohn & Wolfe, Landor Associates, and Penn, Schoen & Berland Associates have partnered to survey consumers on their perceptions of the rapidly evolving “green” space.

This year’s Green Brands Survey is the largest: Over 5,000 people in seven countries (Brazil, China, France, Germany, India, the U.K. and U.S.) participated. This year we also collaborated with Esty Environmental Partners, a corporate environmental strategy consulting firm, to develop the survey.

Key findings of the 2009 survey include:

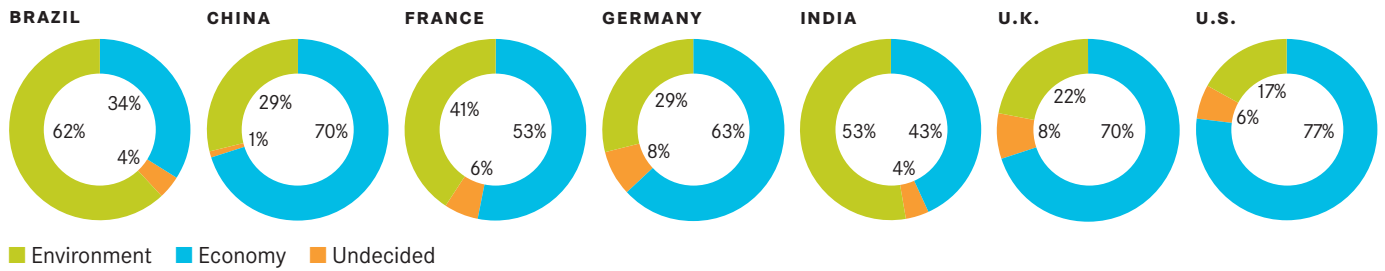
- Globally, consumers report that it is important for companies to be green
- Despite economic concerns, consumers say they will spend more on green products in the coming year
- Consumers trust a variety of sources to inform their green purchase decisions
- No company has established itself as a dominant global green brand, but many are recognized in specific markets
- Consumers expect companies to take comprehensive environmental action

Globally, consumers report that it is important for companies to be green. At least 77 percent of consumers in all seven countries say it is somewhat or very important for a company to be green. But while many environmental beliefs and behaviors are shared across different consumer cultures, others vary widely. For example, consumers in Brazil, China, and India report being more inclined to seek out green products and to favor companies they consider green, while their counterparts in France, Germany, the U.S., and U.K. are less inclined to do so.

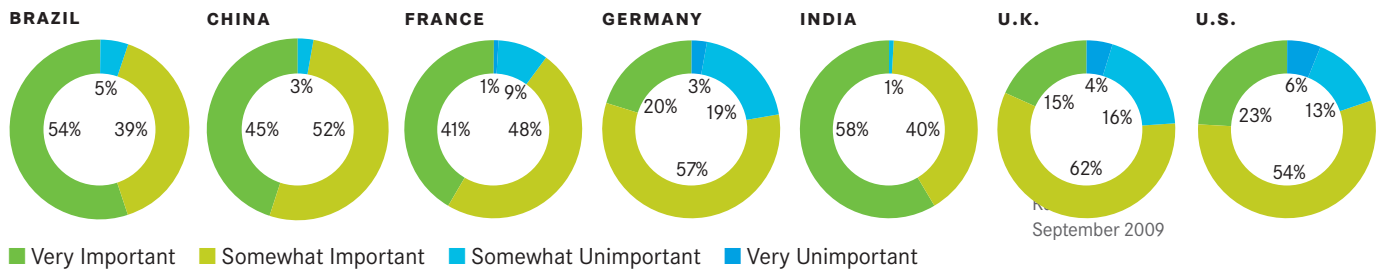
Despite economic concerns, consumers say they will spend more on green products in the coming year. Although most consumers are more concerned about the economy than the environment, India and Brazil are the only two of the seven countries in which consumers express more concern for the environment. In the U.S., 77 percent of consumers communicated deeper concern for the economy than the environment, which is unchanged from 2008. Meanwhile, China, India, and Brazil showed significant support for additional spend: 73 percent of Chinese consumers say they will spend more, 78 percent of Indians say they’ll spend more, and 73 percent of Brazilians plan to increase their green spend in the next year.

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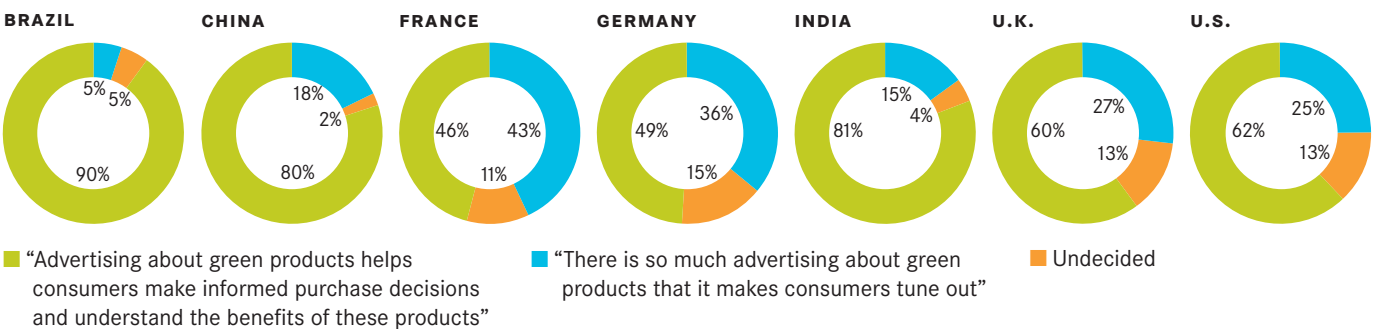
Which concerns you more: the economy or the environment?



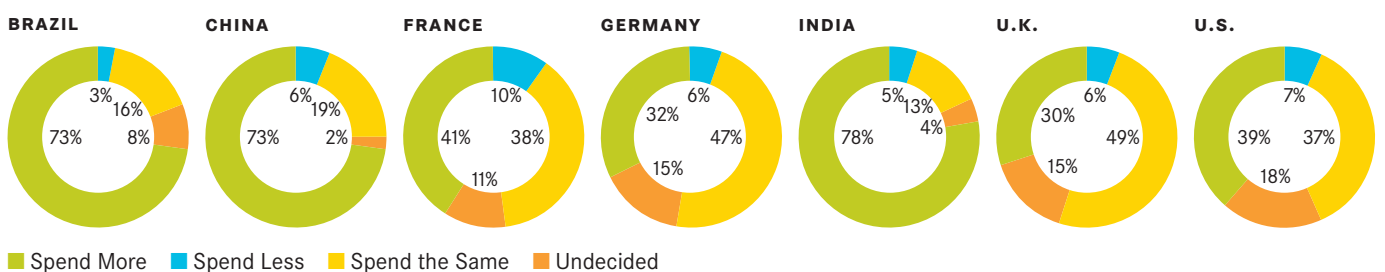
When you think about what brands to buy, how important is it that a company is green?



What do you think about advertising for green products?



In the next year, do you plan to spend more, less, or the same amount on green products or services?



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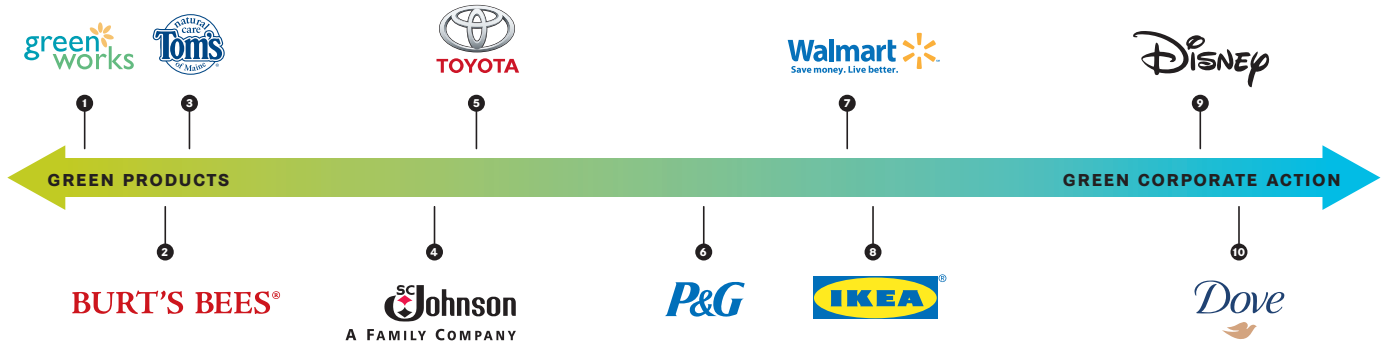


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	BRAZIL	CHINA	FRANCE	GERMANY	INDIA	U.K.	U.S.
1	Natura	Haier	Le Petit Marseillais	Frosch	Dettol	The Body Shop	Clorox Green Works
2	O Boticário	Li Ning	Yves Rocher	Weleda	Tata Indicom	M&S	Burt's Bees
3	Johnson & Johnson	Lenovo	Center Parcs	Dr. Hauschka	Infosys	Sainsbury's	Tom's of Maine
4	Unilever	Baidu	Decathlon	IKEA	Taj Hotels Resorts and Palaces	Waitrose	SC Johnson
5	Azaléia	Apple	IKEA	dm Drogerie	Wipro	Tesco	Toyota
6	Hering	Shangri-La Hotels and Resorts	E.Leclerc	Nivea	Microsoft	E.ON	P&G
7	Pão de Açúcar	Adidas	Belambra vvf	Tegut	REVA	EDF	Walmart
8	Grendene	Liushen	Nivea	REWE	Maruti	Google	IKEA
9	Nivea	Microsoft	Dove	The Body Shop	Colgate	Dove	Disney
10	Microsoft	IKEA	Citroën	Vileda	Lifebuoy	Honda	Dove

Methodology: Penn, Schoen & Berland Associates (psb) conducted 5,756 interviews in Brazil, China, France, Germany, India, the U.K. and U.S. from May 4 – June 13, 2009. The margin of error was $\pm 3.1\%$ in the U.S. and U.K. and $\pm 3.6\%$ everywhere else. Interviews were conducted online among general population, 18 and older. In Brazil, China, and India, respondents were limited to Tier 1 Cities. Brands were chosen from a predetermined set.

Within the top ten U.S. brands, some emphasize green products and others focus on green corporate action.



“With the global climate change discussion focused on what the major new economic powerhouses like China, India, and Brazil are willing to do to control their emissions, those three countries stood out in our research as more interested in buying from environmentally friendly companies and more willing to spend on green products,” says Scott Siff, executive vice president of Penn, Schoen & Berland Associates. “From a political perspective, this turns the assumptions about those countries on their heads, and from a business perspective it says the market for green branding and green products may be even bigger than generally thought.”

Consumers trust a variety of sources to inform their green purchase decisions. Worldwide, consumers identify television and the Internet as their primary sources of information for environmental issues. And respondents—especially those in developing countries—say that they trust advertising to inform them about green products.

Internationally, consumer purchase decisions are influenced by various divergent factors: Consumers in France, Germany, and India are influenced by past experiences with a product, while recommendations from friends are effective in the U.S. and China, and editorial content is most persuasive in the U.K. and Brazil. All countries agree that intellectuals (professors, writers) or activists are the most credible spokespeople for environmental change.

“As consumer demand for information and knowledge on green increases, brands also need to become more sophisticated about how they communicate their company and products,” according to Annie Longworth, sustainability practice leader for Cohn & Wolfe. “Transparency is critical, as are credible spokespeople and authenticity, which can be demonstrated through product labeling and ingredient disclosure, among other strategies.”

No company has established itself as a dominant global green brand, but many are recognized in specific markets. In order to gauge which companies are communicating their green initiatives or values most effectively, the survey asked participants in each country to rate a predetermined set of brands.

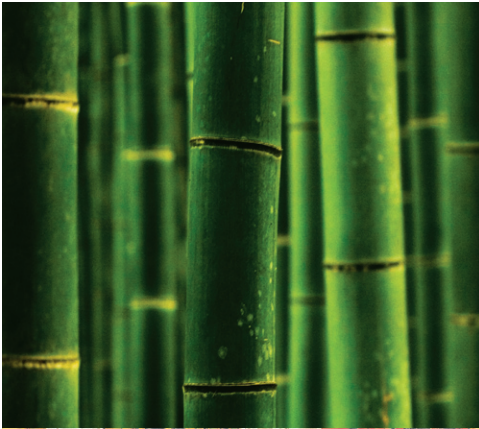
The results provide insight into the categories of most importance to consumers in each country. Interestingly, very few countries identified the same categories as the greenest, although personal care was in the top three for all countries except China.

Consumers expect companies to take comprehensive environmental action. The survey also indicates that consumers have clear ideas about the steps that companies should take to be viewed as green.

“Reducing toxins leads the list of consumer priorities; the data also show that the public holds companies accountable for good environmental behavior across the board,” says Dan Esty, chairman of Esty Environmental Partners. “Consumers expect companies to recycle, use energy efficiently, reduce packaging, and pursue green innovation. To gain loyalty, a company’s environmental strategy must be comprehensive.”

The growing value of a comprehensive approach to environmental strategy is reflected in a company’s performance on brand attributes.

“This year’s findings in both developed and developing countries reinforce consumers’ desires to be green by using products that are green,” says Russ Meyer, chief strategy officer of Landor Associates. “However, we’re also beginning to see a strong positive correlation between greenness and more traditional brand attributes like honesty and trustworthiness. This creates an incentive for global brands faced with the challenge of expanding the reach of preexisting products while introducing green ones, as the presence of one attribute can have a halo effect on others.” ■



The 2009 ImagePower Green Brands Survey was sponsored by:

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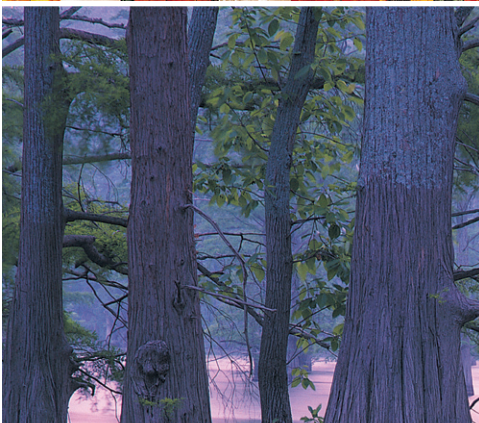
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Esty Environmental Partners

Esty Environmental Partners (EEP) is a management consultancy working with corporate clients to build high-impact environmental strategies that create sustainable business value. EEP serves a range of companies, from Fortune 500 to small business, in diverse industries including apparel, financial services, industrial, and consumer packaged goods. EEP clients are executives whose responsibilities include corporate environmental affairs and sustainability, product line management, facilities management, and the highest levels of company or division general management. They engage EEP’s team of experienced environmental and business professionals to help them build core capabilities, innovate, and differentiate their companies through environmental strategy.

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