

# 2010 ImagePower® Green Brands Survey

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Esty Environmental Partners

Landor



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SCHOEN  
BERLAND







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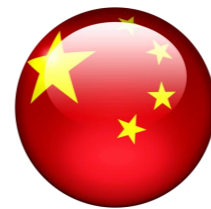


PENN  
SCHOEN  
BERLAND





# 2010 ImagePower® Green Brands Survey



**Feb 27 -  
Mar 24**

**9,022  
interviews**

**8  
countries**







**Sustainable Brands  
need to lose their  
premium status**







**IT'S THE  
ECONOMY  
STUPID**





**Which concerns you more,  
the economy or the  
environment?**

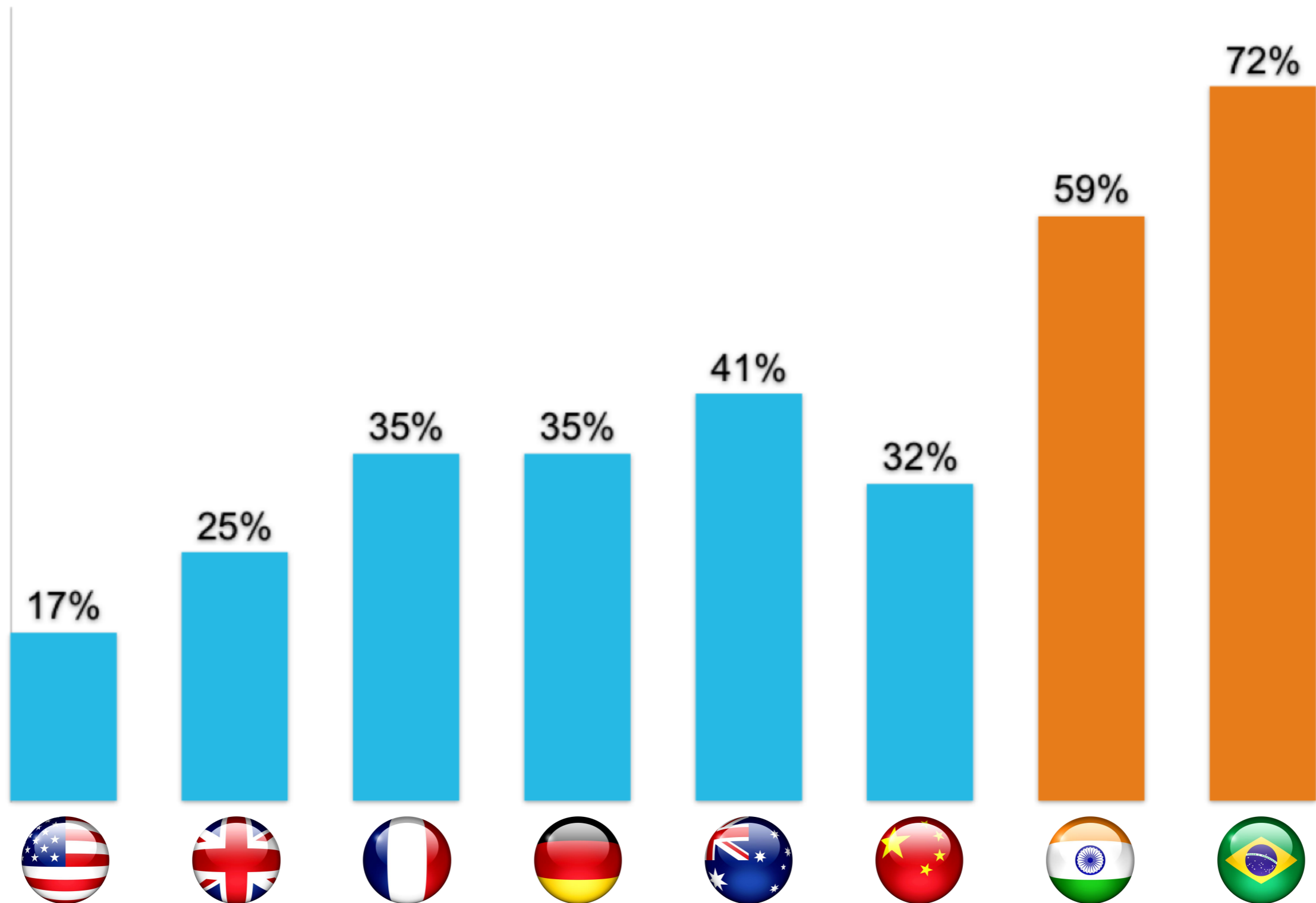






**79%** of Americans are more concerned about the economy than the environment

# Consumers in India and Brazil are more concerned about the environment than the economy





**VALUABLE** CO

which a prom

It includes m

grant, and i

love and a

**VALUATION**

1. estimating worth or

2. act of estimating th

**VALUE**

worth of all the

thing that will be give



**76%** of Americans say it is very important for companies to offer good value

**VALUE**

worth of all the thing that will be give



A lush green forest with a stream flowing through it, surrounded by mossy rocks. The text is overlaid on a dark green semi-transparent background.

Only **37%** of Americans say it is very important for companies to be environmentally conscious





**Do you believe green products cost more or less than comparable non-green products?**





**Most customers still see  
green as more  
expensive**





**82%** of Americans believe that green products cost more

82



85



89



82



84



82



68

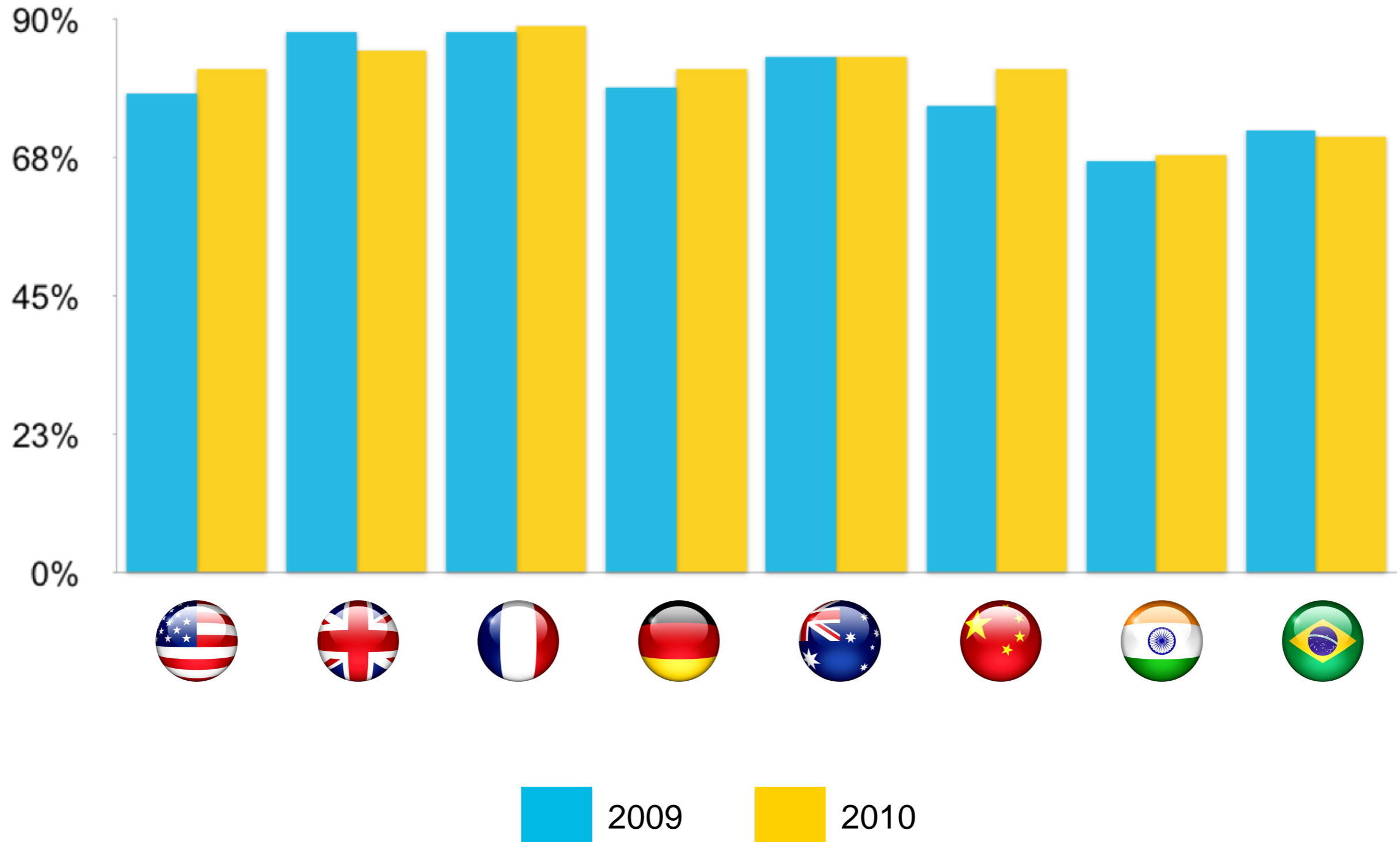


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# The perception that green products cost more continues in all countries





**Consumers still  
want to go Green**







**How important is it that the brands you buy are from an environmentally friendly company?**





Over **60%** of all consumers say it is somewhat or very important to buy Green

75



78



88



63



79



97



97



93





Over **30%** of all consumers plan to spend more on Green goods next year





**US consumers are in something  
of a holding pattern**





**35%** will spend more on  
Green brands next year

**-4%**  
from  
2009



**44%** will spend the same  
on Green brands next  
year

**+7%**  
from  
2009







**Consumers rate IKEA as a Top  
Ten Green Brand showing Green  
can equal Value to consumers**





**Sustainable Brands  
need to respond to  
cultural nuances**



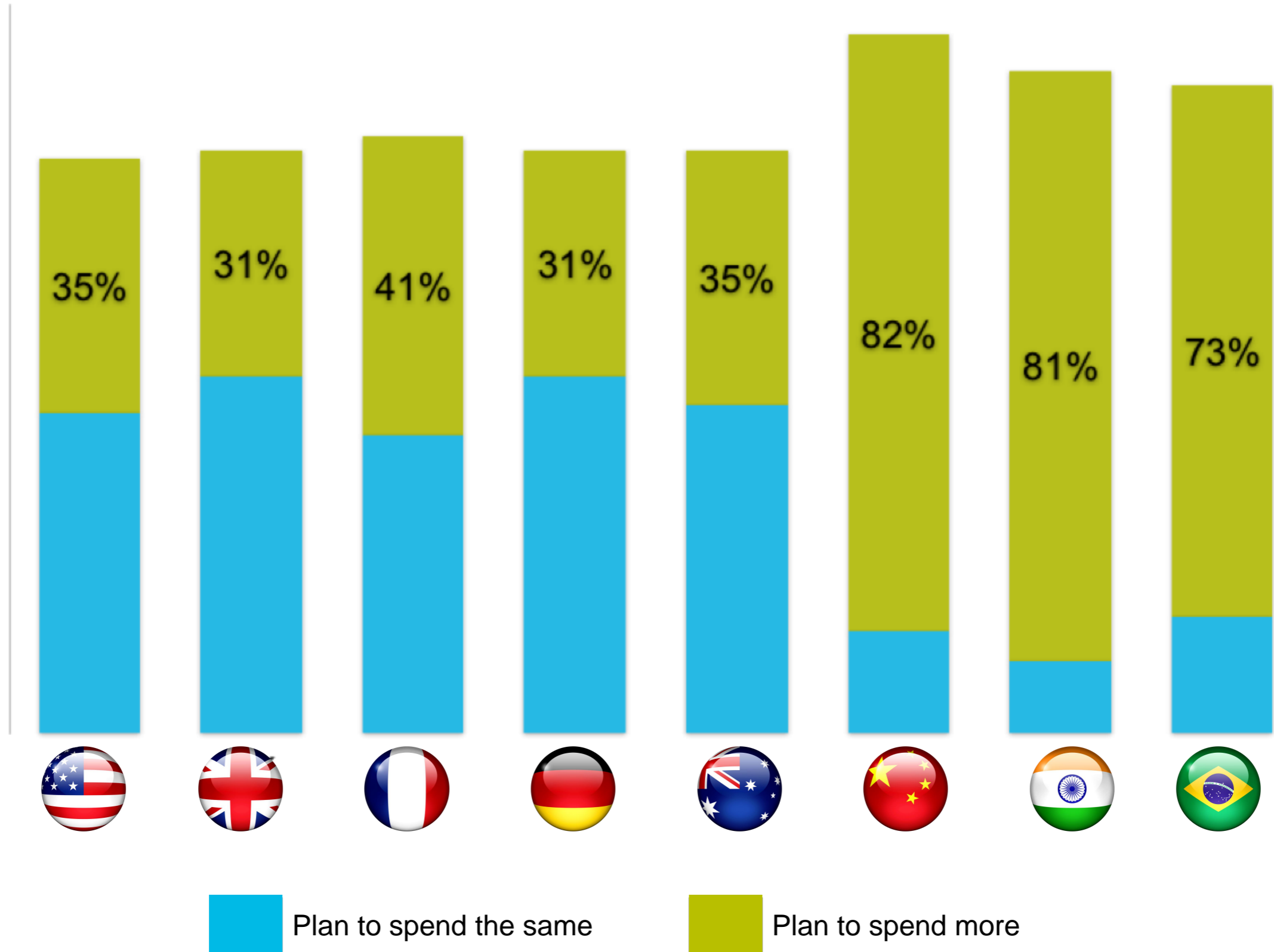


A wide-angle photograph of the Shanghai skyline across the water. The Oriental Pearl Tower is the most prominent feature on the left, with its three spheres and a tall spire. Other skyscrapers of varying heights and colors (blue, gold, white) form a dense urban landscape. The water in the foreground is dark blue with some small boats. The sky is a clear, light blue with a few wispy clouds.

**Greater growth in Green brand  
spending among consumers in  
developing countries**



# Over 70% of consumers in China, India and Brazil plan to spend more on Green products next year



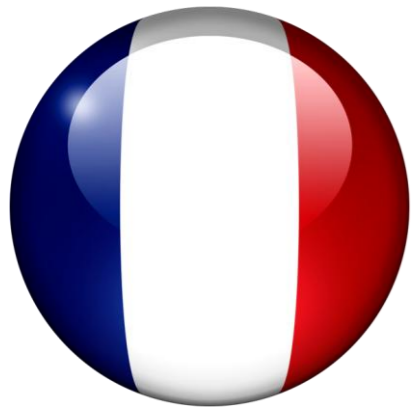


# Hurdles to Green consumption vary by country





# Cost is seen as the #1 barrier by consumers in developed countries





# Lack of selection is the biggest hurdle in Brazil & India







The biggest barrier for Chinese shoppers is the lack of consistent labeling



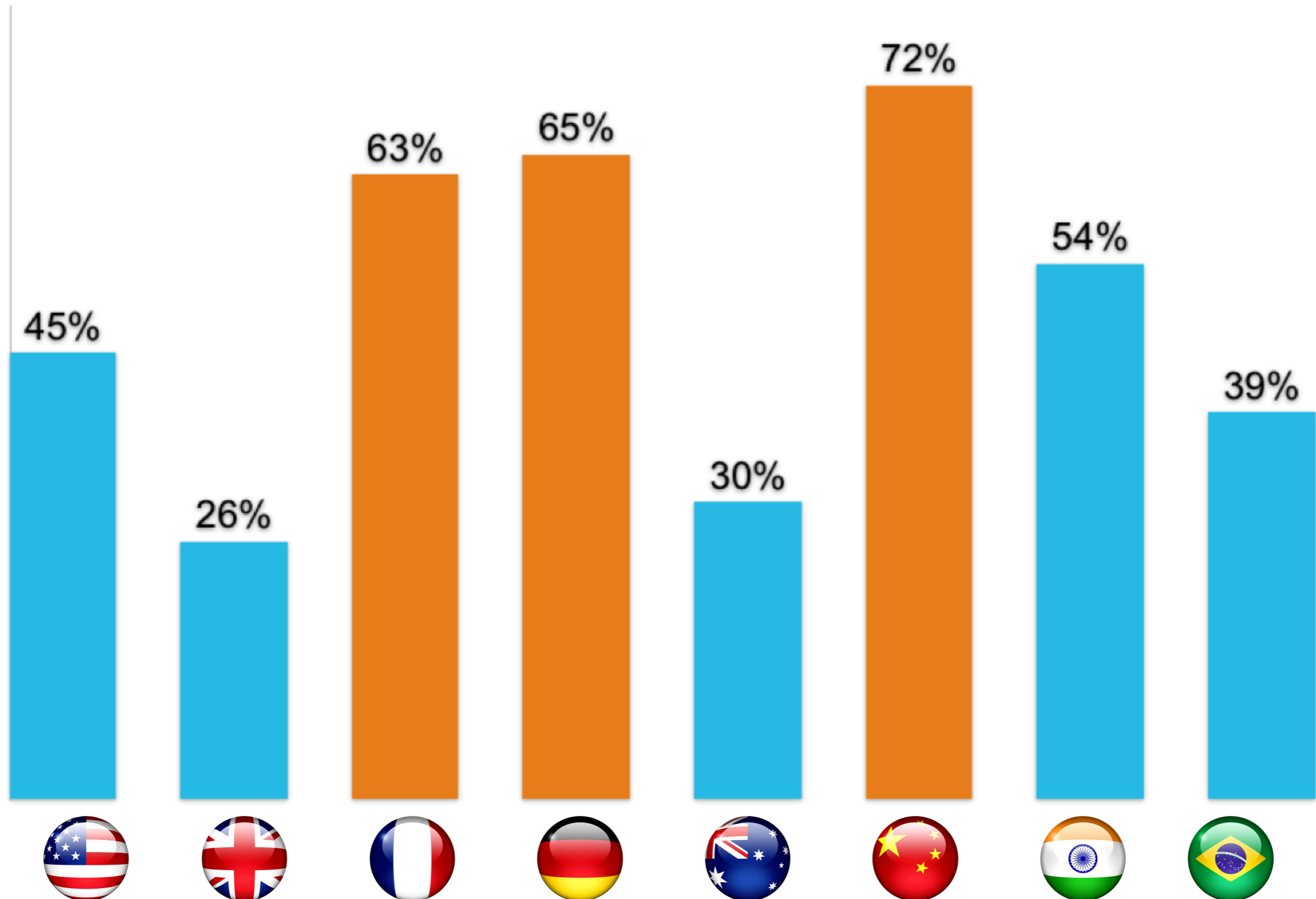


# Education vehicles for Green brands vary in effectiveness



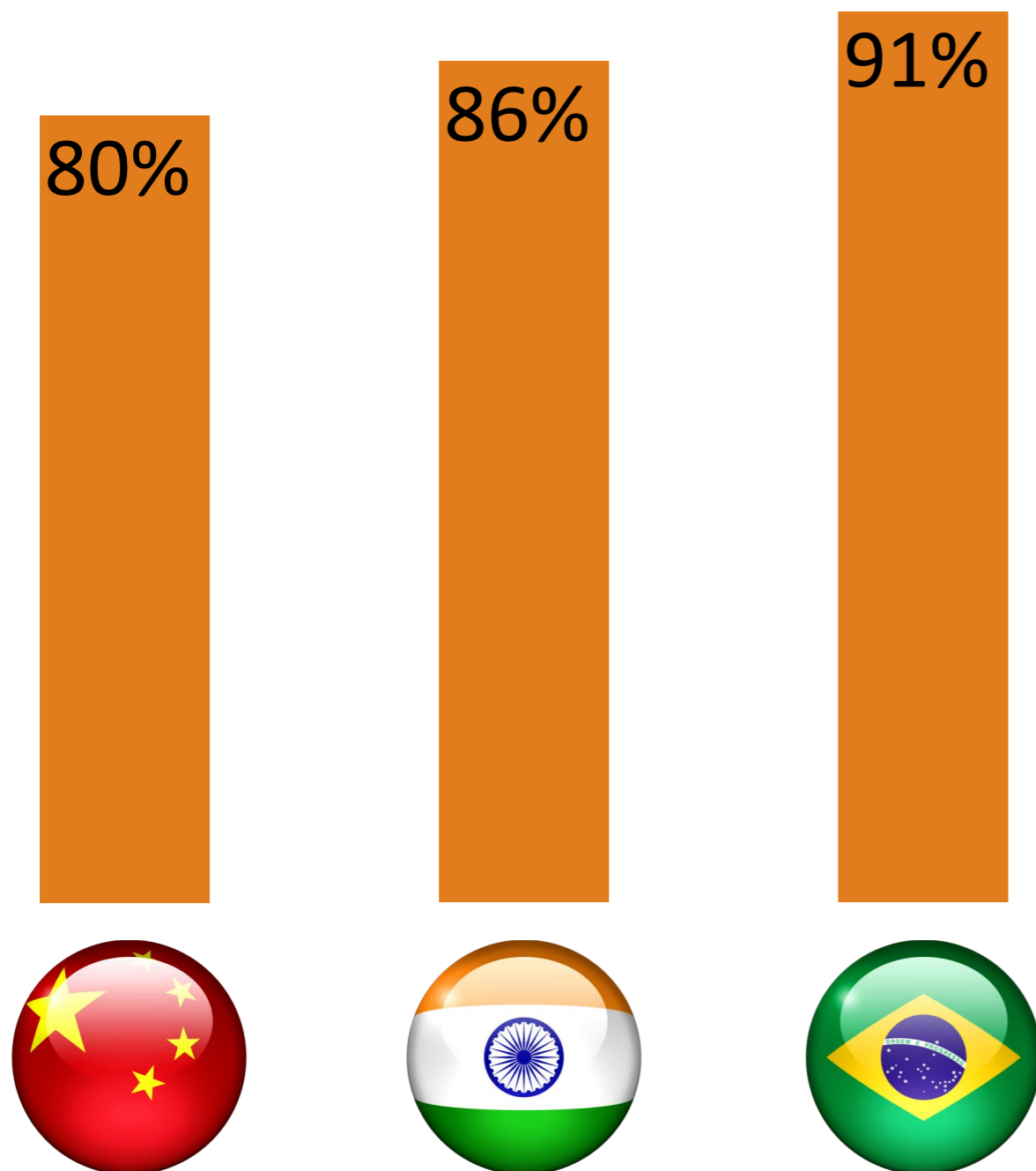


# Consumers in France, Germany & China are more likely to evaluate Green brands on certification marks





# Most consumers in developing countries think Green advertising helps them make informed decisions





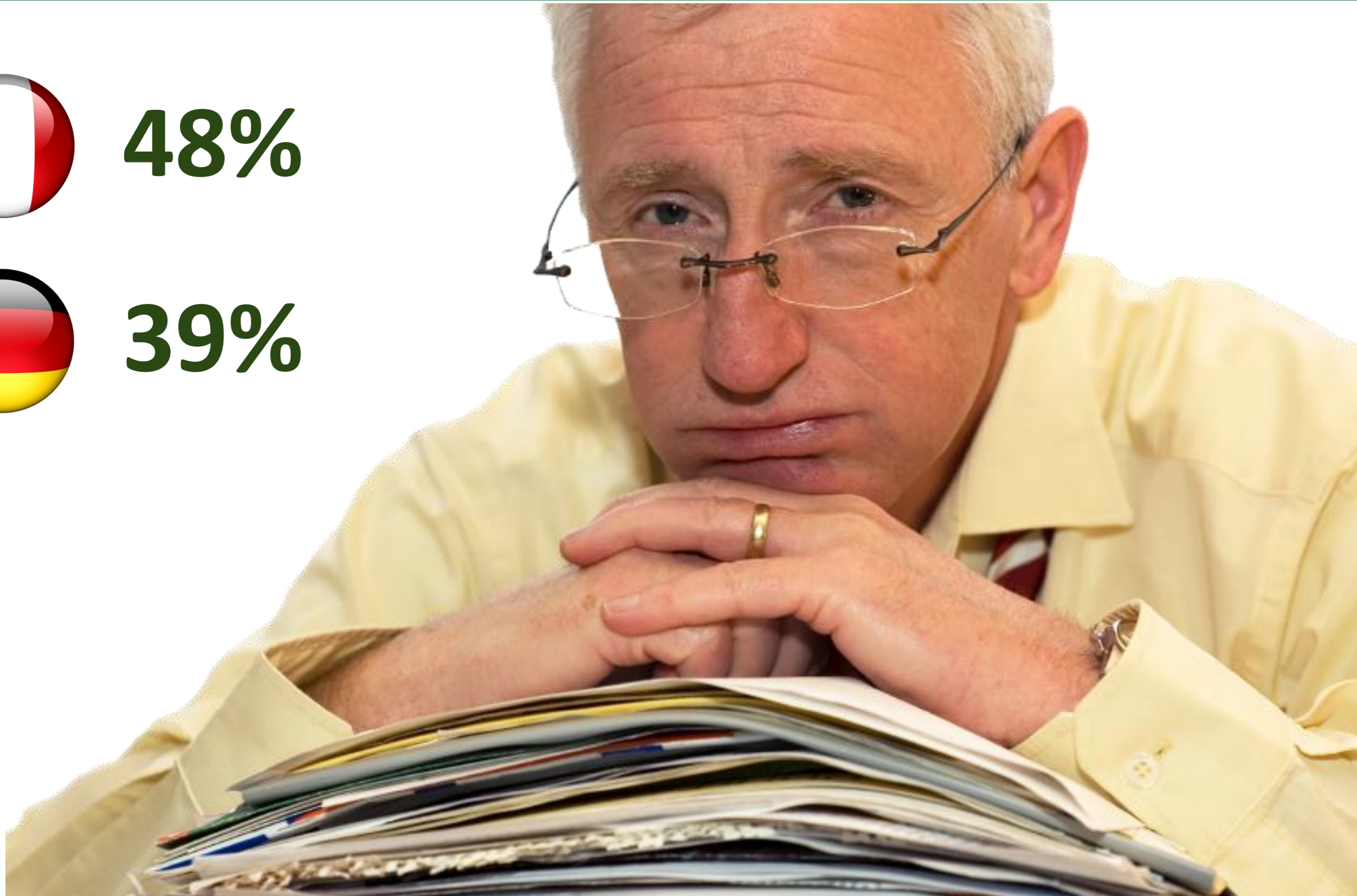
Many respondents in developed countries think there is so much Green advertising that consumers tune out



**48%**



**39%**





# Climate change is seen as the most important Green issue globally



#2

#1

#1

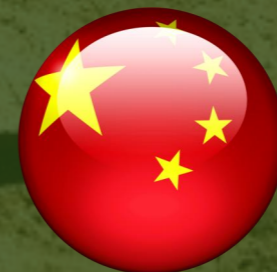
#1

#2

#1

#3

#1





Americans and Brits are  
most worried about  
energy use





# Water is the most important Green issue in Australia







**Deforestation is the #1  
concern in Brazil & India**







**Sustainable Brands  
can take on a leading  
role for change**





Over **60%** of all consumers say it is somewhat or very important to buy Green

75



78



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63



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97



97

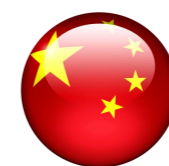


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# Consumers want government to mandate clarity on ingredients, materials, origin, and waste management



	USA	UK	France	Germany	Australia	China	India	Brazil
Disclosure of materials/ingredients	66	65		71	74	82		
Food origin labels	65	65		72	77			
Companies must recycle packaging		75	74					80
Easier to understand labels			69				76	80
More safety testing	65					83	77	
Companies must take back used products								81
Manufacturing information								



Most Important



2<sup>nd</sup> Most Important



Many consumers think the environment in their country is on the wrong track

47



48



54



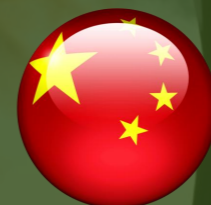
48



42



29



57



66

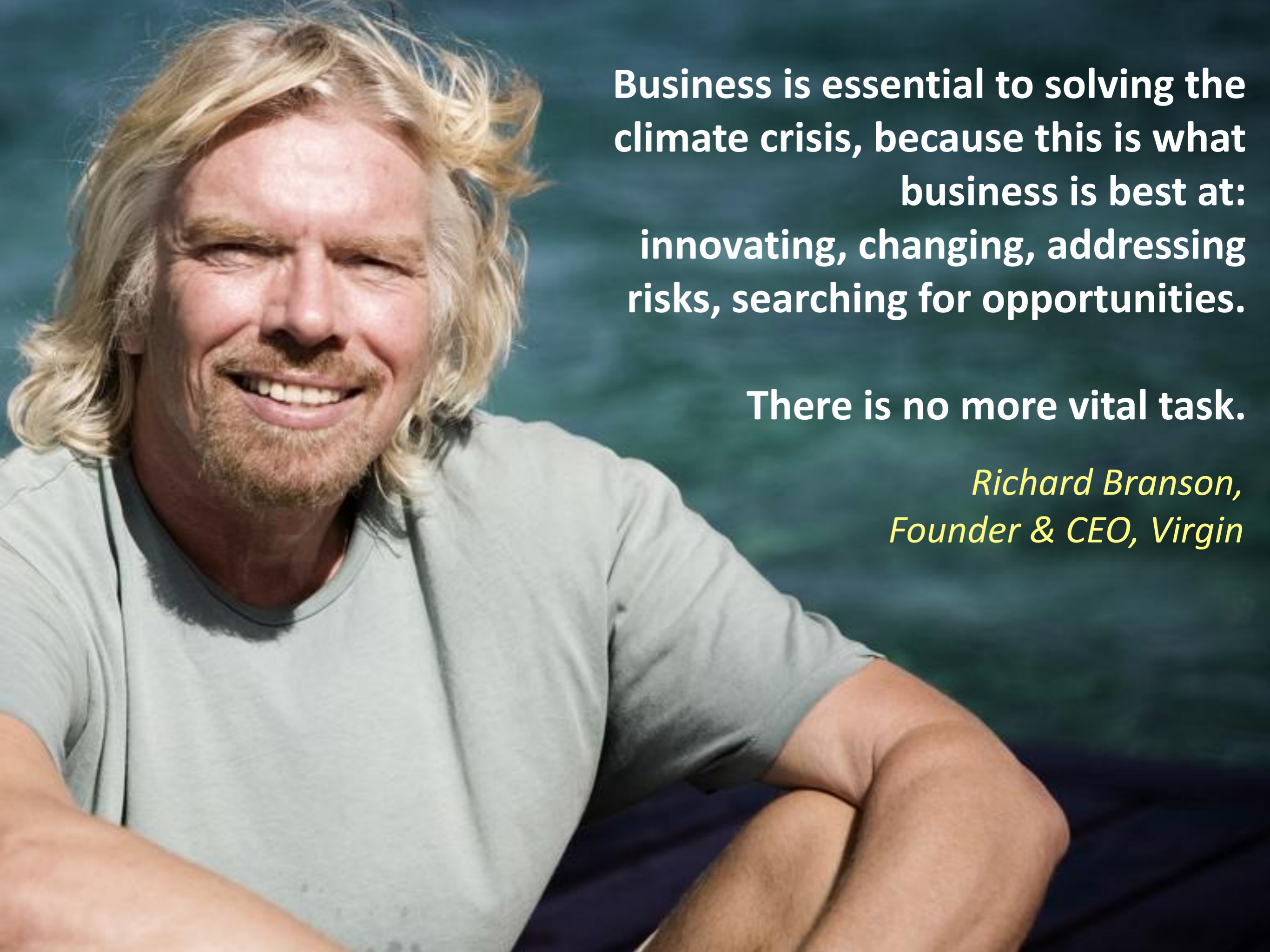




**Business has an opportunity to  
take the lead on these issues**







**Business is essential to solving the climate crisis, because this is what business is best at: innovating, changing, addressing risks, searching for opportunities.**

**There is no more vital task.**

*Richard Branson,  
Founder & CEO, Virgin*





# Top Green Brands from 2010 ImagePower® Survey





# Top Green Brands from 2010 ImagePower® Survey



1								
2								
3								
4								
5								
6								
7								
8								
9								
10								



Brands that are IN ME, ON ME & AROUND ME  
continue to dominate in the US



**TRADER JOE'S**



**WHOLE  
FOODS**  
M A R K E T



**Aveeno**  
ACTIVE NATURALS™



**SC Johnson**  
A FAMILY COMPANY



2010 sees the emergence of Green brands that  
HELP ME...



Google™



**Microsoft®**





**Join us for a deeper dive today at 12:45**

**Bring your lunch to the **Bonsai Room** near the DeAnza Ballroom for additional detail and discussion with all the Green Brands partners.**





# Thank You

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