



U. S. Media Deck

2010 ImagePower® Green Brands Survey

June 2010

cohn&wolfe



Esty Environmental Partners

Landor



Background

- Since 2006, the ImagePower® Green Brands Survey has analyzed consumer perceptions of green products and corporate brands.
- WPP companies Cohn & Wolfe, Landor Associates, and Penn Schoen Berland, in partnership with corporate environmental strategy consultancy, Esty Environmental Partners, conducted the research and analysis.
- The 2010 survey is the largest ever—with over 9,000 people in eight countries.
- Australia was included this year for the first time. We do not offer 2009 comparative data for Australia.
- This deck presents top-line U.S findings and trends. However, it only begins to tell the story—to learn more please contact us.

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 - U.S Key Findings
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- U.S Detailed Data and Top 10 Green Brands List
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Methodology



- 1,200 online interviews conducted in the U.S. February 27 – March 24, 2010
- Margin of error ± 2.8

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The Green Brands Survey answers several important questions

- Do U.S. consumers care about environmental sustainability when they choose a brand, product or service?
- How have U.S. consumers' perceptions of "green" changed from 2009 to 2010?
- What consumer perception challenges must companies overcome in the green space?

United States key findings

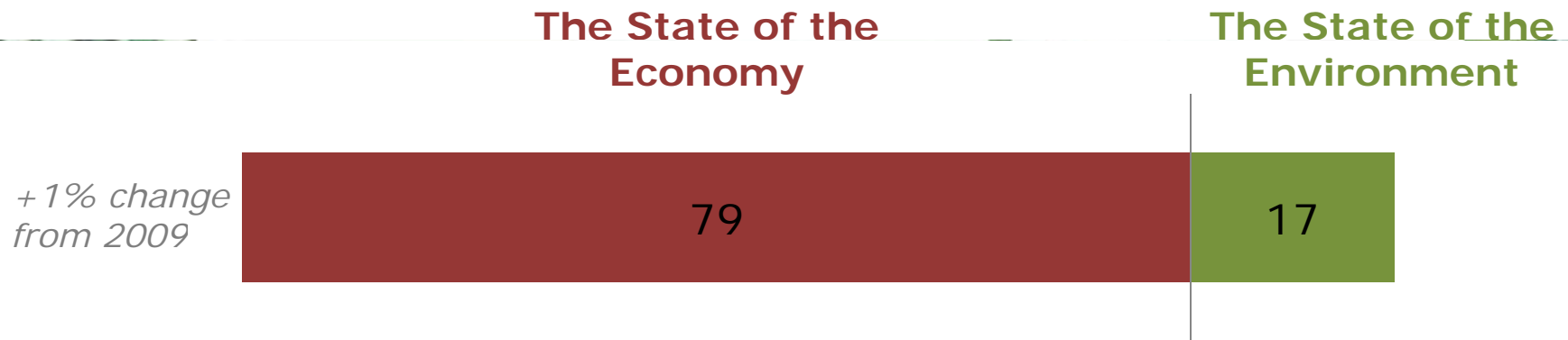
- **Economic concerns predominate, but consumer intention to spend more on green products is holding steady**
 - 79% of consumers are more concerned about the economy than the environment
 - 35% of consumers say they will spend more on green products - down 4% from 2009
- **Energy use and toxics are important issues**
 - U.S. consumers feel energy use is the most important environmental issue
 - 69% of consumers think that, to be considered green, companies need to reduce toxics in products and processes
- **Consumers want value**
 - 76% say it is important for companies to offer good value; 37% say environmental consciousness is important
 - Several of the U.S. top green brands, e.g., IKEA and Whole Foods, appeal to green-oriented consumers, and also emphasize value
 - Other top brands e.g., Burt's Bees, Tom's of Maine, SC Johnson, are providing leadership on information disclosure

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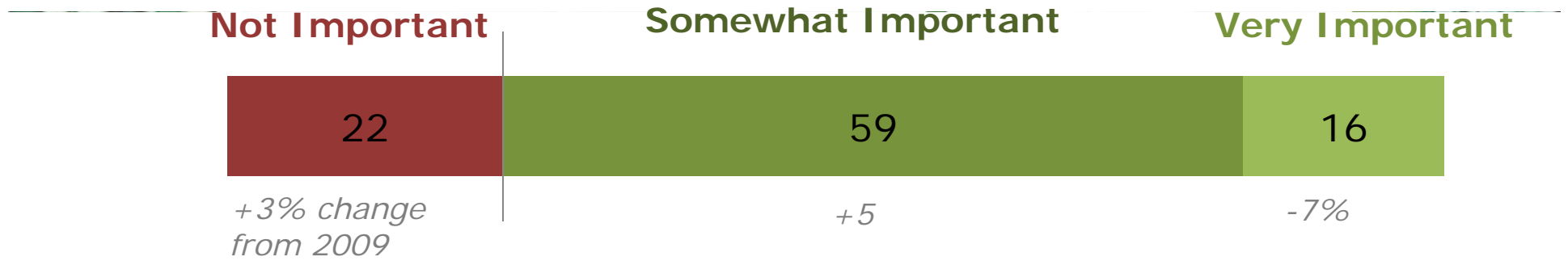
79% of U.S. consumers are more concerned about the economy than the environment, more than in any country polled

Which concerns you more?



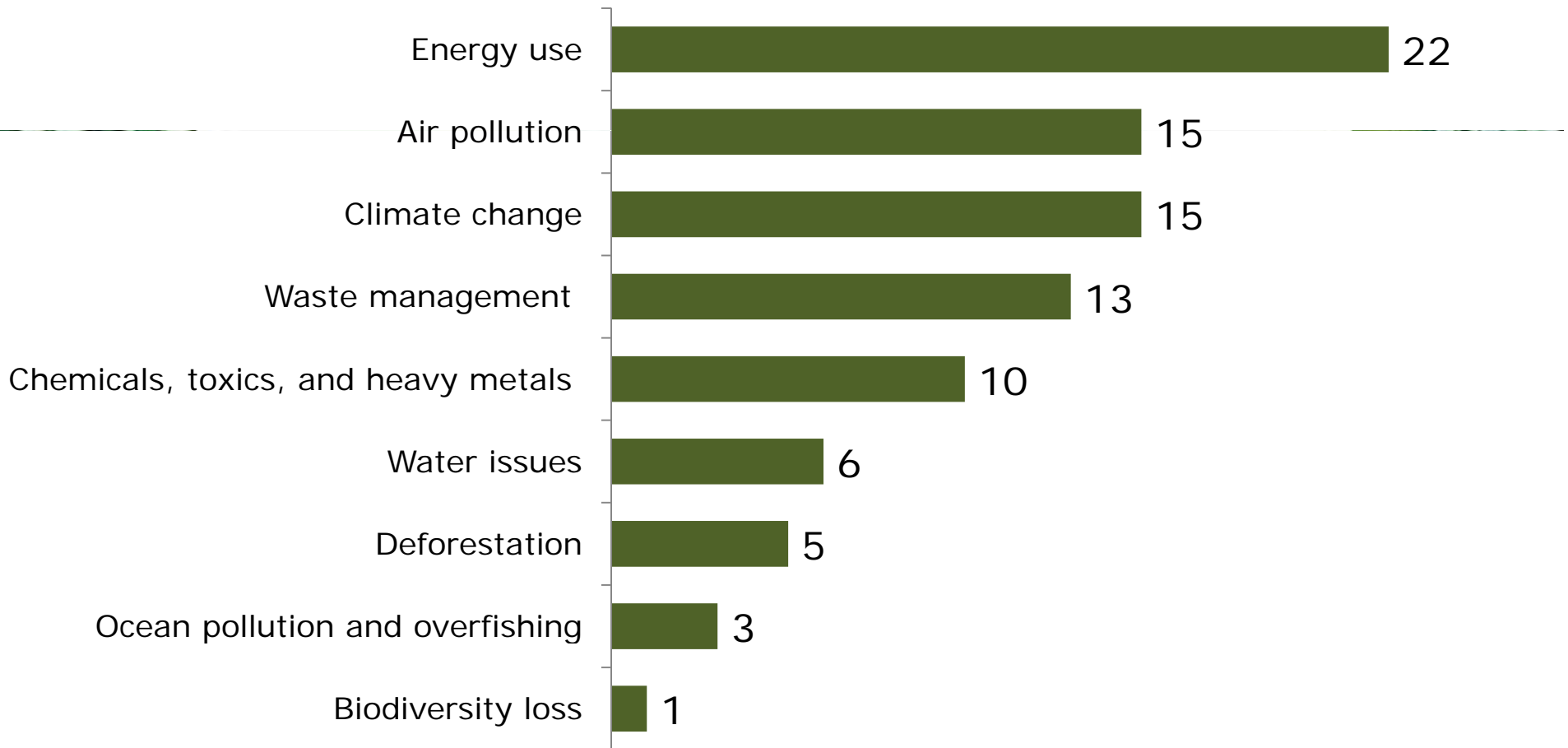
75% of US consumers say it is very or somewhat important to buy from green companies

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



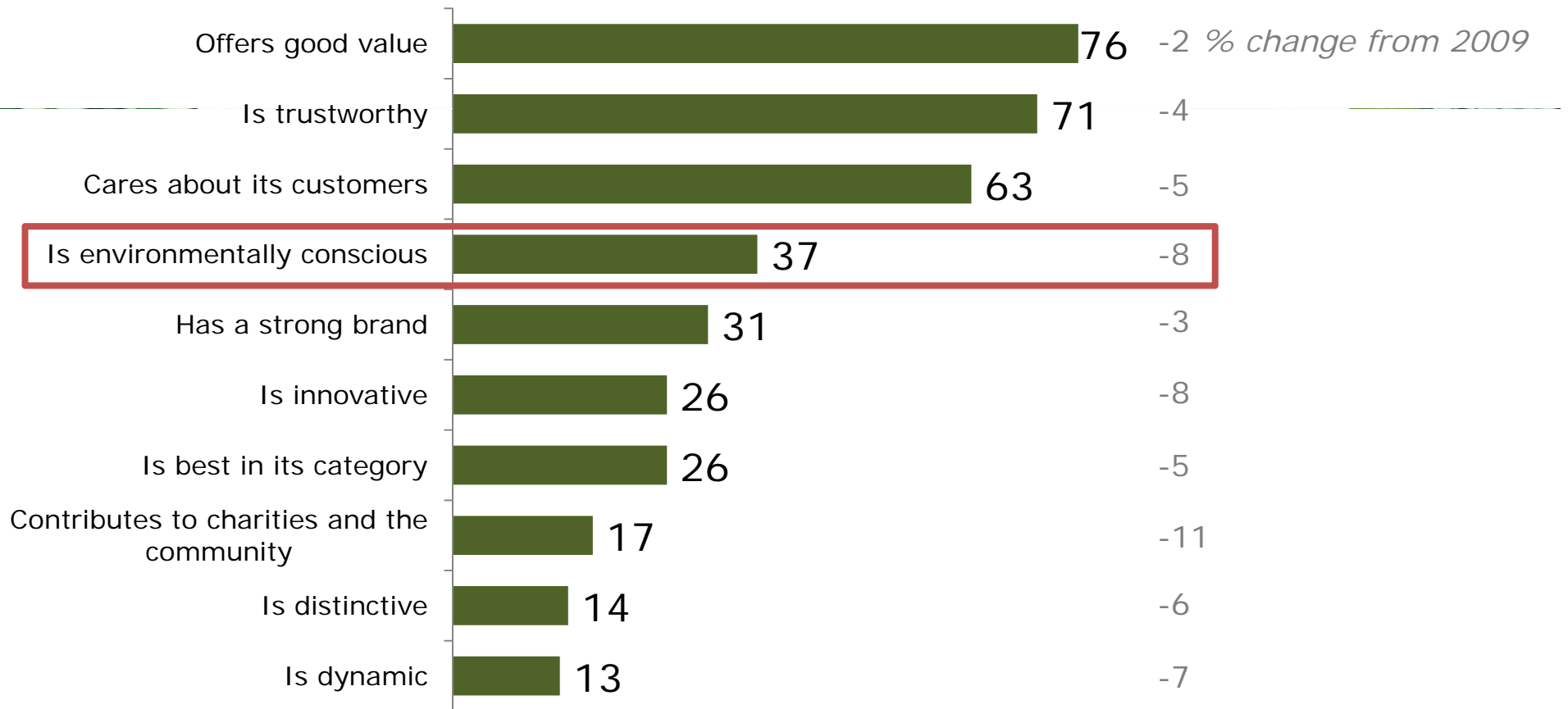
U.S. consumers consider energy use, air pollution and climate change to be the most important green issues

Which of the following do you feel is the most important green issue or problem today?



Consumers rank “offers good value,” “trustworthiness” and “caring about customers” as the top three core brand values they care about; “environmentally conscious” came in fourth

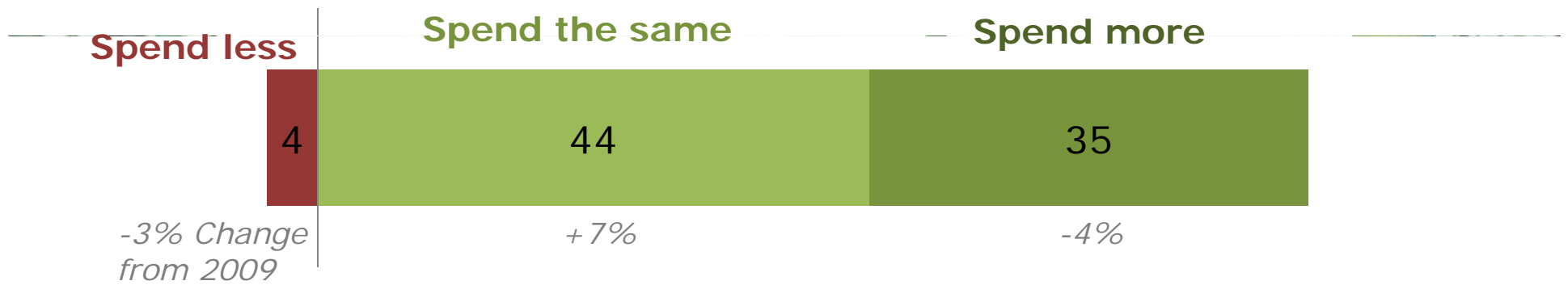
Companies can have different priorities. How important is it to you that a company is the following when choosing to purchase its products or services?



Showing "Very Important"

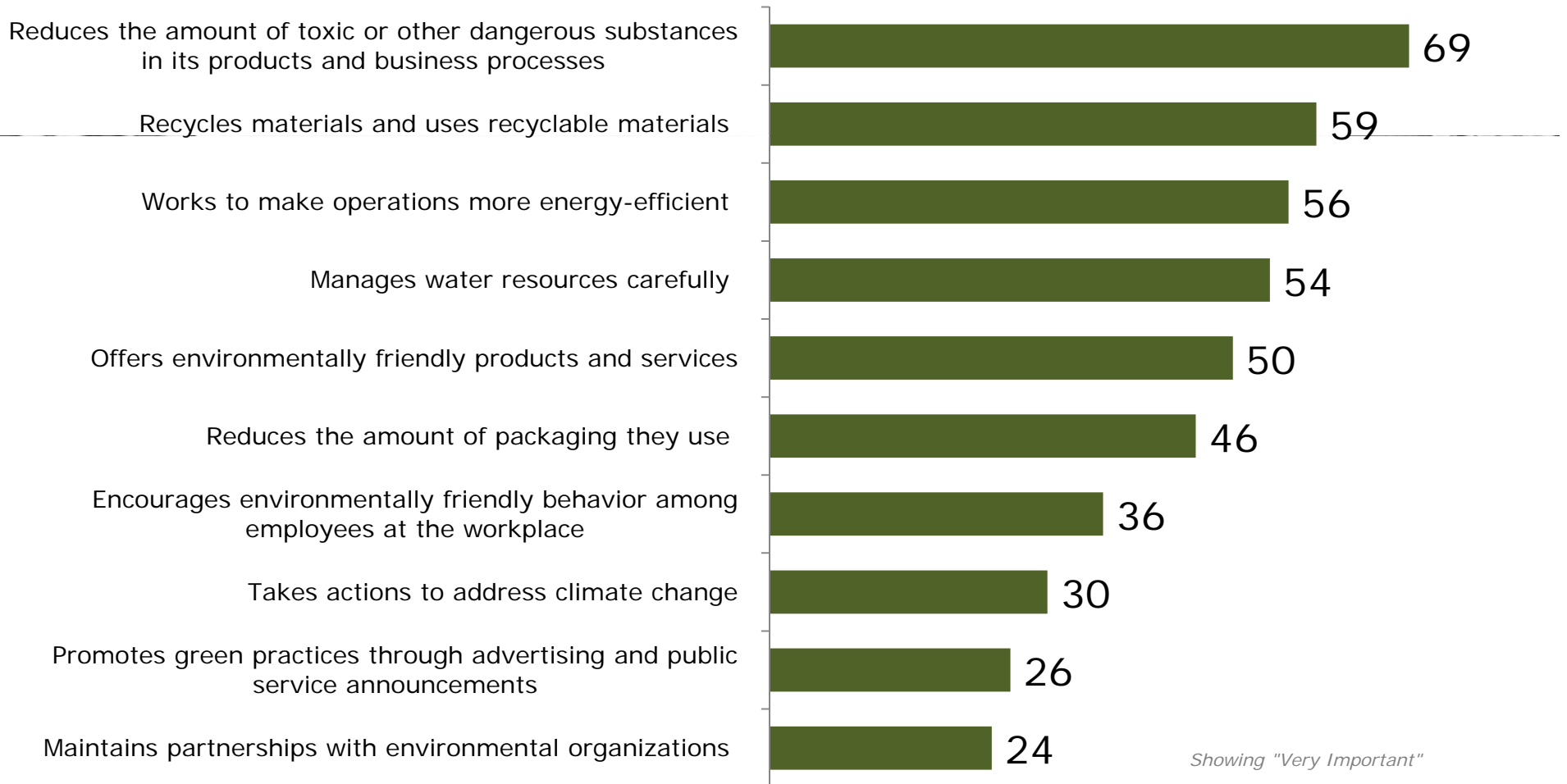
35% of consumers say they plan to spend more on green products in the next year, a slight decline from 2009

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



To be considered green, companies need to manage toxics as well as waste, energy and water.

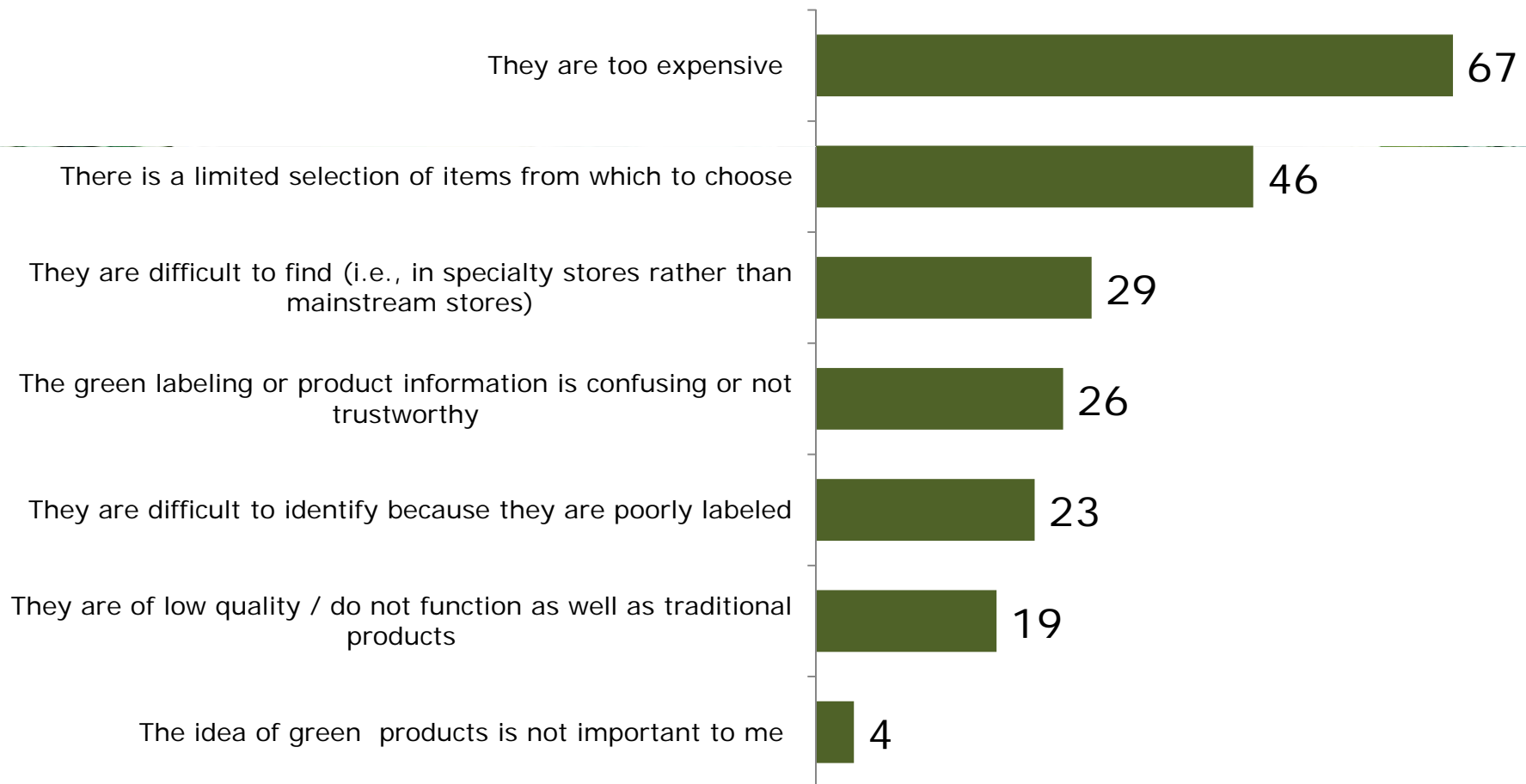
Please rate how important each specific activity is to you in order for you to think of a company as green.



Showing "Very Important"

Most U.S. consumers (67%) see cost as the biggest hurdle to buying green products. Almost 50% also see limited selection as a challenge.

What do you think are the biggest challenges to purchasing green products or services? Please select all that apply.



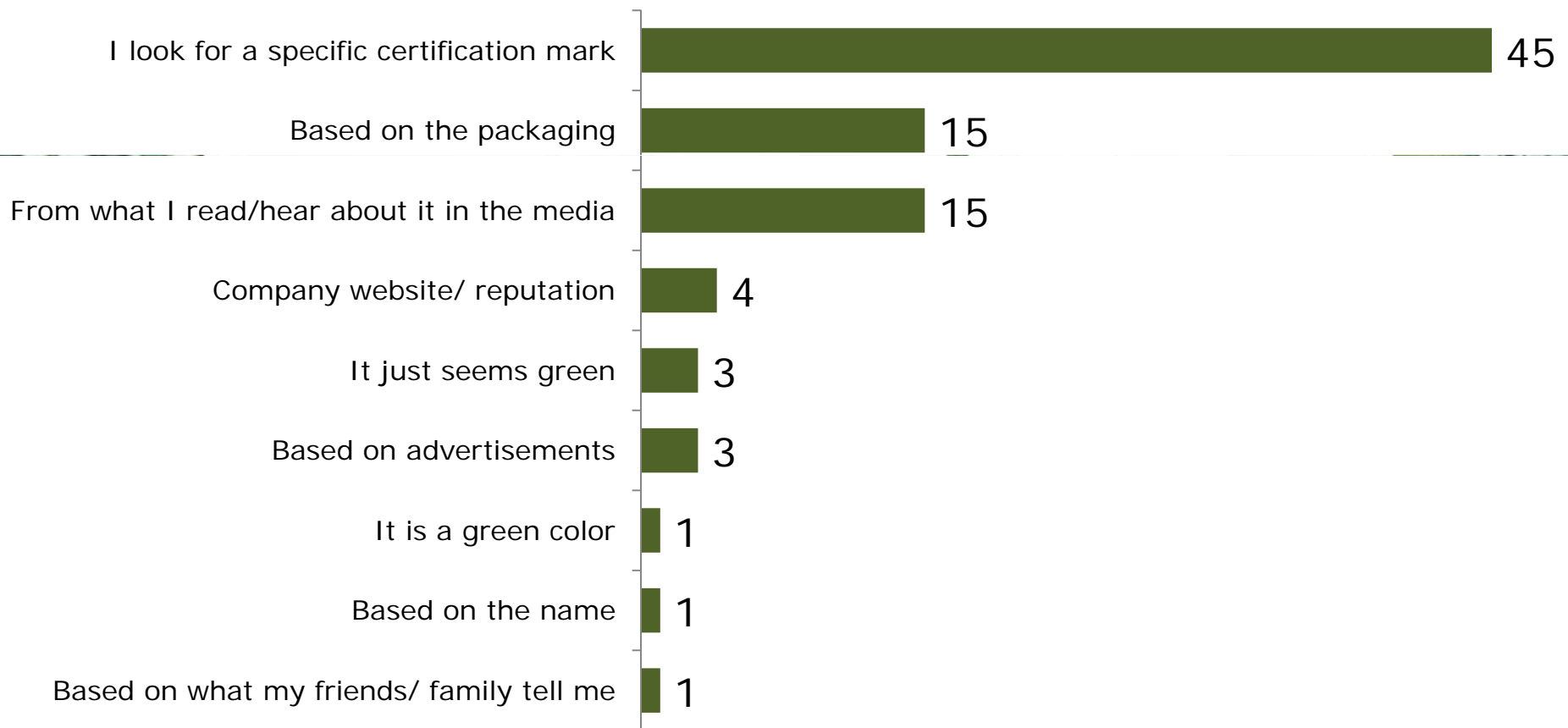
U.S. consumers want more information about ingredient disclosure, safety testing, and sources of food -- and clearer green labeling.

Please rate the following list of possible requirements the government could put in place in terms of importance.



Almost half of US consumers look for a certification mark to tell a product is green.

How do you decide for yourself that a product is green?



Most U.S. consumers also trust advertising to inform them about green products.

Which of the following statements do you more agree with?

There is so much advertising about green products that it just makes consumers tune it out

Advertising about green products helps consumers make more informed purchase decisions and understand the benefits of these products



Consumer Perceptions of the 2010 10 U.S. Green Brands

1



6



2



7



3



8



4



9



5



10



Cohn & Wolfe



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Cohn & Wolfe is a strategic public relations agency dedicated to creating, building and protecting the world's most prolific brands. With offices around the world, the agency is committed to breaking new ground in the delivery of cross-channel media strategies, creative programming, and practice area excellence.

Cohn & Wolfe is recognized year after year by clients and the industry for excellence in creativity, client service, digital communications, media strategy, senior management and strategic counsel. Cohn & Wolfe also consistently ranks among the top "Best Agencies to Work For" in an annual, industry-wide employee survey. For more information, visit: www.cohnwolfe.com. Cohn & Wolfe is part of WPP (Nasdaq: [WPPGY](http://www.nasdaq.com)), one of the world's largest communications services group.

Esty Environmental Partners



Esty Environmental Partners

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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. To learn more, please visit www.EstyEP.com.

Landor Associates

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Landor Associates is one of the world's leading strategic brand consulting and design firms. Founded by Walter Landor in 1941, Landor pioneered many of the research, design, and consulting methods that are now standard in the branding industry. Partnering with clients, Landor drives business transformation and performance by creating brands that are more innovative, progressive, and dynamic than their competitors.

Landor's holistic approach to branding is a balance of rigorous, business-driven thinking and exceptional creativity. Its work spans the full breadth of branding services, including brand research and valuation, brand positioning and architecture, naming and writing, corporate identity and consumer packaging design, branded experience, brand equity management, brand engagement, and digital branding.

With 21 offices in 16 countries, Landor's current and past clients include some of the world's most powerful brands, including BlackBerry, Citi, the Council on Foreign Relations, Diageo, Hilton Hotels, HP, Jet Airways, Microsoft, MillerCoors, Panasonic, PGA of America, Procter & Gamble, Taj Hotels Resorts and Palaces, and Verizon.

Landor is a member of the Young & Rubicam Brands network within WPP, one of the world's largest marketing and communications firms.

For more information, please visit landor.com.

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Penn Schoen Berland is a global research-based consultancy that specializes in messaging and communications strategy for blue-chip political, corporate and entertainment clients. PSB has over 30 years of experience leveraging unique insights about public opinion to provide clients with a competitive advantage. PSB executes polling and message testing services for Fortune 100 corporations and have helped elect more than 30 presidents and prime ministers around the world. Penn Schoen Berland is a part of Young & Rubicam Brands, a subsidiary of WPP, one of the world's leading communications services networks. More information is available at www.psbresearch.com.



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