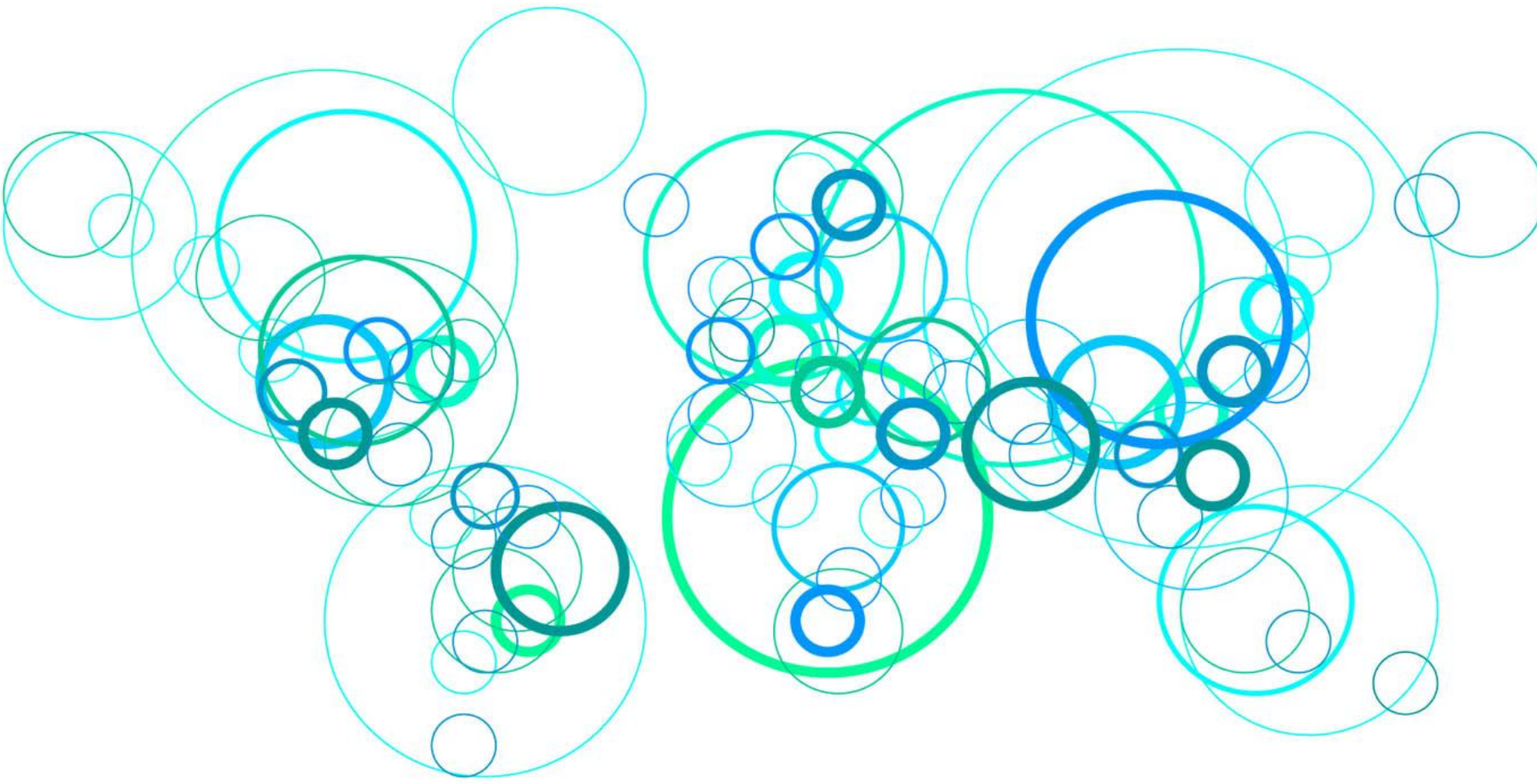


THE SUSTAINABILITY SURVEY 2011

*Survey on Sustainable Consumption
October 2011*



Global Expert Insight

Methodology

- 986 qualified sustainability experts completed the on-line questionnaire September 20 – October 10, 2011.
- Respondents were drawn from: corporate (22%), government (6%), non-government (12%), academic/research (29%), service/media (26%), and other (5%) organizations.
- Experts surveyed span 77 countries in Asia (9%), Africa / Middle East (4%), Europe (43%), North America (28%), Latin America / Caribbean (9%), Australia / New Zealand (8%), and comprise a highly-experienced respondent pool:
 - 59 percent have more than ten years of experience working on sustainability issues.
 - 31 percent have five to ten years of experience.
 - 11 percent have three to four years of experience.
 - Respondents with less than three years of sustainability experience have been excluded from the results.

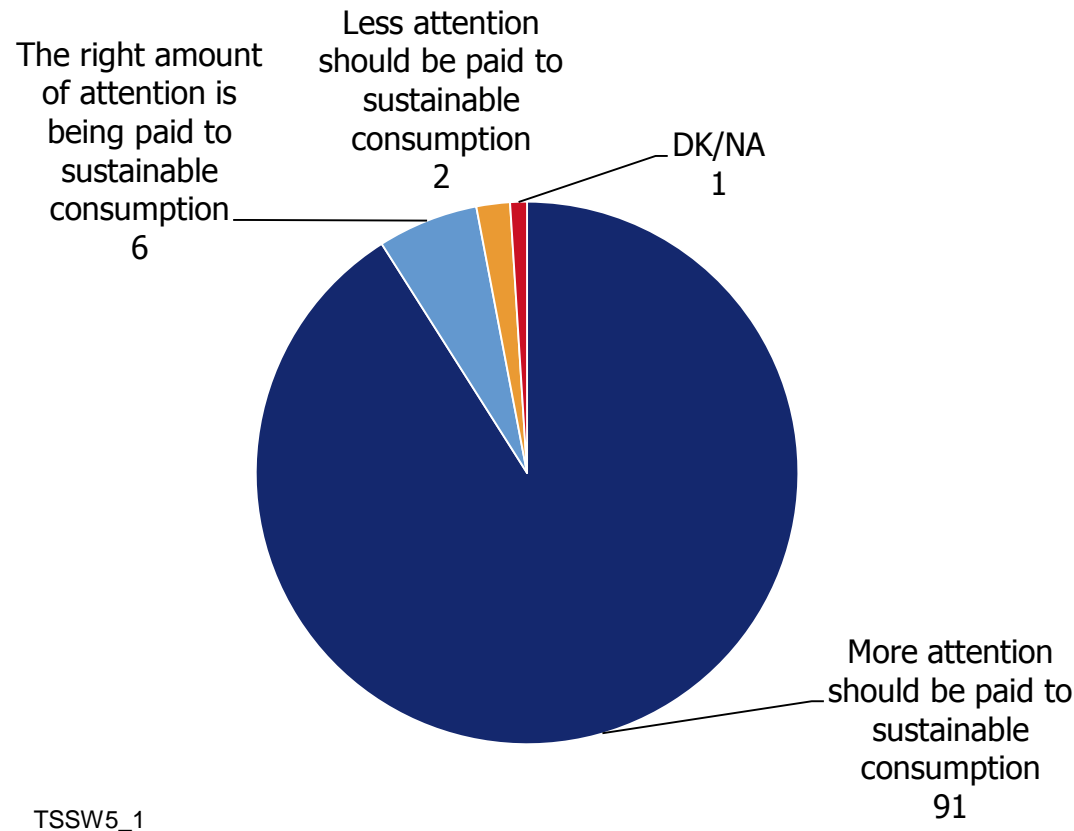
Notes to Readers:

All figures in the charts and tables in this report are expressed in percentages, unless otherwise noted. Total percentages may not add to 100 because of rounding.

Key Findings

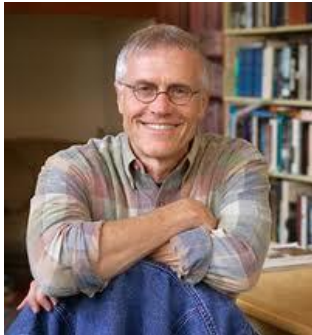
- A vast majority of experts believe that more attention should be paid to the issue of sustainable consumption
- Experts believe that sustainable consumption is achievable, but are divided on whether it is compatible with economic growth
- Businesses should support public policy changes which encourage sustainable consumption and educate consumers on the benefits
- Lack of political will is perceived as the single greatest barrier to more sustainable consumption
- Independently-verified sustainability labels and retailers' brands or reputation have the greatest influence on experts' purchases

A vast majority of experts believe that more attention should be paid to the issue of sustainable consumption



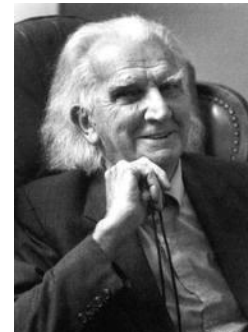
1. Over the past few years there has been a good deal of discussion about the issue of sustainable consumption. Given all the other sustainability priorities, how much attention should business, policy makers and civil society devote to the subject of sustainable consumption?

A vast majority of experts believe that more attention should be paid to the issue of sustainable consumption



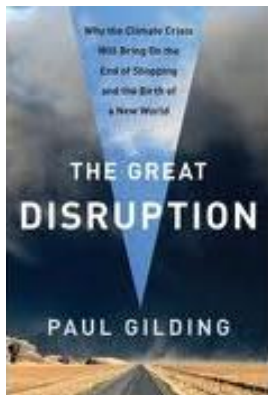
"We have an economy where we steal from the future, sell it in the present, and call it GDP"

- Paul Hawken, entrepreneur, author



"Anyone who believes that exponential growth can go on forever in a finite world is either a madman or an economist"

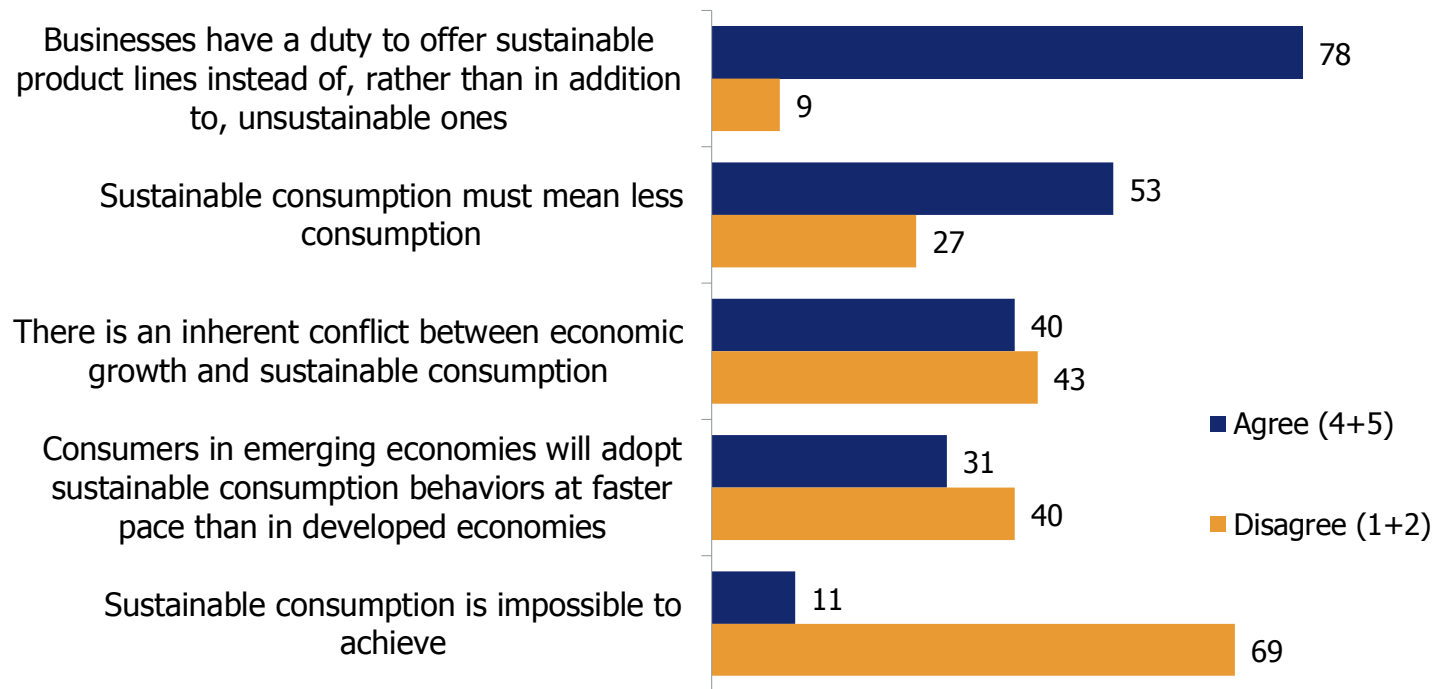
- Kenneth Boulding, economist



*"The earth is full.
...our current model of economic growth is driving the system... we rely upon for our present and future prosperity over the cliff..."*

- Paul Gilding, The Great Disruption

Experts believe that sustainable consumption is achievable, but are divided on whether it is compatible with economic growth



TSSW5_2_bar

Experts believe that sustainable consumption is achievable, but are divided on whether it is compatible with economic growth

While sustainable consumption may be seen to be compatible with economic growth, it may be a different type of economic growth



Decoupling growth and environmental impact:

Sustainable Living Plan—Unilever unveiled plans in 2010 to halve the environmental impact of its products while doubling revenue.

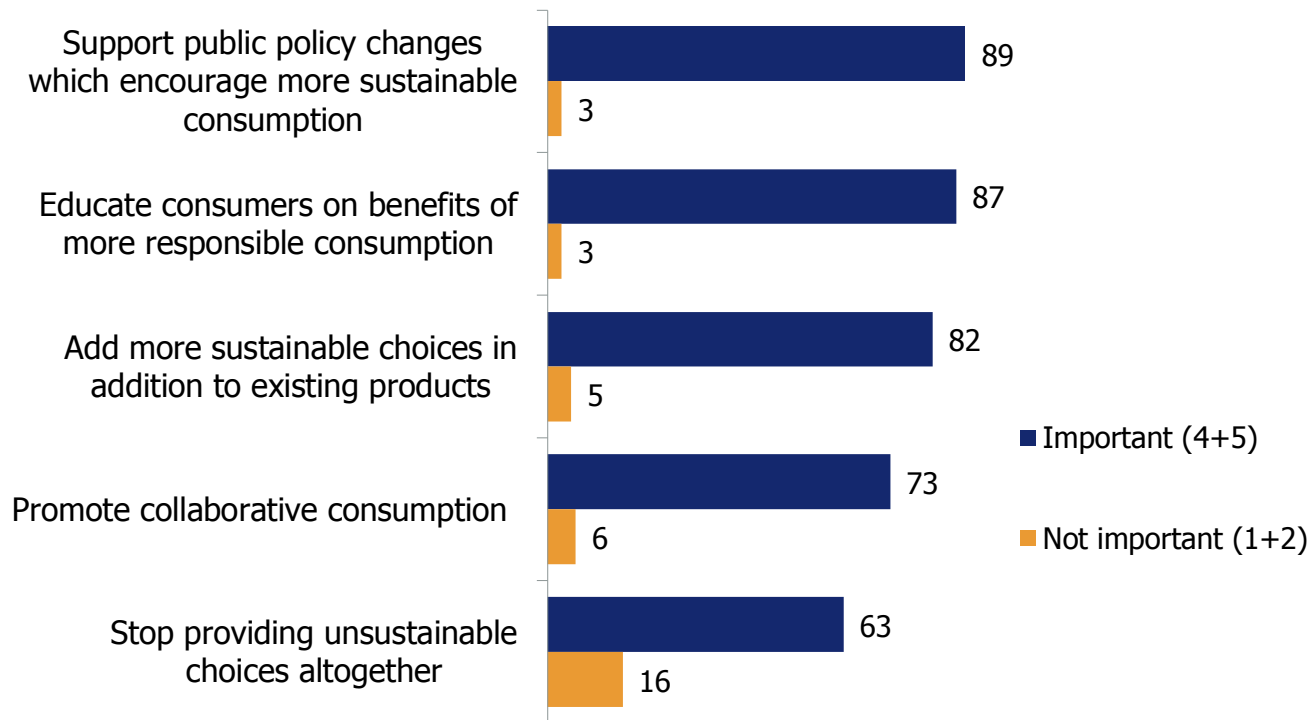
Interface **FLOR**



A closed-loop economy: the move away from a linear process of resource extraction, manufacture, consumption, and disposal towards a system where resources remain in use almost indefinitely



Businesses should support public policy changes which encourage sustainable consumption and educate consumers on the benefits



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3. Rate the importance of the following possible actions by business to drive more sustainable consumption. Please use a scale of 1 to 5 where 1 means "not important at all" and 5 means "very important."

Businesses should support public policy changes which encourage sustainable consumption and educate consumers on the benefits

Some businesses are pointing the way to a future where they are more active in educating consumers on the need or benefits of sustainable consumption.



Staff e-learning:
educating and empowering employees to influence how customers use products



YOUR M&S



Clothing labels:
encouraging customers to wash jeans at lower temperatures



Product and campaign:
encouraging UK consumers to wash clothes at lower temperatures



OPower

Behavioral tools and social networking:
launching Facebook app to get consumers to change their energy consumption habits, creating "the world's largest social energy community"

Businesses should support public policy changes which encourage sustainable consumption and educate consumers on the benefits

Can companies make money by encouraging customers to consume less?



Using, not owning:
While Zipcar is the darling of the sustainable consumption crowd, it has yet to turn a profit.



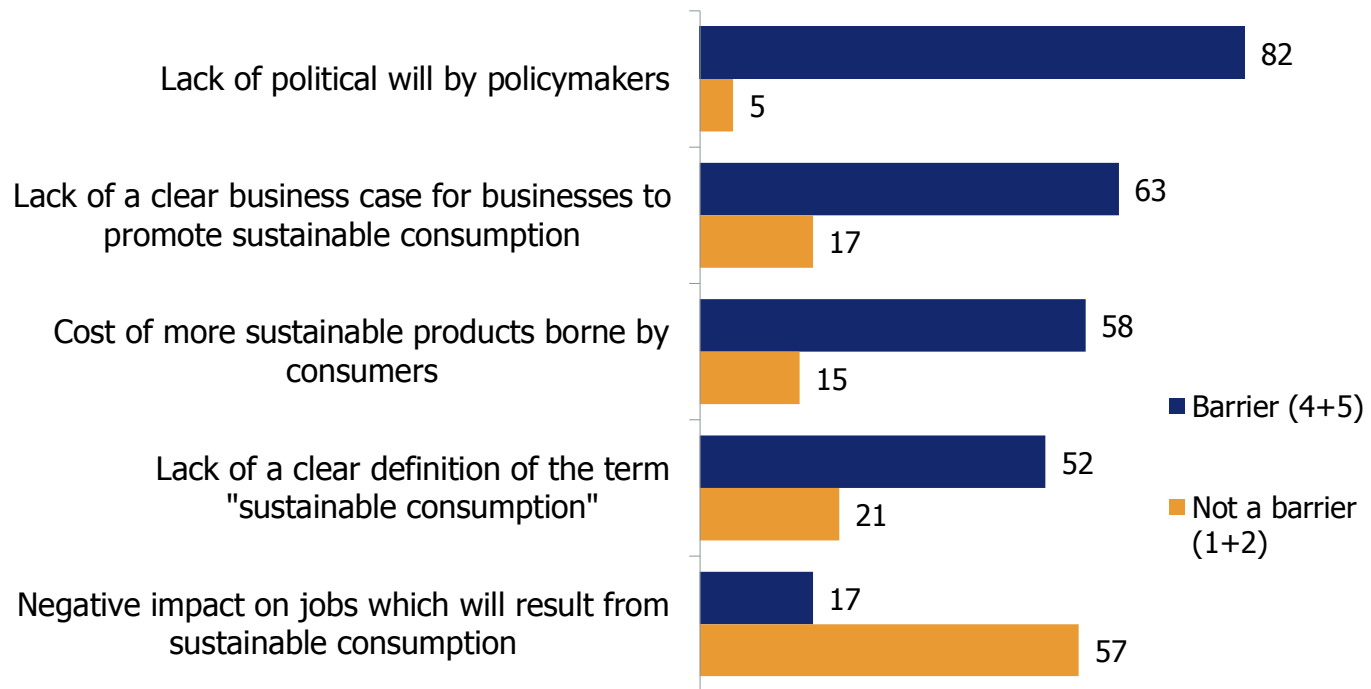
The Common Threads Initiative:
the first time a retail brand has worked with eBay to encourage the buying and selling of used clothes and gear

“The greenest product is the one that already exists.”



Commitment and leasing:
to phase out UK patio heaters and examining the shift from selling items to selling the use, through leasing or fractional ownership

Lack of political will is perceived as the single greatest barrier to more sustainable consumption



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4. Please rate the importance of the following possible barriers to more sustainable consumption. Please use a scale of 1 to 5 where 1 means "not a barrier at all" and 5 means "very important barrier."

Lack of political will is perceived as the single greatest barrier to more sustainable consumption

There are some weak signals that progress measured solely through Gross Domestic Product (GDP) is being called into question by some governments.



“Our Gross National Product...counts air pollution and cigarette advertising and ambulances to clear our highways of carnage. It counts special locks for our doors and the jails for the people who break them. It counts the loss of the redwoods and the loss of our natural wonder in chaotic sprawl...”

- Robert Kennedy, 1965

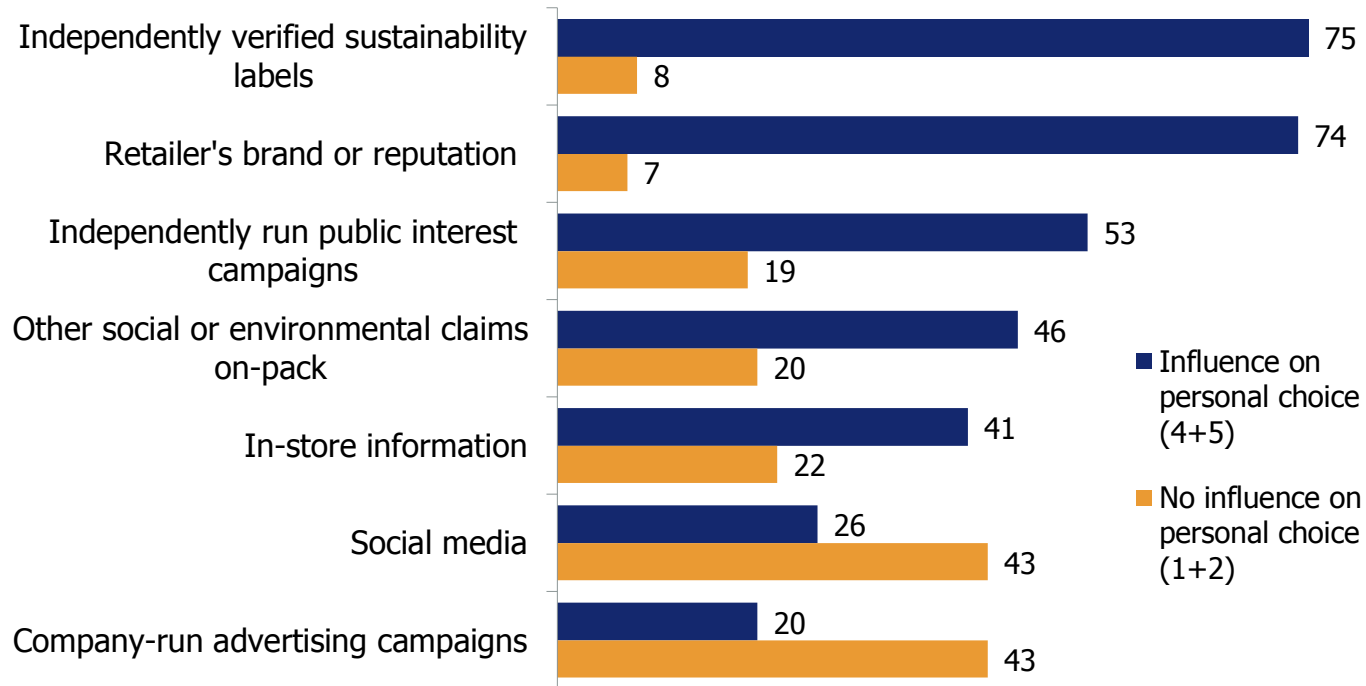


The Office for National Statistics in the UK is exploring existing indicators and datasets that measure societal wellbeing beyond economic growth. The first Well-being Index indicators will be unveiled late in 2011, followed by annual life satisfaction ratings in July 2012.



France's President Sarkozy in 2009 stated his intention to ditch GDP as a measure of national wealth and replace it with one that quantifies well-being alongside economic strength.

Independently-verified sustainability labels and retailers' brands or reputation have the greatest influence on experts' purchases



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5. When you personally make choices about the types of products and services you consume, how much influence does each one of the following have on your own purchase decisions? Please use a scale of 1 to 5 where 1 means "no influence at all" and 5 means "very high influence."

SustainAbility is releasing further research on the effectiveness of labels in November 2011



Signed, Sealed... Delivered?
Eco-labels, trust and behavior
change across the value chain
Phase One White Paper
March 2011

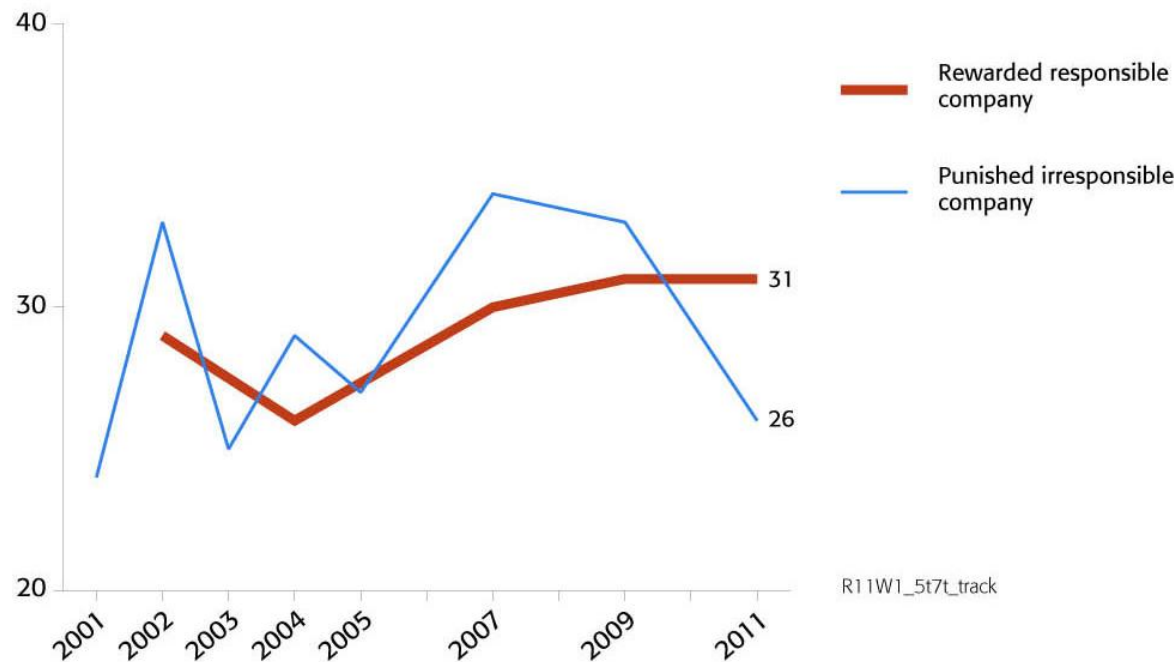


Sustainable consumption – the state of consumer opinion

- GlobeScan’s consumer opinion data suggests that there is an on-going movement towards ethical consumption—the growth of the ethical consumer segment has been one of the most striking developments in public attitudes of the last decade and has been fully reflected in GlobeScan’s regular tracking.
- However, this year’s research documents a significant shift in the evolution of ethical consumerism—consumers are now more likely to reward responsible companies than they are to punish irresponsible ones.
- Results from the latest wave of GlobeScan’s *Greendex* study with National Geographic suggest that environmentally conscious consumer behaviors and attitudes in emerging economies are on the increase, but tensions remain. For instance, consumers in emerging economies are now more likely than in 2008 to report that they engage in energy-saving activities, but other indicators are moving in the opposite direction—the frequency of eating locally grown food in India and Brazil is on the decline as these economies develop and lifestyles change.
- GlobeScan’s work for Fairtrade International also demonstrates that consumers feel positive about their ability to help farmers and workers in developing countries through their shopping choices.

Consumer Opinion: Companies Seen as Socially Responsible / Irresponsible

"Have Done," Average of 14 Tracking Countries,* 2001–2011



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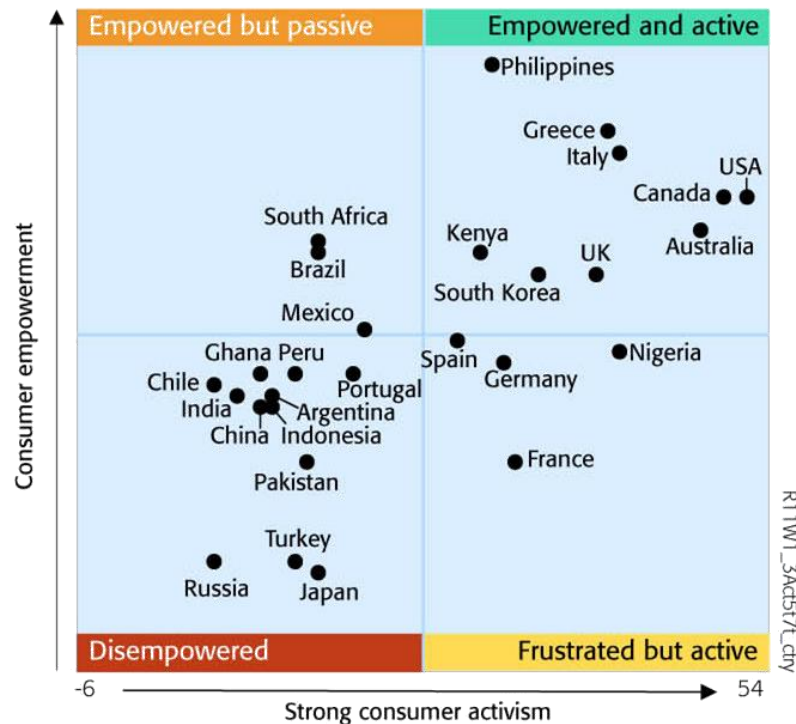
*Includes Australia, Canada, Chile, China, France, Germany, Indonesia, Italy, Mexico, Nigeria, Russia, Turkey, the UK, and the USA

5t. Over the past year, have you considered rewarding a socially responsible company by either buying their products or speaking positively about the company to others? Would you say you have...?

7t. In the past year, have you considered punishing a company you see as not socially responsible by either refusing to buy their products or speaking critically about the company to others? Would you say you have...?

Consumer Empowerment versus Strong Consumer Activism

By Country, 2011



Consumers in the USA, Canada, and Australia are among the most likely to say they have rewarded a responsible company or punished an irresponsible company. This type of ethical consumerism is still nascent in developing markets such as China and India—where consumers are less likely to say they have rewarded a responsible company, and also feel less empowered to make a difference.

3. Please tell me if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with each of the following statements. ct) As a consumer, I can make a difference in how responsibly a company behaves

5t. Over the past year, have you considered rewarding a socially responsible company by either buying their products or speaking positively about the company to others? Would you say you have...?

7t. In the past year, have you considered punishing a company you see as not socially responsible by either refusing to buy their products or speaking critically about the company to others? Would you say you have...?

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