

# Green Brands, India Insights 2011

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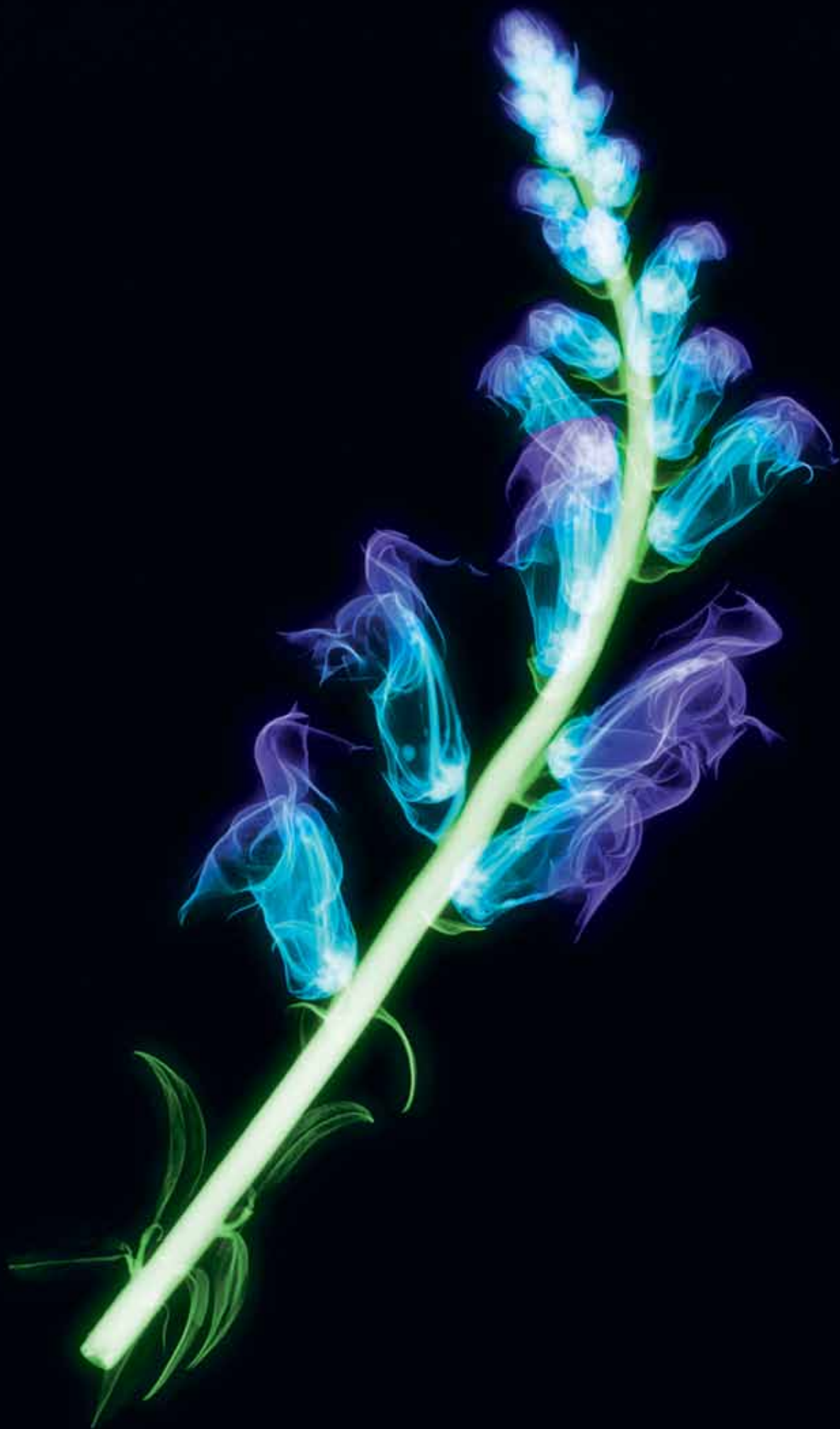
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# Regulation, Transparency and Choice

## Results from the 2011 ImagePower Green Brands Survey

**The 2011 ImagePower® Green Brands Survey was our largest such study to date, capturing the perspectives of more than 9,000 consumers in eight countries. We again saw a split between responses in the “emerging countries” (India, China and Brazil) and those in the “developed countries” (Australia, France, Germany, the United Kingdom, and the United States), and the details proved enlightening.**

We uncovered several trends affecting consumer behaviour:

- Pressure on governments to lead green regulation
- Increased desire to buy green
- Transparency and choice driving buyer behaviour
- Consumers receptive to green advertising
- Interest in big-ticket green products

### **Pressure on governments to lead green regulation**

In most countries, concern about the state of the economy fell, while concern about the state of the environment grew. In line with this, the majority of Indians think the state of the environment is heading in the wrong direction and an overwhelming 95% want government to support more green innovation and regulation. This is consistent with the global trend where people put responsibility for the environment on the government rather than the private sector. The only exception to this was the US where consumers felt the private sector should be more prominent.

With regards to consumer goods, people want governments to mandate producer responsibility and greater label clarity with respect to ingredients and food origin. There was also a significant push for governments to drive companies to use recycled packaging.

### **Increased desire to buy green**

Overall, consumers are less likely to cite hurdles to buying green compared to last year. A majority of respondents in India, China and Brazil say they

# Concern for the environment translates into willingness to pay for green

intend to spend more on green products in the next year. Consumers are putting a higher value on green products with 48% of Indian consumers and 55% of Chinese consumers, willing to spend over 10% more on a product simply because it is green.

In developed countries, price is named as the greatest barrier to purchasing green. Most consumers here believe that green products and brands are more expensive than their non-green counterparts, and more than a third are unwilling to pay higher prices for green products. In the US and UK, only 22% and 13% of those surveyed would spend more than 10% on green products, respectively.

## **Transparency and choice driving buyer behaviour**

The majority of respondents in India, China and Brazil cite lack of availability and inconsistent labelling as the major barrier to buying green. Limited availability of green products in mainstream stores is a major issue, but consumers also want clear and consistent labelling that discloses all materials and ingredients. The lack of clear packaging and labelling standards in India makes it difficult for consumers to get the information they need to help make informed choices.

Conversely, consumers in Australia, France, Germany the UK and the US all cited packaging as their primary source of information on green brands and a major factor in determining what they will purchase.

## **Consumers receptive to green advertising**

Consumers in emerging nations are more trusting of advertising, compared to their counterparts in developed nations. In India, China and Brazil, advertising and mass media editorial content (TV programs, newspaper articles) are the most influential sources of information on green products. 86% of Indian respondents report that advertising about green products help consumers make more informed choices, and 57% of respondents indicate that

TV advertisements have the greatest impact on their likelihood to buy green.

In emerging countries, mass media plays an important role in consumer education and companies should use these channels to increase awareness and inform their customers of the real and tangible value of their products, as well as their green attributes.

## **Interest in big-ticket green products**

Respondents indicated they are most likely to purchase green products in the household, grocery, personal care, and packaged food and beverage categories. This is in line with the on-going interest worldwide in purchasing green for products that are “in me and on me,” but the categories poised for growth paint a new picture.

Consumers in all markets intend to go green on more big-ticket items during the next year. India, China and Brazil show the biggest potential for increased sales of environmental friendly automobiles. In India, 28% of consumers say they intend to purchase green auto this year which is significantly higher than the 16% that purchased green auto last year. Consumers in the UK, US and France say they plan to buy more green technology brands this year.

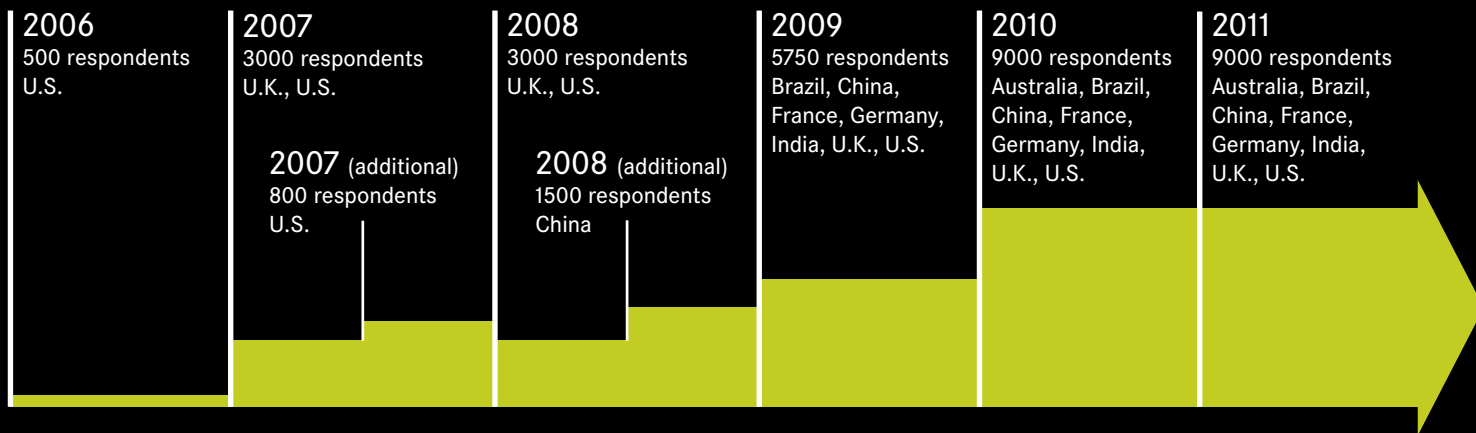
As consumers become more sophisticated on buying green, demand for green big-ticket products will grow. Companies will have to adapt their marketing strategies to show not only the environmental impact and related “greenness” of their products, but also the larger end benefits in order to meet their customers’ changing needs.

## **In summary**

The 2011 ImagePower Green Brands Survey tells us that greenness remains a major issue for consumers around the world, and that they expect green practices from the companies they do business with. There are huge opportunities in the Indian market for companies that establish their green credentials early.

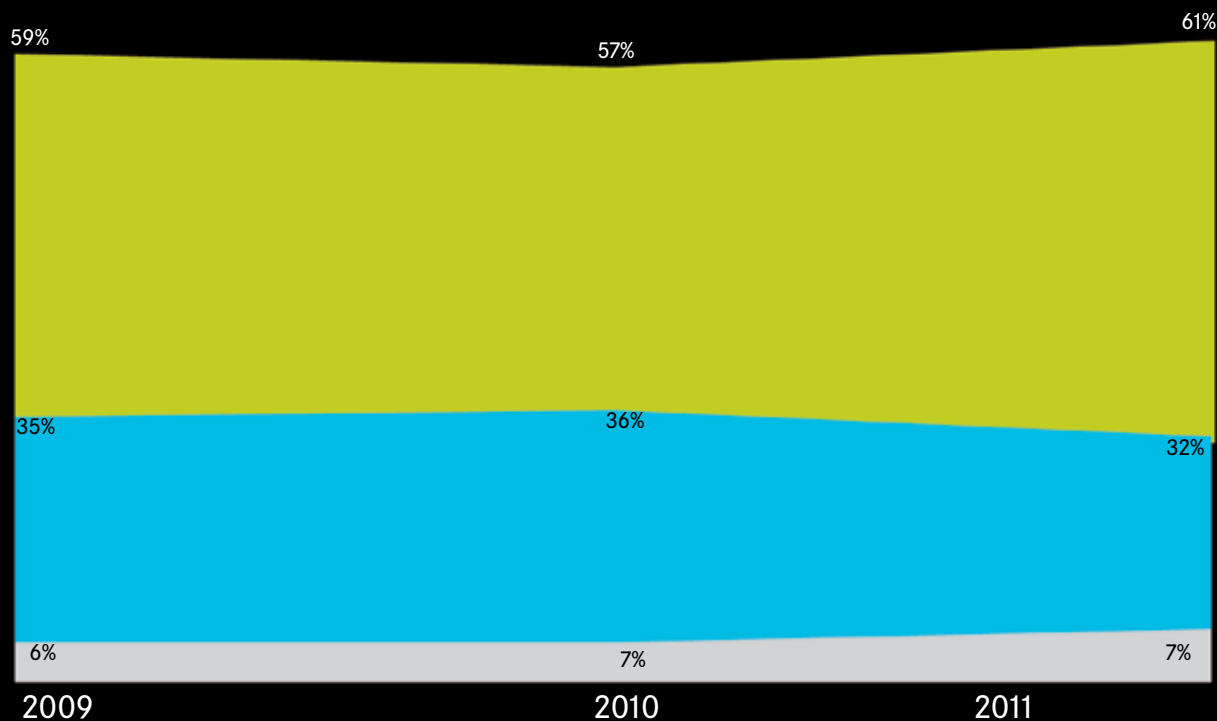
To read the complete survey, please visit [slideshare.net/WPPGreenBrandsSurvey](http://slideshare.net/WPPGreenBrandsSurvey).

Over the last six years we have gauged green perceptions from more than 30,000 consumers around the world.



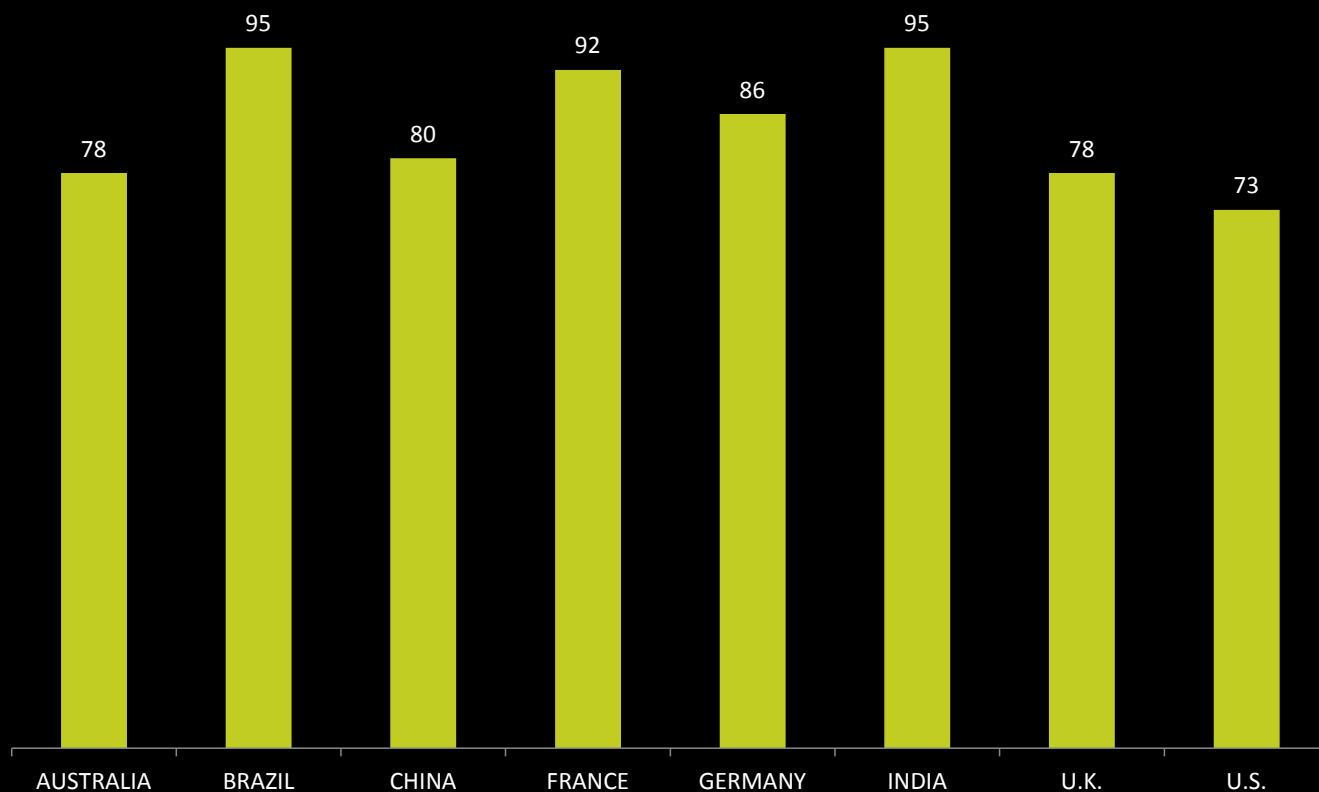
**INDIA DATA: 2009-2011**

Do you think the state of the environment in this country is headed in the right direction, or is it on the wrong track?



GLOBAL DATA: 2011

Do you think your government should support more or less green innovation than it does now? *Showing much and somewhat more.*



GLOBAL DATA: 2011

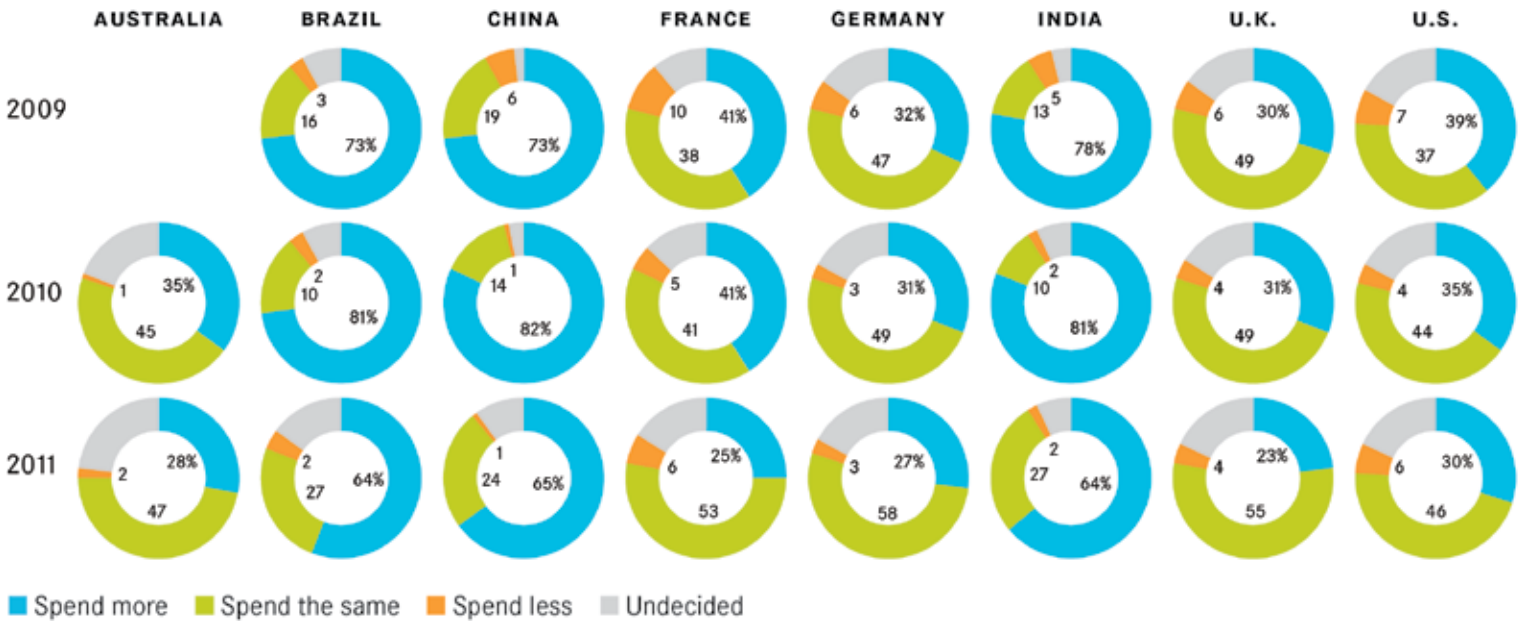
The following is a list of possible requirements your government could put in place. Please rate each initiative in terms of importance. *Showing 8-10 on a 1-10 scale.*

	AUSTRALIA	BRAZIL	CHINA	FRANCE	GERMANY	INDIA	U.K.	U.S.
Companies must recycle product packaging	68	81	68	76	77	71	73	57
Disclosure of all materials and ingredients in products	72	76	75	66	74	73	62	66
Labels that tell where our food come from	77	76	60	73	74	72	64	61
Green product labels that are easier to understand	65	78	74	67	67	73	62	59
More food and product safety testing	63	74	79	67	69	73	51	61
Labels that tell the environmental impact of the product	55	78	70	62	64	72	55	48

■ Most Important ■ 2nd most important

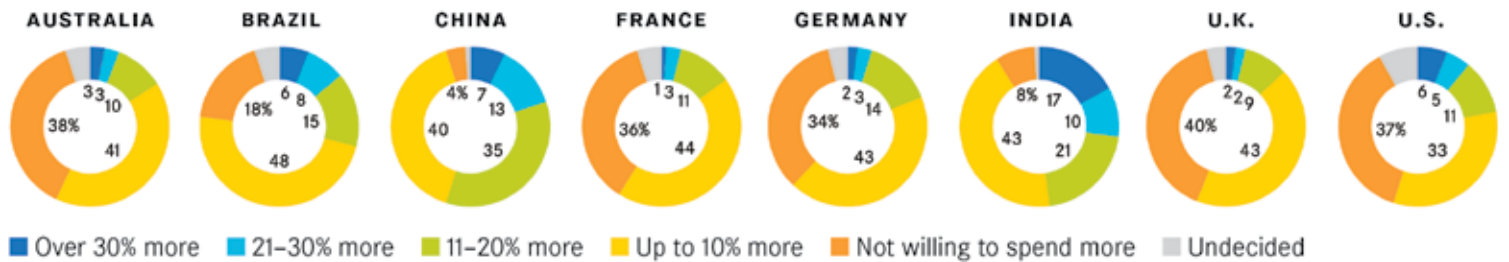
GLOBAL DATA: 2009–2011

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



GLOBAL DATA: 2011

How much more, in percentage terms, are you willing to spend on a product because it is green?



What do you think are the biggest challenges to purchasing green products or services?

	AUSTRALIA	BRAZIL	CHINA	FRANCE	GERMANY	INDIA	U.K.	U.S.
They are too expensive	62	53	41	78	51	43	66	62
There is a limited selection of items	50	59	56	42	34	63	48	44
They are difficult to find	33	55	31	27	27	57	26	23
The green labelling or product information is confusing or not trustworthy.	37	32	56	27	41	33	26	22

■ Biggest Challenge ■ Second Biggest Challenge

Which of the following do you feel has the greatest impact on your likelihood to purchase green products?

	AUSTRALIA	BRAZIL	CHINA	FRANCE	GERMANY	INDIA	U.K.	U.S.
Packaging	35	38	26	30	30	33	34	29
Television ads	24	46	42	19	11	57	25	24
Television programs	24	38	43	18	30	41	22	17
Word of mouth (i.e. family, friends)	25	37	38	23	21	40	20	27
Newspaper articles	19	25	26	18	22	45	17	11
Newspaper ads	10	22	19	7	6	40	7	8

■ Second Biggest Challenge ■ Biggest Challenge



# Key Contacts

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## **Ashwani Singla**

*Managing Director & Chief Executive, PSB, South Asia*

Ashwani Singla is the Managing Director & Chief Executive of Penn Schoen Berland, South Asia.

In his two decade of experience in the communication & service industry, Ashwani has donned the role of a trusted advisor and strategist for building strong and effective communications strategy for top MNCs, Indian enterprises and emerging Indian MNCs across a wide range of sectors.

Voted as one of the most well respected professionals in India by the Holmes Report in its inaugural Asia 'Agency Score Card', Ashwani was named by Campaign India Magazine in its 'A list' in 2009 & 2010 and among the top professionals in Agency FAQ's 2010 listing.

Prior to his current role, Ashwani was the Chief Executive of Genesis Burson-Marsteller and Member of the Asia Pacific Board of Burson-Marsteller Worldwide. Under his tutelage of close to a decade, Genesis Burson-Marsteller went on to become India's most trusted public relations & public affairs firm. Setting new standards of excellence, he has led some of the best cutting edge management practices in the communication industry.

Little wonder that the firm became the first Indian public relations consulting firm to receive the global Consultancy Management Standards (CMS) certification and recognised as the India Consultancy of the year by the Holmes Report in its inaugural Asia Agency Report Card.

Ashwani has been an India board member of the International Association of Business Communicators ([www.iabc.com](http://www.iabc.com)) and has played an active role in the Public Relations Consultants Association of India ([www.prcai.org](http://www.prcai.org)) and the International Communications Consultancy Organization ([www.iccopr.com](http://www.iccopr.com)).

Passionate about sharing his experiences, he often dons the professorial hat in teaching courses and conducting training programmes across the country. He has been invited to speak at several prestigious campuses and associations across the globe including the US, Europe and Asia Pacific. He was also been a jury member for the Asia Pacific region for the Gold Quill Awards. Ashwani is an honours graduate in Economics and holds a postgraduate qualification in International Business & a diploma in Hotel Management; Ashwani started his career with the hospitality division of ITC Ltd.



## **Lulu Raghavan**

*Country Director (India), Landor*

Lulu Raghavan leads the Mumbai office of Landor Associates and is responsible for overall client and employee satisfaction. Among her key clients are Hindustan Construction Company, Mahindra, Taj Hotels Resorts and Palaces, and Tata Global Beverages. As client leader, Lulu plays a vital role in helping her clients create profitable growth by building, leveraging, protecting, and managing their brand assets. Lulu works closely with the consulting and creative teams to ensure a synergy of rigor and creativity in all of Landor's deliverables.

In her more than 10 years at Landor, Lulu has worked in the San Francisco, New York, London, and Mumbai offices. She has led corporate and consumer branding programs for a wide range of clients, including Alcatel-Lucent, American Express, Dow Corning, Fidelity Investments, Hewlett-Packard, Jet Airways, One&Only Resorts, Panasonic, Samsung, and Sony. Lulu is also a member of Landor's global naming network.

Before joining Landor, Lulu was a brand consultant at Ogilvy Consulting in Mumbai. She has a BA in economics from Davidson College in the United States and an MBA in international business and marketing from S.P. Jain Institute of Management and Research in India. Lulu speaks Hindi, Tamil, French, English, and some Spanish—a distinct advantage in developing unique brand names.

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### **Contact Us:**

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Penn Schoen Berland is a global strategic communication advisory rooted in the science of public opinion that specializes in messaging and strategy for blue-chip political, corporate and entertainment clients. It has over 30 years of experience in leveraging unique insights about consumer opinion to provide clients with a competitive advantage, what we call Winning Knowledge™. Penn Schoen Berland serves Fortune 100 corporations and has helped elect more than 30 presidents and prime ministers around the world. Penn Schoen Berland is a part of Y&R Brands and WPP.

## Landor

Landor Associates is one of the world's leading strategic brand and design consultancies. Founded by industry pioneer Walter Landor in 1941, Landor has a rich heritage of brand strategy and design leadership. Partnering with clients, Landor drives brand-led business transformation.

Landor's holistic approach to branding builds upon the combined rigor of disciplined thinking and process and exceptional creativity. Landor's work spans the full breadth of branding services, including brand positioning, brand asset management, brand architecture, brand research, brand valuation, packaging and structural design, branded experiences, brand engagement, corporate identity design and naming.

Landor has 20 offices in 15 countries, including an office in Mumbai led by Lulu Raghavan ([lulu.raghavan@landor.com](mailto:lulu.raghavan@landor.com)). Current and past local clients include TATA, Mahindra, Jet Airways, Taj Hotels Resorts and Palaces, Café Coffee Day, Hindustan Construction Company and Mumbai First.

Landor is part of WPP, one of the world's largest global communications services companies. For more information, please visit [landor.com](http://landor.com)

## cohn&wolfe

Cohn & Wolfe (c&w) 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. c&w 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. c&w is a member of the Young & Rubicam Brands network within WPP, a world leader in advertising and marketing services. For more information, visit [cohnwolfe.com](http://cohnwolfe.com)



## 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. To learn more, please visit [estyep.com](http://estyep.com).

