

# sustainable09 futures

Consumer perception and expectation  
of global brands and the growing opportunities  
to build sustainable brand value

Global Extract





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Sustainable Futures 09 represents the continuing commitment of Havas Media Intelligence to explore and understand the challenges and opportunities for business in adopting more sustainable practices. At a time when trust in multi-nationals is at a low and many stakeholder groups are appealing for more protectionist policies and controlled markets, Havas Media Intelligence recognises that sustainability is being seen by many organisations as the foundation stone upon which to rebuild trust with consumers and a wider stakeholder group.

In order to restore this trust, firms must adopt more inclusive, honest and longer-term approaches to engaging with the market. Approaches that do not draw down on resources around them as some limitless commodity, but understand the need to nurture, feed and replenish their physical and social environments. Approaches that recognise consumers and stakeholders are demanding a re-drawing of corporate boundaries of influence.

Firms must also recognise the importance of holistic, authentic and salient dialogue with stakeholders during this period of change. Specifically, the opportunity to engage, educate and collaborate with consumers around sustainability represents the most compelling long-term business case for embracing this transition. Greater loyalty, access to new markets and the creation of new products are just some of the opportunities for those businesses that are committed to empowering consumers, effecting change and leading us all into a more sustainable future.



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## WELCOME TO SUSTAINABLE FUTURES 09

As the economic climate continues to chill and markets come under increasing levels of scrutiny for tighter control and regulation in response to what most now see as systemic failure, the role of business in modern society has never been more important.

Business needs to renew its purpose in society and in doing so, adopt more sustainable practices. This acceptance and embrace of sustainability is a fundamental adjustment that no business can afford not to make.

Recognising the increasingly important role played by consumers in this adjustment, Sustainable Futures 09 studies the burgeoning issue from the consumer's point of view. As well as presenting a distinct perspective of the company, we believe exploring the challenges through a consumer lens affords significant insights into understanding what sustainability needs to deliver, how the narrative around this delivery can impact significantly on brand equity, and the scale of opportunities awaiting those businesses able to create coherent, authentic and holistic sustainability strategies that resonate with their stakeholders.

*Sustainable Futures 09 is designed to help progressive and engaged companies lead and benefit from sustainable change, by focusing on the opportunity and durable value in translating sustainability endeavours into sustainable brand value.*

Sustainable Futures 09 believes the business case for sustainability will become less and less defined by efficiencies, and more defined by this ability to convert efforts into long-term, durable brand equity. This in turn requires brands to become experts in creating, delivering and driving compelling, authentic and materially relevant sustainability dialogue. This emphasis on *materially relevant* dialogue in turn demands recognising and leveraging the interdependencies between sustainability strategy, broader corporate strategy and marketing strategy.

Sustainable Futures 09 has been created for a number of audiences. The broad cross-section of 'temperature check' insights, garnered from more than 20,000 active consumers at a time of extreme turbulence, will be valuable to any organisation that has a focus on sustainable practices, including NGOs, think-tanks, consulting firms and civil society as a whole. Beyond this, the detailed and robust analysis of the brands and their corporate guardians will be of interest not only to those firms included, but any key player in those sectors covered.

Within the organisation, Sustainable Futures 09 offers pertinent insights for brand management teams, sustainability teams and marketing teams, as well as those directly responsible for corporate reputation.

Finally, Sustainable Futures 09, through its broad contextual findings and specific brand insights, is valuable to the most senior levels of management in any organisation committed to advancing and defining business's role in creating a more sustainable future.

For all of these audiences, Sustainable Futures 09 represents a timely primer for discussion, a detailed diagnostic tool for those companies and sectors featured, as well as a robust and future-proofed framework and methodology from which endeavours and success can be accurately measured over time.



*Recognising the durable business case for sustainability*





## INTRODUCTION

From the outset, it is important to define what we refer to as sustainability within Sustainable Futures 09.

Sustainable Futures 09 takes a broad conceptual definition of sustainability: namely how firms and their brands draw down on the various sources of capital from which to create value, and whether their use of these sources of capital is exceeding their ability to refresh and renew, i.e. is the use of each source of capital sustainable. The accepted five sources of capital<sup>1</sup> are as follows:

### Natural Capital

The use of natural materials and resources

### Human Capital

The use of employees within the organisation

### Social Capital

The use of community and wider social constructs outside of the organisation

### Financial Capital

The use of finance within the organisation

### Manufactured Capital

The use of all assets available to the organisation that are not directly for sale.

Whilst many reports seem to use the terms 'green', 'sustainable' and 'responsible' interchangeably, it is important to stress from the outset that Sustainable Futures 09 is not focused purely on environmental issues, but also embraces the sustainable use of both social and economic or financial capital.

At the heart of Sustainable Futures 09 is a piece of primary research, talking to more than 20,000 consumers across ten markets about their perceptions and expectations of sustainability and how these perceptions and expectations influence their relationships with high profile brands. The result is a unique and vivid picture of how the myriad elements of the debate are increasingly shaping the already complex relationships between consumers and brands.

The fieldwork was completed in early 2009, meaning consumers were being questioned on these issues in the midst of the unfolding global financial and economic crisis. As a result, the data collected represent a timely exploration of how sustainability is 'holding up' as arguably more tangible, pressing issues start to hit home.



*Sustainable Futures 09 markets:  
UK, US, Spain, France, Germany,  
Sweden, Mexico, Brazil,  
India & China*



One key finding from the research is the distinct way in which consumers assemble the sustainability debate. Mapping this assembly process allows us to explore the intricate linkages and associations consumers create between often disparate corporate endeavours. Understanding where these linkages are strongest - and indeed where they are absent - presents a clear opportunity for brands to create more compelling narratives and convert more of their initiatives into sustainable brand equity. We call this process 'relational sustainability'.

This has also allowed us to create a unique metric for businesses - the Sustainable Futures Quotient (SFQ). The SFQ offers a nuanced, but robust metric that reflects not only consumer perception of corporate and brand performance, but the influence that performance has on brand equity. As sustainability moves further mainstream for all stakeholders and becomes more important at the corporate and brand level, so those companies that can record higher SFQs will be in a stronger position to capture and sustain competitive advantage.

We believe SFQs will become accurate proxies for sound management and progressive companies for the immutable reason that they will highlight those firms that have imbued their brands with sustainable qualities: qualities that consumers identify with and consider materially relevant to the brand. At an operational level, thanks to increasingly transparent communications, a high SFQ is also important, since it represents a commitment and ability from the firm to abandon the frequently seen annexation of sustainable efforts *from* the 'day to day business', and instead marks the embedding of sustainability *into* the 'day to day' business.

In short, the Sustainable Futures Quotient is a measure of the authenticity of the firm's efforts within the sustainability arena.

Sustainable Futures Quotients are created for all researched brands and detailed in the Sustainable Futures reports.









## METHODOLOGY

Working with the capitals model as described above, the research looked to gauge how consumers perceived the sustainable use/drawdown/replenishment of these sources of capital and how this perception impacted on the value of the brand for the consumer.

Consumers were not asked specifically about capital sources, but instead, were asked questions that related to the sustainable use of these capitals. This resulted in a bank of questions, relating to 25 business attributes across the sustainability spectrum (the Sustainable Futures attribute bank). In order for Sustainable Futures 09 to represent a robust and future-proofed framework, within which we can track consumer perception over time, it is key to capture all elements of the sustainability debate. Even though at this point in time many consumers may not be forming strong opinions in some of these areas, it is very likely that, as consumer interest and education expands, these less-defined areas will become crucial to firms and their brands in the (near) future.

The research was carried out across nine markets - UK, US, Spain, Germany, France, India, China, Mexico and Brazil. N≥2400 in each market. In addition, a smaller sample was run in Sweden (N=600). Overall N>22,000.

In each market (except Sweden), twenty brands were analysed across eight sectors; auto, finance, retail, FMCG (cleaning/personal care/beauty), food, telecoms, oil/petroleum and utilities. For each brand, N≥500. At least two brands have been analysed in each of these sectors.

In all markets, interviews were conducted via online panels and consumers were screened for familiarity prior to brand rating.

Impact on brand equity was derived from statistical regression analysis between business attribute perceptions and brand equity drivers. Consumer segmentation used K-means cluster analysis, and was tested using Discriminant Function Analysis (DFA). 'Relational Sustainability' pathways were created using Structural Equation Modelling (SEM).

Havas Media Intelligence chose GlobeScan as the research partner on Sustainable Futures 09. GlobeScan is a market-leading strategic research company, focusing on CSR/Corporate Governance/Ethics research and analysis since 1987. The research component of Sustainable Futures 09 was managed by GlobeScan's London and Toronto offices.







## BRANDS INCLUDED IN SUSTAINABLE FUTURES 09

Sustainable Futures 09 covers brands in eight sectors, with at least two brands in each sector in each market. In addition, those brands covered in two markets or more contribute to this Global Summary report. In all country reports as well as the Global Summary, 20 brands are reviewed and analysed.

Brands were selected by a number of criteria including total advertising expenditure, advertising expenditure in specific markets, geographical spread, MNC versus national status, as well as general position in the market regarding sustainability.

UK	US	France	Spain	Germany	Mexico	Brazil	India	China	GLOBAL
Peugeot	Chevrolet	Peugeot	Peugeot	Peugeot	Peugeot	Peugeot	Peugeot	Peugeot	Peugeot
Citroën	Ford	Citroën	Citroën	Citroën	Citroën	Citroën	Citroën	Citroën	Citroën
Vauxhall	Honda	Volkswagen	BMW	BMW	Volkswagen	Volkswagen	Tata	Honda	Toyota
Toyota	Toyota	Toyota	Toyota	Toyota	Toyota	Toyota	Toyota	Toyota	BMW
Danone	Dannon	Honda	Danone	Volkswagen	Danone	Danone	Maruti	BMW	Nestlé
Nestlé	Nestlé	Danone	Nestlé	Nestlé	Nestlé	Nestlé	Nestlé	ChangAn	HSBC
Abbey	Kraft	Nestlé	Santander	Danone	Bimbo	Bradesco	ITC	Nestlé	Reckitt Benckiser
HSBC	HSBC	Crédit Agricole	BBVA	Santander	Santander	Santander	SBI	General Mills	Procter & Gamble
LloydsTSB	Bank of America	Société Générale	HSBC	HSBC	BBVA	HSBC	HSBC	China Merchants Bank	L'Oréal
Reckitt Benckiser	Citi	HSBC	Reckitt Benckiser	Sparkasse	HSBC	Reckitt Benckiser	Reckitt Benckiser	HSBC	Walmart
Procter & Gamble	Reckitt Benckiser	Procter & Gamble	Procter & Gamble	Procter & Gamble	Procter & Gamble	Procter & Gamble	Procter & Gamble	Reckitt Benckiser	Carrefour
Unilever	Procter & Gamble	Reckitt Benckiser	L'Oréal	Reckitt Benckiser	Reckitt Benckiser	Unilever	L'Oréal	Procter & Gamble	Danone
Vodafone	AT&T	L'Oréal	Vodafone	Unilever	Unilever	Claro	Unilever	L'Oréal	BP
O2	Verizon	SFR	Movistar	Deutsche Telecom	Movistar	Vivo	Vodafone	China Mobile	Telefónica
Orange	T-Mobile	Orange	Orange	O2	Telcel	Carrefour	Bharti Airtel	China Unicom	EDF
Marks & Spencer	Sears	Carrefour	Telefónica	Vodafone	Walmart	Walmart	SingTel	Walmart	Santander
Tesco	Kmart	Auchan	Carrefour	Douglas	Liverpool	Casas Bahia	Spencers	Carrefour	Vodafone
Asda	Walmart	Intermarché	El Corte Inglés	Lidl	Soriana	Pão de Açúcar	Pantaloon Retail	Gome	Unilever
EDF	Exxon	EDF	Endesa	E.On	Pemex	Petrobras	Tata Power Co	Esso	BBVA
Carrefour	BP America	Total	Repsol	Deutsche BP	BP Mexico	CoelceAmpla	BP India	BP China	Volkswagen

## GLOBAL EXTRACT

This extract contains a sample of the principle findings from Sustainable Futures 09, looking at the data and insights at an all-market level.

More detailed and market-specific material is available in the full reports, available at [www.sustainablefutures09.com](http://www.sustainablefutures09.com).

Sustainable Futures 09 draws on extensive primary research across ten markets, to generate fresh insights into how consumers are relating to sustainability issues in the current, turbulent environment, as well as forensic analysis of a number of prominent brands across a series of consumer-facing sectors.

The result is a vivid snapshot across markets and sectors, revealing consumer ambitions, aspirations and concerns going forward, and how these emotions are impacting on the complex relationships with brands.

With extensive data at the brand level to support detailed path and drivers analysis, Sustainable Futures 09 is also a powerful diagnostic tool for those brands featured and indeed any company operating in these consumer-facing sectors.

With the creation of a proprietary metric - Sustainable Futures Quotient - Sustainable Futures 09 also represents a framework within which it is possible to capture a robust, yet nuanced view of each firm's progress over time.

### I. Contextual Extract

Consumers are still extremely engaged in the sustainability debate. Even in the midst of the financial markets chaos and deep economic recession, it appears that consumers are not losing sight of the longer-term problems that have contributed to the

current situation. Concerns over crime, violence, poverty and inequality are causes of major concern for nearly 40% of consumers across the Sustainable Futures markets. Environmental pollution is the fifth most cited major concern for consumers, with 35% of the sample registering it as a major concern (the highest response is unemployment, at 43%). Water shortages and the depletion of natural resources are also major issues for 30% of consumers. However, the issues surrounding population growth and the pressures this will place on systems, are not yet very visible with consumers: only 17% registered this a major concern.

When it comes to business and sustainability, consumers are still placing considerable importance on a company's efforts in this area. More than 80% of consumers claim to respect companies that are being responsible. A similar proportion of consumers (80%) feel companies should be actively involved in this area and accept that they themselves need to adapt and change their lifestyles to combat current issues.

Even in such challenging economic conditions, 48% of consumers express a willingness to pay a ten percent premium for goods or services produced in an environmentally and socially responsible way.

However, 64% of consumers feel most companies only engage in initiatives and activity around sustainability solely to protect or improve their image.

This lack of authenticity - together with low consumer numbers who believe companies are actually working hard in this area - may explain in part the continued disconnect between consumer intent and behaviour when it comes to buying responsible goods and services (premium-priced or not): it is not a case of consumers being fickle, but rather a case of businesses being unauthentic.



In terms of activism, over 60% of consumers believe they can influence a company to behave more responsibly. And when asked if solving these issues should be the responsibility of the government rather than business, only 30% agreed. This represents a clear mandate being issued by consumers to business: it is primarily your responsibility to find solutions to today's problems.

The potential spoils from responding to this mandate are clear. Sustainable Futures 09 reveals a key turning point has been reached with consumers: when asked how often they reward or punish companies based on their performances, more consumers now look to endorse companies for what they perceive to be environmentally and socially responsible behaviour, than to punish. This suggests the blame culture is being replaced with one of greater optimism and encouragement. Not only does this shift corporate and brand communication from the defensive and risk-oriented to a more positive stance, but it also highlights the opportunities for all firms, regardless of

size or sector, to enter into dialogue with consumers and other stakeholder groups.

A pre-requisite of any dialogue, however, is a clear understanding of the concept of sustainability.

Exploring this further, Sustainable Futures 09 finds that nearly 90% of all consumers are familiar with the term, with 50% claiming to hear the term often. Awareness is highest amongst emerging markets, with 89% of Chinese consumers hearing the term often. US consumers are least aware of the term, with only 21% claiming to hear it often.

When describing what sustainability means to them, significantly higher numbers of consumers associate the concept with positive, aspirational and future-focused attributes. However, the definition of the concept varies enormously, market to market, reinforcing the fact that whilst many of the issues that fall under the banner of sustainability are faced by us all, local specifics shape and define personal views.



Sustainable Futures 09 discovered an extremely vocal group in the US that has strong negative associations with the term in relation to the environment. Whilst a clear minority, the US is the only market where this attitude is heard.

That said, across all markets it is clear that the majority of consumers regard sustainable practices and efforts as highly aspirational and a way forward, not just for business, but for the individual.

## 2. Sector Perception Extract

Consumers are becoming increasingly discerning when reviewing the performances of sectors, recognising that certain sectors have more significant impacts on environmental resources than social resources, and vice versa. Specifically, consumers recognise that banks and financial institutions are having an increasingly negative impact on society. Furthermore, financial institutions are not perceived to be working effectively to ameliorate this situation, arguably causing widespread damage to the banking sector reputation.

Amongst other sectors, unsurprisingly auto and oil/petroleum are seen as high negative impact sectors, although the FMCG cleaning/personal care/beauty sector also receives heavy criticism with respect to negative impact across both the social and environmental axes. Of these high impact sectors, auto is perceived to be working the hardest to alleviate the damage it causes.

Overall, the food sector (followed by retailers and telecoms) is seen by consumers to have the lowest negative impact on the environment and society and to be the most progressive in terms of initiatives to offset any negative impact. This may well be as a result of progressive companies in this sector taking a lead on the personal benefits from more sustainable practices, such as organic, free-range and fair trade products. In other words, making the issue relevant to the sector, and relevant to consumers.

It should be mentioned, however, that the majority of sectors are currently failing to deliver a comprehensive 'sustainable deal' to consumers.





### 3. From Hostages to Sceptics - an introduction to consumer segments in a turbulent market

With consumers facing such uncertainty in terms of financial insecurity, unemployment and terrorism to name but a few key global issues, Sustainable Futures 09 has created a consumer segmentation that reflects the degree to which sustainability is remaining on the radar for consumers in these tumultuous times.

The segmentation looks at levels of consumer activism in this space (including the propensity to reward or punish companies) and levels of engagement or enthusiasm around the topic (willingness or ability to learn more). The result is a model with five key consumer segments: Devotees, Critics, Hostages, Sceptics and the Disengaged.

Devotees represent a key target group for brands, since they are active and engaged and looking to endorse companies they perceive to be progressive. Devotees are slightly more visible amongst female, higher educated respondents.

Hostages and the Disengaged are also important targets since they display higher than average levels of activism. However, neither group is engaged in the issue: in the case of Hostages, they cannot engage further due to a sense of panic and disempowerment by this issue, and in the case of the Disengaged, there is a lack of will to modify an established opinion. The Disengaged are slightly more visible amongst younger, less educated respondents.

Since both groups are active, firms should target communication efforts towards both of these segments in order to improve engagement and ensure activism is based on fuller recognition of the challenges and performances of the firm. Devotees

could play a key role in this transition as advocates for more informed and engaged consumer activism.

At the most engaged level are Critics: very knowledgeable of the sustainability debate, this group does not necessarily translate this knowledge into endorsement or boycotting of firms and their brands. But Critics are vocal and may engage in dialogue with other consumer groups. Recognising them as influencers and getting Critics on-side is key for companies that want to reach out to a wider consumer base.

Sceptics, as the name suggests, are highly doubting of corporate efforts. They are however not averse to engaging with the issue, and this may represent the key to bringing this group into the debate and more active in terms of brand choices. Sceptics skew towards the young, reinforcing the need to engage and encourage this segment.

Devotees are the most prominent segment in Brazil, China and Mexico. Hostages are the largest group in India. The Disengaged represent the largest group in the US, whilst Critics are the largest in France. Finally, Sceptics make up the largest segment in Germany, Spain and the UK.

Market-level segmentation maps are available within the Sustainable Futures 09 market reports.

### 4. Brand performances

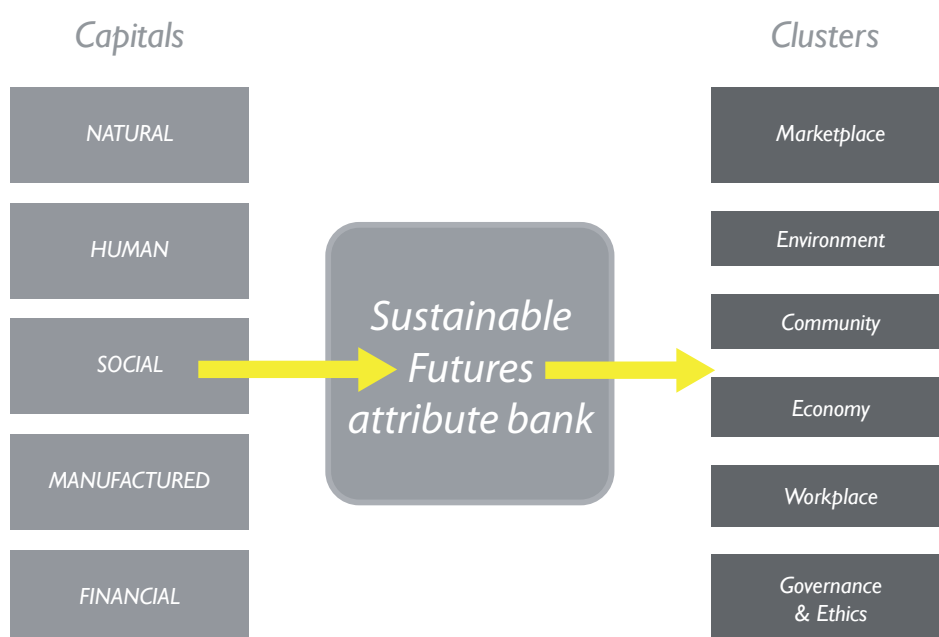
Through the creation of a proprietary 'attribute bank', Sustainable Futures 09 can monitor growing, waning and shifting consumer perception across a comprehensive range of sustainability issues - essential for any business needing to gauge consumer sentiment towards such a dynamic and evolving subject.

This attribute bank is based on a detailed review of the sources of capital available to a firm from which it can derive value. From the accepted five sources of capital (human, social, manufactured, financial and natural), Sustainable Futures 09 has created a 25-reference point attribute bank that analyses the various ways a company can operate through the eyes of the consumer. Although certain attributes are at present a little less visible to consumers, perception could shift rapidly due to sector-wide education initiatives or indeed systemic crises, as has happened with the banking collapse and consumer sentiment towards the sustainable use of financial capital.

Once recorded, these 25 attributes are clustered into six distinct consumer-oriented categories:

marketplace, community, economy, workplace, environment and governance/ethics.

Linking perceived performance to value for the brand, it is possible to plot all these attributes in a single matrix. From this we can see that some attributes represent clear 'red flags' for companies, in that a perceived poor performance is impacting significantly on brand equity. In essence, these red flags represent un-met consumer expectations and firms should move swiftly to compensate. In addition, we can also see where exemplary performance may not be resonating with consumers, demanding either education and awareness initiatives to build recognition, or in extreme cases, a re-deployment of resources towards those issues deemed more important. The matrices allow for an instant assessment of a balanced approach to sustainability:





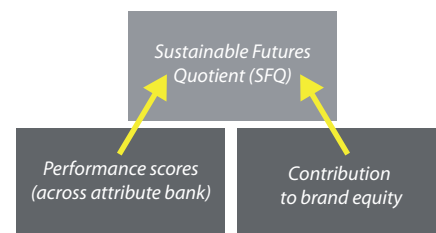
this will be reflected in a strong 45° trend line across the quadrants, signifying the appropriate management of all issues deemed relevant to the brand by consumers.

In very few cases does it appear that companies are building holistic sustainability programmes and communicating them effectively. Most notable for this failure are oil/petroleum companies. At the other end of the spectrum are certain food companies (such as Danone), as well as some progressive FMCG companies (such as Procter & Gamble). In these cases, a number of material issues are being managed well and clearly communicated to consumers.

## 5. Sustainable Futures Quotient

The Sustainable Futures Quotient (SFQ) is a proprietary metric that allows for the measurement

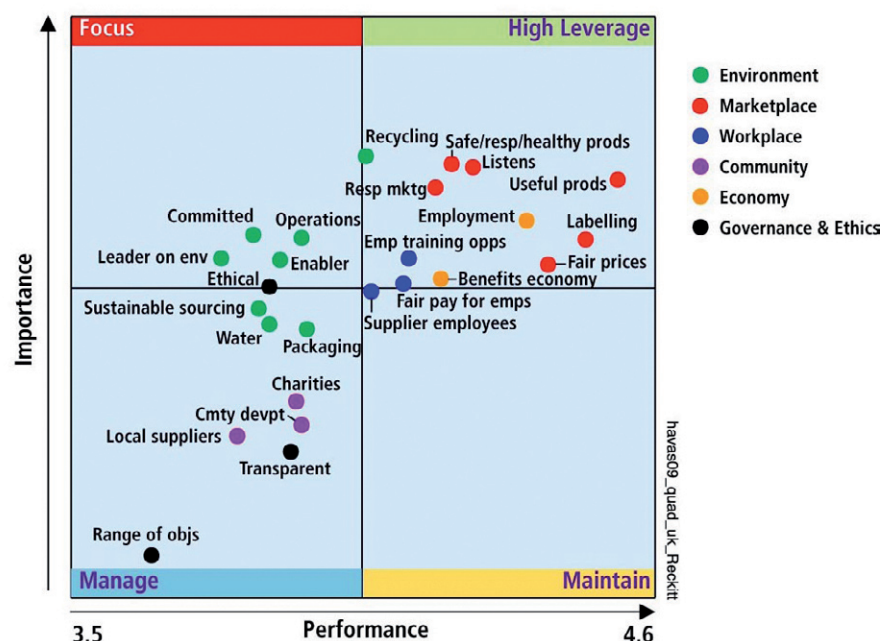
of not only performance in sustainable practices, but also the *contribution these performances make to brand equity*.



Elements that contribute to the Sustainable Futures Quotient

In order for corporate endeavours to 'flow' into brand equity drivers, it is key these efforts are communicated to consumers in an authentic and relevant way. Since the SFQ recognises the relationship between sustainable practices on one hand and brand equity drivers on the other, the

Sample drivers matrix - fmcg brand



SFQ offers a nuanced, but robust measurement and analysis of the saliency and authenticity of communication with consumers. By saliency, we mean relevance to the consumer. Saliency is a product of not just the relationship between the consumer and the brand, but also wider market considerations and cultural cues. By authenticity, we mean genuineness and appropriateness on the part of the brand. If consumers feel that the communications are legitimate, well constructed and durable, and reflect a commitment or action in keeping with the established positioning and personality of the brand, then this is considered to be authentic. Authenticity is about recognising that the action or initiative is central or pivotal to the brand.

Each company within Sustainable Futures 09 has a unique SFQ that allows for benchmarking across sectors, regions and changes in performance over time. This is possible since each SFQ is derived from the 'common currency' of consumer perception (relevant and valuable to every consumer-facing company) and recognises broader expectations of brands and sectors, so levelling the playing field in cross-sector benchmarking.

All quotients sit on a 100-point index, allowing for easy, visual analysis.

Those firms included in Sustainable Futures 09 that show the highest SFQs are once again the food companies and FMCG companies, including Danone and P&G, with quotients approaching 70 (69.8 highest). To reiterate, these are companies that are not necessarily recording higher performance scores, but are recording high contributions to brand equity. This implies a coherent and efficient narrative to consumers around sustainability (and is reflected in the strong alignment of attributes within the drivers analyses).

The companies within Sustainable Futures 09 currently recording the lowest SFQs, are banks and financial institutions, with the lowest quotient being 57.8.

In the long-term, we feel this unique metric will be a vital tool with which to take a corporate temperature check: a healthy SFQ will indicate significant brand equity being derived from sustainability endeavours that are consistently and authentically communicated. This will become a far more compelling and long-term business case than the short-term pursuit of the 'sustainability price premium'. Where companies are building such strong links between sustainability endeavours and brand promise, the result will be a more durable competitive advantage, since these links will serve the brand well as consumers increasingly factor in social and environmental considerations into their purchasing decisions.

## 6. Relational Sustainability

A key step in developing these strong flows between sustainability initiatives and brand promise involves understanding the relationships between the various attributes that create the overall impression of sustainability for the consumer. Sustainable Futures 09 offers a forensic analysis of these relationships through what it calls 'relational sustainability'.

In the same way 'relational thinking' focuses on the 'hidden value' in the linkages and pathways between ideas, so relational sustainability recognises these linkages between the various elements of sustainability: the benefit being an ability to understand which element influences which element and how powerfully they feed into brand equity drivers. Recognising where linkages are strong - or non-existent - presents opportunities to build communication vehicles with which to leverage/







build these linkages in line with established areas of expertise and best practice within the organisation.

These path analyses capture the attribute bank clusters (marketplace, economy, community, environment etc), as well as broader, more emotional attributes (brand personality associations) in order to provide a more contextualised picture.

Sustainable Futures 09 produces detailed path analyses as part of the face to face presentations for clients.

## 7. Conclusion

This short extract report highlights some of the principle findings from Sustainable Futures 09, and offers detail on the contents and structure of the full reports.

All reports can be purchased directly at [www.sustainablefutures09.com](http://www.sustainablefutures09.com)

If you would like to receive more information on Sustainable Futures 09 and discuss a more detailed review of any of the brands or markets outlined in this report, please contact us.

For brands featured in Sustainable Futures 09 Havas Media Intelligence offers face to face presentations, with further drivers and path analysis tailored to the client's needs.

In addition, Havas Media Intelligence can build a seminar and round-table discussion, using the research as a launch point and involving a number of specialists in the fields of sustainability and communication planning. Designed in conjunction with the more detailed research review, the seminar runs for one day and delivers to the client a range of thoughts, opinions and recommendations on sustainability communication strategy.





More information on Sustainable Futures 09 can be found at [www.sustainablefutures09.com](http://www.sustainablefutures09.com)

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### About Havas Media Intelligence

Havas Media Intelligence represents Havas Media's commitment to develop the very latest insights and around consumer behaviour. These insights, together with industry-leading tools and resources, allow us to build and execute the most effective and efficient integrated communication strategies for clients and their brands.

Through proprietary consumer-centric communication planning methodologies, together with a suite of solutions that are consistently deployed across the entire Havas Media network of agencies, Havas Media Intelligence plays a crucial role in translating world-class communication thinking into real-world communication plans.



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### About Havas Media

Havas Media is the global media network of Havas.

Havas Media is one of the world's fastest growing media networks and its agencies have grown from 10 markets in 1999 to 101 markets in 2009.

Havas Media services its clients through a portfolio of specialist global networks and agencies. This group is organised to maximise local market dynamics whilst leveraging the extensive global insight and strategic support within Havas Media. The range of companies within Havas Media include: MPG (Havas Media's global media communications arm), Arena (Havas Media's network for tailor-made communication services), Havas Digital (Havas Media's global interactive network) and Havas Sports & Entertainment (Havas Media's global sports and entertainment communication and brand integration network).