

# VIAP- CHANGE 2010

A SUSTAINABILITY  
BRAND MAP STUDY

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FINAL RELEASE  
COMPLETE COLLECTION  
VOLUMES 1-3

Maddock Douglas  
Agency of Innovation®



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## **chunqa** MAPCHANGE 2010

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## **change** MAPCHANGE 2010

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## 1. MapChange

A sustainable image can be a brand's best source of competitive advantage.

Although there are benefits to adopting sustainability measures for other reasons (efficiency or compliance, for example), building sustainable consumer-facing brands can provide real differentiation in increasingly commoditized consumer product / service markets.

Change's first MapChange study in 2008 showed a significant difference between brand perception and product reality. Consumers thought certain brands were sustainable when they actually weren't, while other brands weren't considered sustainable, when they really were.

This year we wanted not only to profile the difference between actual and perceived brand sustainability, but how the brands in question measure up against their direct competition.

So for MapChange 2010 we partnered with Climate Counts and Angus Reid Public Opinion to compare the top brands within 10 sectors:

1. Food & Beverage
2. Apparel
3. Household
4. Internet/Software/Media
5. Electronics
6. Airlines
7. Hotels
8. Food Services
9. Consumer Shipping
10. Banks

We gave each brand an 'actual' and a 'perceived' sustainability score and plotted the results on a classic perceptual map.

This document is the complete collection of all 10 sectors.

It is also available for download on our website.

[www.getmapchange.com](http://www.getmapchange.com)

## 2. Methodology

We used two distinct methods to calculate actual and perceived leadership in addressing climate change.

### Actual Sustainability

To measure actual brand sustainability we used Climate Counts newly released 2010 corporate climate scores. For the past three years, Climate Counts has audited the brands within all 10 sectors using a scorecard that tracks corporate climate action in four key areas: measurement of impact, reduction of impact, engagement on public policy related to climate change and openness and transparency with consumers on corporate climate activities.

### Climate Counts Scorecard

Climate Counts uses a 0-to-100 point scale and 22 criteria to determine if companies have:

- **MEASURED** their climate “footprint”
- **REDUCED** their impact on global warming
- **SUPPORTED** (or suggest intent to block) progressive climate legislation
- **DISCLOSED** (publicly) their climate actions clearly and comprehensively

The full scorecard can be found in Appendix 1.

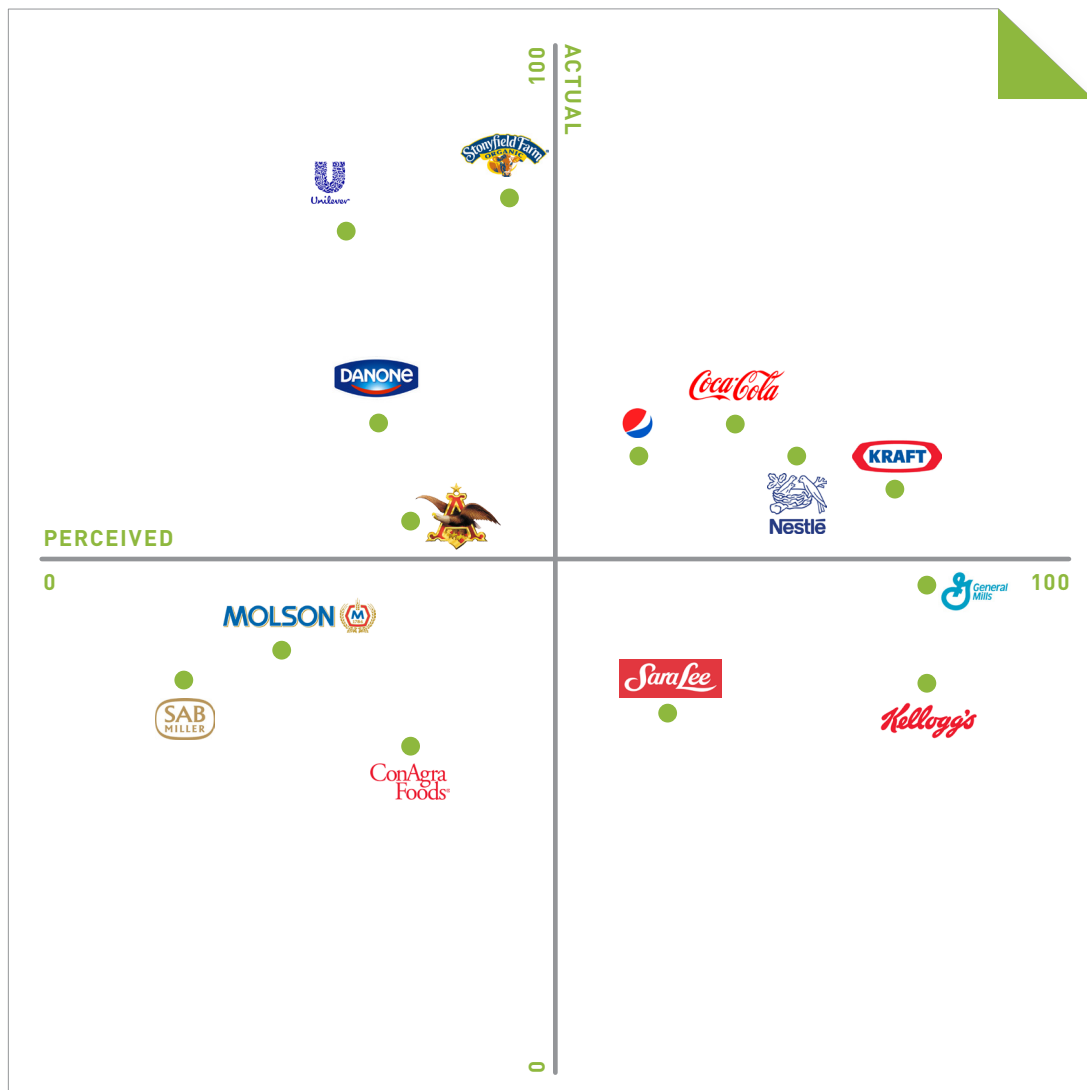
### Perceived Sustainability

To measure consumer brand perception, Angus Reid Public Opinion conducted an online survey of 2,032 American adults. The results were weighted to ensure a random sample that was representative of the entire adult American population.

A ‘maxdiff’ methodology was used to assist the respondents in evaluating the 97 companies represented across 10 different sectors meaning that respondents were asked to “choose the best and worst company in terms of their leadership in addressing climate change” out of a random group of 3-6 companies (dependent on the number of companies in each sector). The survey was divided into two parts, with five sectors in each, to mitigate respondent fatigue and ensure the quality of the data.

The complete survey methodology can be found in Appendix 2.

3. Complete MapChange Report & Brand Scores  
 a. Food & Beverage Sector Map



Data Source: Climate Counts / Angus Reid Public Opinion

\* Stonyfield Farm is a principal funder of Climate Counts and has been scored annually by the organization in the spirit of transparency.

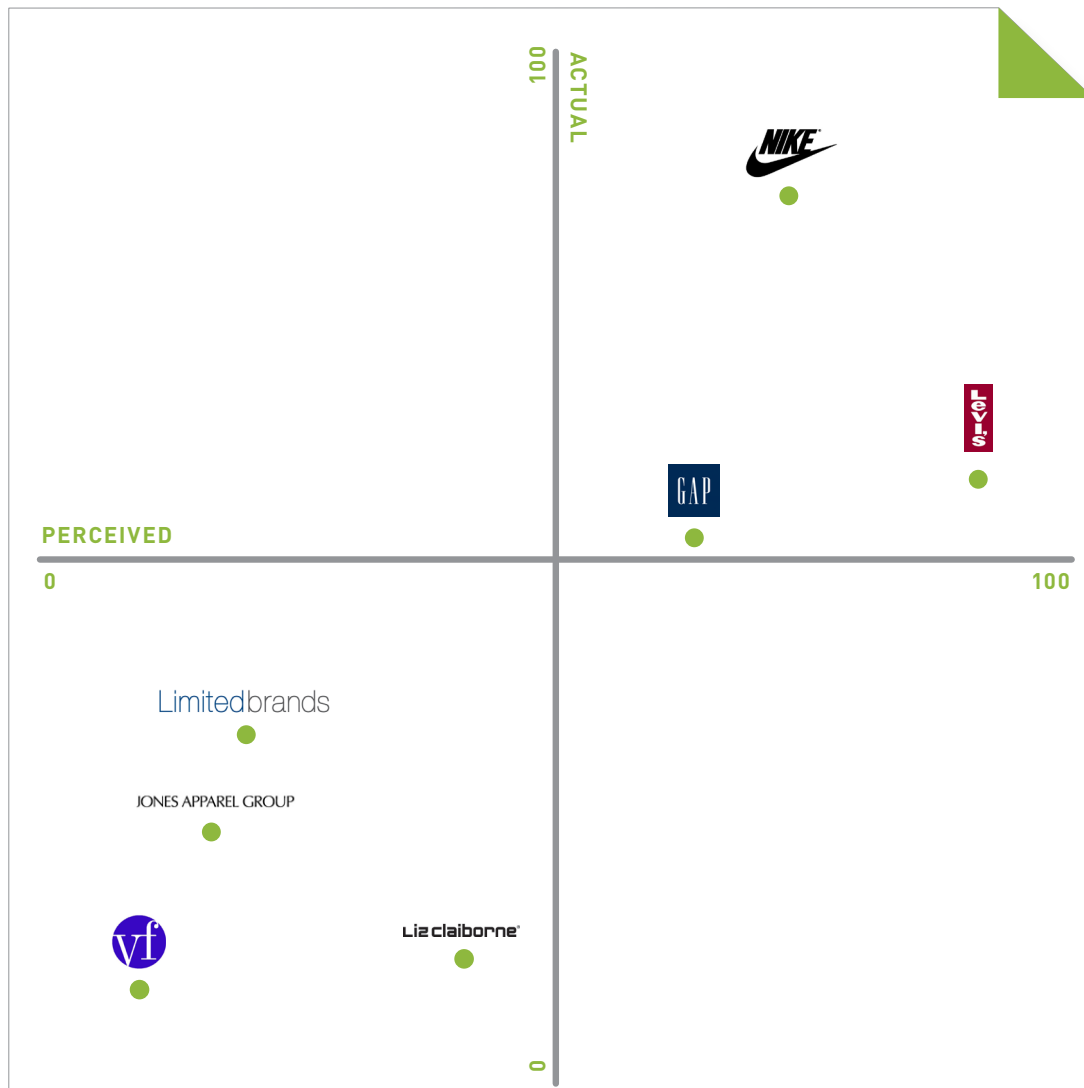
3. Complete MapChange Report & Brand Scores

a. Food & Beverage Sector – Brand Scores

	BRAND	PERCEIVED	ACTUAL
1	General Mills	82	49
2	Kellogg's	81	42
3	Kraft Foods	79	58
4	Nestle	71	63
5	The Coca-Cola Co.	64	66
6	Sara Lee	59	33
7	PepsiCo	55	62
8	Stonyfield Farm	44	81
9	Anheuser-Busch InBev	37	54
10	ConAgra Foods	36	31
11	Groupe Danone	33	64
12	Unilever	32	79
13	Molson Coors Brewing	24	44
14	SABMiller	14	44

Data Source Climate Counts / Angus Reid Public Opinion

3. Complete MapChange Report & Brand Scores  
b. Apparel Sector Map



Data Source: Climate Counts / Angus Reid Public Opinion



**3. Complete MapChange Report & Brand Scores**

**b. Apparel Sector – Brand Scores**

	<b>BRAND</b>	<b>PERCEIVED</b>	<b>ACTUAL</b>
1	Levi Strauss	86	58
2	Nike	73	83
3	Gap Inc.	62	52
4	Liz Claiborne	42	7
5	Limited Brands	24	35
6	Jones Apparel Group	22	20
7	VF Corporation	14	6

Data Source Climate Counts / Angus Reid Public Opinion

3. Complete MapChange Report & Brand Scores  
c. Household Sector Map



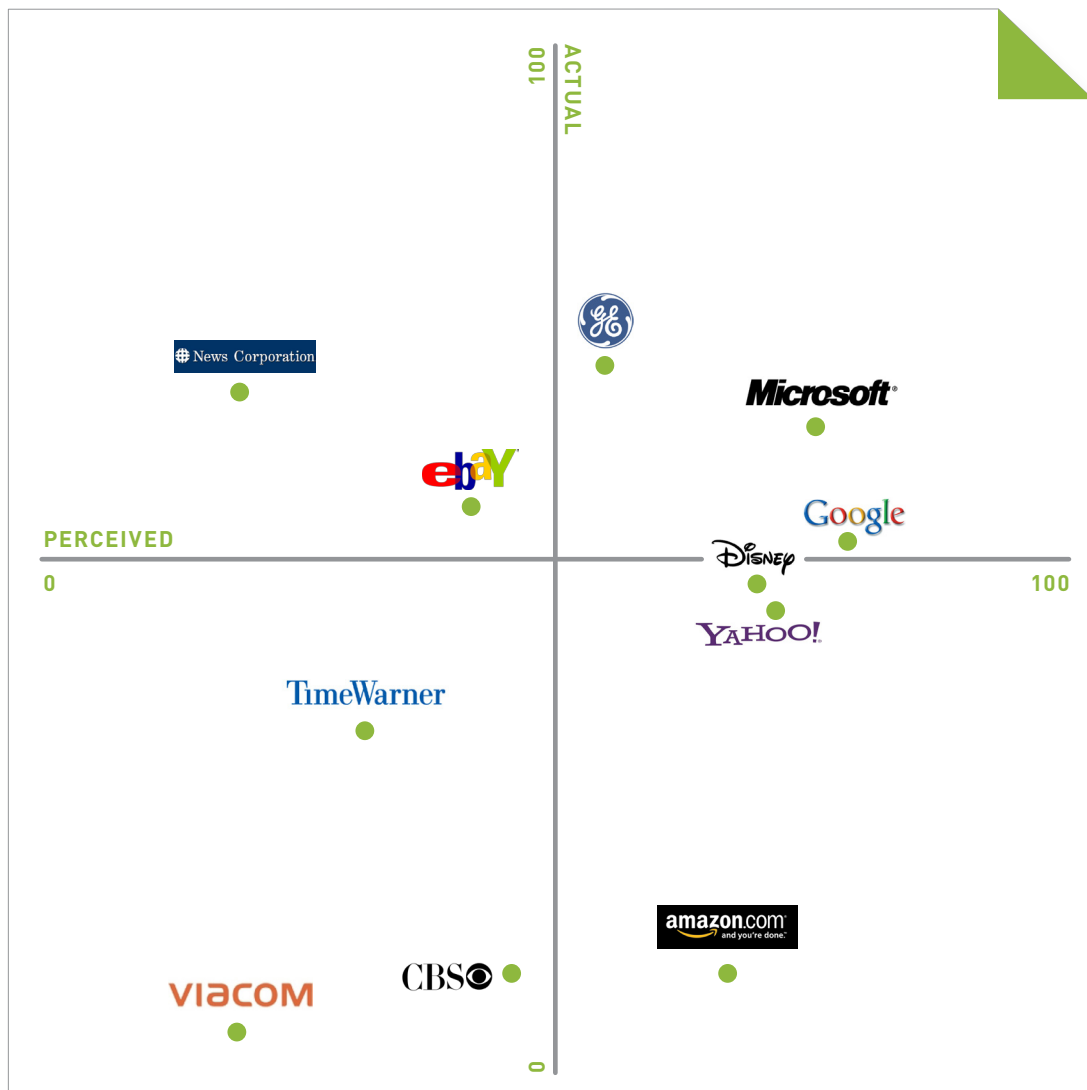
Data Source: Climate Counts / Angus Reid Public Opinion

**3. Complete MapChange Report & Brand Scores**  
**c. Household Sector - Brand Scores**

	<b>BRAND</b>	<b>PERCEIVED</b>	<b>ACTUAL</b>
1	Procter & Gamble	70	63
2	Colgate-Palmolive	64	59
3	Clorox	56	27
4	Kimberly-Clark	50	59
5	Avon	34	51
6	L'Oreal	33	67

Data Source: Climate Counts / Angus Reid Public Opinion

3. Complete MapChange Report & Brand Scores  
 d. Internet / Software / Media Sector Map



Data Source: Climate Counts / Angus Reid Public Opinion

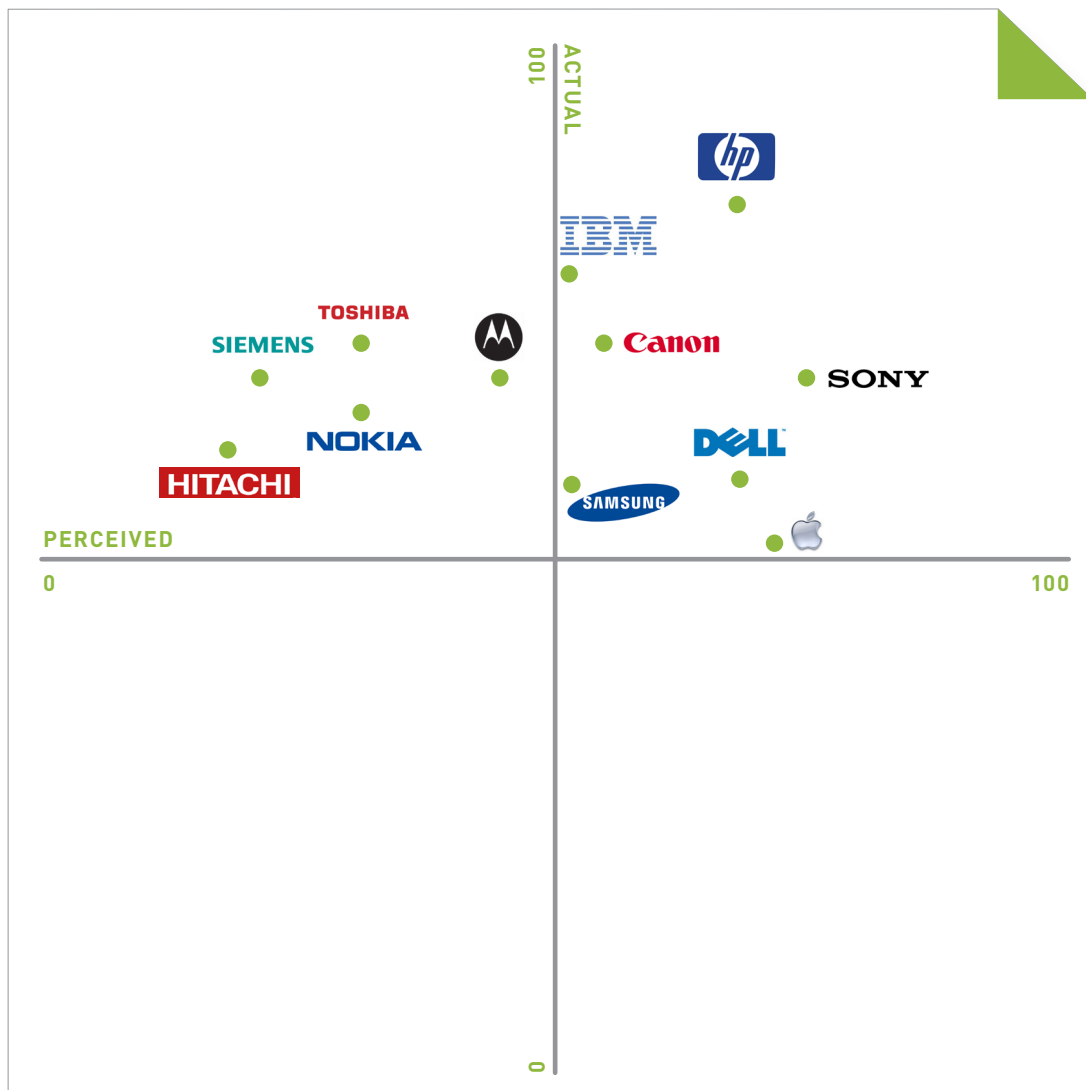
**3. Complete MapChange Report & Brand Scores**

**d. Internet / Software / Media Sector – Brand Scores**

	<b>BRAND</b>	<b>PERCEIVED</b>	<b>ACTUAL</b>
1	Google	77	52
2	Microsoft	76	61
3	Yahoo	64	45
4	Disney	63	47
5	Amazon.com	60	14
6	General Electric	55	74
7	CBS	45	13
8	eBay	40	53
9	Time Warner	30	36
10	Viacom	17	3
11	News Corp.	16	68

Data Source Climate Counts / Angus Reid Public Opinion

3. Complete MapChange Report & Brand Scores  
 e. Electronics Sector Map



Data Source: Climate Counts / Angus Reid Public Opinion

**3. Complete MapChange Report & Brand Scores**

**e. Electronics Sector – Brand Scores**

	<b>BRAND</b>	<b>PERCEIVED</b>	<b>ACTUAL</b>
1	Sony	74	62
2	HP	68	78
3	Apple	68	52
4	Dell	66	57
5	Canon	52	71
6	Samsun	51	56
7	IBM	51	76
8	Motorola	48	67
9	Nokia	38	66
10	Toshiba	34	71
11	Siemens	22	64
12	Hitachi	17	59

Data Source Climate Counts / Angus Reid Public Opinion

3. Complete MapChange Report & Brand Scores  
f. Airlines Sector Map



Data Source: Climate Counts / Angus Reid Public Opinion



**3. Complete MapChange Report & Brand Scores**

**f. Airlines Sector – Brand Scores**

	BRAND	PERCEIVED	ACTUAL
1	Southwest	77	40
2	American	72	48
3	United	69	37
4	Delta / Northwest	67	40
5	US Airways	63	43
6	Continental	62	37
7	JetBlue	52	33
8	Alaska Air	51	23
9	British Airways	47	36
10	SkyWest Air	33	0
11	AirTran	29	5
12	ExpressJet	24	7

Data Source Climate Counts / Angus Reid Public Opinion

3. Complete MapChange Report & Brand Scores  
g. Hotel Sector Map



Data Source: Climate Counts / Angus Reid Public Opinion

**3. Complete MapChange Report & Brand Scores**

**g. Hotel Sector – Brand Scores**

	<b>BRAND</b>	<b>PERCEIVED</b>	<b>ACTUAL</b>
1	Marriott	80	51
2	Hilton	72	23
3	Hyatt	72	12
4	Wyndham	42	25
5	Carlson	17	12
6	Starwood	16	24

Data Source: Climate Counts / Angus Reid Public Opinion

3. Complete MapChange Report & Brand Scores  
 h. Food Service Sector Map



Data Source: Climate Counts / Angus Reid Public Opinion

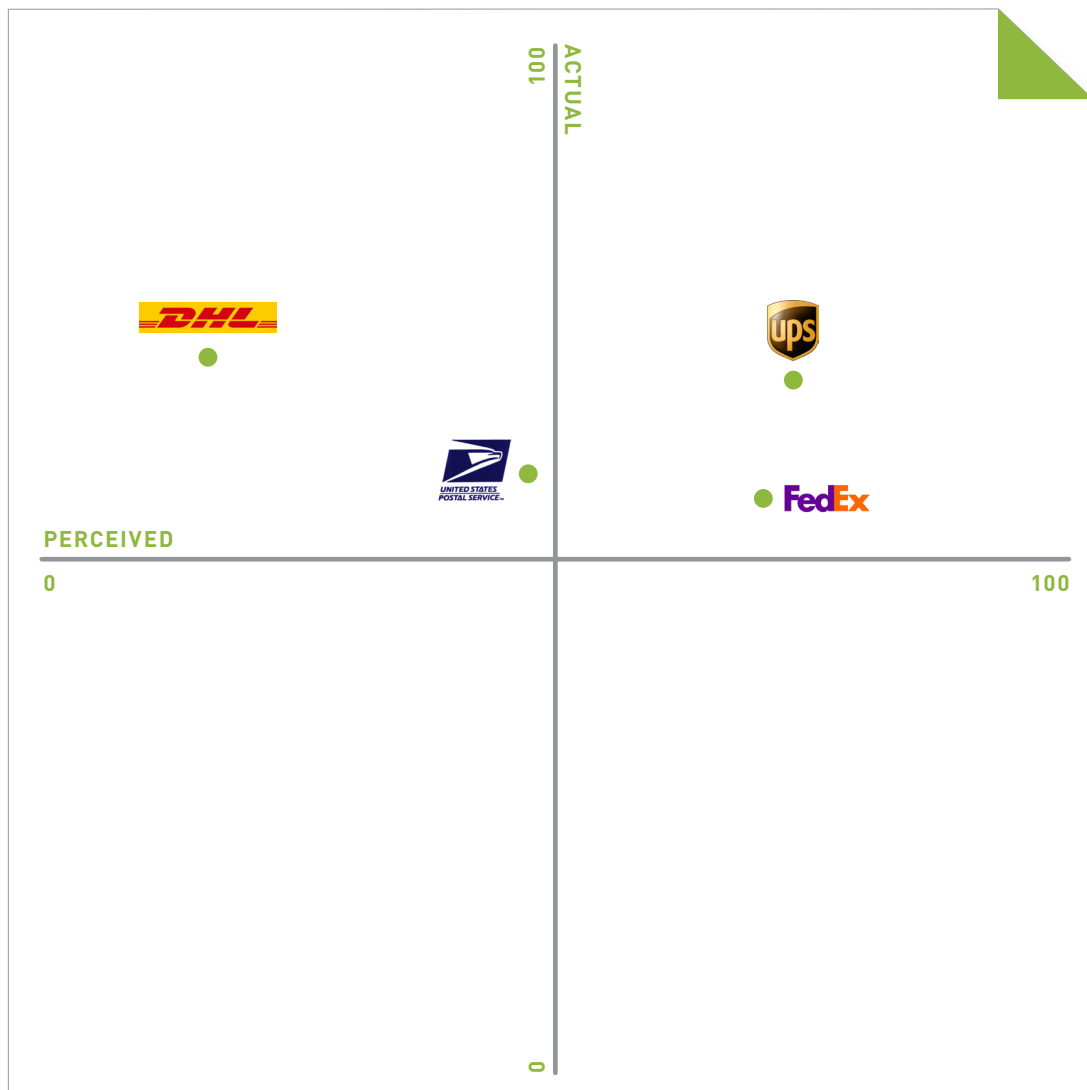
**3. Complete MapChange Report & Brand Scores**

**h. Food Service Sector – Brand Scores**

	<b>BRAND</b>	<b>PERCEIVED</b>	<b>ACTUAL</b>
1	Wendy's International	64	2
2	McDonald's	56	30
3	Darden Restaurants	49	30
4	Burger King	49	10
5	Starbucks	48	51
6	Yum! Brands	34	30

Data Source Climate Counts / Angus Reid Public Opinion

**3. Complete MapChange Report & Brand Scores**  
**i. Consumer Shipping Sector – Brand Scores**



Data Source: Climate Counts / Angus Reid Public Opinion

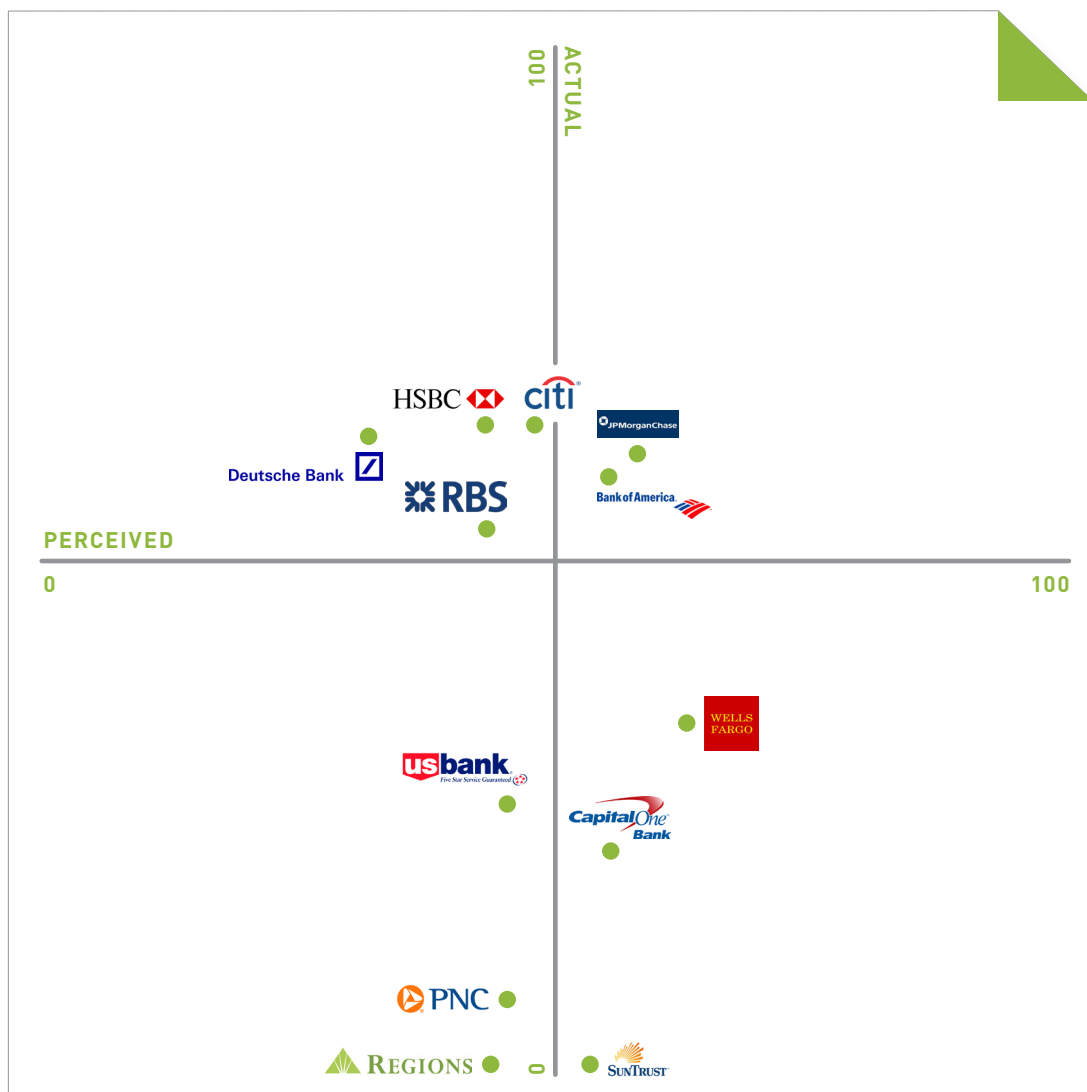
**3. Complete MapChange Report & Brand Scores**

**i. Consumer Shipping Sector – Brand Scores**

	<b>BRAND</b>	<b>PERCEIVED</b>	<b>ACTUAL</b>
1	UPS	76	69
2	FedEx	71	55
3	US Postal Service	49	56
4	Deutsche Post / DHL World Net	16	68

Data Source Climate Counts / Angus Reid Public Opinion

3. Complete MapChange Report & Brand Scores  
j. Banks Sector Map



Data Source: Climate Counts / Angus Reid Public Opinion



**3. Complete MapChange Report & Brand Scores**

**j. Banks Sector Map – Brand Scores**

	<b>BRAND</b>	<b>PERCEIVED</b>	<b>ACTUAL</b>
1	Wells Fargo	66	27
2	JP Morgan Chase	61	63
3	Capital One	57	12
4	Bank of America	57	60
5	SunTrust	51	2
6	CitiGroup	49	67
7	HSBC	46	67
8	US Bancorp	45	25
9	National City	44	3
10	Regions	42	1
11	Royal Bank of Scotland	42	55
12	Deutsche Bank	37	66

Data Source Climate Counts / Angus Reid Public Opinion

## 4. Insights

- Across every sector, MapChange shows a disparity exists between the actual sustainable activity of brands, and consumers' perception of sustainable activity of those brands.
- Some sectors emerged as sustainability leaders and others, as laggards. For example, the Consumer Shipping brands all scored above 55, whereas the Airline brands all scored below 50.
- This year, most of the brands had much higher 'perceived sustainability' ratings than they did last year.
- This increase in 'perceived' sustainability could be due to:
  - a. Improved/increased brand communications about sustainability initiatives
  - b. Increased consumer-facing sustainable products
  - c. Heightened consumer and media interest in sustainable brands
- To compete, brands need to generate sustainable innovation quickly and communicate it effectively.
- In some sectors, brands with high perception scores actually had average actual scores. This suggests that the overall positive perception of these popular brands has a positive 'halo' effect on their perceived sustainability. In some cases it could be linked to the trend of large master brands buying smaller brands known for their emphasis on sustainability. The smaller brands imbue the larger master brand with a halo of sustainability.
- On the other hand, brands with the highest actual scores sometimes had relatively low perception scores. This suggests that the corporation's sustainability activity might not be consumer-facing, or that the activity might be focussed in areas outside of the products / services being produced.
- This represents an opportunity to improve perception through increased consumer-facing sustainable product innovations and improved communications.
- On the flip side, brands already benefiting from a positive consumer perception have an opportunity to strengthen this position through increased sustainability efforts and continuing to innovate new, consumer-facing sustainable products.

**Note** These insights are necessarily general, given the broad spectrum of sectors studied. We would be happy to discuss more specific insights pertaining to individual sector maps. To arrange a conversation, please leave your contact information at [info@changebiz.com](mailto:info@changebiz.com).

## 5. The 5 C's of Sustainability Branding

From our MapChange study research and five years experience building green brands we've created 'The 5 C's of Sustainability Branding' – a tool that outlines the 5 things brand sustainability must be in order to succeed:

### 1. COMPETITIVE

To compete, brands must innovate – and the best new innovations tend to be sustainable. All other things being equal (price & quality = value), sustainability differentiates and provides durable competitive advantage.

### 2. CONSUMER-FACING

Not sure what to do first? Get the most benefit out of new sustainability initiatives by making them something the consumer will see. There are plenty of ways to improve corporate sustainability, but consumer-facing changes will have the most immediate impact on public perception and, potentially, financial performance.

### 3. CORE

Tying sustainability to a brand's core business is another way to ensure it resonates with consumers. If a brand sells hamburgers, its sustainability has to be about hamburgers ie. organic beef, recycled wrapper etc. Car brands must focus on making more fuel-efficient, cleaner cars, not saving the rainforest. Don't do something that is unrelated to what people know you for, or they won't reward your efforts and you could be seen as greenwashing.

### 4. CONVERSATIONAL

Sustainability branding is more effective as a two-way conversation rather than one-way communication. Honesty and transparency will go a long way with consumers. Disclosing what you're doing well and what you could be doing better will instill trust. And trust breeds loyalty. Inviting consumers to participate in a conversation about your process will further strengthen the brand-consumer relationship.

### 5. CREDIBLE

Sustainability strengthens brands. But, greenwashing, even if unintended, damages them. The good news is that it is easily avoidable and the key is sequence. As long as sustainability efforts are in place, functioning and measurable before being announced, they will be viewed as credible. And, proven, objective credibility paired with innovation and communication is the key to sustainable brand success.

## **6. About Change**

Change is an innovation brand agency specializing in green innovation. Clients include multinationals like Unilever, key regionals like TransLink, and innovation-driven companies like Powertech. With 'outside the jar' thinking and a simple, flexible process, Change helps companies incorporate brand innovations that provide competitive advantage, then helps communicate those brand innovations in a way consumers can understand, appreciate and reward. Change is structured like a hub – key strategists and creative thinkers at the core, and trusted specialists in research, analysis, design, social media and production in an 'on call' network. Change's work has won over 20 international design awards, and has been profiled in international journals, newspapers and books. The organization's founder, Marc Stoiber, is also an expert speaker on green brand innovation, with engagements that include the TED conference and Strategy's Cause and Effect Conference.

### **7. About Climate Counts**

Climate Counts is a non-profit campaign that scores companies annually on the basis of their voluntary action to reverse climate change. The Climate Counts Company Scorecard—launched in June 2007—helps people vote with their dollars by making climate-conscious purchasing and investing choices that put pressure on the world’s most well-known companies to take the issue of climate change seriously. Launched by organics pioneer Stonyfield Farm, Climate Counts believes everyday consumers can be the most important activists in the fight against global warming. Climate Counts has currently evaluated nearly 150 companies—representing over 3000 brands—in sixteen major consumer sectors. Climate Counts’ work has appeared in many of the world’s leading media outlets, among them the New York Times, National Public Radio, The Economist, BBC World Service, the Wall Street Journal, Newsweek, The Huffington Post, and the Harvard Business Review. The organization will launch its iPhone app and its Climate Counts Industry Innovators (I2) program in early 2010.

### **8. About Angus Reid Public Opinion**

Angus Reid Public Opinion is the public affairs practice of Vision Critical – a global research and technology company specializing in custom online panels, private communities, and innovative online methods. Vision Critical is a leader in the use of the Internet and rich media technology to collect high-quality, in-depth insights for a wide array of clients. Dr. Angus Reid and the Angus Reid Strategies team are pioneers in online research methodologies, and have been conducting online surveys since 1995. Vision Critical is now one of the largest market research enterprises in the world. In addition to its five offices in Canada—located in Vancouver, Calgary, Regina, Toronto, and Montreal—the firm also has offices in San Francisco, Chicago, New York, London, Paris and Sydney. Its team of specialists provides solutions across every type and sector of research, and currently serves over 200 international clients.

## 9. The Story of MapChange

### Interview with Founder of Change, Marc Stoiber.



In January 2010 Change, Angus Reid Public Opinion and Climate Counts release the findings from the second MapChange study.

The original study was conducted in 2008. The new study is over 10 times larger, and covers virtually every sector in North American consumer goods and services.

In the following interview, Change founder Marc Stoiber explains the origins of the study, what it was meant to answer, and how it has evolved.

**INTERVIEWER (I):** Tell us about how MapChange started.

**MARC STOIBER (MS):** In 2008, Change was still a relatively new company, helping companies build green innovation into their brands. The only problem was, big companies didn't believe they needed us, or green brands. They were all building green into their operations, and thought that was enough.

**I:** What was your pitch to them?

**MS:** We told them that building green into your operations was great, but the real win was building green into the things they made and sold... their brands.

**I:** And the response was?

**MS:** They told us to take a hike.

**I:** So MapChange was the door opener?

**MS:** Actually, MapChange was the result of us sitting around, thinking about how we could convince these big companies that we were right and they were wrong!

We thought the best way to do this was to show how companies that 'did' green didn't necessarily get credit for it. And companies that didn't 'do' green often ended up with more credit than they deserved. Our thinking was, that if a good company could see they were getting short shrift from consumers, that would make them sit up and smell the organic coffee.

**I:** What was the structure of the first study?

**MS:** It was simple. We developed a scorecard that could measure the declared – that is online or publicly reported – green actions of a company. Then we developed a questionnaire that would enable us to probe consumers on what they thought of those companies and their green actions. Then we picked 20 top brands in Canada, and did the study. When we had the numbers, we mapped out the brands on a perception / reality chart.

**I:** Did the numbers surprise you?

**MS:** To put it mildly, yes. They revealed that most of the companies engaged in green actions did not get their due in the court of public opinion. And a few companies that did virtually nothing to fight climate change were getting undeserved credit.

**I:** What happened when you went back to the companies in the study?

**MS:** Molson hired us! (laughs) Actually, we managed to use the study as a good door opener with a few companies. I was surprised that more of them didn't at least take a closer look. And yes, Molson did turn around and hire us because of their results in the study.

**I:** Fast forward to 2010. What makes the new study better?

**MS:** Depth and breadth. First, we asked Climate Counts in the US to provide us with much more thorough information on the climate change actions of companies. They're experts at this, and gave us incredible info – much deeper and more insightful than the info we'd gathered in the first study.

Second, breadth. In our first study, we measured 20 companies. Now we're measuring over 100, in 10 different sectors across North America.

There's also a greater breadth in the consumer questionnaire. Our partners at Angus Reid actually quizzed over 2000 Americans for their perspectives on the companies in the study.


**I:** How will this study help further the green agenda?

**MS:** I believe it will make companies less reticent about greening the things they make and sell. Consumers want to buy green. They want green brands. And if we can sell green brands instead of non-green brands, the world might be a bit better for it. So I believe that the green agenda will be served by convincing companies to take green outside their own 4 walls, and into the world of their consumer-facing brands.

**TO SEE THE NEW MAPCHANGE STUDY, GO TO  
[WWW.GETMAPCHANGE.COM](http://WWW.GETMAPCHANGE.COM)**

Appendix 1: Climate Counts Scorecard

# SCORECARD



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## REVIEW

<p><b>1 GHG emissions inventory completed?</b></p> <p>0 No 1-3 Yes, partial inventory only reviewing some of the company's emission sources (dependent on percentage of emitting sectors covered) 4 Yes, almost comprehensive inventory 5 Yes, comprehensive inventory</p> <p><b>2 Rough calculations or standard protocol/calculator?</b></p> <p>1 Rough, partial calculations 2 Generalized, but complete calculations (estimates, perhaps using a general calculator) 3 Full calculations using a standard protocol/methodology (e.g., WRI)</p> <p><b>3 Are Kyoto gases besides CO2 included?</b></p> <p>0 Just inventorying CO2 emissions 1 Measuring CO2, CH4, and N2O 2 All relevant, material Kyoto gases included 3 If other Kyoto gases are not emitted, full points can be awarded</p>	<p><b>4 Are indirect emissions accounted for? (e.g., supply chain, travel, commuting, use/disposal of products/services, investment)</b></p> <p>0 Only accounting for direct and facility energy use emissions 1 Including emissions from one indirect source 2-4 Including emissions from multiple indirect sources</p> <p><b>5 Is there external, qualified third party verification of emissions data, reductions, and reporting (where applicable)?</b></p> <p>0 No 1 Yes, verification by a trade association 2 Yes, verification by a qualified, external consultant working on company's inventory 3 Yes, verification by a qualified, third-party, not involved in developing the inventory. Extra point for verification beyond basic inventory (e.g., verification of physical reductions or reporting)</p> <p><b>6 Is the inventory an ongoing, regular process accounting for multiple years?</b></p> <p>0 One time project 1 Plans for future, annual inventory work 2 At least two inventories completed 3 Multiple inventories completed 4 Multiple inventories completed and a time-series of emissions presented (i.e., emissions covering beyond the baseline and current year)</p>								
<table border="1" style="border-collapse: collapse; width: 100%;"> <tr> <td style="text-align: center;">HIGHEST POSSIBLE SCORE</td> <td style="text-align: center;">SCORE</td> </tr> <tr> <td style="text-align: center;">5</td> <td style="text-align: center;">5</td> </tr> </table>	HIGHEST POSSIBLE SCORE	SCORE	5	5	<table border="1" style="border-collapse: collapse; width: 100%;"> <tr> <td style="text-align: center;">HIGHEST POSSIBLE SCORE</td> <td style="text-align: center;">SCORE</td> </tr> <tr> <td style="text-align: center;">4</td> <td style="text-align: center;">4</td> </tr> </table>	HIGHEST POSSIBLE SCORE	SCORE	4	4
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HIGHEST POSSIBLE SCORE	SCORE								
4	4								

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## REVIEW SUBTOTAL

HIGHEST POSSIBLE SCORE	SCORE
22	22

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## REDUCE

<p><b>7 Has a clear goal been set?</b></p> <p>0 No target 1 Loose, undefined goal 2-3 Defined goal specifying baseline, reduction amount/percentage, or timeframe but not all three 4 Goal with defined baseline, reduction amount/percentage, and timeframe</p> <p><b>8 Strength of baseline year used for the reduction goal? (keeping in mind changes in company's size/composition)</b></p> <p>0 No baseline 1 Using year of inventory or 1-4 years back as baseline 2 Using a baseline 5-10 years back 3 Baseline over 10 years back When scoring, consider if company has significantly changed in size or divested during the time period or if the company has picked a year with atypically high emissions, as this will affect the appropriateness of the baseline; also adjust scoring if company is new and older baselines are not possible</p> <p><b>9 Magnitude of reduction goal (considering size of reduction and target year)</b></p> <p>0 No reduction goal 1 Keep emissions constant 2 Up to 5% reduction 3 6-10% reduction 4 &gt;10% reduction Discretionary point based on timeliness of target year (i.e., target goal set for near term scores better than small reduction goal set far in the future)</p> <p><b>10 Have a management plan and organizational structure been established for climate?</b></p> <p>0 No plan established 1 General carbon/climate plan established 2 Designation of committee or responsible parties for company climate strategy 3 Designation of key responsible people and a specific plan for climate action 4 Climate strategy incorporated into overall business strategy Extra point for publicly available detailed plan</p> <p><b>11 Is there top-level support for climate change action?</b></p> <p>0 No 1 Senior level executive or Board members designated as responsible for climate issues 2 Clear, public articulation of company's views on climate by CEO and/or top management</p> <p><b>12 Has the company taken steps towards achieving reduction target? (interim progress on reduction)</b></p> <p>0 No Points awarded for actions such as the following: Programs to improve energy efficiency; Use of emissions-reducing technology; Projects to reduce corporate travel; Investments in technology for future reductions; Incentive programs; Purchase of additional, verifiable offsets, etc.; Up to 2 points per action, based on level and depth of actions and company size, for a maximum of 8 points</p>	<p><b>13 Has the company achieved emissions reductions?</b></p> <p>0 No 1-4 Partial reduction (below target or in limited sub-sectors) 5-6 Achieved goal reductions or reductions on a timeline to meet significant target in a later year 7-10 Exceeded goal reductions Points awarded here for absolute or intensity-based achievements</p> <p><b>14 Absolute or intensity-based reductions?</b></p> <p>0 Only intensity-based (relative) reductions 1-2 Absolute reductions for a sub-unit of the company 3-4 Absolute reductions When scoring, consider if company has significantly changed in size or divested during the time period, as this will affect ease of achieving absolute reductions; Note that absolute reductions can be achieved even if a relative target was set</p> <p><b>15 Has the company achieved verified reductions to date (prior to current goal-setting)?</b></p> <p>0 No 1-5 Yes, reductions achieved prior to current goal setting (based on magnitude, frequency, etc)</p> <p><b>16 Has the company made successful efforts to reduce GHG impacts associated with the use of its products/services?</b></p> <p>0 No 1 Conducting partial analyses (e.g., partial LCA, eco-assessment, etc.) of GHG impacts from use of products/services 2 Conducting full analyses of GHG impacts associated with use of products/services 3-4 Producing lower carbon product line that realizes a reduction in carbon-intensity of the traditional line of products/services</p> <p><b>17 Does the company work to educate its employees, trade association, and/or customers on how they can reduce individual GHG emissions (through direct education programs, incentives, or philanthropic projects)?</b></p> <p>0 No educational efforts Up to 2 points for each of the following categories: Internal employee education, incentives that will increase employee awareness (e.g., tax breaks for using mass transit), Education of peer companies within trade association, and customer/general public education, for a maximum of 4 points</p> <p><b>18 Does the company require suppliers to take climate change action or give preference to those that do?</b></p> <p>0 No 1 Yes, gives preference to suppliers who take action 2 Yes, requires suppliers to take action</p>								
<table border="1" style="border-collapse: collapse; width: 100%;"> <tr> <td style="text-align: center;">HIGHEST POSSIBLE SCORE</td> <td style="text-align: center;">SCORE</td> </tr> <tr> <td style="text-align: center;">4</td> <td style="text-align: center;">4</td> </tr> </table>	HIGHEST POSSIBLE SCORE	SCORE	4	4	<table border="1" style="border-collapse: collapse; width: 100%;"> <tr> <td style="text-align: center;">HIGHEST POSSIBLE SCORE</td> <td style="text-align: center;">SCORE</td> </tr> <tr> <td style="text-align: center;">10</td> <td style="text-align: center;">10</td> </tr> </table>	HIGHEST POSSIBLE SCORE	SCORE	10	10
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4	4								
HIGHEST POSSIBLE SCORE	SCORE								
10	10								

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## REDUCE SUBTOTAL

HIGHEST POSSIBLE SCORE	SCORE
56	56

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## POLICY STANCE

<p><b>19 Does the company support public policy that could require mandatory climate change action by business?</b></p> <p>0 No 1-3 Yes, on a local level or in a generalized manner 4-6 Yes, on a state or regional scale or in multiple strong general stances 7-10 Yes, supports non-voluntary federal- or international-level initiatives Points awarded within each specified range for demonstrated depth of support in company materials (website, publications), via a public forum (press, speeches, advertising), and active lobbying</p>	<p><b>20 Does the company oppose public policy on climate change that could require mandatory action by business, or has it made efforts to undermine climate change action?</b></p> <p>0 No 1-3 Yes, opposes local initiative 4-6 Yes, opposes a state or regional scale initiative 7-10 Yes, publicly opposes non-voluntary federal-level initiatives Range of negative points awarded for depth of opposition as displayed in company materials (website, publications), via a public forum (press, speeches, advertising), and active lobbying. Note: negative points will also be awarded if company belongs to trade association seeking to undermine climate change action</p>								
<table border="1" style="border-collapse: collapse; width: 100%;"> <tr> <td style="text-align: center;">HIGHEST POSSIBLE SCORE</td> <td style="text-align: center;">SCORE</td> </tr> <tr> <td style="text-align: center;">10</td> <td style="text-align: center;">10</td> </tr> </table>	HIGHEST POSSIBLE SCORE	SCORE	10	10	<table border="1" style="border-collapse: collapse; width: 100%;"> <tr> <td style="text-align: center;">HIGHEST POSSIBLE SCORE</td> <td style="text-align: center;">SCORE</td> </tr> <tr> <td style="text-align: center;">-10</td> <td style="text-align: center;">-10</td> </tr> </table>	HIGHEST POSSIBLE SCORE	SCORE	-10	-10
HIGHEST POSSIBLE SCORE	SCORE								
10	10								
HIGHEST POSSIBLE SCORE	SCORE								
-10	-10								

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## POLICY STANCE SUBTOTAL

HIGHEST POSSIBLE SCORE	SCORE
10	10

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## REPORT

<p><b>21 Is the company publicly reporting on emissions, risks, and actions? How is information disclosed? Company-based (e.g., on their website or annual report) or through a credible third-party program (e.g., CDP, GRI, etc.)?</b></p> <p>0 No information on company climate change actions is available 1-2 Minimal, general info available through company report or website 3-4 Minimal/basic info available through third party (e.g., CDP) 5-6 Detailed info (emissions, reductions, goals) on company website/reports 7-8 Detailed disclosure through third-party An extra 1-2 points awarded for time series of emissions and other climate action or risk data (e.g., in SEC filings or 10Ks)</p>	<p><b>22 Are emissions broken out by facility, business unit, country of operations, or other meaningful subsegment?</b></p> <p>0 Only total emissions or one lumped number are presented 1 Some sub-unit emissions broken out 2 Emissions clearly tallied by company-appropriate sub-units</p>								
<table border="1" style="border-collapse: collapse; width: 100%;"> <tr> <td style="text-align: center;">HIGHEST POSSIBLE SCORE</td> <td style="text-align: center;">SCORE</td> </tr> <tr> <td style="text-align: center;">10</td> <td style="text-align: center;">10</td> </tr> </table>	HIGHEST POSSIBLE SCORE	SCORE	10	10	<table border="1" style="border-collapse: collapse; width: 100%;"> <tr> <td style="text-align: center;">HIGHEST POSSIBLE SCORE</td> <td style="text-align: center;">SCORE</td> </tr> <tr> <td style="text-align: center;">2</td> <td style="text-align: center;">2</td> </tr> </table>	HIGHEST POSSIBLE SCORE	SCORE	2	2
HIGHEST POSSIBLE SCORE	SCORE								
10	10								
HIGHEST POSSIBLE SCORE	SCORE								
2	2								

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## REPORT SUBTOTAL

HIGHEST POSSIBLE SCORE	SCORE
12	12

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## SUMMARY

	HIGHEST POSSIBLE SCORE		HIGHEST POSSIBLE SCORE
REVIEW	22	POLICY STANCE	10
REDUCE	56	REPORT	12

# TOTAL SCORE

HIGHEST POSSIBLE SCORE	SCORE
100	100



## Appendix 2: Survey Methodology – Consumer Perception

### CONDUCTED BY

Angus Reid Public Opinion

### SAMPLE SIZE

2,032

### METHODOLOGY

Online omnibus

### FIELD DATE

November 2009

### SAMPLE COMPOSITION

General US Population

Sample Weighting: Results were weighted according to the most current education, age, gender and region US Census data to ensure a random sample representative of the entire adult American population.

A Maxdiff methodology was employed to assist the respondents in evaluating the 97 companies represented across 10 different sectors. Respondents were given four tasks for each sector where they were asked to “choose the best and worst company in terms of their leadership in addressing climate change” out of a random group of 3-6 companies (dependent on the number of companies in each sector).

From November 6 - 12, 2009, Angus Reid Public Opinion conducted an online survey among 2,032 American adults who are Springboard America panelists. The margin of error – which measures sampling variability – was  $\pm 2.2\%$ . The results have been statistically weighted according to the most current education, age, gender and region US Census data to ensure a sample representative of the entire adult population of the United States.

The survey was divided into two parts (with five sectors in each part) in order to manage respondent fatigue and ensure the quality of the data. A total of 2978 completes were obtained for Part One (margin of error  $\pm 1.8\%$  at the 95% confidence level) and 2032 completes for Part Two. The data was collected over the following time frames: Part One Nov 6 – 9th and Part Two Nov 9 – 12th.

**Appendix 2 Continued: Survey Methodology – Consumer Perception**

	Field Dates	Sample Sizes	Margin of error 95% Confidence Level	Sectors
Part One	Nov 6 – 9th	2970	±1.8%	Electronics Banks Apparel Shipping Food & Beverage
Part Two	Nov 9 – 12th	2032	±2.2%	CPG Airlines Hotels ISM Food

Angus Reid Public Opinion polls in the US are conducted using the Springboard America ([www.springboardamerica.com](http://www.springboardamerica.com)) online panels, which are carefully recruited to ensure representation across all demographic and psychographic segments of these populations. Panel members pass through rigorous screening and a double opt-in process ensuring highly motivated and responsive members. These premier on-line survey platforms present respondents with highly visual, interactive, and engaging surveys, ensuring that panel members provide thoughtful and reliable responses. Each survey is actively sampled and weighted to model the characteristics of the universe required and employs the latest in quality control techniques to ensure data validity.

### Appendix 3: Limitations

Choosing climate change leadership as our measure of ‘actual’ sustainability necessitated the exclusion of certain other factors like community, charity and fair trade and ethical sourcing initiatives.

For the perception measure, we could not avoid the fact that some brands were less well known to consumers than others and acknowledge that the low perception scores of some of these lesser-known brands could be attributed to low awareness rather than negative consumer perception.

We believe we need to clarify the use of the word “brand”. MapChange uses the term to reference the corporate brand (Kellogg’s, Nestle, etc.) while Climate Counts generally uses “brand” to refer to the actual products (Pop Tarts, etc.). MapChange profiles the corporate brand’s sustainability perceptions (which inevitably are linked to consumer perceptions of a corporation’s sub-brands).

The scorecards could also have influenced the general increase in ‘perceived sustainability’ of this year over last. 2008’s scorecard, created by Change (actual) and Environics (perceived), was a broader, more general measure of overall sustainability, whereas this year’s, created by Climate Counts (actual) and Angus Reid Public Opinion (perceived), focused solely on climate change.

Lastly, in order to coordinate brand perception scores with Climate Counts’ actual scores, consumers were asked to rate their perception of company brands, not sub brands. In other words, respondents were asked to make a decision about the company, and not the individual brands in its roster.

To avoid confusion we provided respondents with the full list of the sub brands under each corporate brand.

**Contact Us**

For more information on the study or to obtain the map for your sector, please contact us:

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