

The SHIFT Report 2010 Update

Overview: The SHIFT Report is the most cohesive set of intelligence on people's attitudes, perceptions, behaviors around sustainability and social responsibility and the impact this has on lifestyle choices, brand relationships and purchase decisions. SHIFT looks collectively at sustainability, brand, lifestyle and media.

Opportunity: The SHIFT Report and its latest installation – a 5,000 person study - provides immediate and ongoing value. A robust, actionable research tool tailored to your needs, the insight in SHIFT reveals new opportunities, and helps evaluate and prioritize current ones in positioning, product development, partnership and marketing communications. SHIFT was developed with this need in mind.

Big Picture: While the majority of the marketing world has been talking sustainability as green, to consumers it's more than green, but a collection of issues, which include, but go far beyond 'environmental' concerns only. The SHIFT Report uncovered this qualitatively, and then validated it quantitatively.

SHIFT is fresh and broad, with a big picture approach to sustainability.

SHIFT is a continually updated market research tool with qualitative and quantitative research, cultural reporting and trend analysis. Ci offers The SHIFT Report research for sale in both custom and off-the shelf products, and leverages SHIFT in our brand consulting services.

We believe sustainability is a tool for innovation.

What SHIFT 2010 Reveals:

Sustainability Profile

- People's relationship with the myriad issues that define sustainability, that fall into the Four Pillars of Sustainability™: personal, social, environmental and spiritual sustainability.
- Where the rubber hits the road: How people's concern for these issues manifests in daily actions from merely sharing information with peers to voting with their wallet.
- Barriers to behavior: Understanding the attitude –action gap revealing peoples' relationship with the Four Barriers to Conscious Consumption™: Time, Knowledge, Price and Pressure.
- Categories of sustainable consumption: those areas people have made socially responsible and sustainable purchase and lifestyle choices, and those they are planning to.
- What motivates people to care about these issues, and ultimately make socially responsible lifestyle choices and purchase decisions?
- Specific areas people want to see tangible action if they are to believe a brands sustainability/CSR claims.

- Marketing: Vehicles consumers consider and seek out when looking for information about a brand's sustainability 'credibility and socially responsible initiatives. i.e. are they looking to print, TV, radio, blogs, social networking sites, friends and family, information via cell/mobile, point of sale etc.
- Digital Marketing and SEO: What search terms consumers are using when looking for more information about a product or service's sustainability and social responsibility commitments or "credibility.
- Brand Characteristics: What consumers look for when identifying a brand as socially responsible from product design to packaging, affiliation with a charitable brand, CSR reputation of retailer and more.
- How various Fortune 500 Brands are perceived by consumers as socially responsible or socially irresponsible.
- Consumer segmentation: Sustainability is a collection of issues for people, so we believe it's inherently flawed to look at a green only relationship, but more important to look at 'green' in the context of peoples' overall sustainability relationship. The Sustainability Passion Index reveals the true 'sustainability' segments of the population, based on looking at people's relationship with the issues of our time. Five distinct segments have emerged from our analysis. They are defined by their passion for specific sustainability issues.
- Each consumer segments' relationship with:
 - All of the sustainability relationship details outlined above
 - Specific media brands (print, TV and digital properties)
 - Technology + Social Media: blogging, social networking and sharing (Facebook, YouTube, MySpace, Twitter, Flickr etc), Internet TV, music and video downloading, gaming, print vehicles, TV vehicles etc
- Demographics: (age, HHI, region, gender, ethnicity, income, political affiliation, parents, grandparents)

Methodology

- Sample size: N=5,000 is a robust sample size to give us the ability to drill down and use the data accurately. Note that inputs are determined by preliminary qualitative research.
- Online questionnaire: Distributed across country, region, gender and age groups. Respondents recruited to ensure responses are collected from an Internet representative audience.
- Representative: North American general population (Canada and US), 18+

Customization and Brand Specific Options

- Perception of brand as socially responsible or socially irresponsible
- Looking specifically at the sustainability profile (as above) of a particular brand's consumer
- Looking at the brand relationship of a particular consumer group
- Various levels of consumer engagement from high to low frequency

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|--|---|------------------------------------|
| Nike | Disney | Verizon [US ONLY] |
| GE (General Electric) | Ebay | AT&T |
| Wal-mart | Samsung | Sprint |
| Adidas | H&M | T-Mobile [US ONLY] |
| Best Buy | Sony | Mercedes Benz |
| Radio Shack | Eileen Fisher | American Express |
| Sesame Street | Trader Joe's [US ONLY] | Visa |
| Mountain Equipment CO-OP (MEC) [CANADA ONLY] | A&P | Mastercard |
| The North Face | Heinz | Royal Bank of Canada [CANADA ONLY] |
| REI | Colgate | TD Bank [CANADA ONLY] |
| Starbucks | Amazon | Scotia Bank [CANADA ONLY] |
| Apple | Gap | Bank of America [US ONLY] |
| Microsoft | Old Navy | Bank of Montreal [CANADA ONLY] |
| Dell | Banana Republic | HSBC |
| Whole Foods | Target | Lexus |
| Safeway | Sephora | Volkswagen |
| HP | Avon | Mini |
| Lululemon | Aveda | Nissan |
| Virgin | The Body Shop | Toyota |
| Virgin Mobile | Motorola | BMW |
| Nature's Path | Johnson & Johnson | United Airlines |
| McDonalds | IBM | Air Canada |
| Future Shop [CANADA ONLY] | Nokia | West Jet |
| Ikea | Campbells | Jet Blue |
| Clorox | Chipotle | Southwest |
| Tide | Rona [CANADA ONLY] | Cathay Pacific |
| Timberland | Green Works | British Airways |
| Tostitos | Taco Bell | Delta |
| Tropicana | Terasen Gas [CANADA ONLY] | Virgin America |
| Pepsi | PG&E (Pacific Gas & Electric) [US ONLY] | |
| Coca Cola | Telus [CANADA ONLY] | |
| Lay's | Rogers [CANADA ONLY] | |

Sustainable Consumption Categories Include

Macro Categories:

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|------------------|--------------------------|--|
| Home cleaning | Personal banking choices | Clothing |
| Home decorating | Financial investments | Shoes and footwear |
| Vacation choices | Food choices | Purchase/lifestyle decisions for my children |
| | Home energy choices | |

Pet products
Gardening or yard work
Gift giving

Daily transportation choices
(excluding specific car
purchases and items like fuel)

Choices related to my
profession
Choices related to my car itself

Micro Categories

Home cleaning

- Laundry detergent
- Dishwasher soap
- Dishwashing (by hand) soap
- All purpose cleaner

Home decorating

- Linens/bedding
- Lighting
- Flooring
- Paint

Vacation choices

- Airline
- Rental car
- Destination

Personal banking choices

- Day-to-day banking
- Credit card choices
- Mortgage

Food choices

- Fresh produce: fruits and vegetables
- Milk & dairy
- Meat
- Seafood
- Snack foods
- Breads and cereals

Home energy choices

- Lighting choices
- Home heating
- Oven
- Water heater
- Dishwasher
- Washing machine
- Dryer
- Furnace or boiler
- BBQ
- Computer
- TV
- Other electronics (not including TV and computer)

Clothing

- Pre-owned clothing
- Organic clothing
- Ethically produced clothing

Shoes and footwear

- Pre-owned
- Organic
- Ethically produced

Purchase/lifestyle decisions for my children

- Clothing for my children
- Toys for my children
- Hair or skin care for my children
- Food for my children

Pet products

- Food
- Cleaning and grooming

Gardening or yard work

- Fertilizers
- Pest control
- Weed control

Daily transportation choices (excluding specific car purchases and items like fuel)

- Carpooling
- Biking
- Public transportation

Choices related to my car itself

- Vehicle purchase: choosing the most fuel-efficient vehicle I can
- Fuel: choosing a gas/fuel brand that is more socially responsible

Media Brands Include

Digital

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|------------|-------------------|---------------------------------------|
| • Facebook | • CNN.com | • Washingtonpost.com |
| • YouTube | • Cbc.ca | • NYTimes.com (New York Times online) |
| • Flickr | • Treehugger.com | • Guardian.co.uk |
| • HGTV.com | • Active.com | • usatoday.com |
| • iTunes | • Oprah.com | • Twitter |
| • Google | • Wikipedia | • eons.com |
| • Yahoo! | • epicurious.com | • planetgreen.com |
| • MSN | • Amazon.com | |
| • NPR.org | • Huffington Post | |

Broadcast

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|----------------|-----------------------|---------|
| • HGTV | • Discovery | • CBS |
| • Lifetime | • Discovery Health | • NBC |
| • Global | • MTV | • FOX |
| • CBC | • BBC | • ESPN |
| • CTV | • National Geographic | • USA |
| • Fine Living | • HBO | • Bravo |
| • Food Network | • ABC | • AMC |

Print

- Shape
- Self
- Men's Health
- Women's Health
- Wired
- Lucky
- National Geographic Adventure
- USA Today
- Vogue
- Elle
- Marie Claire
- Cosmopolitan
- Vanity Fair
- Rolling Stone
- Canadian House and Home
- Martha Stewart Living
- Canadian Gardening Magazine
- Fine Gardening Magazine
- AARP The Magazine
- Readers Digest
- Better Homes and Gardens
- Cookie
- Canadian Living
- "O" Oprah Magazine
- Parenting
- Real Simple
- Bon Appetit
- Gourmet
- Ebony
- Car & Driver
- Time
- Sports Illustrated
- Popular Mechanics

Lifestyle Activity and Behavior Includes

- Hiking
- Running
- Gardening
- Volunteering
- Cooking at home
- Making a meal from scratch
- Seeing a movie at the movie theater
- Attending concerts
- Blogging
- Reading blogs
- Commenting to blogs
- Attending sporting events
- Taking a class
- Downloading music off the Internet
- Downloading movies or television shows off the Internet
- Playing video games
- Supporting local businesses
- Watching videos on the Internet (e.g., YouTube, Vimeo, Hulu)
- Consuming soy based food or beverage products
- Shopping online
- Use my debit card for purchases
- Use my credit card for purchases
- Use cash for purchases
- Playing golf
- . Meditation or prayer
- Yoga
- Use Twitter
- Shopping at the mall
- Shopping at the farmer's market
- Shop on Ebay
- Sell on Ebay
- Travel for business
- Travel for personal vacation
- Use Facebook

"Many people trying to market sustainability efforts barely know what the word means, and have no new ideas for how to explore and explain it -- that's what makes Ci and their SHIFT Report so refreshing. They combine deep, grounded knowledge of the sustainability landscape with fresh thinking and hot insights about how to actually get through to people about what your business is doing for the planet and humanity. SHIFT is about changing your thinking, not just the buzzwords in your pamphlets."

- Alex Steffen
CEO and Executive Editor, Worldchanging
Author, Worldchanging: A User's Guide for the 21st Century