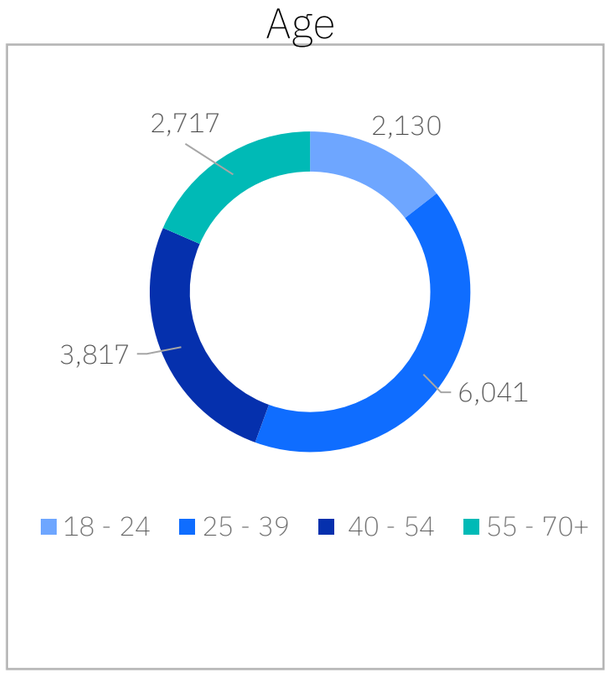
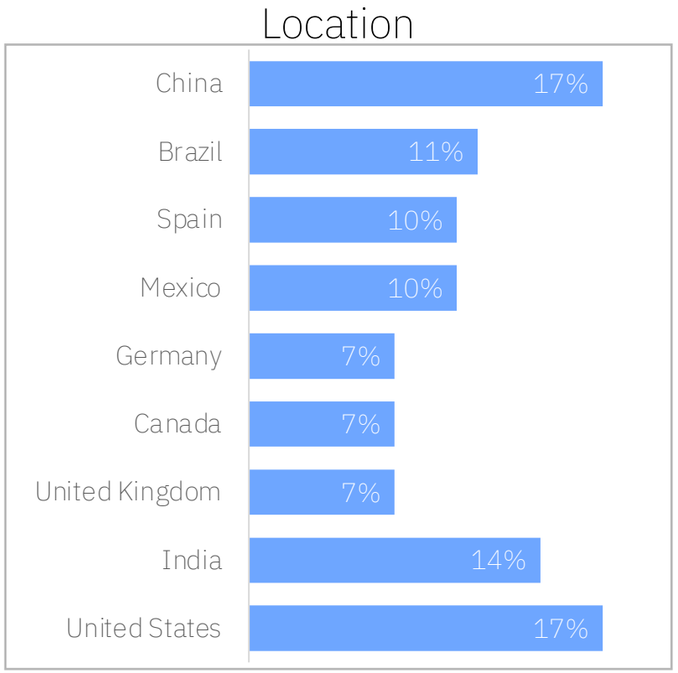
IBM Institute for Business Value Global Consumer Study

The strength of our resolve

How environmental causes impact our behavior

IBM surveyed more than 14,000 consumers in nine countries during March 19-24, 2021

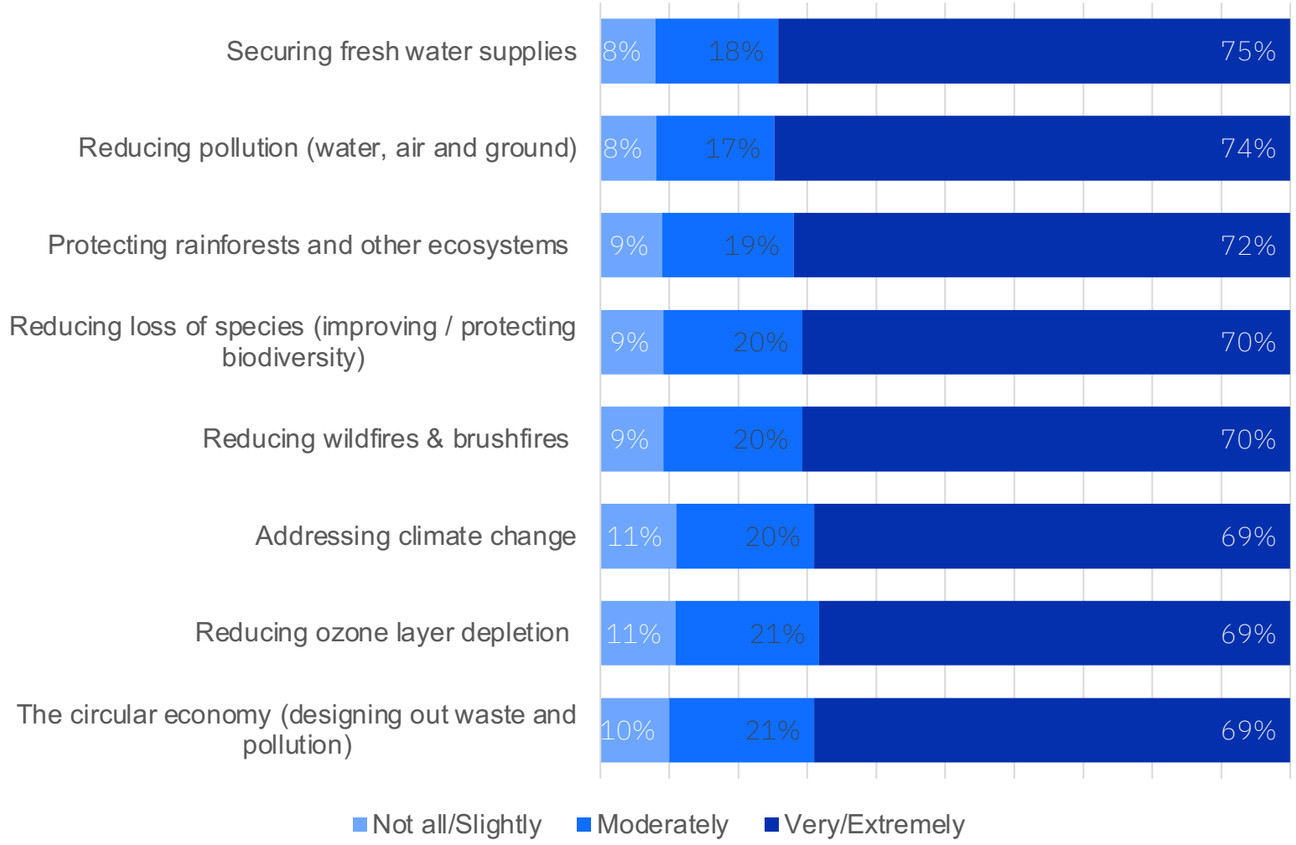




Knowledge, importance and general perspectives

Overall, respondents see environmental sustainability issues as important, with a majority reporting they find these issues personally important

Q16: Importance of issues in Environmental Sustainability to you personally TODAY

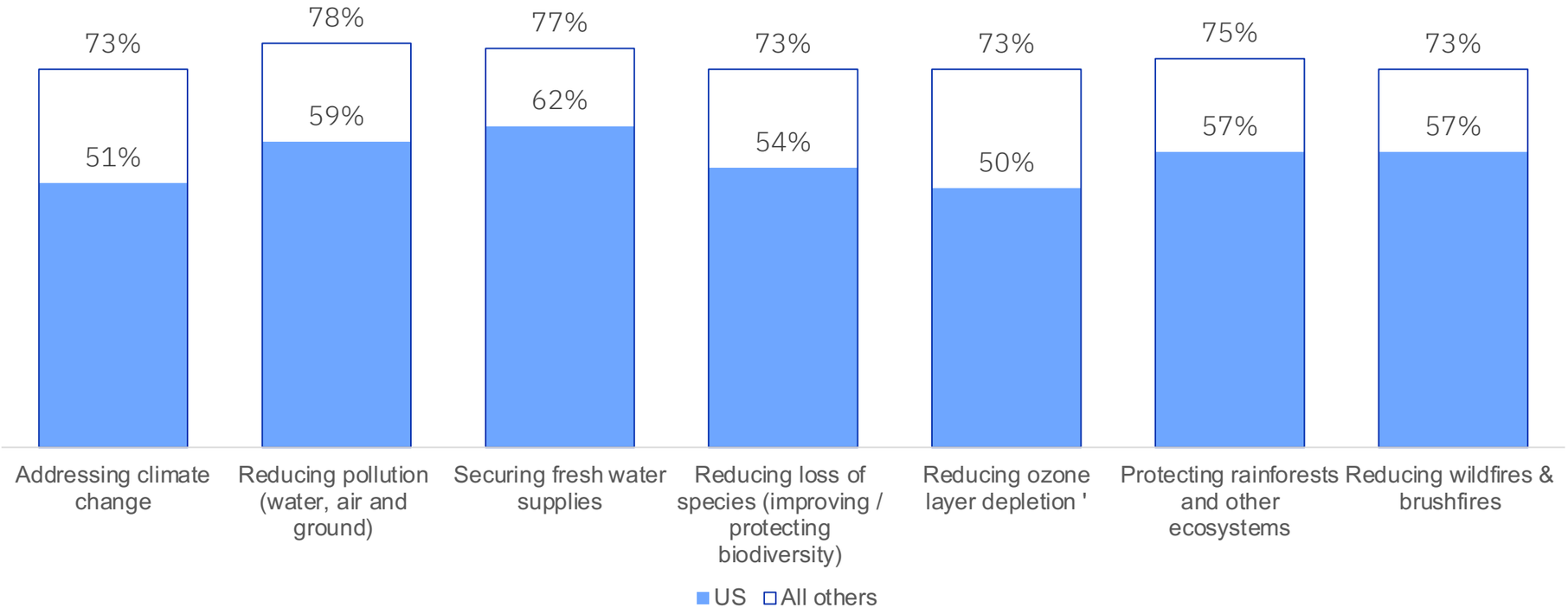


- All ER issues were seen as at least very important by nearly two-thirds of the respondents or more
- While there were minor differences in age groups, they were not statistically different, nor in gender
- In the US, addressing climate change was 18 percentage points under the average. Mexico was 15 percentage points over.
- The US was 15 percentage points under on pollution and 13 percentage points under on securing water. 16 percentage points on loss of species and 19 percentage points under on the Ozone. They were also under 17 percentage points on the rainforest (see additional slide)
- Those in rural areas were 10 percentage points under on biodiversity

Q16.x: Importance of the issue in Environmental sustainability to you personally TODAY , (4,5) – x; n=14705, *some totals may be slightly lower or higher than 100% due to rounding.

Issues of environmental sustainability were less personally important to individuals in the US than in other countries. In fact, the US had the lowest "very or extremely" important scores in 7 out of 7 categories.

Q16: Importance of the issue in Environmental Sustainability to you personally TODAY, respondents choosing very or extremely important



Q16: Importance of the issue in Social Responsibility to you personally TODAY, n=14,705, respondents choosing very or extremely important

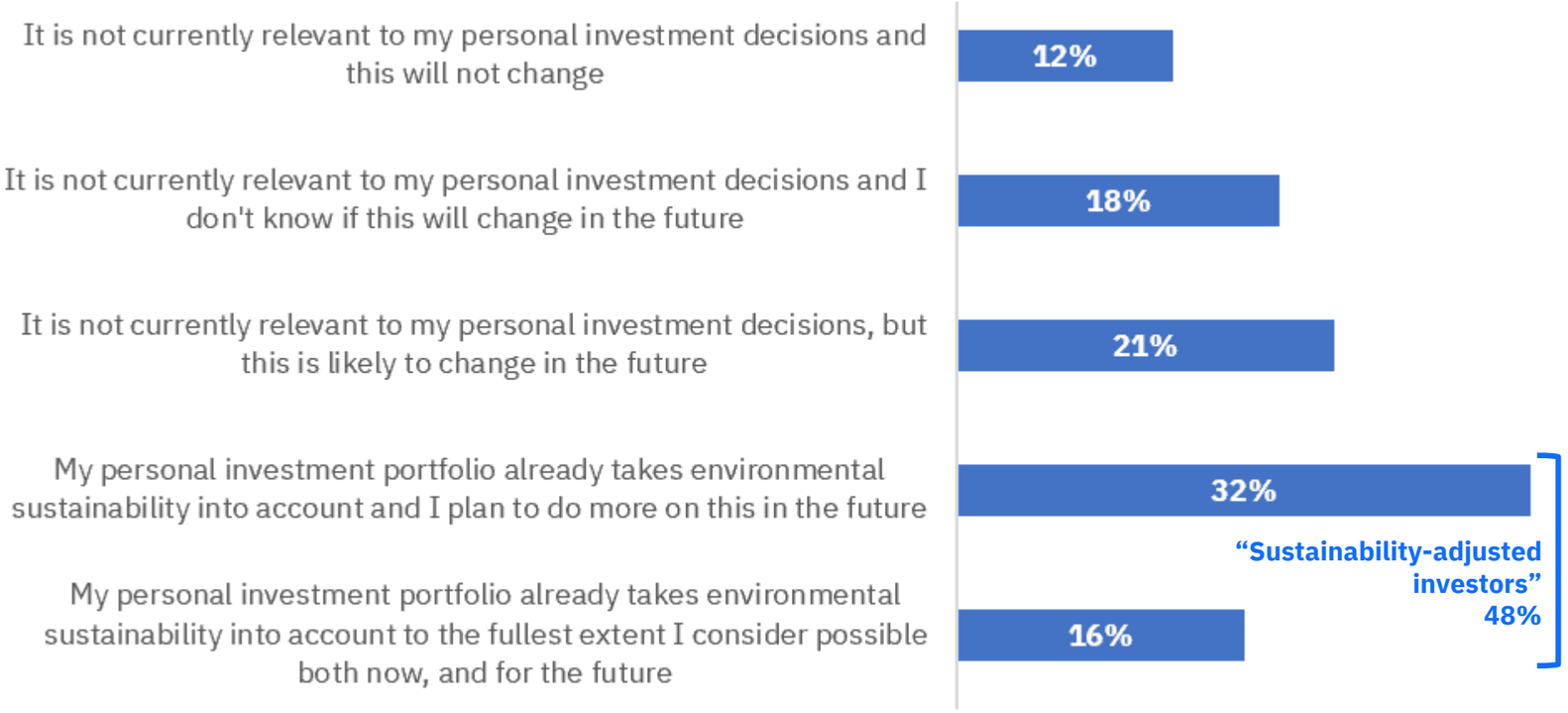
Investing

IBM **Services**

Nearly half (48%) of all personal investors already take environmental sustainability into account in their investment portfolios and a further fifth (21%) say they are likely to do so in the future

Which of the following statements best represents the link between environmental sustainability and your personal investment portfolio?

n6,339



- 12% of personal investors say environmental sustainability is not relevant to their personal investment decisions currently and that this will not change.
- 21% of personal investors say environmental sustainability is not currently relevant to their personal investment decisions but this is likely to change.
- Nearly half (48%) of personal investors already take environmental sustainability into account in their personal investment portfolios ("sustainability-adjusted investors").
- 16% of personal investors consider their portfolios already take environmental sustainability into account to the fullest extent possible both now and for the future. This is one third of the "sustainability-adjusted investors".
- Age group differences are relatively modest for each of these categories. "Sustainability-adjusted investors" (48%) differ a little by age:
  - 25-39yrs: 53%
  - 40-54yrs: 48%
  - 18-24yrs: 44%
  - 55-70+yrs: 39%

Source: Q24 Which of the following statements best represents the link between environmental sustainability and your personal investment portfolio? *(Select one) Answer options as shown above*
Personal investors are respondents who said that they expect to have any of the following in answer to Q22 (Which of the following do you expect to have 12 months from now?): Direct holding of company shares or bonds; Company shares or bonds held through a retirement fund; Company shares or bonds held through funds other than a retirement fund. Personal investors n6,339
Some totals may be slightly lower or higher than 100% due to rounding.

83% of personal investors plan to take action on social responsibility and/or environmental sustainability through their portfolios in the next 12 months

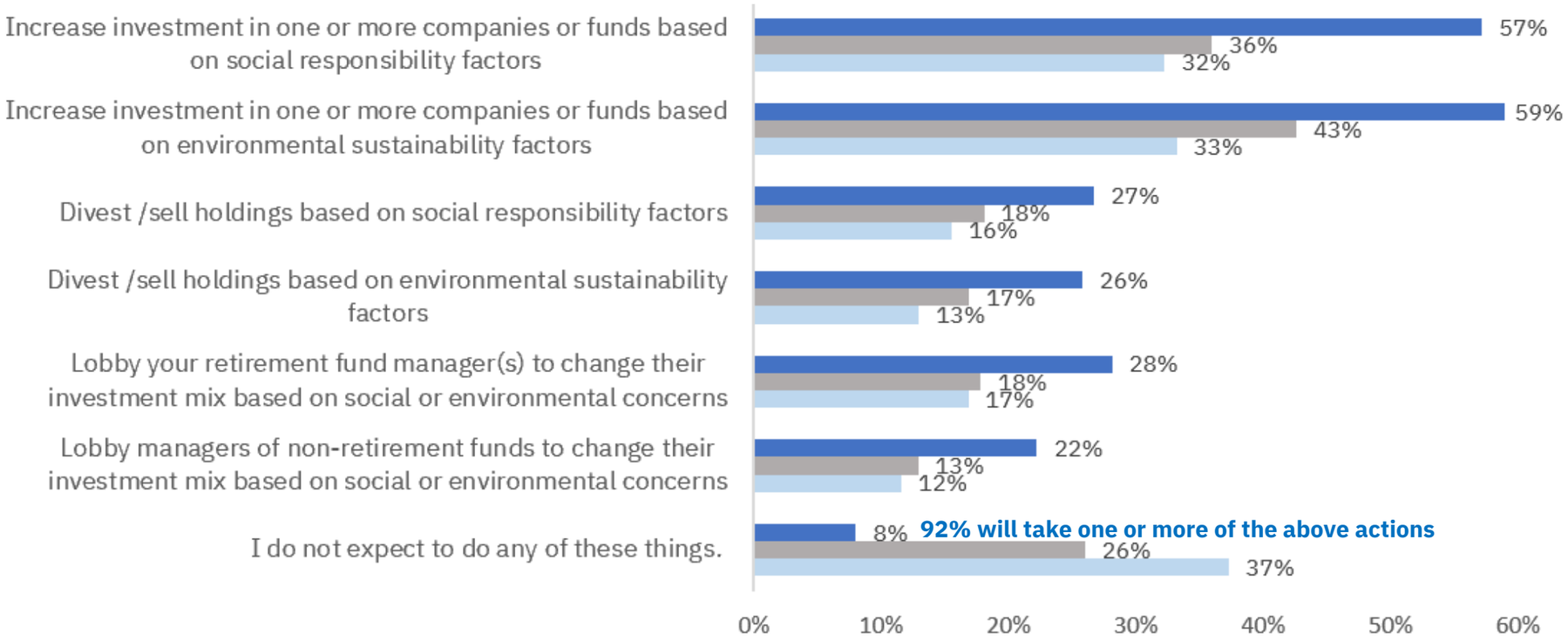
Which of the following do you expect to do in the next 12 months? (Select all that apply)

- 83% of personal investors say they will invest, divest or lobby fund managers to change investment mixes based on social responsibility and/or environmental sustainability factors in the next 12 months.
- More than half of personal investors (51%) say they will increase investment in one or more companies or funds in the next 12 months based on environmental sustainability factors.
- The proportion of personal investors who expect to increase investment in the next 12 months based on environmental sustainability (51%) is more than double the proportion expecting to divest holdings (22%) in the next 12 months based on environmental sustainability.
- The percentage of personal investors who expect to increase investment in the next 12 months based on social factors and environmental factors are each more than 2x the proportions that plan to divest holdings or lobby fund managers based on these factors.
- Meanwhile, "sustainability-adjusted investors" *(a sub-set of personal investors – see previous slide)* are consistently more likely to take each type of action. 62% of them plan to increase investment in the next 12 months based on environmentally sustainable factors.
- The percentage of respondents age 25-39yrs for each answer option other than 'I do not expect to do any of these things' is higher than other age groups, but the differences are not large, except with those age 55+, for whom we might expect portfolios to be more stable, or locked-in to retirement packages and similar. 48% of personal investors age 55+ do not expect to do any of these things in the next 12 months.

Source: Q23. Which of the following do you expect to do in the next 12 months? (Select all that apply) Options as above. The final option - "I do not expect to do any of these things" - was exclusive.
n6,339

Nearly 1.5x more of the personal investors who consider climate change risk as financial risk expect to change their investment portfolio in the next 12 months based on environmental and/or social reasons

Which of the following do you expect to do in the next 12 months?



I consider climate change risks as part of my assessment of financial risk when making personal investment decisions

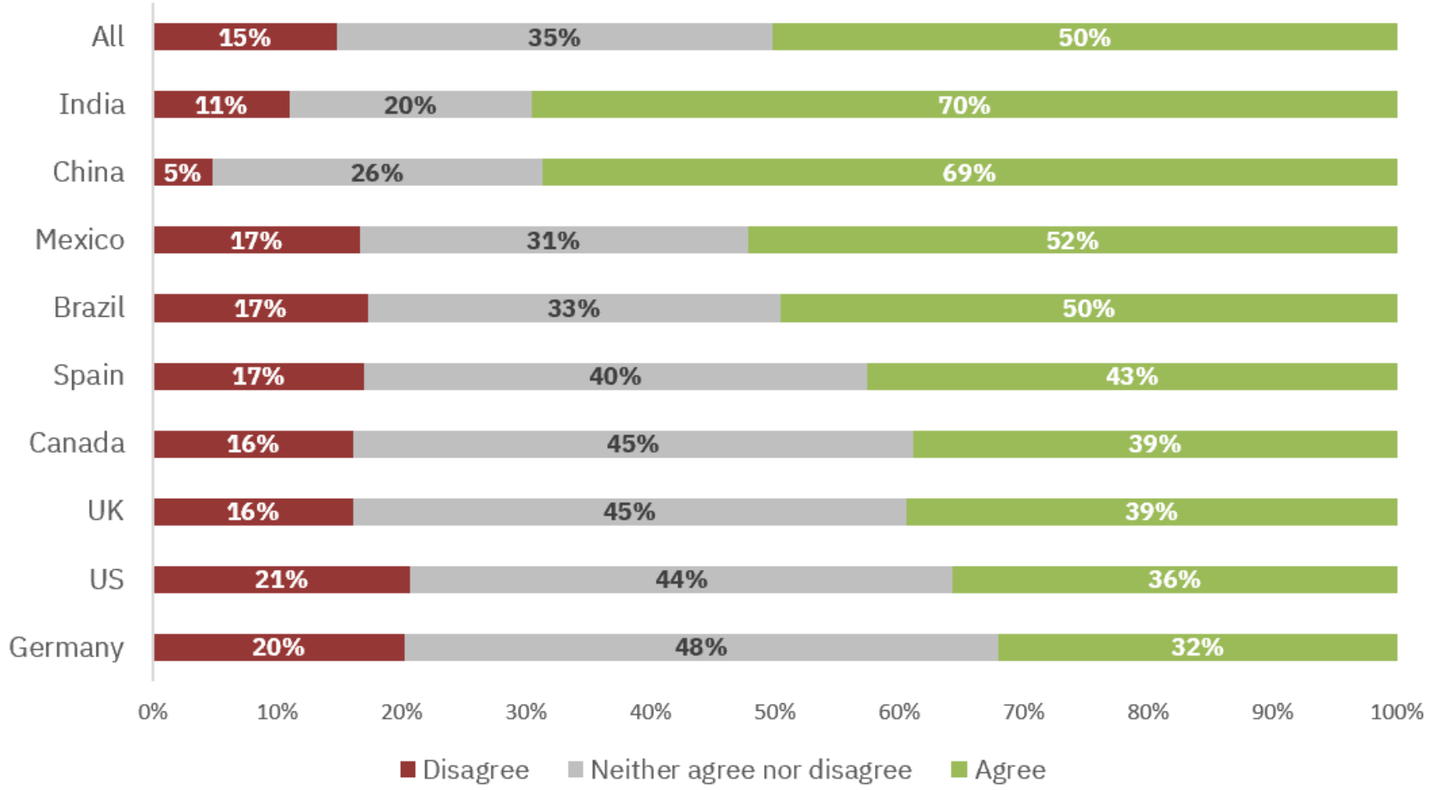
Agree | Neither agree nor disagree | Disagree

- 92% of personal investors who consider climate change risk as financial risk expect to invest, divest or lobby fund managers to change investment mixes based on social responsibility and/or environmental factors in the next 12 months. This is nearly 1.5x higher than personal investors who do not consider climate change risk as financial risk.
- 59% of personal investors who consider climate change risks as part of their assessment of financial risk when making personal investment decisions plan to increase investment in the next 12 months based on environmental sustainability.
- Whether it is increasing investment, selling holdings or lobbying fund managers, in each case, a higher proportion of personal investors who consider climate change risk as part of their financial risk expect to take action in the next 12 months, compared with personal investors who don't consider climate change risk.
- The proportion of personal investors who consider climate risk as financial risk expecting to divest holdings in the next 12 months based on environmental sustainability factors (26%) is double that of those who don't consider climate risk as financial risk (13%).

Source: Q23 Which of the following do you expect to do in the next 12 months? *(Select all that apply) Answer options as shown above.* n6,339
Q25.7 Please indicate your agreement or disagreement with the following statements: I consider climate change risks as part of my assessment of financial risk when making personal investment decisions.

Attitudes to climate risk as investor financial risk vary significantly around the world: in China and India more than two-thirds agree that the climate change exposure of a company impacts an investor's financial risk, while in Germany less than one-third agree

Please indicate your agreement or disagreement with the following statement:
The climate change exposure of a company impacts my financial risk as an investor



Source: Q25.6 Please indicate your agreement or disagreement with the following statements. *(Rate each on a scale of 1-5 where 1 = strongly disagree, 2 = somewhat disagree, 3 = neither agree nor disagree, 4 = somewhat agree, 5 = strongly agree)* The climate change exposure of a company impacts my financial risk as an investor. n14,705
Some totals may be slightly lower or higher than 100% due to rounding.

- Half of all surveyed consumers agree that the climate change exposure of a company impacts investors' financial risk. Around a further one third (35%) neither agree nor disagree.
- Only 15% of all surveyed consumers disagree that the climate change exposure of a company impacts financial risk as an investor.
- Respondents in Brazil reflect the overall average profile. The country is 4th highest ranked by level of agreement. India and China have by far the highest levels of association of climate risk with financial risk, whereas Germany, US, UK and Canada are most dominated by uncertainty.
- Meanwhile, associating climate risk with financial risk is also linked with higher levels of knowledge:
  - 65% of respondents with a Master's or postgraduate degree agree that the climate change exposure of a company impacts financial risk as an investor, with agreement decreasing as education level decreases, to 31% of respondents with no schooling completed;
  - 67% of respondents who say they are highly informed about topics in the area of environmental sustainability agree that the climate change exposure of a company impacts financial risk as an investor, compared with 46% of those who say they feel generally well informed and 27% of those who say they know little to nothing about topics in the area of environmental sustainability.
- There is no strong pattern by age group:
  - 18-24yrs: 47% agree, 18% disagree
  - 25-39yrs: 58% agree, 12% disagree
  - 40-54yrs: 48% agree, 14% disagree
  - 55-70+yrs: 39% agree, 20% disagree

81% of people who consider climate change risks as part of their assessment of financial risk when making personal investment decisions say that addressing climate change is very or extremely important

I consider climate change risks as part of my assessment of financial risk when making personal investment decisions

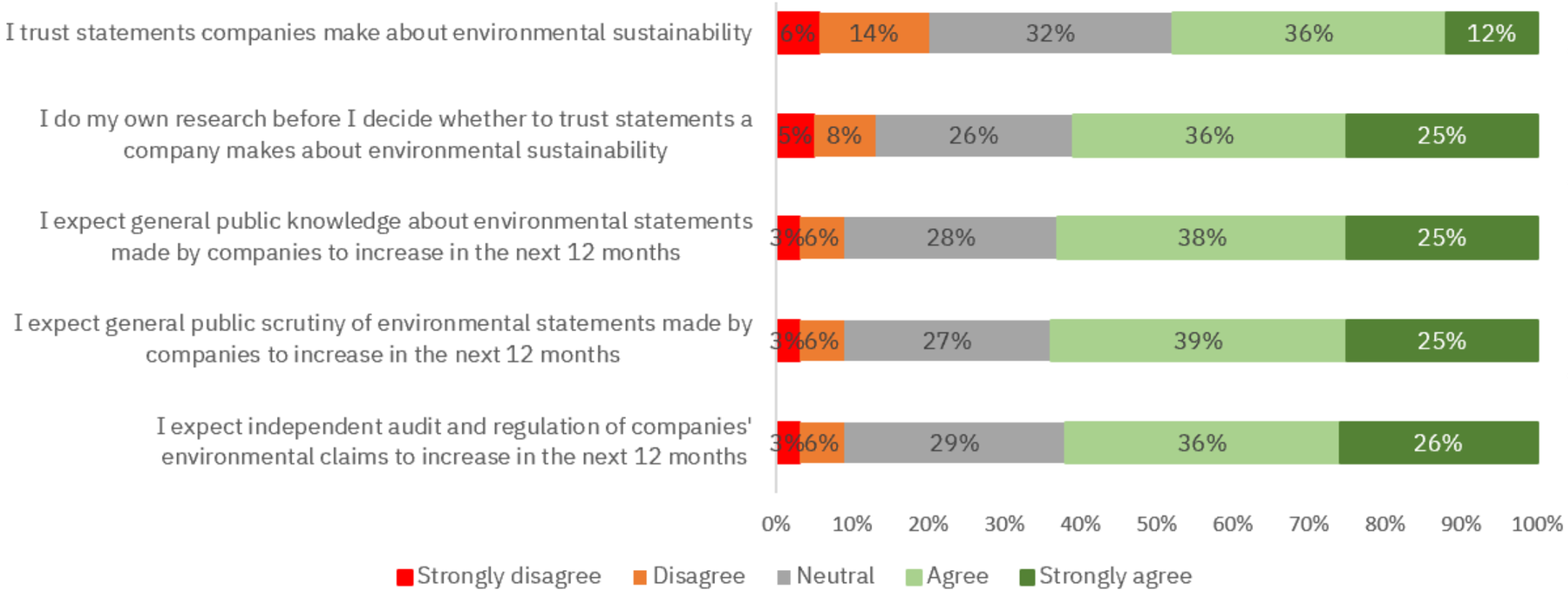
Importance of addressing climate change to me	**Disagree** n2,280 (16%)	**Neither agree nor disagree** n4,947 (34%)	**Agree** n7,478 (51%)
Not at all or Slightly Important	28%	11%	5%
Moderately Important	22%	29%	14%
Very or Extremely Important	49%	60%	**81%** >16x

- 81% of people who consider climate change risks as part of their assessment of financial risk when making personal investment decisions say that addressing climate change is very or extremely important to them. This is more than 16x the proportion who say that addressing climate change is not at all or slightly important.
- Those who say they do not consider climate change risks as part of financial risk when making personal investment decisions are in a small minority (16%) and even though they don't equate climate risk with financial risk around half (49%) of these respondents still say that addressing climate change is very or extremely important to them.
- Neither of these factors – the importance of addressing climate change, nor consideration of climate risk as financial risk – are strongly linked with age groups. The highest proportion by age group of respondents who consider addressing climate change to be very or extremely important (72%) are aged 25-49. The highest proportion by age group to consider climate risk in investment decisions (59%) are also aged 25-49. Fewer respondents aged 55+ consider climate risk in investment decisions (37%).

Source: Q25 Please indicate your agreement or disagreement with the following statements: *(Rate each on a scale of 1-5 where 1 = strongly disagree, 2 = somewhat disagree, 3 = neither agree nor disagree, 4 = somewhat agree, 5 = strongly agree)* 25.7 I consider climate change risks as part of my assessment of financial risk when making personal investment decisions
Q16 How important would you say the following topics in these issue areas are to you personally TODAY? *(Rate each on a scale of 1-5 where 1=Not at all, 2=Slightly, 3=Moderately, 4=Very, 5= Extremely)*
16.1 Addressing climate change
n14,705
Some totals may be slightly lower or higher than 100% due to rounding.

Nearly half (48%) of surveyed consumers trust statements companies make about environmental sustainability but nearly two-thirds (64%) expect general public scrutiny of companies' environmental statements to increase in the next 12 months

Please indicate your agreement or disagreement with the following statements



- Nearly half (48%) of surveyed consumers trust statements companies make about environmental sustainability. 32% are neutral.
- 20% of surveyed consumers mistrust statements companies make about environmental sustainability but *only 6% strongly.*
- Nearly two-thirds of surveyed consumers expect public knowledge about (63%) - and scrutiny of (64%) - environmental statements made by companies to increase in the next 12 months. A quarter strongly expect this, in both cases.
- A clear majority (61%) of surveyed consumers expect independent audit and regulation of companies' environmental claims to increase in the next 12 months. More than a quarter (26%) of all surveyed consumers strongly expect this to be the case.
- 67% of those aged 25-39 do their own research compared to 53% of those aged 55yrs+

Source: Q25.1 – Q25.5 Please indicate your agreement or disagreement with the following statements. *(Rate each on a scale of 1-5 where 1 = strongly disagree, 2 = somewhat disagree, 3 = neither agree nor disagree, 4 = somewhat agree, 5 = strongly agree)*
Statements exactly as shown above
N14,705

More than three-quarters of people who trust statements companies make about environmental sustainability say they do their own research before deciding whether to trust

I trust statements companies make about environmental sustainability

I do my own research before I decide whether to trust statements companies make about environmental sustainability	Disagree	Neither agree nor disagree	Agree
	20%	32%	48%
Disagree	27%	13%	7%
Neither agree nor disagree	24%	39%	18%
Agree	49%	47%	**76%**

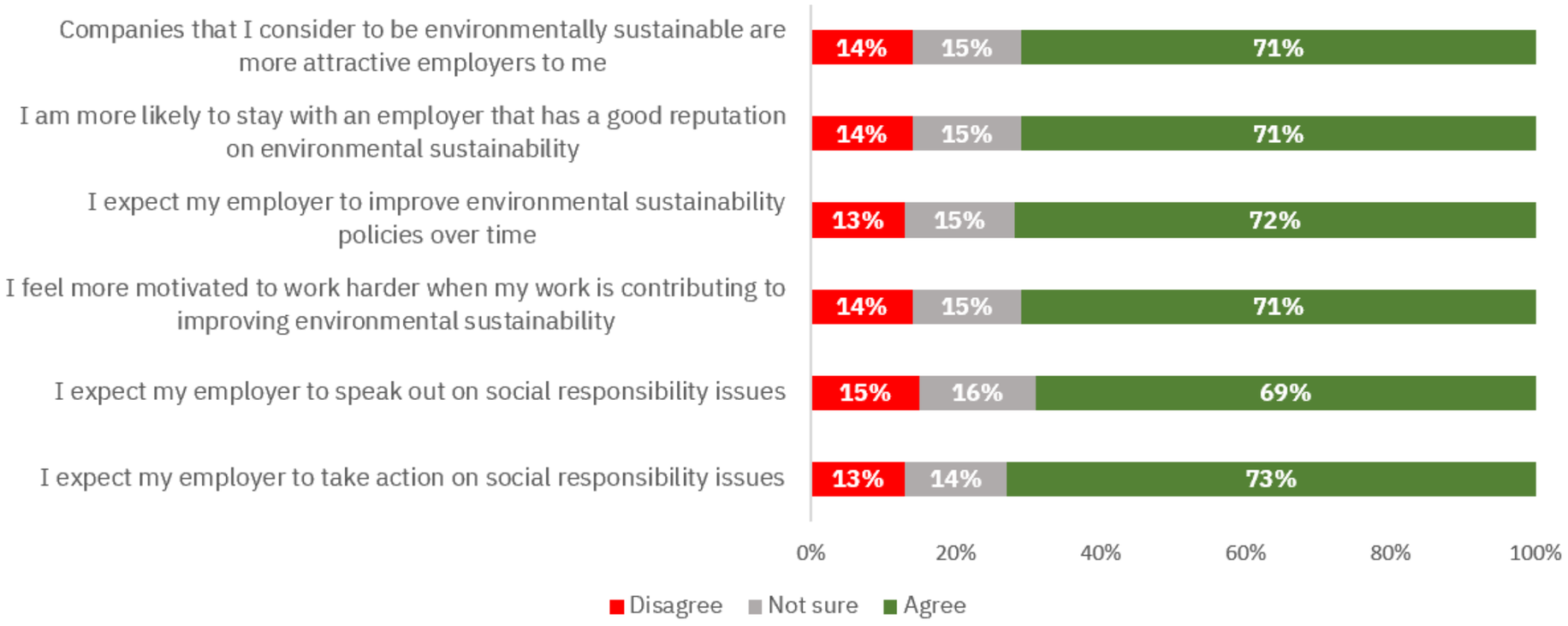
- Of the 48% of respondents who say they trust statements companies make about environmental sustainability, more than three-quarters (76%) say they do their own research before making a decision on trust.
- One in five (20%) of respondents do not trust statements companies make about environmental sustainability and nearly half of these (49%) say they do their own research before making a decision.
- Research can also lead to uncertainty – 47% of those who do their own research say they neither agree nor disagree that they trust statements companies make about environmental sustainability. *This could reflect differences between companies e.g. research on one company may lead to trust and another may lead to mistrust.*
- Meanwhile, trust is not strongly linked with gender or age. Trust is otherwise linked with:
  - Countries (> 2/3 from India and China trust; approx. 1/3 trust from US, UK, Canada, Germany, Spain… i.e. similar to the climate risk profile shown on earlier slide)
  - Levels of knowledge and engagement with the topic – including engagement through personal investment.

Source: Q25 Please indicate your agreement or disagreement with the following statements:
(Rate each on a scale of 1-5 where 1 = strongly disagree, 2 = somewhat disagree, 3 = neither agree nor disagree, 4 = somewhat agree, 5 = strongly agree)
Q25.1 I trust statements companies make about environmental sustainability
25.2 I do my own research before I decide whether to trust statements a company makes about environmental sustainability
n14,705

Employment

71% of the employed and employment seekers say that environmentally sustainable companies are more attractive employers

Please indicate your agreement or disagreement with the following statements

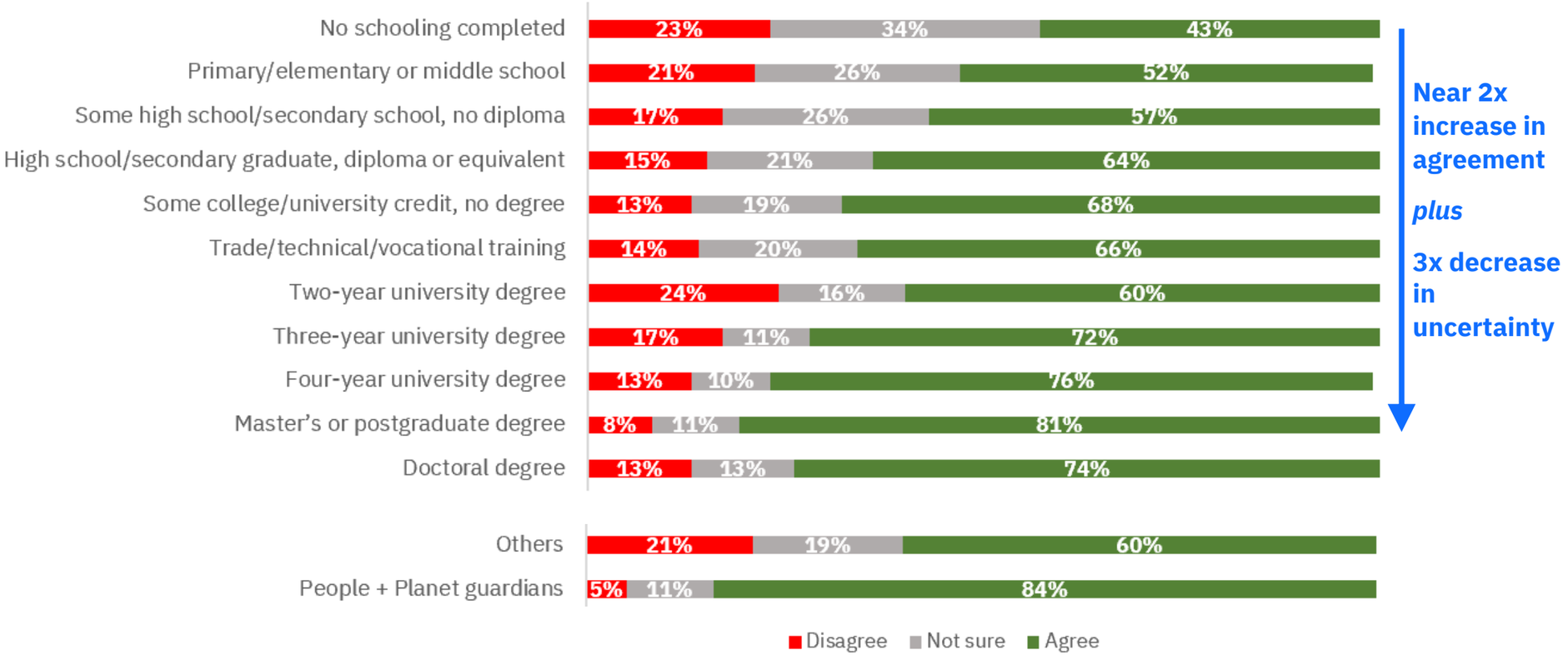


- 71% of employees and those seeking employment think of companies they consider to be environmentally sustainable as more attractive employers.
- 71% of employees and those seeking employment are more likely to stay with an employer that has a good reputation on environmental sustainability.
- 72% of employees and those seeking employment expect employers to improve environmental sustainability policies over time.
- 71% of employees and those seeking employment feel more motivated to work harder when their work is contributing to improving environmental sustainability.
- 69% of surveyed consumers expect employers to speak out on social responsibility issues and 73% expect employers to take action on these issues
- Meanwhile, in all instances fewer respondents who are full-time employed are unsure and more respondents who are currently seeking employment are unsure.
- Age groups do not answer substantially differently, though those aged 25-39 are almost always most in agreement. Their most significant differences are: (1) 73% agree that 'companies I consider environmentally sustainable are more attractive employers' vs 64% for 18-24yrs; (2) 75% agree 'I am more likely to apply for a job with a company I consider socially responsible' vs 66% for 55-70+yrs.

Source: Q26 Please indicate your agreement or disagreement with the following statements *(For each statement, indicate whether you 1. Agree, 2. Disagree or 3. Not sure.)*
Answer options as shown above
n11,595
Respondents are a. Employed-part-time, b. Employed—Full-time, d. Unemployed-currently seeking employment

Nearly twice as many respondents who are the most highly educated employed and employment seekers consider environmentally sustainable companies more attractive employers. Three times fewer respondents in this group are uncertain.

Companies that I consider to be environmentally sustainable are more attractive employers to me

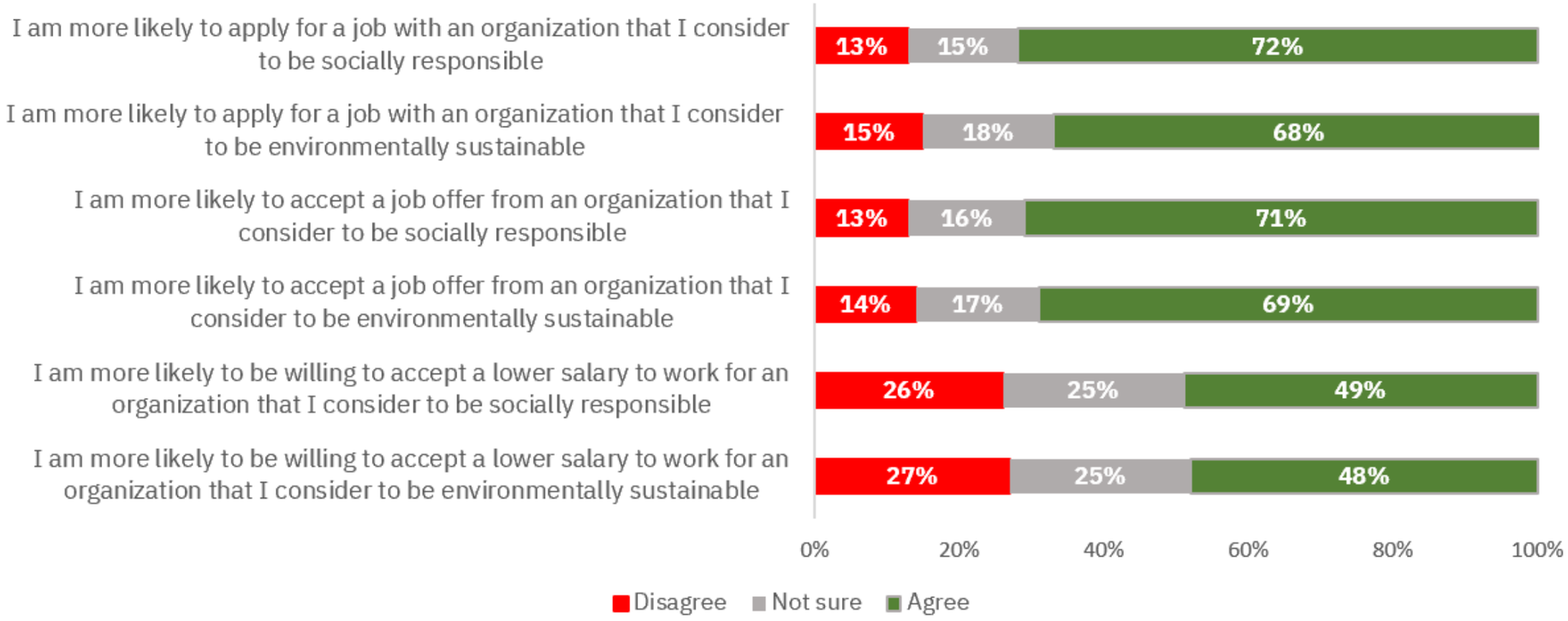


- Agreement nearly doubles (43%->81%)– and uncertainty falls even more (34%->11%) - from lowest to highest levels of education.
- More than half of all respondents with at least school education, who are employed or seeking employment, consider environmentally sustainable companies more attractive employers.
- *Notes:* 'No schooling completed' was a small (0.6%) group within the sample; Doctoral degree category overlaps with others
- Country remains a factor, though the greatest differences between countries are not as great as the differences shown between education levels:
  - India 85% agree, 8% disagree
  - US 57% agree, 24% disagree
- Meanwhile, age is again not a strong differentiator:
  - 18-24yrs 64% agree, 18% disagree
  - 25-39yrs 73% agree, 14% disagree
  - 40-54yrs 70% agree, 13% disagree
  - 55-70+yrs 66% agree, 14% disagree

Source: Q26 Please indicate your agreement or disagreement with the following statements *(For each statement, indicate whether you 1. Agree, 2. Disagree or 3. Not sure.)*
Answer option as shown above
n11,595
Respondents are a. Employed-part-time, b. Employed—Full-time, d. Unemployed-currently seeking employment

More than two-thirds of the full potential workforce* are more likely to apply for and accept jobs with socially and environmentally responsible organizations – *and nearly half would accept a lower salary to work for such organizations*

Thinking about your next job working for an employer, please indicate your agreement or disagreement with the following statements



- 72% are more likely to apply for a job with an organization they consider to be socially responsible.
- 68% are more likely to apply for a job with an organization they consider to be environmentally sustainable.
- 71% are more likely to accept a job offer from an organization they consider to be socially responsible.
- 69% are more likely to accept a job offer from an organization they consider to be environmentally sustainable.
- Nearly half are more willing to accept a lower salary to work for organisations they consider to be socially responsible / environmentally sustainable.
- Age groups differ about willingness to accept lower salaries, e.g. for environmentally sustainable employers (similar for socially responsible):
  - 18-24yrs 46% agree, 24% disagree
  - 25-39yrs 53% agree, 24% disagree
  - 40-54yrs 45% agree, 30% disagree
  - 55-70+yrs 37% agree, 36% disagree

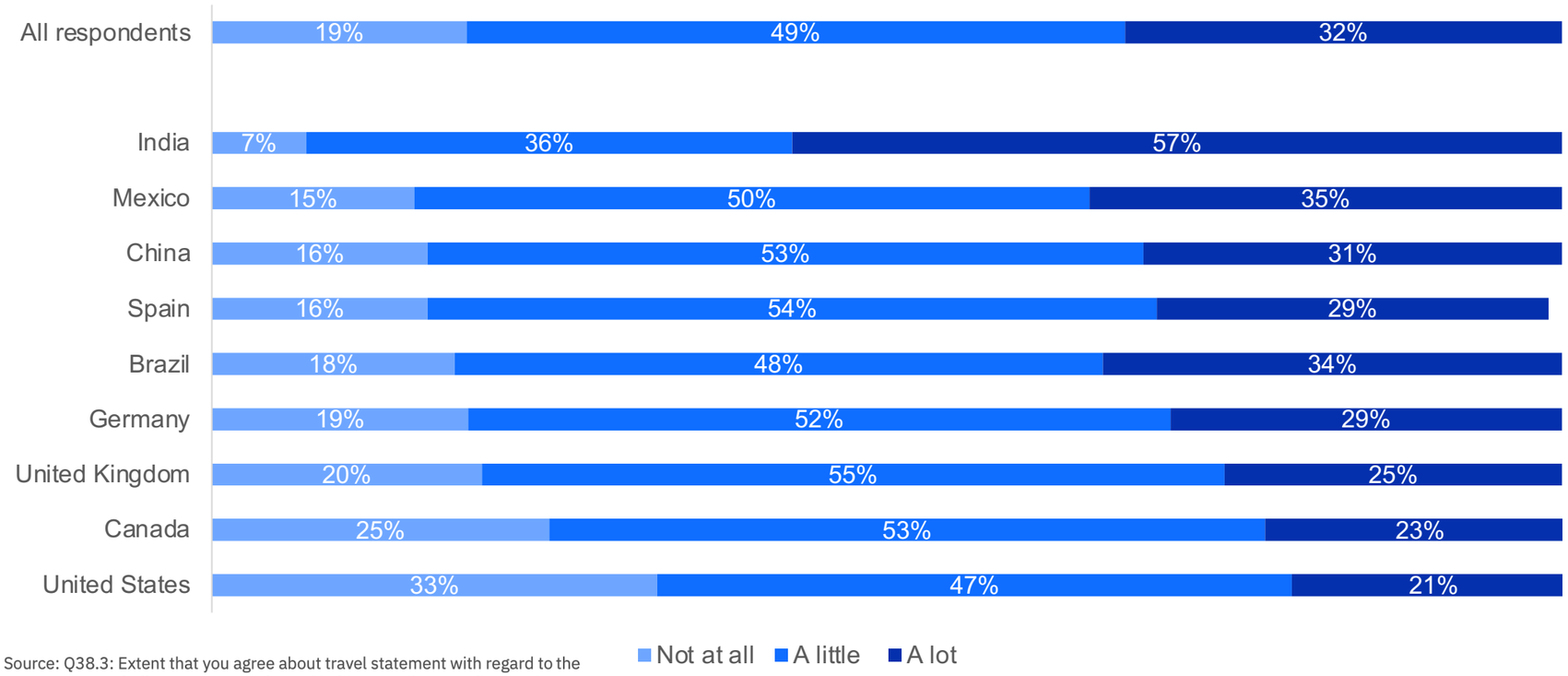
Source: Q27 Thinking about your next job working for an employer, please indicate your agreement or disagreement with the following statements. *(For each statement, indicate whether you 1. Agree, 2. Disagree or 3. Not sure.)* Answer options as shown above
m12,268
* Respondents, described here as the full potential workforce are a. Employed-part-time, b. Employed—Full-time, d. Unemployed-currently seeking employment, c. Full-time student or apprentice
Some totals may be slightly lower or higher than 100% due to rounding.

Travel & mobility

IBM **Services**

Almost one in three respondents strongly believe their personal travel habits contribute to climate change; however, Americans lag their global peers in that regard

To what extent do you agree with the following statement about travel with regard to the environment: *I believe my personal travel habits contribute to climate change*



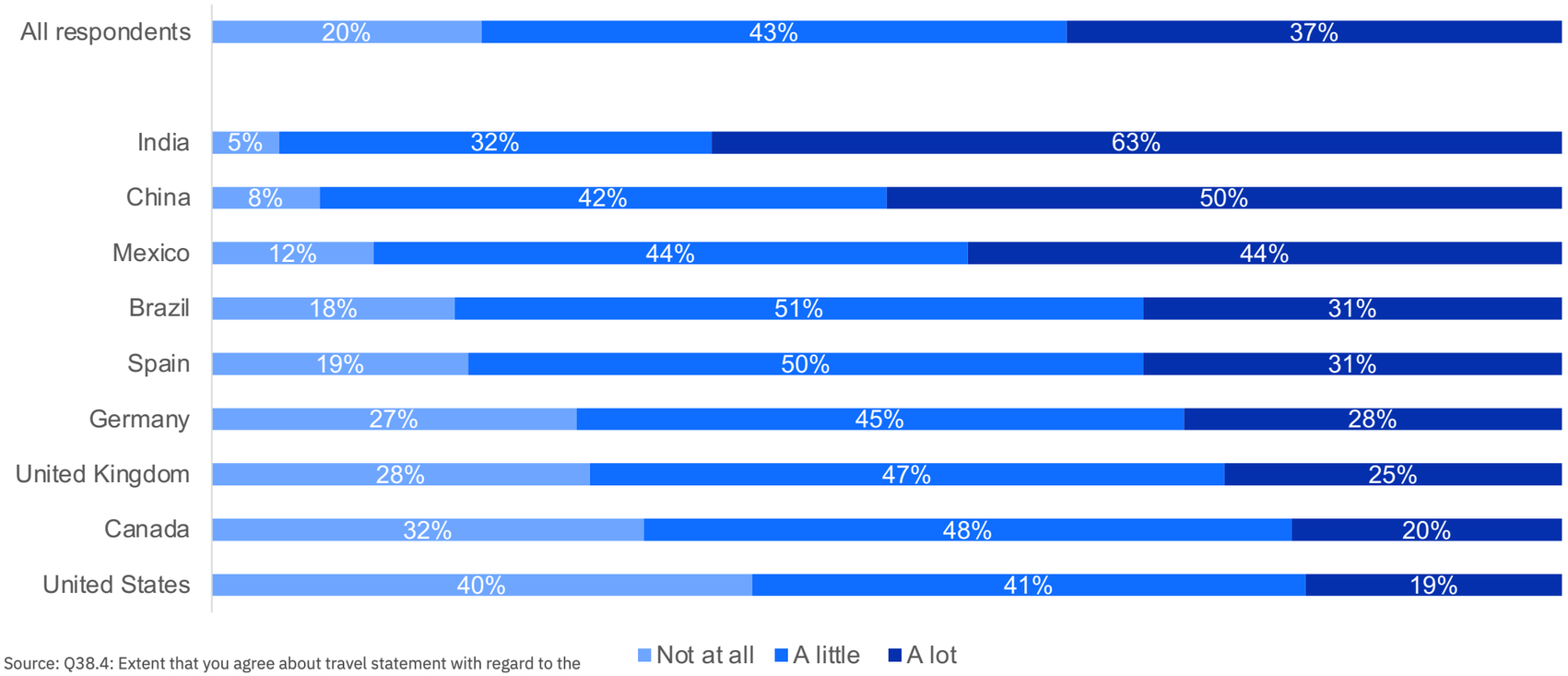
Source: Q38.3: Extent that you agree about travel statement with regard to the environment - I believe my personal travel habits contribute to climate change. n=14,705

- 33% of American respondents say that they do not believe their personal travel habits contribute to climate change. This exceeds the next country, Canada, by a comparative rate of 32%.
- At the other end of the spectrum, Indian respondents are most ardent in their belief that their personal travel habits contribute to climate change (93%).
- With respect to age, more Millennial respondents perceive their personal travel habits as contributing to climate change (85%), followed by Gen Z (83%), Gen X (80%), and Baby Boomers (73%).
- Respondents from higher-income households consistently state that they believe their personal travel habits contribute to climate change at a greater frequency than respondents from lower-income households.
- Fewer rural respondents (74%) say that their travel habits contribute to climate change than their suburban (78%) and urban (83%) counterparts.

Note: Bars may not sum to 100% due to rounding of data

Individuals are looking to utilize more environmentally friendly modes of transportation

To what extent do you agree with the following statement about travel with regard to the environment: *I am actively looking to travel via more environmentally friendly modes of transportation*



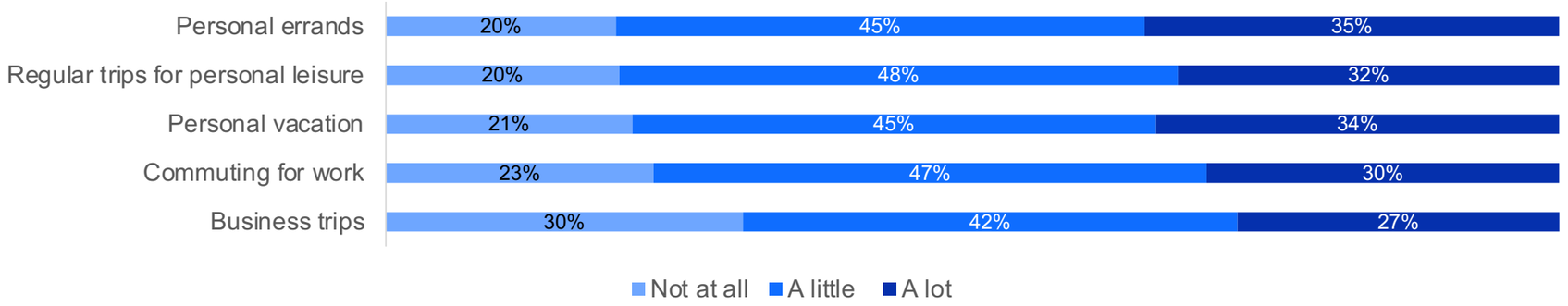
Source: Q38.4: Extent that you agree about travel statement with regard to the environment - I am actively looking to travel via more environmentally friendly modes of transportation. n=14,705

Note: Bars may not sum to 100% due to rounding of data

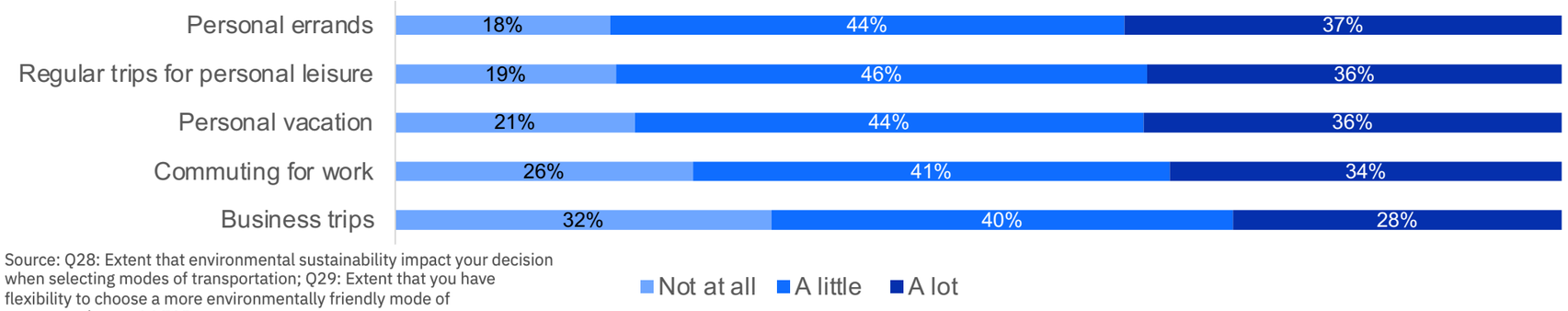
- American respondents are least actively looking to travel via more environmentally friendly modes of transportation (60%), while Indian and Chinese respondents are groups most looking to do so (95% and 92%).
- 86% of millennial respondents are actively looking to travel via more environmentally friendly modes of transportation, compared to 83% of Gen Z respondents, 78% of Gen X respondents, and 67% of Baby Boomer respondents.
- Respondents from higher-income households consistently say they are actively looking to travel via more environmentally friendly modes of transportation at a greater frequency than respondents from lower-income households.
- 31% of rural respondents say they are not looking to travel via more environmentally friendly modes of transportation, compared to 27% of suburban respondents, and 15% of urban respondents.

More than two thirds of respondents already factor environmental sustainability into their transportation decisions – and they also feel they have flexibility to choose more environmentally friendly modes of transportation

To what extent do environmental sustainability factors impact your decisions when you select modes of transportation for the following purposes?



To what extent do you have flexibility to choose a more environmentally friendly mode of transportation for the following purposes?



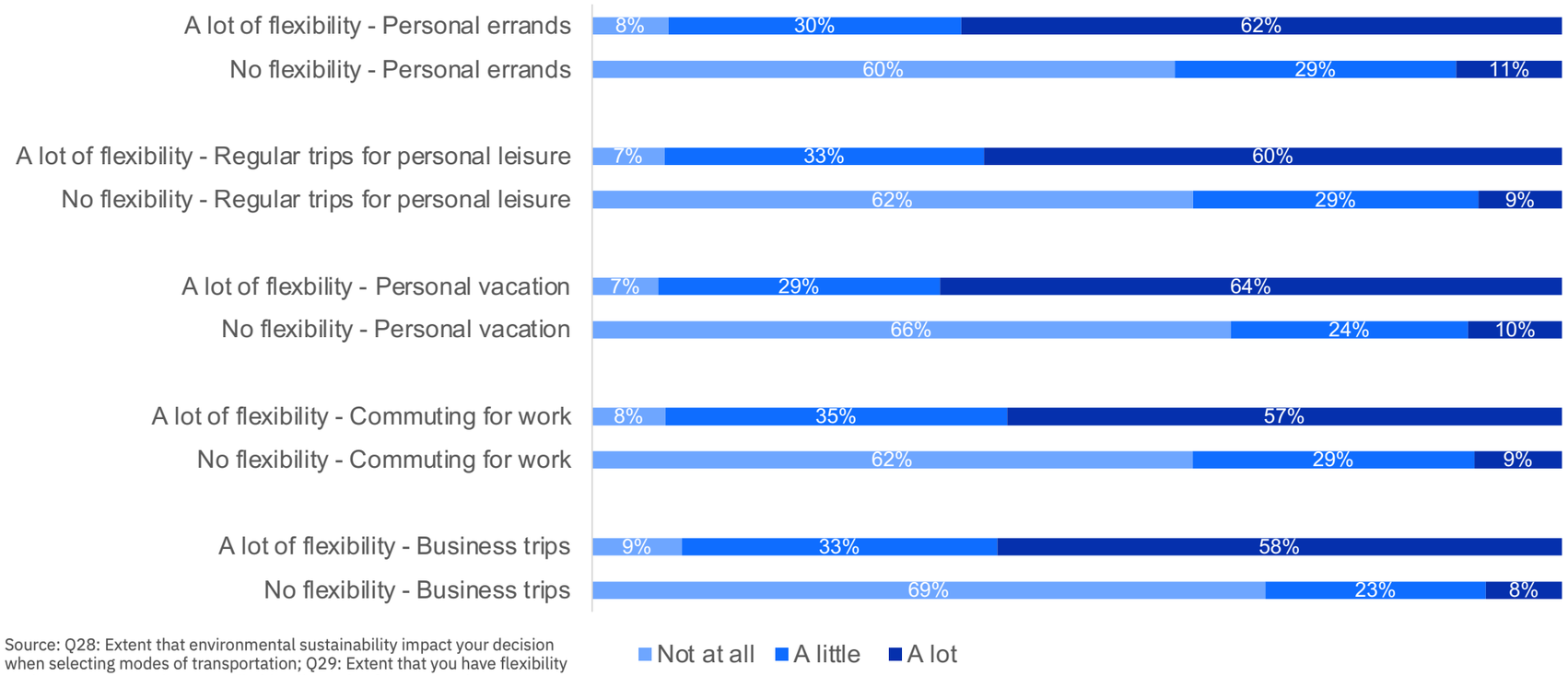
Source: Q28: Extent that environmental sustainability impact your decision when selecting modes of transportation; Q29: Extent that you have flexibility to choose a more environmentally friendly mode of transportation. n=14,705

Note: Bars may not sum to 100% due to rounding of data

- At least 69% of respondents factor environmental sustainability into their decisions when it comes to selecting modes of transportation for the queried purposes (e.g., personal errands), and at least 68% say they have the flexibility to choose a more environmentally friendly mode of transportation for the same purposes.
- Respondents cite less environmental influence – and less flexibility to choose more environmentally friendly transportation options – when it comes to work-related transportation compared to personal transportation.
- Respondents cite the most environmental influence when it comes to choosing a mode of transportation for "personal errands", and that is also the purpose of transportation for which respondents express the most flexibility to choose a more environmentally friendly mode of transportation.
- Respondents from higher-income households consistently cite more environmental influence on their transportation decisions, as well as more flexibility to choose more environmentally friendly modes of transportation, than respondents from lower-income households.

When afforded the flexibility to choose more environmentally friendly travel options, the vast majority of respondents take environmental sustainability into account when selecting modes of transportation

To what extent do environmental sustainability factors impact your decisions when you select modes of transportation for the following purposes?



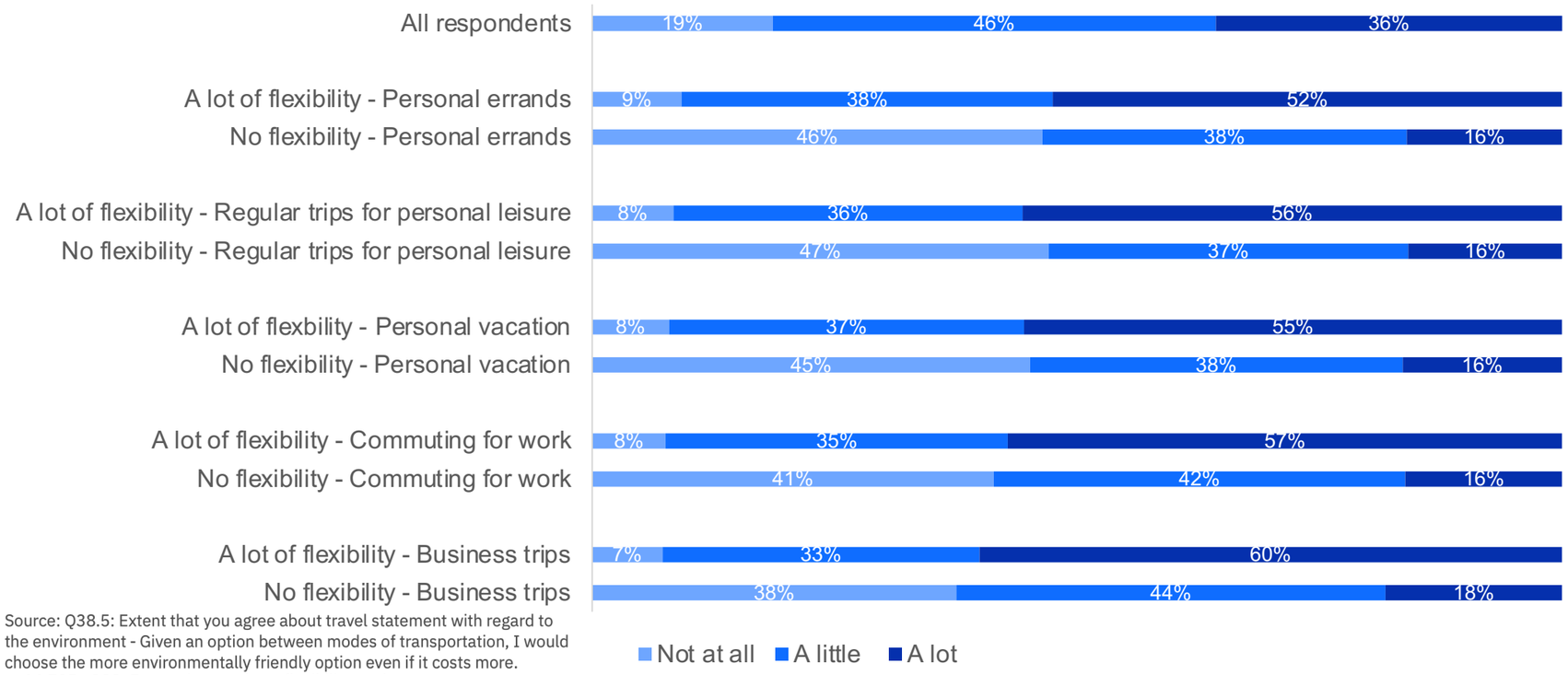
Source: Q28: Extent that environmental sustainability impact your decision when selecting modes of transportation; Q29: Extent that you have flexibility to choose a more environmentally friendly mode of transportation. n=14,705

Note: Bars may not sum to 100% due to rounding of data

- Over 90% of respondents who express 'a lot' of flexibility to choose a more environmentally friendly mode of transportation for the queried purposes (e.g., personal errands) say that environmental sustainability factors impact their decisions when selecting modes of transportation for those same purposes to at least some extent; and 57% of individuals with 'a lot' of flexibility say that environmental sustainability impact factors impact their decisions 'a lot'.
- For respondents who say they have no flexibility at all to choose a more environmentally friendly mode of transportation for the queried purposes, 60% or more say that environmental sustainability factors do not impact their decisions when selecting modes of transportation for those same purposes.

Respondents who believe they have a lot flexibility to choose more environmentally friendly travel options more often indicate a willingness to pay a premium for it

To what extent do you agree with the following statement about travel with regard to the environment: *Given an option between modes of transportation, I would choose the more environmentally friendly option even if it costs more*



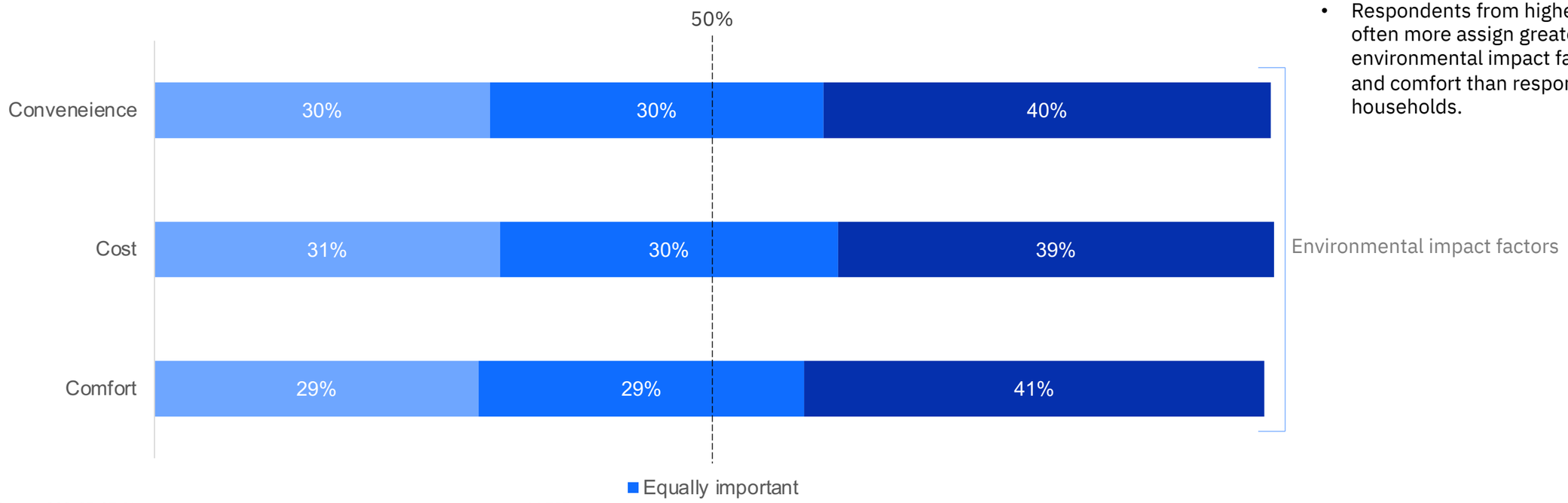
Source: Q38.5: Extent that you agree about travel statement with regard to the environment - Given an option between modes of transportation, I would choose the more environmentally friendly option even if it costs more. n=14.705 ; Q29: Extent that you have flexibility to choose a more environmentally friendly mode of transportation. n=14,705

Note: Bars may not sum to 100% due to rounding of data

- 82% of all respondents say that given an option between modes of transportation, they agree - at least to some extent - that they would choose the more environmentally friendly option even if it costs more; 36% strongly agree.
- When looking at respondents who say they feel they have ‘a lot’ of flexibility in choosing a more environmentally friendly mode of transportation versus those who say they have no flexibility to do so at all, the respondents who believe they have a lot of flexibility consistently express a much greater preference for the more environmentally option, even at a premium.
- For respondents indicating no flexibility at all to choose a more environmentally friendly mode of transportation, across each of the purposes of travel queried (e.g., personal errands), at least 38% say they would not choose the more costly, more environmentally friendly option if presented an option to do so.

Respondents rate environmental impact factors as being relatively more important to them than convenience, cost, and comfort when considering transportation and mobility

How would you rate the importance of each of the following relative to one another when selecting how you will travel?



- Respondents indicate that the most difficult trade-off to make is environmental impact factors vs. cost, when also considering environmental impact factors vs. convenience or comfort.
- Still, nearly one third of all respondents believe that convenience, cost, and comfort are equally as important as environmental impact factors when considering transportation and mobility.
- Respondents from higher-income households more often more assign greater relative importance to environmental impact factors vs. convenience, cost, and comfort than respondents from lower-income households.

Source: Q32, 35, 37: Most important factor to you when selecting how you will travel. n=14,705

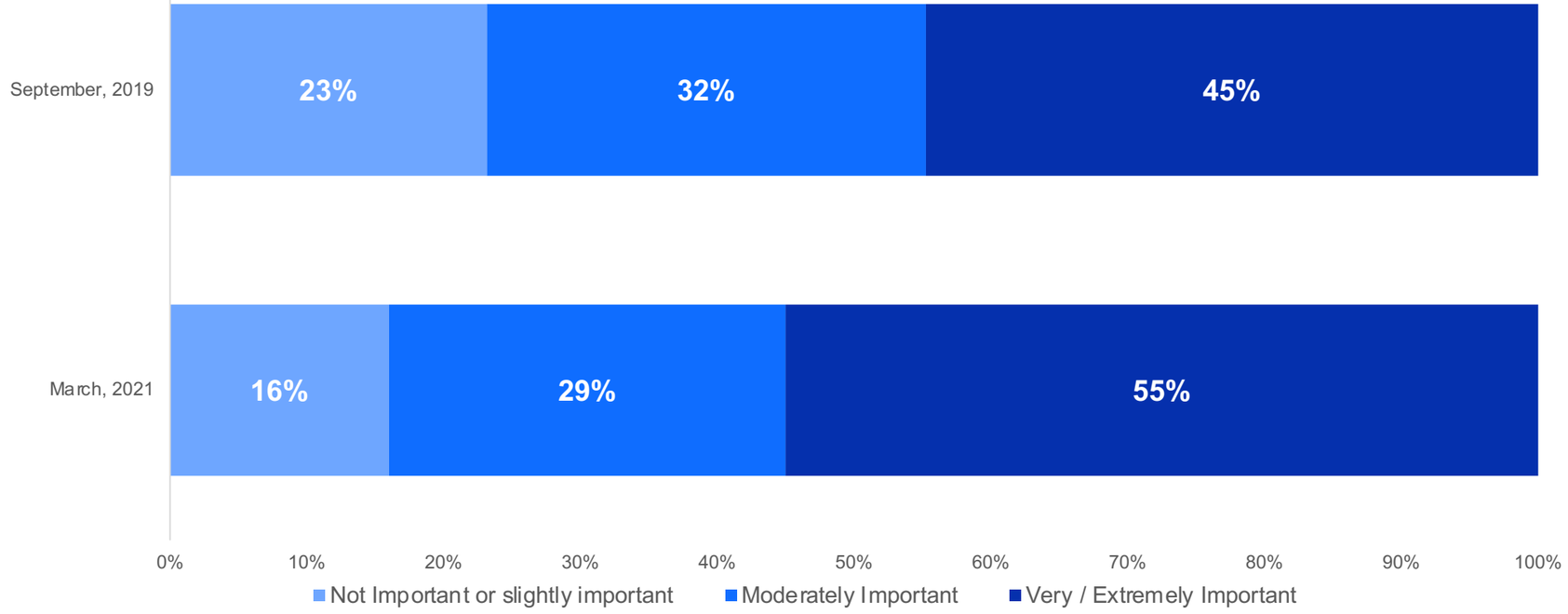
Note: Bars may not sum to 100% due to rounding of data

Shopping

Sustainability and environmental responsibility are becoming increasingly important to consumers when they choose a brand

Q39.3: Extent of importance of the attribute to you when choosing a brand - Whether the brand is sustainable and / or environmentally responsible (March 2021) vs. Q55.4: Importance while choosing a brand - Whether the brand is sustainable and / or environmentally responsible(Sept 2019)

Q40.1: Extent of agreement about statement - I am willing to pay more for brands that are sustainable and environmentally responsible



	Total	(1) 18 - 24	(2) 25 - 39	(3) 40 - 54	(4) 55 - 73
March, 2021	55%	50%	60%	54%	48%
September, 2019	45%	43%	48%	45%	40%

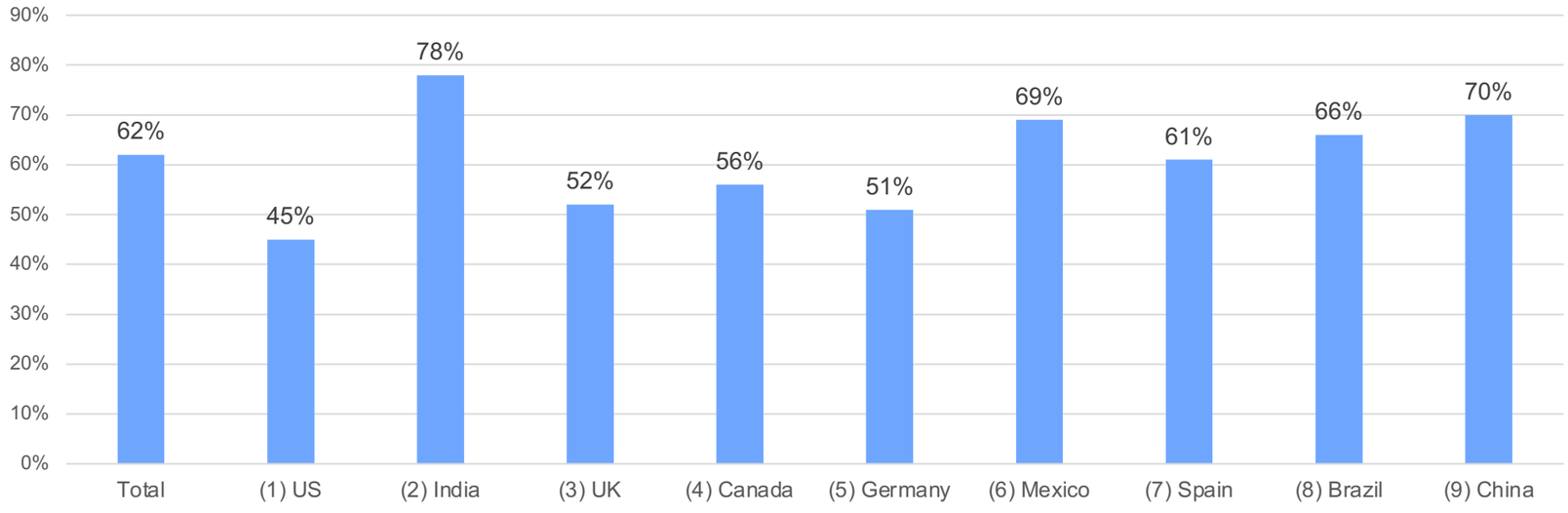
- Compared to our previous study, 22% more consumers indicated sustainability are very / extremely important to them when choosing a brand
- What's more, 54% consumers are willing to pay a premium for brands who are sustainable and / or environmentally responsible

Q39.3: Extent of importance of the attribute to you when choosing a brand - Whether the brand is sustainable and / or environmentally responsible (March 2021) vs. Q55.4: Importance while choosing a brand - Whether the brand is sustainable and / or environmentally responsible(Sept 2019) (Sept 2019)

Q40.1: Extent of agreement about statement - I am willing to pay more for brands that are sustainable and environmentally responsible)

In addition to willing to pay extra to support brands that are sustainable and / or environmentally responsible, consumers across all age groups are willing to change their purchasing behavior to help reduce negative impact on the environment

Q40.10: Extent of agreement about statement - I am willing to change my purchasing habits to reduce environmental impact (3grp)

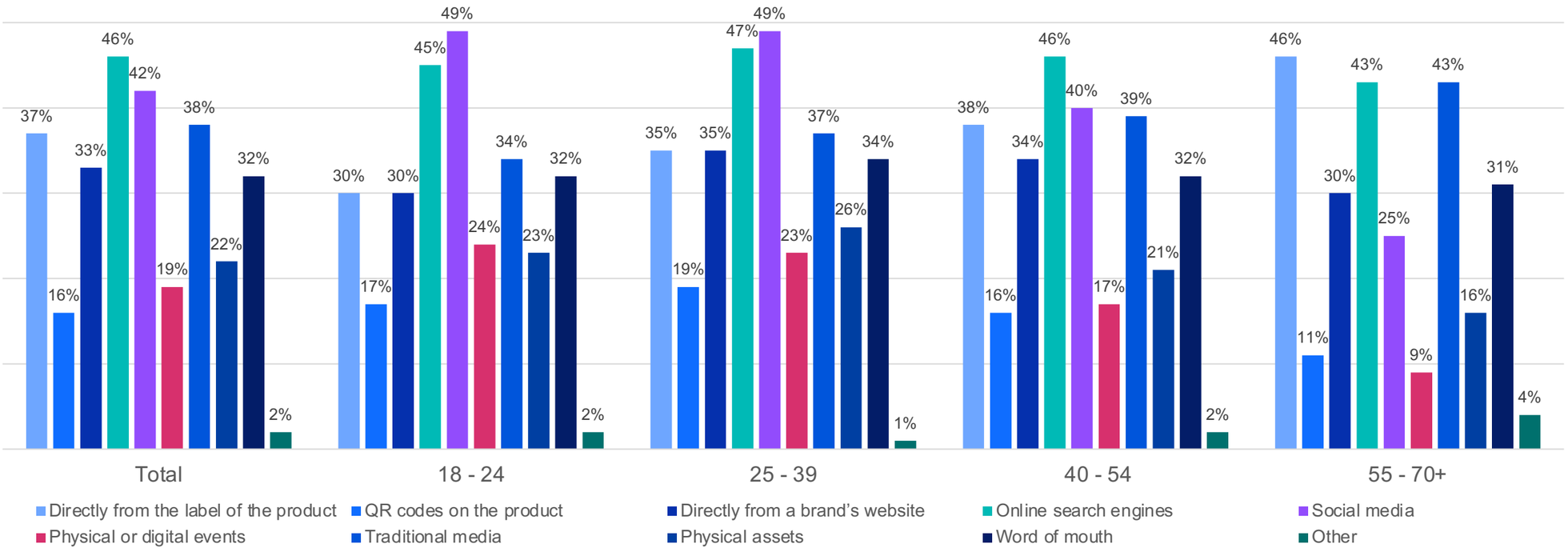


- More than half, 62% consumers are willing to change their purchasing behavior to help reduce negative impact on the environment, with higher degree of willingness from emerging countries
  - Consumers in India (78%) and China (70%) are most willing to change their purchasing behavior to help reduce negative impact on the environment
  - Consumers in Latin America countries, Mexico (69%) and Brazil (66%) also have high degree of willingness to change their purchasing behavior to help reduce negative impact on the environment
- Millennials (66%) have a higher degree of willingness among all age groups to change their purchasing behavior to help reduce negative impact on the environment

Q40.10: Extent of agreement about statement - I am willing to change my purchasing habits to reduce environmental impact (3grp)

The most common way consumers get their information is via Online search engine

Q52: Where do you typically get information around environmental sustainability or social responsibility initiatives] for a brand and/or products they make? [Select all that apply]



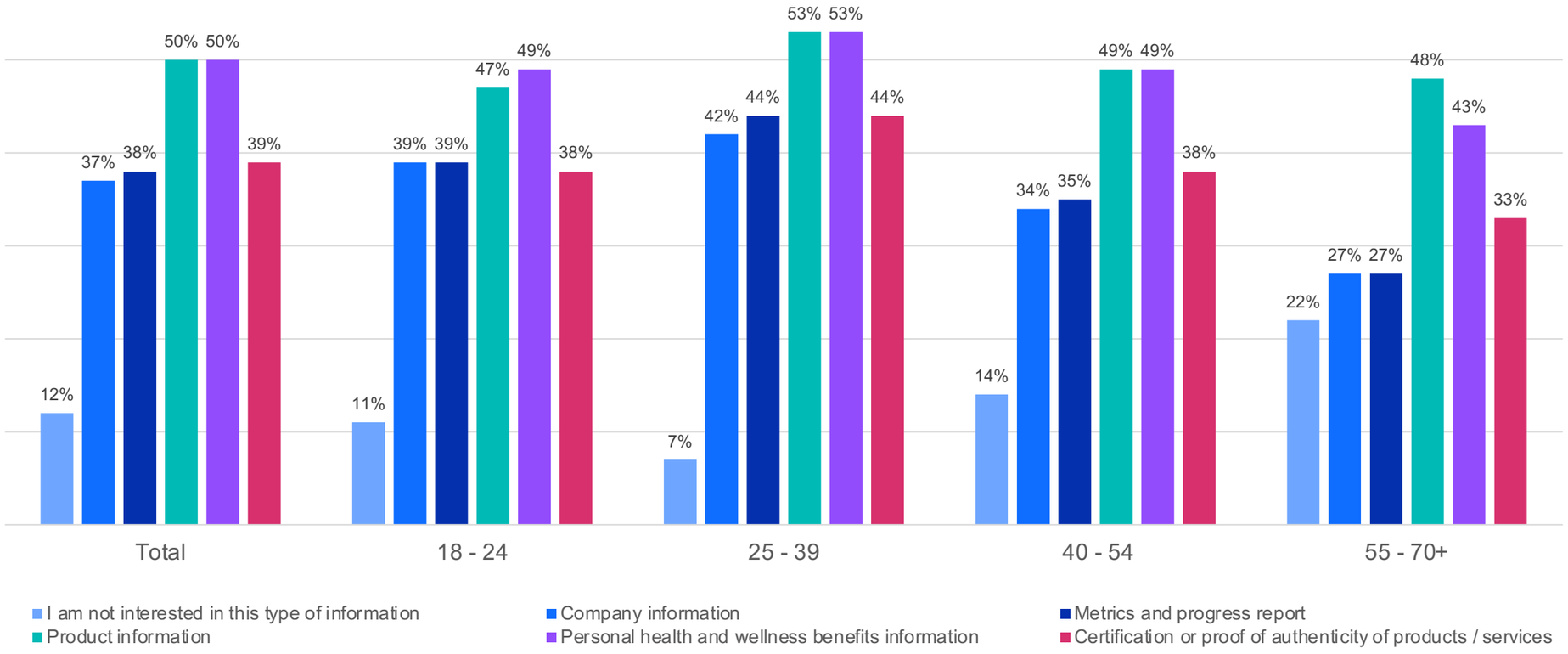
- Across different age groups and countries:
  - Nearly half of consumers (46%) get their information about company's environmental sustainability / social responsibility initiatives via online search engine
  - More than one third get their information about company's environmental sustainability / social responsibility directly from products and brand's website
  - Younger age groups (Gen Z and Millennial) get their information more often via social media while 55+ (43%) get their information via traditional media more often
  - Word of mouth is another popular way to get information for consumers in India (42%) and China (39%)

Q52: Where do you typically get information around environmental sustainability or social responsibility initiatives] for a brand and/or products they make? [Select all that apply]

Consumers look for product information as well as personal health and wellness benefits the most when researching on company's environmental sustainability records and initiatives

Q21: Company's environmental sustainability and/or social responsibility records and initiatives and brand purpose that you research about (MRALL)

Q25.2: Please indicate your agreement or disagreement with the following statements - I do my own research before I decide whether to trust statements a company makes about environmental sustainability

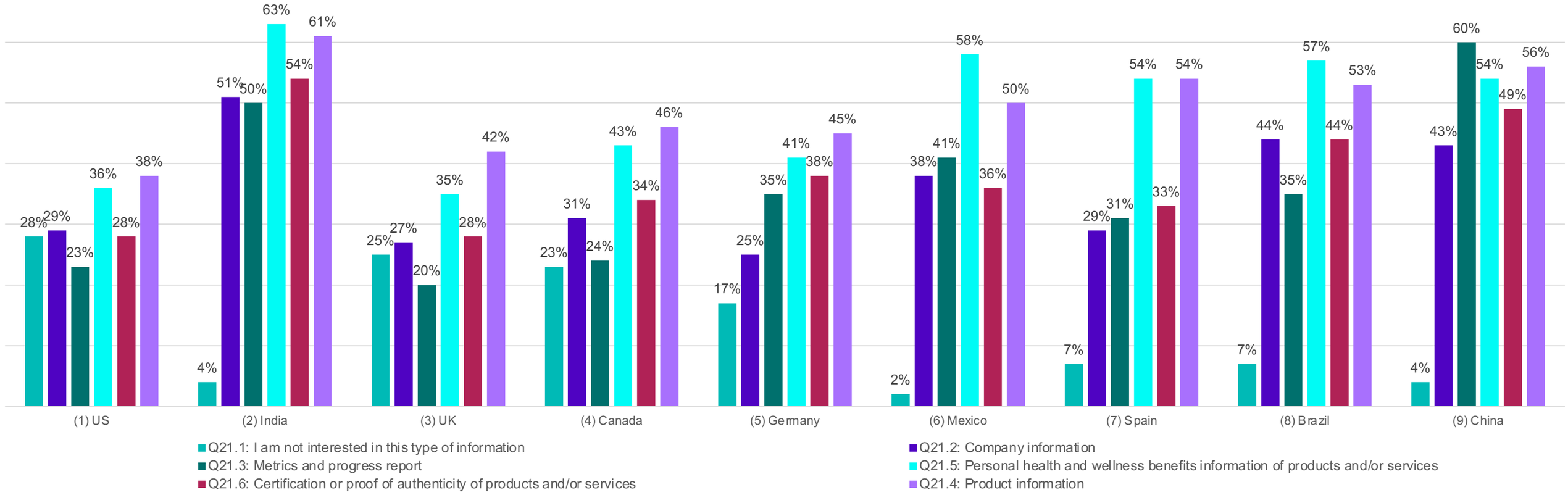


- Most consumers (61%) conduct their own research on company's statements on environmental sustainability
- Half of them (50%) research on product information, and personal health and wellness benefits information of products and / or services
- Nearly 4 in 10 of them research on metrics and progress report on company's initiatives on environmental sustainability

Q21: Company's environmental sustainability and/or social responsibility records and initiatives and brand purpose that you research about (MRALL]
Q25.2: Please indicate your agreement or disagreement with the following statements - I do my own research before I decide whether to trust statements a company makes about environmental sustainability

But consumers from different countries look for different information on company's environmental sustainability and/or social responsibility records and initiatives

Q21: Company's environmental sustainability and/or social responsibility records and initiatives and brand purpose that you research about (MRALL)



- Consumers in India (63%) research on personal health and wellness benefits information of products and/or services the most
- Consumers in China (60%) look for metrics and progress reports most often compared to their global peers
- US has the highest penetration of consumers (28%) who are not interested in this type of information

Q21: Company's environmental sustainability and/or social responsibility records and initiatives and brand purpose that you research about (MRALL]

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