



Let them eat cake

Satisfying the new consumer appetite
for responsible brands

ABRIDGED VERSION

Anthony Kleanthous & Jules Peck



"This work by WWF... should be an important part of the education of all aspiring Marketers."

Chris Pomfret, Consultant and Senior Associate, University of Cambridge Programme for Industry

"This WWF report exposes the true meaning of value in modern economies. Until now, most companies have failed to recognise and align themselves with the deep shifts in personal values that are happening in our society, particularly with relation to environmental and social issues. Doing so is indispensable to long-term commercial success."

David Blood, Founding Partner, Generation Investment Management

"This study approaches its subject in a novel, constructive and digestible way. The WWF approach shows a real understanding of the challenges and business motivators for everyone involved in brand management and all other aspects of marketing."

Sir Paul Judge, Master of the Worshipful Company of Marketers

"With this report, WWF has issued a powerful wake-up call to marketers and presented a challenge to which marketers must respond. Backed up by a fresh set of valuable insights through new research, the authors propose a radical new role for marketing and advertising executives in the emerging economy of values."

Professor Melanie Howard, Founding Partner, the Future Foundation

"Kleanthous and Peck have done Adland some real good by showing how agencies can help clients grapple with the complex issues that CSR raises for marketing. In 'Let Them Eat Cake', they not only draw attention to the 'elephant in the room'; they show us how to make friends with it, instead of getting trampled."

Hamish Pringle, Director General, Institute of Practitioners in Advertising

Abstract

Instead of preaching about the moral responsibility of business to further the goals of sustainability, this report exposes the considerable commercial potential of a new approach to business, based on the provision of more “responsible” mainstream brands. This potential comes from an increasing demand among mainstream consumers for their regular brands to come with environmental and social responsibility “built in”. These consumers are not usually prepared to pay more or put themselves out to buy “green” or “ethical”, but they do value these attributes as part of the brand package. Sustainability can act as a differentiator between mainstream brands, encourage loyalty and even change people’s perceptions of themselves. To unlock this commercial potential, environmental and social values must be built into the DNA of mainstream consumer brands.

“Opinions are the ripples on the surface of the public’s consciousness, shallow and easily changed.

“Attitudes are the currents below the surface, deeper and stronger.

“Values are the deep tides of the public mood, slow to change, but powerful.”

Sir Robert Worcester, Chairman, MORI

“Marketing is one of the last domains of commercial enterprise to face up to issues of sustainable development. On both the environmental dimension of resource limits/pollution and the social dimension of wellbeing, marketing has significant impacts and is deeply implicated in the current challenges of unsustainable consumption and production. Yet at the same time, and I simplify, while marketing got us into this mess, it may be that marketing can get us out. We need to harness the creativity and the sophistication of marketing, and its methodologies, for human health and environmental sustainability.”

Ed Mayo, Chief Executive, National Consumer Council, September 2005¹

“We need to reinvent the way we market to consumers. We need a new model.”

AG Lafley, CEO, Procter & Gamble²

“At length, I remembered the thoughtless saying of a great princess, who on being informed that the country people had no bread, replied, ‘Then let them eat cake.’”

Jean Jacques Rousseau³

Acknowledgements

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Anthony Kleanthous

Jules Peck

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¹ Statement to this report.

² Quoted in Harvard Business Review, December 2005.

³ Confessions, 1776.



Introduction

The marketing industry stands accused by NGOs, think tanks and the media of fuelling rampant and unsustainable patterns of consumption. Marketers are blamed for a multitude of sins: encouraging ever greater consumption of alcohol, fatty foods, empty calories, water and biological resources; using too much packaging; limiting the useful life of products so that people are forced to replace them earlier than necessary; producing greenhouse gases...The list seems never-ending.

And yet, our society is dependent upon communications. The communications industry (of which branding and marketing are an important part) is bigger and more powerful even than governments. We must find a way for all parts of business, including the branding and marketing functions, to flourish without compromising the wellbeing of this or future generations.

Deep shifts in the values and consciousness of mainstream consumers have created great commercial opportunities for brands that can recognise and exploit them. In this report, we abandon the philanthropic approach adopted by previous (largely unsuccessful) attempts to tackle the challenge of sustainable consumption. In its place, we create a more realistic, constructive and practical framework for understanding the opportunities, responsibilities and roles of brand and marketing professionals in assuring a good quality of life for this and future generations.

We identify areas of commonality between the goals of sustainable development⁴ and those of business, at both corporate and brand levels, and we propose an approach to marketing based on the notion of using environmental and social values to build stronger, more valuable brands. Instead of preaching about the moral responsibility of business to further the goals of sustainability, this report exposes the considerable commercial potential of a

new approach to business, based on the dreams and concerns of ordinary people. In future, mainstream brands will need to come with environmental and social responsibility “built in”, driven by genuinely held, thoroughly embedded corporate and brand values.

If you work in corporate or brand communications, marketing or CSR, either for a brand-owning company or a communications agency, this report is for you. It's also for you if you are a CEO or board director, because you are the engine behind the brand and you guide the values and processes of your organisation. If you wish you could reconcile your need to advance in your career with your need to make a personal contribution to a happier, healthier future, then this report could provide the bridge you are looking for.

This is an abridged version of a more detailed report, downloadable free of charge from wwf.org.uk/letthecatcake

Methodology

This report has been nine months in the making. We began with a comprehensive literature review of hundreds of written sources, from formal reports to academic papers and articles in the media. Then, we met more than 50 leading figures from the worlds of branding, marketing and policy. Finally, we tested some of the hypotheses from these first two phases by means of a web-based survey of 255 brand and marketing professionals from both client and agency worlds.⁵

⁴By “sustainable development”, we mean the preservation of natural resources, the protection of species and the generation of greater human wellbeing.

⁵For more about methodology, see our full report, downloadable from wwf.org.uk/letthecatcake

Structure of the full report

In Chapter 1, “The Elephant in the Room”, we summarise the environmental and social context of our report – the “problem” that needs to be fixed. We point out that economic development is reaping potentially irreparable damage to our planet at ever increasing rates and challenging our own concepts of human wellbeing. We argue that the marketing function is at the heart of the sustainability debate, because it is the interface between the forces of production and consumption.

In Chapter 2, “Exploding Myths”, we give a brief history of previous, largely unsuccessful attempts from outside industry to bring about an epiphany in sustainable branding and marketing. We argue that their failure is the result of the false premise on which they were based: that businesses set out to further the goals of sustainable development. Even where there is a commitment to sustainability at the highest level, short-term financial and classic brand value indicators are still the measure of success for marketing departments and their agencies. We identify six “myths” that have further strengthened resistance from the marketing industry and point out that a new perspective is required if recent advances in thinking are to become the new paradigm.

In Chapter 3, “Shifting Values”, we take a closer look at consumers. There is strong evidence from surveys and observations of the market that values are shifting at a deep level; that the majority of consumers now prefer brands that are environmentally and socially responsible. These shifts and changes in behaviour have manifested themselves in a series of trends that are aligned with the goals of the sustainability agenda, including organic food and drink, healthy living, Fairtrade, downsizing, “mass luxury” and “localism”. Yet most brand communicators and marketers have been slow to pick up on these shifts, and have consequently failed to spot enormous commercial opportunities. We present evidence from

surveys and academic papers that commercial success and market leadership increasingly require companies to embed sustainability into their core brand values.

In Chapter 4, “What our Survey Revealed”, we present the key findings from our web-based quantitative survey of the perceptions of branding, marketing and communications professionals from both client and agency sides of the branding and marketing industry. We identify the following key perceptions:

- *Industry professionals care about sustainability and prefer to work for companies that share those concerns;*
- *consumers tend to choose responsible brands whenever they can, so long as those brands are as attractive as other alternatives;*
- *brands should communicate more on environmental and social issues to both staff and consumers;*
- *employers are less concerned with environmental and social issues than the communications professionals they employ, and fail to encourage and reward sustainable practices internally;*
- *although communications professionals believe they have a strong influence over consumer behaviour, they are not held responsible by their employers for the environmental and social aspects of that behaviour;*
- *clients are just beginning to screen agencies for their sustainability credentials; and*
- *clients and agencies lack information about consumer attitudes to environmental and social issues*

In Chapter 5, “What To Do (Part 1):

Aligning Values”, we argue that companies should recognise and incorporate sustainability into their corporate values in order to reflect the value shifts in wider society. Aligning brand values with relevant consumer values in this way increases the brand’s relevance to consumers, differentiates it from the competition, provides focus for communications campaigns and reduces the risk of reputational damage. We propose a new approach to mainstream marketing, driven not by the goals of sustainable development, but by the social shifts of which they are a product. The clever money is on companies which sign up their consumers to support them on their journey to sustainability. We explore what clients and agencies can do to understand and repair their brand values and personality – sometimes called the brand “DNA” – so that it reflects the changing values of their target markets. We encourage brand owners and marketers to switch off their computers and get out into the real world to observe what kinds of “jobs” people are looking for their products and services to do, whether they be practical or emotional. We also look at cultural and structural issues within organisations. Recognising that leadership from the most senior level is required for the necessary values to be embedded, we also propose some practical tools for competitive advantage.

In Chapter 6, “What To Do (Part 2):

Emerging Best Practice”, we show how some mainstream brands are using sustainability to create value for consumers, shareholders and staff. We look at a variety of different types of brand – corporate brands, umbrella brands, retail brands and endorser brands – to learn what they are doing to take consumers on a journey to more sustainable consumption patterns.

In Chapter 7, “What To Do (Part 3): The Ten Point Plan for Sustainable Brands”, we lay

out practical actions that CEOs, marketers and agencies can take to unleash the potential of brand sustainability. These are described under ten steps:

- 1. Understand your brand**
- 2. Understand your consumers**
- 3. Get your house in order**
- 4. C(S)R: Handle with care!**
- 5. Innovate**
- 6. Motivate**
- 7. Collaborate**
- 8. Communicate**
- 9. Sign up your consumers to the sustainability journey**
- 10. Measure, monitor and report continuously.**



Chapter 1. The Elephant in the Room: Unsustainable Consumption

...in which we identify the problem to be tackled

"The continued poverty of the majority of the planet's inhabitants and excessive consumption by the minority are the two major causes of environmental degradation. The present course is unsustainable and postponing action is no longer an option."

UNEP (1999), GEO-2000, London: Earthscan.

Key Points

- The way that people buy and consume products and services has profound implications for the future health and happiness of our species
- We are consuming as if we had three planets but failing to increase our wellbeing. We need to change the way we measure our success as a society
- Many efforts to integrate sustainability into marketing have failed because they were based on the mistaken assumption that business exists to be socially and environmentally responsible
- By developing their role as the crucial link between social values, production and consumption, brand marketers and communications professionals can be the key to corporate sustainability and raise their profile at board level

Introduction

In this chapter, we face up to the elephant in the room of modern business: the problem of unsustainable consumption. The way that people buy and consume products and services has profound implications for the future health and happiness of our species.

“Earth, we have a problem”

Three Earths would be required to sustain European patterns of consumption globally; five, if North Americans were to set the global standard. Dramatic species loss over the last 30 years is so severe that *Nature* magazine warned in 2004 that we could lose a quarter of all living species by 2050.

The Living Planet index (Figure 1) shows average trends in populations of terrestrial, freshwater and marine species worldwide. It declined by about 40 per cent from 1970 to 2000. By 2001, our “Ecological Footprint” exceeded the Earth’s biological capacity by about 20 per cent.

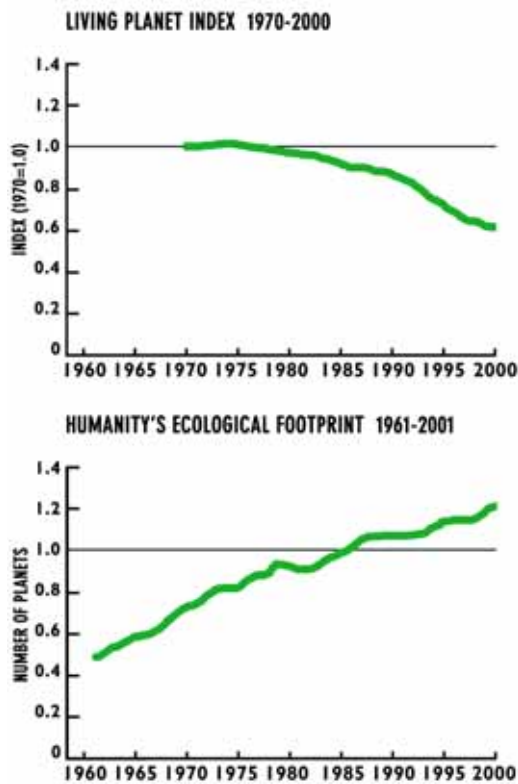


Figure 1:
Human Demands on
Natural Resources

“Affluenza” and the Fallacy of GDP

While UK GDP has almost doubled since 1974, UK citizens are no more satisfied with their lives than they were in that same year (Figure 2). GDP is a grossly distorted picture of human achievement. Nobel Laureate Simon Kuznets, the original architect of GDP, never meant it to be used to measure quality of life, saying “The welfare of a nation can scarcely be inferred from a measurement of national income”. In his recent series of Lionel Robbins memorial lectures on happiness, Emeritus Professor of Economics at LSE, Professor Lord Richard Layard, condemned GDP as “a hopeless measure of welfare” and argued for a radical review of what delivers “welfare” to society.

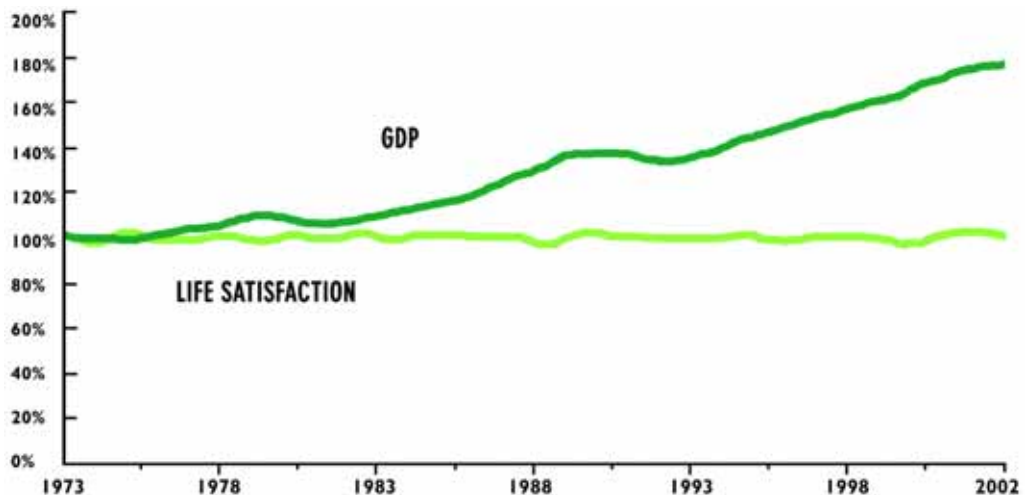


Figure 2:
UK Life Satisfaction and
Gross Domestic Product
(GDP), 1973-2002*

*A Well-being Manifesto for a Flourishing Society, New Economics Foundation, 2004.

Dissatisfaction and the origins of consumerism

On a similar theme, Professor David Cadman, writing in *Resurgence* in April 2003, points out that “the doctrine of consumption and economic growth is not primarily founded on ‘satisfaction’ but upon ‘dissatisfaction’”. Cadman quotes from Robert Lane’s *The Loss of Happiness in Market Democracies*: “Advertising must use dissatisfaction to achieve its purpose” and shows that this deliberately misleading aspect of consumer culture dates back to Edward Bernays who, in the 1930s, applied his experience of US wartime propaganda to the foundation of what is now modern-day consumerism: “[Bernays] understood that the appetite of our present materialism depends upon stirring up our wants – but not satisfying them.”

If this is true, this “promise” of consumerism is not only failing to make us happier and destroying the planet, but it is also a lie! There is a shift to new measures of success at all levels in our society (Figure 3).

both through our careers and the products or services on which we spend our money or our time. Despite all this, business and governments seem to have trouble acting as though there were any indicator of success other than economic growth.

A way forward

There are many innovative solutions to the challenge outlined above, both physical and knowledge-based, just waiting to be applied.

These solutions are not about hair shirts and impossible ideals; they are about innovative, practical, exciting new ways of doing the jobs that we need to do in our daily lives. They are, to borrow an analogy from economics, about living off the “interest” of our planet’s resources – the products of sunshine and biological richness – rather than its “capital” – non-renewable resources, such as fossil fuels and biodiversity itself.



Figure 3:
Elements of the sustainable
paradigm shift

Progressive elements exist at every level: macroeconomists talk of a shift from GDP to “wellbeing”; business professionals make the “business case” for sustainability; as individuals, we strive to improve the quality of our lives,

The business community has great potential to bring about real and lasting change. The messages from business – in the form of products, services, advertising, PR, packaging and so on – heavily influence consumers.

By incorporating social and environmental benefits into the brand package, brands can free consumers from their own feelings of guilt, ignorance and powerlessness in the face of enormous problems such as water shortages, loss of biodiversity, global warming, global dimming and social breakdown. In turn, consumers can be the vehicle by which businesses can benefit from sustainable values and practices; responsible brands are more attractive to consumers, and are able to build more comfortable relationships with regulators, local communities, investors and the media.

Regulation and Sustainable Consumption

The basic requirement for all advertising in the UK is that it should be “legal, decent, honest and truthful”. While various elements of sustainability are addressed in the regulatory codes, regulators have neither the teeth, the mandate nor the appetite to take on sustainability challenges beyond what is required by law or overwhelming public pressure.

The codes that regulate advertising in the UK stipulate that “advertisements must not make unsubstantiated claims about environmental impact”. They also cover certain issues of particular public concern such as alcohol, smoking, obesity and advertising to children but they do not effectively address the issue of sustainable consumption, or reflect the subtlety and complexity of the debate.

For example, advertisers are forbidden from encouraging the excessive consumption of food, but not of fossil fuels or electricity. Furthermore, while “advertisements must not encourage or condone behaviour prejudicial to the environment”, this does not apply to “products or services that may have adverse environmental impact in normal use or in their manufacturing processes”.

The advertising codes of practice claim a sense of responsibility to consumers and society, but

they do not uphold complaints simply on the basis that a particular product is offensive to some people.

In addition to the CAP codes in the UK, there are a number of voluntary codes of conduct and best practice applying to parts of the marketing world which cover aspects of communications. Of these, the Portman initiative is perhaps the most noteworthy because it represents a considerable effort by the alcohol industry to control alcohol abuse. As societal values shift on sustainability issues, it will be interesting to see whether, for instance, carbon-based industries take on similar voluntary responsibilities to make their communications about climate change more responsible, or whether the lead will have to be taken by government.

We urge the Committees of Advertising Practice – and the legislators who control the code covering broadcast advertising – to consider how their codes and guidelines can be brought into line with the new environmental and social concerns of our age.

FOR A FULL VIEW OF THE ISSUES DEALT WITH IN THIS CHAPTER SEE OUR FULL REPORT AT wwf.org.uk/letthemeatcake





Chapter 2. Exploding Myths

...in which we review previous attempts to tackle the problem of unsustainable marketing

"I'm sick of hearing that consumers want more information; they don't! They want knowledge - knowledge of what a brand stands for and to what extent it can be trusted to make those complicated decisions on their behalf."

Rita Clifton, Chair, Interbrand

"In many instances, a 'business of business is business' outlook has blinded companies to outcomes, or to shifts in the implicit social contract, that often could have been anticipated"

Ian Davis, Worldwide Managing Director, McKinsey & Company

"A brand is the shorthand for the complicated relationship between a company and its customers"

Hamish Pringle, Director General, Institute of Practitioners in Advertising

Key Points

- There have been several serious attempts to examine this issue in the last decade, but they have met with mixed success
- This is mainly due to a series of myths that we debunk.
- Marketing and corporate communications are central to our economic system because they are the conduit through which signals pass between producers and wider society.
- Agencies should act as beacons of sustainability, helping their clients to spot and exploit the commercial potential of sustainability in innovative ways.

Good Intentions, Weak Responses

Several external parties – most notably the United Nations Environment Programme (UNEP) – have tried to explain to the marketing community why they should embrace the principles of sustainability in their marketing

communications. Some early attempts at collaboration with the advertising industry, such as *Advertising as a Partner for Sustainable Development* (2001) were rather defensive in tone and contributed little impetus for change. More recent attempts have contributed more: in *Opportunity Space*⁷ (2003), UNEP pointed out the opportunity for agencies that understand Corporate Social Responsibility to build real value on behalf of their clients. Most recently, in *Talk the Walk*⁸ (2005), it recognised that environmental and social concerns among consumers are spreading and that some previously niche green or ethical products have become very successful in mainstream markets.

A few senior figures from the worlds of marketing, advertising and branding have also tried to engage⁹, as have some industry associations. The European Association of Communication Agencies, the Institute of Practitioners in Advertising, the Marketing Society, the Worshipful Company of Marketors, the Chartered Institute of Marketing and the Chartered Institute of Public Relations have

⁷ UNEP/EACA, 2003

⁸ UNEP/Utopias, 2005

⁹ For example, Rita Clifton, Chair of Interbrand, the UK's leading brand consultancy, sits on the Sustainable Consumption Round Table, an initiative of the government's own Sustainable Development Commission, soon to publish the results of its work. John Hegarty of BBH, MT Rainey (founder of Rainey Kelley Campbell Rolf), John Grant

(founder of advertising agency St Lukes), Tyler Brule (founder of Wallpaper magazine and Winkreative), Jim Williams of Young & Rubicam and many others have all made efforts to move the debate forward. For a full list of those who have given us the benefit of their time and experience as part of this project, see our main report, available for download from wwf.org.uk.

all engaged with this WWF report and contributed to the debate in some way.¹⁰

The Chartered Institute of Marketing is planning a major focus on sustainability in 2006, and has begun to work with a panel of experts in both marketing and sustainability to help it capture best practice, draw lessons and incorporate lessons into its materials, publications and training courses. Represented on its steering committee is also the Marketing and Sales Standards Setting Board, the body responsible for setting standards in the marketing industry on behalf of the UK government.

Despite all this, practitioners themselves have been slow to engage. Progress is being hindered, in part, by the misguided attempts of CSR professionals and industry outsiders to persuade companies to pursue sustainable consumption as a goal in its own right. Progress has also been hindered by the perpetuation of a series of myths in the business community.

Myth 1: “The objective of business is to encourage sustainable consumption”.

Wrong! Brand managers and marketers are offered incentives to increase sales and market share, not human wellbeing; new incentives are therefore required.

Myth 2: “Marketing cannot drive sustainable consumption”.

Wrong! Marketing and brand communications can make a major contribution to meeting the biggest challenges of our age.

Myth 3: “Mainstream consumers do not value responsible brands.”

Wrong! There are huge market opportunities waiting for canny marketers who tune in to deep shifts in societal values.

Myth 4: “Marketing professionals do not understand sustainability”

Wrong! Many marketers are just waiting for “permission” and an appropriate framework in which to engage with sustainability issues, even if they aren’t familiar with the language and concepts of corporate responsibility.

Myth 5: “Media owners should enforce a strict separation between editorial and advertising departments.”

Wrong! If anything, editorial and advertising policy needs to be more closely aligned.

Myth 6: “Agencies are barristers, not beacons.”

Wrong! There is unmet latent commercial potential for more responsible brands; helping clients to spot and exploit that potential is part of the essential function of agencies.

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¹⁰ The industry association that represents the biggest-spending advertisers in the UK, the ISBA, chose not to engage. In an email statement to this report, chairman Malcolm Earnshaw stated: “ISBA has a clear role to play...which relates to championing advertising, defending our freedom to advertise and helping members to advertise efficiently and economically... I believe involving ISBA in this is outside our remit”. Clearly, something has changed since 1994, when the ISBA published a book on sustainable marketing entitled *In the Company of Green: Corporate Communications for the New Environment*.



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Chapter 3. Shifting Values

...in which we show that environmental and social issues are no longer the sole concern of a privileged few, but of a sizeable proportion of mainstream brand-conscious consumers.

“As the world society approaches a balance among economic, environmental and social sustainability, markets are transparent, stimulate innovation and are effective in their role as a catalyst for change toward a better quality of life for everyone.”

Chad Holliday, Chairman of DuPont, and John Pepper, Chairman of Procter & Gamble, 2001

Key Points

- There is strong evidence from both existing surveys and observations of the market that values are shifting at a deep level; the majority of consumers now prefer brands that are environmentally and socially responsible
- These values shifts are associated with changes in consumer behaviour, both in terms of the brands people choose and other aspects of their lifestyle
- Brand communicators and marketers have been slow to pick up on these shifts, and have consequently failed to spot commercial opportunities
- These values shifts and changes in behaviour have manifested themselves in a series of trends that are aligned with the goals of the sustainability agenda, including organic food and drink, healthy living, Fairtrade, downsizing, “mass luxury” and “localism”
- The profile of leading brands is changing; social aspects in particular are becoming increasingly important in driving brand value
- Some leading consumer brands are responding to these trends by incorporating relevant messages into their advertising and other communications, without being forced into it by previous crises.

Existing Survey-based Evidence of Value Shifts

A variety of consumer surveys and academic studies provide compelling evidence of enormous untapped commercial potential among mainstream consumers for responsible brands.

An SWR study in 2002¹¹ reported that:

- **53% of UK consumers and 66% of US consumers have considered switching brand due to issues of CSR**
- **19% of UK consumers have actually purchased as a result of a company’s ethical reputation**
- **18% have participated in an ethically-motivated boycott.**

Then, in 2005, research by the Future Foundation¹² found this trend to be real and growing in the UK. According to this study:

- **57% of consumers have recommended a company on the basis of its responsible reputation**
- **58% have avoided a product or service because of the company’s reputation**
- **35% have actively sought information on a company’s reputation**
- **35% have felt guilty about unethical purchase(s)**

¹¹ Quoted in UNEP’s Talk the Walk (referenced separately)

¹² Ethical Consumerism Report, 2005, Co-operative Bank/NEF/Future Foundation

A recent Guardian/ICM¹³ poll showed that most British people are willing to make personal sacrifices to tackle the threat of climate change:

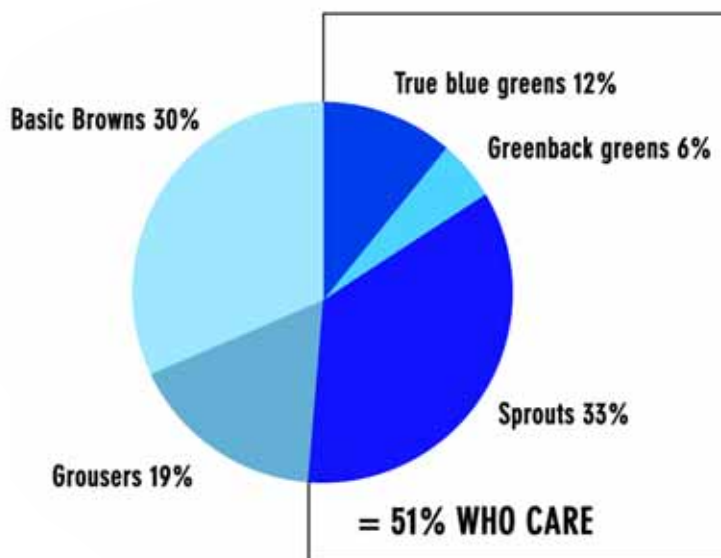


Figure 4. Roper Starch's segmentation based on environmental values

- 51% said they or their family had boycotted a company because its products damage the environment
- 63% approved of a green tax to discourage behaviour that harms the environment
- people are willing to pay an extra £331 to make their homes more environmentally friendly, even if the move brought them no direct cost saving

Clearly there is a difference between what people say they would do in a survey and what they actually end up doing. Nevertheless, Y&R claim to have behavioural evidence to back up their link between esteem and social equity (see below). Furthermore, the survey-based evidence given throughout this section provides important insights into how people would like to see themselves and to glimpse the idealised self image to which they aspire.

Taken together, this data is powerful evidence of a huge potential market that most marketers have yet to notice, let alone nurture and grow.

Consumer Segmentations

Three well-known consumer segmentations - Roper Starch (Figure 7), MORI and LOHAS – identify mainstream consumer segments for whom environmental and social factors are influential in their consumption choices. Together, they make a convincing case **that more than 50 per cent of consumers value environmental and social performance highly enough to let it influence their choice of brand.**

Leading advertising agency Young & Rubicam (Y&R) has developed a model that identifies seven types of people: Reformer, Explorer, Succeeder, Aspirer, Mainstream, Struggler and Resigned. Each type is linked to a set of values that drives them (Figure 5).

¹³ Most Britons willing to pay green taxes to save the environment, The Guardian, 22 Feb, 2006.

Figure 5:
Y&R's "Seven Kinds of
People" and the values that
drive them



This model is the basis for Y&R's Brand Asset Valuator, a tool that we use in the next section to assess the importance of "social equity" to a brand's true value.

As far as we are aware, no-one has yet attempted systematically to map Y&R's segmentation onto behavioural data; we recommend that such a project be undertaken.

Trends for Sustainability

Although most consumers do not understand or use the term sustainability, a number of trends have emerged both to demonstrate consumer demand and give hope for further advances in sustainable consumption.

For example, the world market for organic food and drink has grown from almost nothing 10 years ago to an estimated \$25bn in 2005. In the UK, 50% of baby food sales are now organic. In the US, sales of organic products have been growing at 20% – 10 times the pace of the conventional food market – generating an estimated \$15bn in sales in 2005. The world's taste for organic products is not limited to food; this year in the UK alone, Marks & Spencer, Oasis and Top Shop have launched clothing ranges made from organic cotton, the demand for which considerably outstrips the available supply.

Other (sometimes related) trends include Fairtrade, "downsizing", "mass luxury" and "localism". These trends are on the increase and represent an opportunity for sustainable brands, products and services to prove their commercial worth in mainstream markets.

Anatomy of modern brands

The profiles of leading brands have shifted; performance, innovation and "sociability" are becoming increasingly important parts of their DNA. "Social Equity" is now the fastest growing aspect of brand value, and the most powerful driver of "Esteem"¹⁴; in the Y&R/Goodbrand model, there is a 77% correlation between esteem and social equity.

Social equity is therefore already an important draw for consumers. While a poor social reputation may not be quite enough to put the average high street shopper off the latest must-have item, it does leave the brand vulnerable to competitors with a more responsible image. In fact, it is becoming increasingly difficult to become a "hot" brand in the US or UK without reassuring consumers on this front. It will not be long before all brands have to be "responsible" simply to remain mainstream players.

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¹⁴"Esteem", according to this model, is one of the four key pillars of brands



Chapter 4. What our Survey Revealed

...in which we find out what marketing professionals think about environmental and social issues. We explore how their working environment helps or hinders their efforts to become more sustainable, and review the results of our quantitative survey of marketing professionals.

Aligning values is not just a matter of preaching. Few of us have the luxury of being our true selves at work. Most of us have to modify the way we think and act in order to build high-performing teams and advancement in our careers. This is what we learnt about the perceptions of marketing and brand communications professionals on both client and agency sides¹⁵ :

Marketing and brand professionals care about sustainability¹⁶ and prefer to work for companies that share those concerns¹⁷.

➔ This suggests that companies that tuning into these issues will be better able to recruit and retain the best staff.

Yet, companies are less concerned with environmental and social issues than their own brand and marketing staff are¹⁸.

➔ Although this is disappointing, it does suggest that future attempts to embed sustainable values among brand and marketing staff are likely to succeed.

Respondents felt that consumers tend to choose responsible brands whenever they can, as long as those brands are as attractive as other alternatives¹⁹.

➔ So companies can use environmental and social messages to differentiate themselves in mainstream markets.

Although 81% of communications professionals believe they have a strong influence over consumer behaviour, only 3% were held responsible by their employers for the environmental and social aspects of that behaviour.

➔ Clearly, more employers need to encourage and reward sustainable practices internally.

Clients are just beginning to screen agencies for their sustainability credentials²⁰.

➔ This practice is likely to increase, and agencies should be ready to respond. Clients should ensure that they screen potential suppliers for environmental and social performance.

Clients and agencies lack information about consumer attitudes to environmental and social issues²¹.

➔ All parties should recognise the rising importance of environmental and social issues to consumers and invest in research to understand these areas better.

¹⁵ For information on how this survey was conducted and the job titles of respondents, see Appendix I of the full version of this report at www.wwf.org.uk/letthecatcake.

¹⁶ 97% of respondents thought recycling was important; 90% that charity donations were important; 87% thought it important to buy sustainable brands

¹⁷ More than two thirds of respondents from the client side were also looking for an employer that shared their concerns about environmental, social or ethical issues

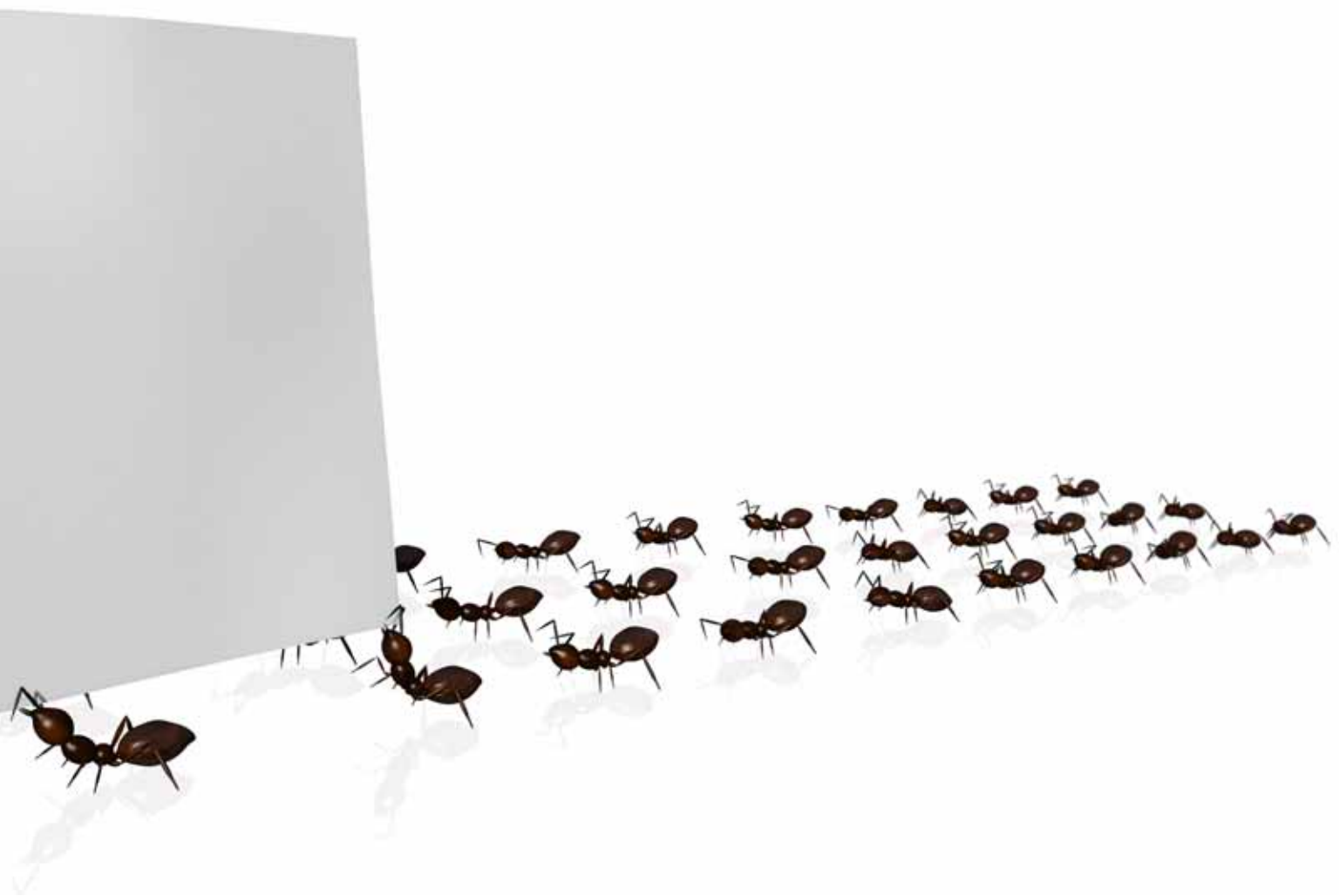
¹⁸ 83% of client staff and 73% of agency staff claimed to care as much or more than their employer about environmental and social issues. Only 13% and 6% respectively

said their employer cared more than them.

¹⁹ 53% thought their customers were influenced by environmental and social issues in their consumption behaviour; 48% believed that there was unmet latent demand for more responsible mainstream brands; only 11% felt that consumers disregarded such factors when making purchasing decisions.

²⁰ More than a quarter of agencies claimed to have been quizzed on their sustainability credentials by clients. 18% of clients claimed to have quizzed their agencies on this subject.

²¹ 21% rely more than anything on personal experience and observation.



Chapter 5. What To Do (Part 1): Aligning values

...in which we argue for a closer alignment of corporate, brand and consumer values.

"I owe a lot to my early years in the advertising world. I just wish we could have put all that energy and imagination into something better than flogging cars and fags."

Lord Puttnam

"Social pressures often indicate the existence of unmet social needs or consumer preferences. Businesses can gain advantage by spotting and supplying these before their competitors do."

Ian Davis, worldwide managing director of McKinsey & Company

"Visionary companies [are guided by] an almost cult-like devotion to a 'core ideology' or identity, and active indoctrination of employees..."

Jerry Porras and James Collins

Key Points

- A new conceptual framework is useful for understanding the complex dynamics of consumption as they relate to "brandscape", "brainscape" and "behaviour"
- Most mainstream brands will not benefit from simplistic attempts to position themselves as primarily "green" or "ethical", because such a positioning does not correspond to consumer priorities
- Mainstream brands should recognise and incorporate sustainability into their corporate values in order to reflect the value shifts in wider society
- Aligning brand values with relevant consumer values in this way increases the brand's relevance to consumers, differentiates it from the competition, provides focus for communications campaigns and reduces the risk of reputational damage
- Greater use should be made of ethnographic and anthropological techniques to fuel insights for innovation
- Communicating the "green" element can distract from the main message, especially in mass advertising, where creatives always try to communicate just one message at a time and

that message usually has to focus on the most motivating aspect of the brand. In mainstream markets, this is rarely anything to do with the environment or social issues

Brandscape, Brainscape and Behaviour

The behaviour of people – whether investors, employees or consumers – both affects and is affected by the values, beliefs and messages that prevail in our society. In order to make sense of a very complicated set of motivations and relationships, this report has found it helpful to look at the world in terms of three dimensions: "Brandscape" "Brainscape" and "Behaviour" (Figure 6). •

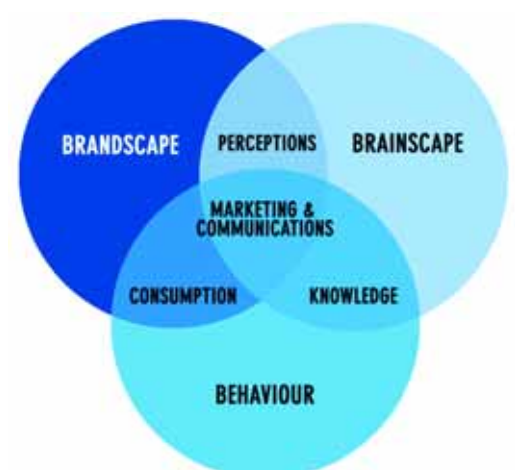


Figure 6. Marketing as mediator between Brandscape, Brainscape and Behaviour

Brandscape is the map of brands in our society. It is a combination of the products and services themselves, their prices and distribution systems, their design and functionality, their packaging, sales and promotional activities (including advertising), their logos and trademarks and even their reputation and image.

Brainscape is the collection of beliefs, values and motivations of individuals, many of whom fulfil more than one role (consumer and marketer; investor and journalist). The Brainscape is influenced both by the Brandscape – through personal experience of products, services and communications – and by the behaviour of customers and staff. The impact of brands on human consciousness is sometimes called the “brainprint”.

Behaviour is expressed by brands and consumers. It both affects and is affected by the other two dimensions: as people learn from their own behaviour and from observing that of others, they change their own attitudes, beliefs and expectations (Brainscape). Their behaviour alters in response to elements of the Brandscape, such as pricing, availability, advertising activity and personal recommendation

The marketing function acts as a conduit between these three dimensions. Not only does it influence and partly define the brand package as experienced by consumers; it also measures the physical and emotional responses of those consumers in order to innovate.

Lifting the veil, changing perspective

As we have shown in Chapter 3, there are huge potential new markets available to companies that tune their values into shifting societal values on sustainability issues.

However, doing so will require a change of culture and perspective within organisations.

In big corporations, it is often the CSR department that is left having to make the business case for sustainable marketing, yet most CSR professionals do not understand marketing well enough to make that case.

From the perspective of some chief executives, the marketing department exists to increase revenues, while the CSR department is there to minimise reputational risks and enforce policies. This sets up a tension at departmental level, where CSR managers are regarded with suspicion by marketers and remain excluded from the planning process.

Marketing changes perceptions and enables consumers to make the choices that are most closely aligned with their most positive personal values. Used well, it can also help to change consumer behaviour directly. For this reason, pioneering brands are beginning to switch perspective from that of the CSR community to that of marketing professionals, whose job it is to generate and exploit consumer demand and who understand how to give and read market signals.

From Niche to Mainstream

Achieving sustainable consumption is only going to be possible if mainstream brands become responsible. Mainstream consumers seek personal relevance and benefit, convenience, value and social acceptability. As long as environmental, social and ethical responsibility is the domain of a few niche offerings that cost more money or are hard to find, or do not carry the caché required by brand-conscious consumers, they will not make a significant impact on consumption patterns.

Figure 7 describes brands in terms of two variables: the vertical axis plots a brand's relevance to consumers in terms of its positive, personal value (utility, emotional appeal and fit with consumers' personal lives); the horizontal

axis plots how “easy” a brand is to buy in terms of its price, availability, familiarity, trustworthiness, distinctiveness and social acceptability. In the past, green and ethical brands have tended to occupy the niche positioning, either because they were more expensive than mainstream alternatives, or because they were harder to find, less useful or less socially acceptable.

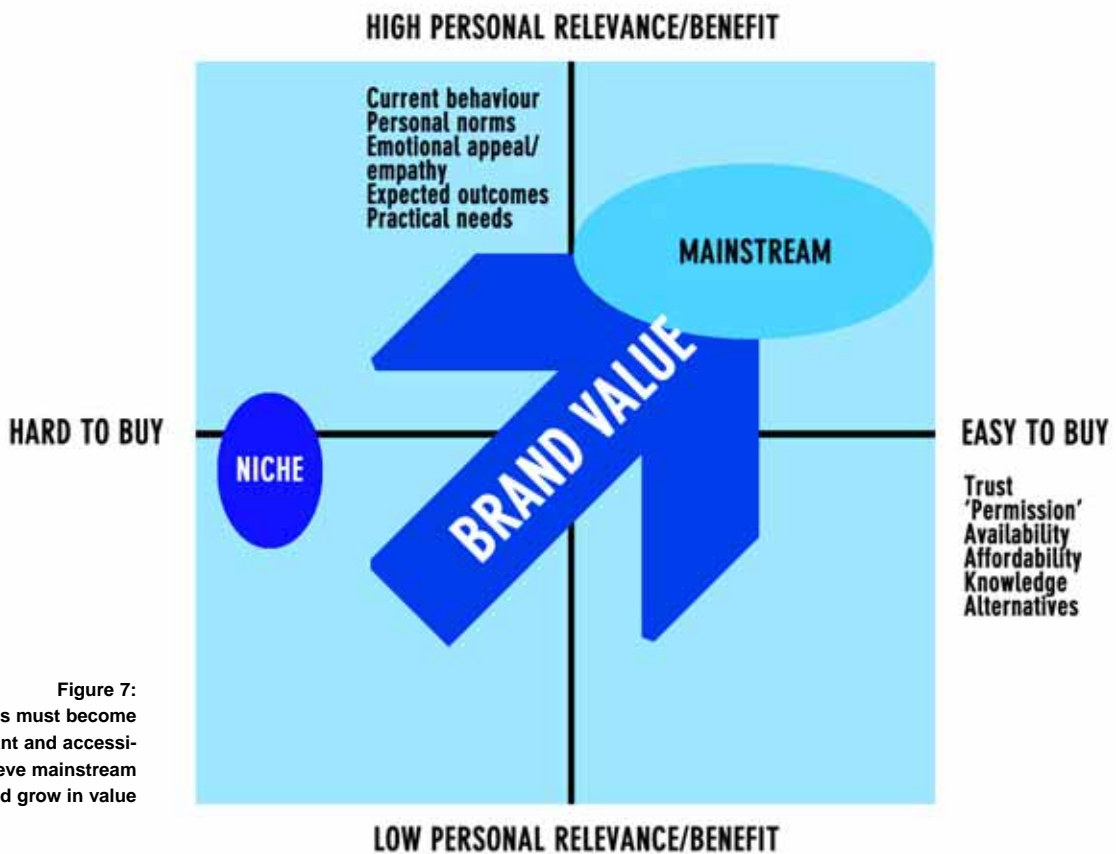


Figure 7: Niche brands must become more relevant and accessible to achieve mainstream status and grow in value

Understanding the value of values

Once upon a time, music lovers needed half a ton of vinyl and several metal boxes full of wires to enjoy their music collections. Nowadays, we use iPods. We consume the same amount of music, but our consumption of music-related vinyl and metal has decreased. From the perspective of marketers, the CSR community has become so transfixed by metal

consumption that it has forgotten about the music, which is where the real value lies. Marketing is the key to decoupling material consumption from consumer value; the creation of “stuff” from the creation of wealth. “Emotional” aspects of brands offer real value to consumers, without damaging the environment.

Aligning social, corporate and brand values

Figure 8 shows an ideal world in which brand values are a subset of corporate values, perfectly aligned with them but with their own identity. In turn, corporate values are a subset of social values. And since values are fluid and interdependent, they change at each of the three levels.

Marketing is guided by these values in its attempts to influence consumer behaviour through product design, price, distribution and communications (although marketers often have little or no influence over the first two elements). Marketers are also guided by the response from consumers, both in terms of their actual behaviour and the feedback they provide through formal and informal channels such as research, customer service and media comment.

Any company or brand prepared to revisit its values and to align them more closely with those of its potential customers can reap huge commercial rewards. Not only will its promise to customers be more compelling and the experience more rewarding, but its staff will also be more highly motivated and more in tune with shared objectives.

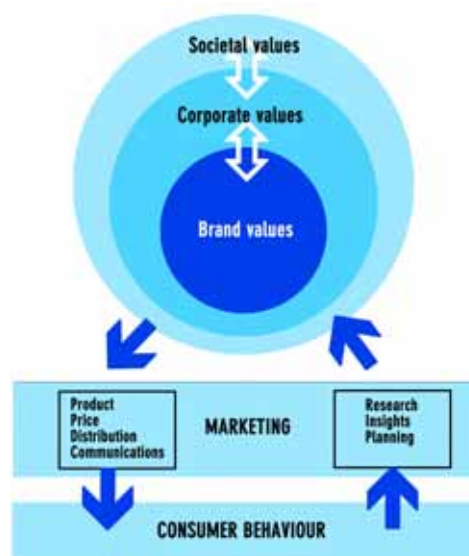


Figure 8:
How social values affect
consumer behaviour
through marketing

The clever money is on companies which sign up their consumers to support them on their journey to sustainability.

This virtuous cycle of positive feedback between social values and the forces of production provides a vision in which marketing plays a central role in long-term success.

From the ashes of a ruined reputation...

here are many examples of corporate reputations that have been damaged by dishonest, selfish or unethical behaviour. Many of these companies have subsequently changed in ways that have led to significant systemic or cultural change in their industries. For example, McDonalds launched a range of salads and “healthy” options; BP invested in renewable energy and declared a new aim to go “Beyond Petroleum” to a flurry of cynicism; Shell allowed a member of the public to call it a “corporate murderer” on its flagship corporate website; Nike cleaned up its sweat shops and published the addresses of its factories in case curious passers-by wished to mount an impromptu inspection. All these initiatives were the result of a combination of company-wide embarrassment at the grass roots and a mandate for change from the highest level. They involved a degree of soul-searching that went beyond individual advertising campaigns (which tend to focus on specific products or services) to the heart of the company’s culture and values system; and they responded to deep shifts in the belief systems of the societies in which they were operating.

The Body Shop, Ben & Jerry’s, Green & Blacks, The Fairtrade Foundation, Shell, duPont, Ruhrgas, St. Lukes and WWF all provide documentary evidence to support the commercial value of sustainability messages. BT attributes 25 per cent of its brand value to its reputation for environmental and social worthiness.

Greenwash and Parapets

Crucial to any decision over what to communicate to consumers is the following question: is your message a true reflection of your corporate/brand values and of your products and services? If the answer is “yes”, then communicating with your customers about environmental and social aspects of your product, service or performance will almost certainly be worthwhile. Otherwise, you risk being accused of greenwash, and damaging your reputation.

Generating insights

“To build brands that mean something to customers, you need to attach them to products that mean something to customers. And to do that, you need to segment markets in ways that reflect how customers actually live their lives.”

Harvard Business Review, December 2005

Successful brand and communication strategies depend on great insights. A great insight is a combination of keen observation and creative thinking - “how can I use what I know about consumers to achieve my objectives?”

Recognising the limitations of traditional qualitative and quantitative techniques, some researchers have looked to anthropology and sociology for better ways of generating insights. For example, “ethnographic” studies involve researchers spending time with their subjects in their natural environment; on shopping trips, watching television, interacting with their kids and so on. Researchers build up a picture of what influences the observed behaviours and what “jobs” the subject is trying to accomplish by means of that behaviour. Then they work with the brand or marketing team to think of ways in which they can help consumers to do those “jobs” more efficiently and effectively.

Communicating brand personality

For most mainstream brands, overt sustainability messages are unlikely to prove the most effective use of advertising budgets. However, the “softer” elements of brand personality can be communicated in subtler ways: through the choice of typeface, the style of the writing, the atmosphere of the photography and the conceptual framing of the messages themselves. Just as we can tell a lot about a person by the complex mixture of non-verbal signals they give out, so we can tell a lot about the brand by the way it interacts with us.

FOR A FULL VIEW OF THE ISSUES DEALT WITH IN THIS CHAPTER SEE OUR FULL REPORT AT wwf.org.uk/letthecatcake

Figure 9. Marks & Spencer's "Look Behind the Label" campaign introduces customers to sustainable sourcing and production

Our prices may vary. Our quality doesn't.

We put all our products through rigorous quality tests, regardless of their price.



Wear out our clothes before you buy them.

Some of our clothing ranges undergo a selection from 100 M&S quality tests before they last.



YOUR
M&S
look behind the label



Chapter 6. What To Do (Part 2): Emerging Best Practice

...in which we show how some brands are using sustainability to create value for consumers, shareholders and staff.

"Make friends before you need them"

Rita Clifton, Chairman of Interbrand

Introduction

Throughout this report, we have stressed the importance of values in building sustainable brands. Some brands already have those values; others have to go through a process of reappraisal and change. Some choose to make this change quickly, with radical and widespread programmes; others prefer (or are forced) to begin with oases of best practice that permeate through the organisation more slowly.

In our main report, we draw lessons from a variety of different companies and brands, each with its own approach. Although in reality no two cases are the same, we group them into four distinct types of approach:

1. "Corporate brands": companies with a single identity for both consumers and staff (Marks & Spencer, Interface, eBay)
2. "Umbrella brands": comprising a number of different consumer brands under a corporate banner of which those consumers may or may not be aware (Unilever, P&G)
3. "Retailer brands": typically high street stores selling other brands over which they have no direct control, such as Boots and John Lewis
4. "Learner brands": already known to consumers, these have chosen to acquire or launch "sustainable" sub-brands, ostensibly to act as beacons of change for the rest of the organisation (L'Oreal and The Body Shop; Cadbury's and Green & Black's chocolate; Nescafé Partners' Blend)

5. "Endorser Brands": these are a kind of "stamp" of sustainability, owned and run externally but used by consumer brands to reassure consumers of sustainability credentials (Fairtrade)



Figure 12. Café Direct is now the UK's sixth largest coffee brand, prompting mainstream rivals to launch Fairtrade variants

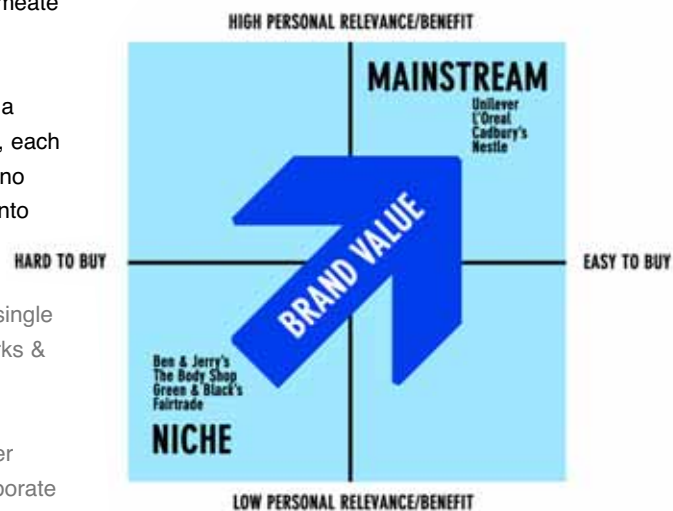


Figure 11. "Learner" brands acquire or launch "mass niche" or "mass luxury" brands to drive internal change as well as sales

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Chapter 7. What To Do (Part 3): The Ten Point Plan for Sustainable Brands

...in which we explain what brand and marketing professionals and agency staff can do to unlock the latent commercial potential of the environmental and social aspects of their brands. The following ten tasks do not fall into a neat sequence; implementing them can be a complex task. For more details on how to carry out this ten point plan, contact WWF.

1. Understand your brand. Conduct a “brand perception audit” to understand and define your brand’s true personality as it exists in the minds of both employees and consumers/customers. Include environmental and social elements in this and subsequent tracking studies. Consider the inherent qualities of your product or service to see how it might affect the environment or society.

2. Understand your consumers and how their relationship with sustainability affects their esteem for your brand. Understand how your company provides “social utility” to your customers. Observe and understand the values, beliefs and lifestyles of your present and potential customers, preferably using “anthropological” techniques such as home visits and accompanied shopping. Bear in mind existing information about consumer segmentation as summarised in this report and think of fresh ways to generate consumer insights.

3. Get your house in order. Audit and improve your internal processes, from office management to production and logistics. Minimise power consumption, water use and waste. Screen your suppliers for sustainability. Use environmentally-friendly cleaning products and office supplies²³.

4. C(S)R: Handle with care! The Corporate Responsibility Function should act as a driver of innovation, using its combination of sustainability expertise and broad strategic view to tease out consumer insights. Rather than adopting a narrow focus on the measurement

and reduction of risks and impacts, CSR should pay much more attention to opportunities, as Procter & Gamble has begun to do with its Corporate Social Opportunity (CSO) unit. Even then, CSO should be seen as a short-term change management role intended to do itself out of a job as soon as possible by making CSO part of the DNA of the brand and values of the company. Rather than seeking to “own” sustainability, these units should work with the heads of the core business functions (including sales and marketing) to develop key performance indicators (KPIs) of sustainable business practices. These KPIs should then be used for setting objectives and targets, reviewing performance and determining remuneration and career progression.

5. Innovate. Identify new and efficient ways in which your brand can help consumers do what they wish to do or feel how they wish to feel. Re-tune the corporate values and brand to resonate with attributes and attitudes that you see emerging in the consumer “brainspace” on sustainability issues. As your product or service progresses from inception through design and manufacturing, constantly query its sustainability at all levels, from the way it is sourced, produced and packaged to the impacts of how it is used, and the way it is destroyed or recycled at the end of its life. Think of new ways your existing products or services might do useful jobs while enhancing people’s perceptions of themselves as environmentally or socially responsible. Think how changes to these products and services might make them even more useful and responsible.

²³ For an explanation of social utility, see Chapter 3

6. Motivate. Review the way in which marketing and branding staff are rewarded: instead of simply rewarding higher sales, make at least part of their annual performance review dependent on how they perform their job, in line with company/brand values. Consider also entering awards (which everyone loves to win!) such as the annual CaRMA (Campaign for Real Marketing Awards)²³.

7. Collaborate. Create multi-functional, multi-skilled teams that include personnel from all relevant functions, including marketing communications, investor relations, product design/development, brand strategy, financial planning and analysis, and corporate responsibility.

8. Communicate. Once you have done all of the above, communicate externally. If you are open, honest and heartfelt, then a bit of sniping here and there from your critics will just be grist to your mill. Think about how consumers interact with the new media landscape. Integrate your messages through the most appropriate channels, even if you have to invent those channels yourself.

9. Sign-up your consumers to the sustainability journey that your company needs to take – use them to create and ride the sustainability wave. Ensure that consumers come away from every interaction with your brands, products and services with as positive a self image as possible. If your brand makes them feel like better people as it does its main “job”, then it will thrive.

10. Measure, monitor and report continuously.

Develop ways of identifying, measuring, evaluating and reporting the various elements of brand value, including those that relate to sustainability, so that they can be used by managers as indicators of performance. Specific targets may then be set to sit alongside shorter-term ones and be taken into account at staff performance reviews.

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²³ For cleaning services and office supplies, consider using via3office.com. For further information on how to run a green office, see the EACA's Green Office Guide, available for download at www.uneptie.org/pc/sustain/reports/advertising/EACA_greenguide%20FINAL.pdf, or the Australian government's more detailed but generic Green Office Guide, downloadable from www.deh.gov.au/settlements/publications/government/purchasing/green-office-guide/index.html



Instead of preaching about the moral responsibility of business to further the goals of sustainability, this report exposes the considerable commercial potential of a new approach to business, based on the provision of more “responsible” mainstream brands. This potential comes from an increasing demand amongst mainstream consumers for their regular brands to come with environmental and social responsibility “built in”. These consumers are not usually prepared to pay more or put themselves out to buy “green” or “ethical”, but they do value these attributes as part of the brand package. Sustainability can act as a differentiator between mainstream brands, encourage loyalty and even change people’s perceptions of themselves. To unlock this commercial potential, environmental and social values must be built into the DNA of mainstream consumer brands.

“This work by the WWF... should be an important part of the education of all aspiring Marketers.”

Chris Pomfret

“This WWF report exposes the true meaning of value in modern economies. Until now, most companies have failed to recognize and align themselves with the deep shifts in personal values that are happening in our society, particularly with relation to environmental and social issues. Doing so is indispensable to long term commercial success.”

David Blood, Founding Partner, Generation Investment Management

“This study approaches its subject in a novel, constructive and digestible way. The WWF approach shows a real understanding of the challenges and business motivators for everyone involved in brand management and all other aspects of marketing.”

Sir Paul Judge, Master of the Worshipful Company of Marketors

“With this report, WWF has issued a powerful wake-up call to marketers and presented a challenge to which marketers must respond. Backed up by a fresh set of valuable insights through new research, the authors propose a radical new role for marketing and advertising executives in the emerging economy of values.”

Professor Melanie Howard, Founding Partner, The Future Foundation

“Kleanthous and Peck have done Adland some real good by showing how agencies can help clients grapple with the complex issues that CSR raises for marketing. In ‘Let Them Eat Cake’, they not only draw attention to the ‘elephant in the room’; they show us how to make friends with it, instead of getting trampled.”

Hamish Pringle, Director General, Institute of Practitioners in Advertising

This report can be downloaded from wwf.org.uk/letthemeatcake To discuss the issues raised in this report and the further work WWF is doing in this area, contact Anthony Kleanthous, WWF-UK Global Policy Advisor. email: akleanthous@wwf.org.uk

The mission of WWF is to stop the degradation of the planet's natural environment and to build a future in which humans live in harmony with nature, by:

- conserving the world's biological diversity
- ensuring that the use of renewable natural resources is sustainable
- reducing pollution and wasteful consumption



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