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Dentsu Conducts Sustainable Lifestyle Receptivity Survey in 14 Countries, Finds “Sustainablists”—People Inclined to Sustainable Lifestyles—Emerging in Growing Markets

Dentsu Inc. (Tokyo: 4324; ISIN: JP3551520004; President & CEO: Tadashi Ishii; Head Office: Tokyo; Capital: 58,967.1 million yen) has conducted a sustainable lifestyle receptivity survey in 14 countries, with a focus on growing markets, and produced an analysis report of the results. Inspired by the Global Survey on Sustainable Lifestyles carried out since 2009 by the United Nations Environment Programme (UNEP) in partnership with the National Institute for Environmental Studies (Tsukuba, Japan), the survey was conducted with cooperation from Dentsu Asia Pte. Ltd. and Dentsu Research Inc.

Lifestyle practices with a good balance between three aspects—environment, social and economy (the triple bottom line)—and appropriate alternative products/services are essential to realizing a sustainable society. In reality, however, companies are seldom willing to develop for or invest in a market without verification of its marketability or of the receptivity toward Sustainable Lifestyles.

Dentsu has verified the inclination to Sustainable Lifestyles in 14 countries including BRICs and emerging ASEAN member countries. The results clearly indicate that caring for sustainability is an effective facet of companies’ sustainable business strategies.

In Japan the concept of sustainability tends to evoke ascetic images like caring for the environment and diminishment, whereas in BRICs and ASEAN member countries it is understood as a triple bottom line concept that includes not only the environment but also social and active economic growth.

The results also confirm in all the countries surveyed a wide emergence of people aiming at Sustainable Lifestyles, which Dentsu named “Sustainablists”, expected to

be a driving force in growing markets. This suggests that corporate strategies that realize lifestyles tailored to these "Sustainablists" and support sustainable community development will be the key to approaching growing global markets.

Significant survey results are as follows.

1. In the 14 countries surveyed, "sustainability" is understood as the concept relates to environment and social, and also to "development," "technological advancement" and other words that suggest active economic growth, meaning it is widely understood to be a triple bottom line concept.
2. There is a wide emergence of "Sustainablists" pursuing Sustainable Lifestyles.
3. Respondents hope to realize "time for mental relaxation," "relationships with family and friends" and "making life better in one or a few years' time."
4. "The year 2030" evokes images of "technological advancement," "digital," "global" and "development."
5. Some countries prioritize the benefit to the next generation with regard to "environmental issues," but most countries prioritize the benefit to the present generation with regard to "social issues" and "economic issues."

1. In the 14 countries surveyed, "sustainability" is understood as the concept relates to environment and social, and also to "development," "technological advancement" and other words that suggest active economic growth, meaning it is widely understood to be a triple bottom line concept.

- While "sustainability" brings to mind various words in each country, the average of the 14 countries shows high scores for "global environment" (=environment), "responsibility/obligation" and "sense of balance" (=social), and "development" and "technological advancement," which suggest active economic growth.

■ Words that relate to "sustainability"

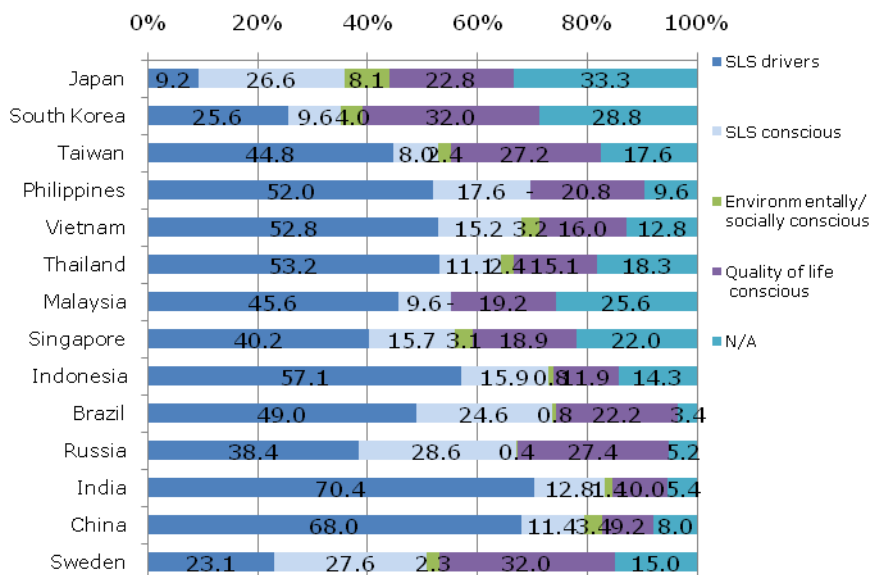
		Average of 14 countries	Japan	South Korea	Taiwan	Philippines	Vietnam	Thailand	Malaysia	Singapore	Indonesia	Brazil	Russia	India	China	Sweden
1	Global environment	38.2	31.7	24.0	52.8	48.8	28.0	47.6	36.8	44.9	47.6	59.2	14.0	34.2	58.0	36.0
2	Development	35.7	13.5	41.6	31.2	60.0	48.0	48.4	38.4	37.0	38.1	60.6	50.6	34.2	20.6	38.6
3	Responsibility/Obligation	32.1	20.0	30.4	34.4	38.4	17.6	33.3	29.6	29.9	29.4	61.2	25.4	28.2	38.6	34.5
4	Technological advancement	31.2	4.8	32.8	20.8	44.0	32.8	33.3	32.8	17.3	32.5	44.6	57.8	26.2	42.8	33.9
5	Sense of balance	30.6	15.3	31.2	21.6	43.2	23.2	40.5	32.8	22.0	36.5	53.2	32.6	28.4	26.2	36.0
6	Recycling society	29.1	-	24.8	32.0	35.2	15.2	38.1	27.2	31.5	19.8	61.6	8.8	24.6	57.4	41.7
7	Efficiency	28.7	13.1	25.6	13.6	49.6	33.6	45.2	32.8	30.7	23.8	42.8	48.4	32.4	25.6	23.6
8	Security	28.0	15.1	12.8	20.8	32.8	39.2	29.4	24.0	20.5	33.3	40.0	33.8	29.8	31.4	29.8
9	Children (next generation)	27.5	16.9	26.4	48.8	38.4	20.8	39.7	21.6	18.9	52.4	37.6	25.8	26.6	37.6	23.3
10	Sense of safety	26.6	13.4	32.0	29.6	38.4	24.8	42.9	17.6	17.3	23.8	24.0	30.2	26.8	27.6	36.4

The table displays the five highest-ranking responses by the average of the 14 countries and by individual country.

2. There is a wide emergence of “Sustainablists” pursuing Sustainable Lifestyles (SLS): SLS drivers and the SLS conscious.

- All 14 countries surveyed clearly show a wide existence of SLS drivers and the SLS conscious groups, whose either conduct or awareness is inclined to Sustainable Lifestyles in all three aspects of environment, social and living (=economy)*.

SLS drivers and the SLS conscious groups—who are inclined to triple bottom line lifestyles, which differ from conventional lifestyles that overemphasize economic growth—are clearly coming to prominence regardless of nation, state of economic growth, race, and ethnicity. They are projected to be pioneers and a driving force in the global markets of the next generation.



SLS drivers group: High conduct scores in all three aspects of living (=economy), environment, and social
 SLS conscious group: Not SLS drivers but high conduct or awareness scores in all three aspects of living (=economy), environment, and society
 Environmentally/socially conscious group: High conduct or awareness scores in the two aspects of environment and social.
 Quality of life conscious group: High conduct or awareness scores in the sole aspect of living (=economy)
 N/A: Not applicable to any of the above categories
 Categories are based on the scores of 30 questions related to “lifestyle and conduct at present” and “lifestyle and conduct you hope to realize.”
 Regarding the three aspects of sustainability—environment, social, and economy—Dentsu interprets economy as the quality of life, and accordingly defines sustainable lifestyles as lifestyles inclined to environment, social, and living.

3. Respondents hope to realize “time for mental relaxation,” “relationships with family and friends” and “making life better in one or a few years’ time.”

- To the question regarding lifestyle and conduct they hope to realize, people in many countries responded “have time for mental relaxation,” “live life at my own pace,” “make life better in one or a few years’ time,” “regard relationships with family and friends as most important,” and “offer assistance to people they need it.” This indicates a sense of values that, in a constructive way, regards respect for the individual a priority and at the same time wants to care for others.



■ Lifestyle and conduct you hope to realize

		Average of 14 countries	Japan	South Korea	Taiwan	Philippines	Vietnam	Thailand	Malaysia	Singapore	Indonesia	Brazil	Russia	India	China	Sweden
1	Have time for mental relaxation	80.7	85.4	59.2	67.2	80.8	69.6	70.6	64.8	77.2	77.0	84.0	88.2	84.8	85.6	77.7
2	Regard relationships with family and friends as most important	80.1	70.2	59.2	71.2	80.8	76.8	75.4	64.0	76.4	77.0	87.0	86.6	88.2	85.4	84.3
3	Live with the intention of making life better in one or a few years’ time	79.0	64.2	70.4	79.2	85.6	76.0	73.8	68.8	77.2	85.7	90.6	91.0	86.2	85.6	77.2
4	Live life at my own pace without competing with others	77.9	75.0	56.8	64.8	80.0	68.0	70.6	60.8	64.6	74.6	84.6	84.6	84.2	78.6	82.1
5	Offer assistance to the elderly and people with disabilities when I think they require it	75.5	73.9	49.6	67.2	77.6	72.0	69.0	64.8	70.9	77.0	82.8	76.2	86.2	85.6	69.4
6	Live in good harmony with nature	74.5	60.6	38.4	65.6	76.8	69.6	69.0	64.8	70.9	83.3	87.2	85.8	84.4	87.8	72.0
7	Buy products that may be more expensive but last a long time	73.4	56.5	66.4	69.6	76.0	75.2	68.3	57.6	76.4	81.7	79.2	89.0	84.8	83.0	71.5
8	Take on new challenges in life without being afraid of failure	72.6	54.9	48.0	54.4	81.6	60.0	62.7	61.6	73.2	79.4	86.0	80.8	81.2	80.6	78.5
9	In the course of everyday life, have a habit of reducing negative environmental impact	72.3	59.8	54.4	58.4	74.4	69.6	74.6	57.6	65.4	79.4	83.8	78.0	85.8	84.6	68.9
10	Want sufficient savings for the future	72.2	76.8	28.8	36.0	75.2	73.6	69.0	56.8	69.3	77.8	48.8	89.0	77.2	74.6	78.9

Colored percentages represent the five highest-ranking responses by the average of the 14 countries and by individual country.

4. "The year 2030" evokes images of "technological advancement," "digital," "global" and "development."

- In the average of the 14 countries, the words that rank highest in relation to the year 2030 are "technological advancement," "digital," "global," "development," and "far." This confirms that many countries have strong hopes for the future.

■ Words that relate to "the year 2030"

		Average of 14 countries	Japan	South Korea	Taiwan	Philippines	Vietnam	Thailand	Malaysia	Singapore	Indonesia	Brazil	Russia	India	China	Sweden
1	Technological advancement	49.2	20.8	56.0	43.2	69.6	61.6	64.3	52.0	54.3	69.8	64.4	57.2	50.8	51.2	54.8
2	Digital	33.2	19.4	53.6	38.4	36.8	48.0	54.0	26.4	29.1	44.4	49.0	39.2	35.4	25.2	29.8
3	Global	33.0	17.3	53.6	43.2	46.4	40.8	29.4	44.0	36.2	57.9	38.8	26.6	37.4	40.4	31.9
4	Development	32.5	12.5	36.0	32.0	47.2	51.2	37.3	40.8	37.8	37.3	47.0	34.8	36.8	17.2	40.4
5	Far	29.7	17.5	15.2	32.8	22.4	24.0	15.9	20.0	20.5	14.3	34.0	54.0	11.8	29.8	47.7
6	Growth	29.3	9.6	32.8	22.4	44.0	40.8	34.9	30.4	31.5	36.5	47.4	27.6	40.0	29.2	29.0
7	Progressing	25.0	4.8	35.2	28.8	45.6	33.6	47.6	28.8	26.8	34.9	17.8	36.0	36.2	28.8	24.9
8	Anxiety	24.2	41.5	17.6	26.4	10.4	14.4	21.4	16.0	13.4	15.1	24.6	28.4	17.2	20.6	18.4
9	Danger	21.1	16.0	20.8	23.2	23.2	24.8	28.6	20.0	20.5	19.0	39.8	16.2	21.8	21.2	16.7
10	Recycling society	19.2	-	14.4	12.8	24.0	20.8	21.4	17.6	12.6	16.7	29.6	14.2	30.4	28.4	25.9

The table displays the five highest-ranking responses by the average of the 14 countries and by individual country.

5. Some countries prioritize the benefit to the next generation with regard to “environmental issues,” but most countries prioritize the benefit to the present generation with regard to “social issues” and “economic issues.”

- Of the values of the triple bottom line, people in Japan, South Korea, Taiwan, Indonesia, and China place a higher priority on the benefit to the next generation than the present generation when it comes to environmental issues. On the other hand, people in most countries place a higher priority on the benefit to the present generation when it comes to social and economic issues.

60% or higher

	Environmental issues		Social issues		Economic issues	
	Prioritize the benefit to the present generation	Prioritize the benefit to the next generation	Prioritize the benefit to the present generation	Prioritize the benefit to the next generation	Prioritize the benefit to the present generation	Prioritize the benefit to the next generation
Japan	26.6	73.4	54.7	45.3	55.2	44.8
South Korea	30.4	69.6	64.0	36.0	76.0	24.0
Taiwan	37.6	62.4	60.8	39.2	73.6	26.4
Philippines	48.0	52.0	68.0	32.0	64.0	36.0
Vietnam	48.0	52.0	56.0	44.0	60.8	39.2
Thailand	53.2	46.8	67.5	32.5	78.6	21.4
Malaysia	41.6	58.4	60.8	39.2	56.0	44.0
Singapore	44.9	55.1	61.4	38.6	68.5	31.5
Indonesia	20.6	79.4	52.4	47.6	50.8	49.2
Brazil	72.6	27.4	82.2	17.8	77.2	22.8
Russia	68.6	31.4	80.4	19.6	78.8	21.2
India	61.8	38.2	69.6	30.4	70.8	29.2
China	29.0	71.0	50.8	49.2	64.6	35.4
Sweden	49.7	50.3	67.3	32.7	64.9	35.1

Survey outline

	Japan	Sweden	BRICs		Asia
Survey period (2010)	March 24–26	September 6–21	September 6–21	October 21–28	September–November
Target countries	Japan	Sweden	Brazil, Russia, and China	India	Thailand, Indonesia, South Korea, Malaysia, Vietnam, Singapore, Taiwan, and Philippines
Sample criteria	Men and women aged 18–69	Men and women aged 18–69	Men and women aged 18–44	Men and women aged 18–44	Men and women aged 18–44
Sample size	1,000	1,000	500 per country; 1,500 total	500	125 per country; approx. 1,004 total
Number of questions	60	Approx. 30	Approx. 25	Approx. 25	Approx. 25
Survey method	Online				
Conducting institution	Dentsu Research Inc.				Dentsu Asia Pte Ltd. D-AIR*®

* D-AIR (Dentsu Asia Influencer Research) ®

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