

2010 Gibbs & Soell Sense & Sustainability™ Study

Perspectives on Corporate Sustainability
Among Consumers and Fortune 1000 Executives

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Background and Objectives

- Gibbs & Soell Public Relations (G&S) is a global independent PR firm with communications expertise to reach **consumer and business audiences in advanced manufacturing, energy, greentech, and sustainable industries.**
- G&S commissioned Harris Interactive® to conduct the **2010 Gibbs & Soell Sense & Sustainability™ Study** among consumers and Fortune 1000 executives in the United States.
 - The primary focus of the survey was corporate sustainability, specifically:
 - ❖ **Perceptions of businesses' commitment to sustainability;**
 - ❖ **Barriers to more businesses “going green”;** and,
 - ❖ **Responsibility for sustainability initiatives.**



Methodology

- All data collection was **conducted online**.
- A nationally representative sample of **2,605 U.S. adults ages 18+** was interviewed using the *QuickQuery*SM online omnibus service, with the *Harris Poll Online* (HPOL) panel as the sampling frame.
 - Data collection was conducted between July 8 and 12, 2010.
 - Final data are weighted to be representative of the U.S. adult population based on: age within gender, region, education, household income, race/ethnicity, and propensity to be online.
- A nationally representative sample of **304 Fortune 1000 executives** was interviewed using Harris Interactive's *Executive Omnibus*, with the *LinkedIn* database as the sampling frame.
 - Data collected was conducted between July 6 and 16, 2010.
 - Final data are weighted to be representative of the population of F1000 executives based on: annual revenue, number of employees, and Fortune 1000 rank.



Executive Summary

Executive Summary

- Only 29% of executives and 16% of consumers believe that a majority of businesses are committed to “going green.”
 - The plurality of both executives (54%) and consumers (48%) believe that only “some” businesses are committed to sustainability.
- Most executives cite insufficient return on investment (78%) and consumers’ unwillingness to pay a premium for green products or services (71%) as the primary obstacles to more businesses “going green.”
 - Additionally, more than 2 in 5 executives (45%) reported difficulty in evaluating sustainability across the entire life cycle of a product as a barrier to “going green.”

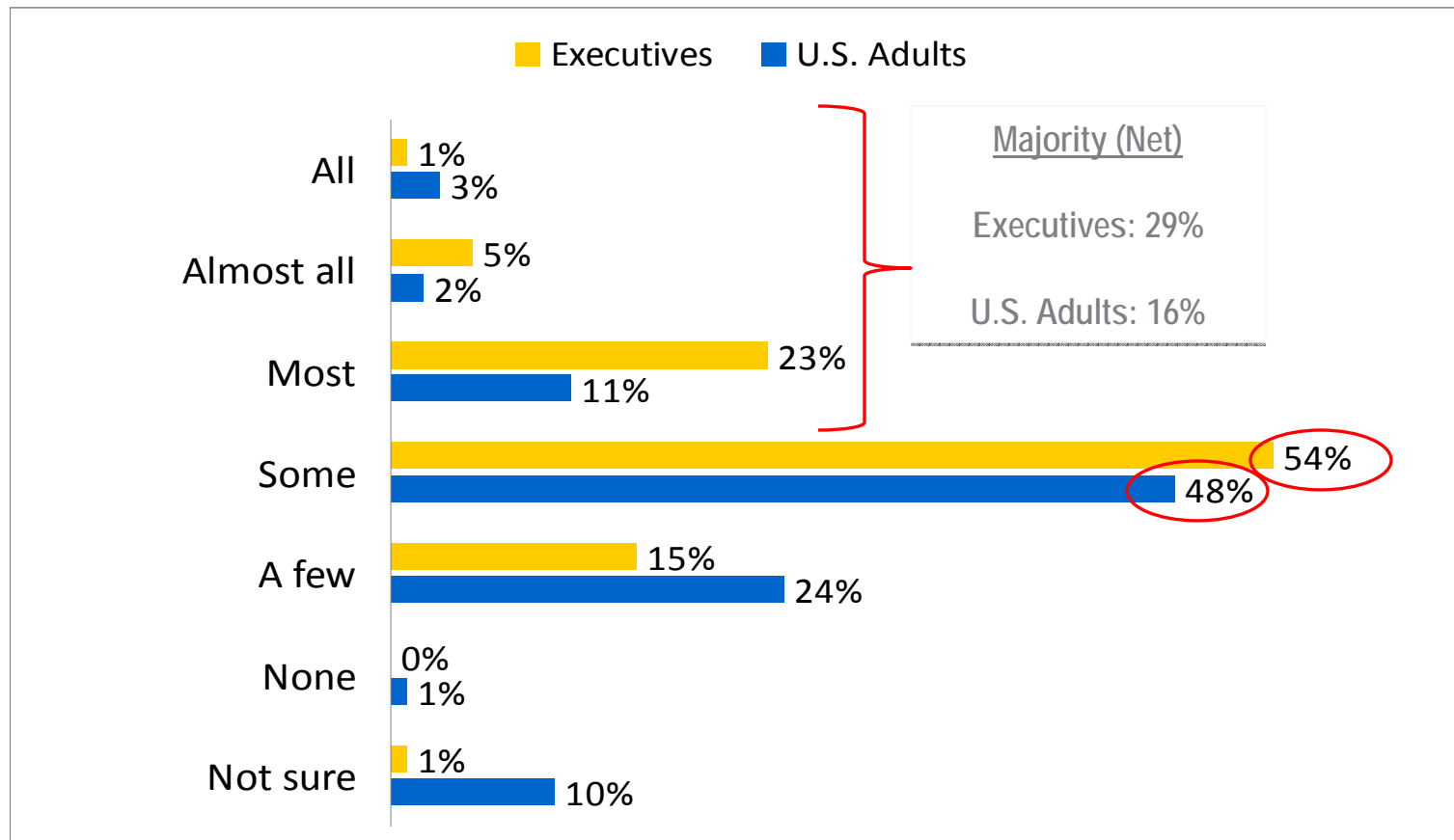
Executive Summary

– While more than two-thirds of executives (69%) say their companies have people responsible for sustainability, most have only added responsibilities for green efforts to the primary duties of a team of individuals (35%), or a C-suite or another senior level position (15%).

- Only about 1 in 10 (12%) report that their company has a C-suite or other senior level title/position dedicated solely to sustainability.
- 31% noted there is no one at their company who is responsible for “going green” initiatives.

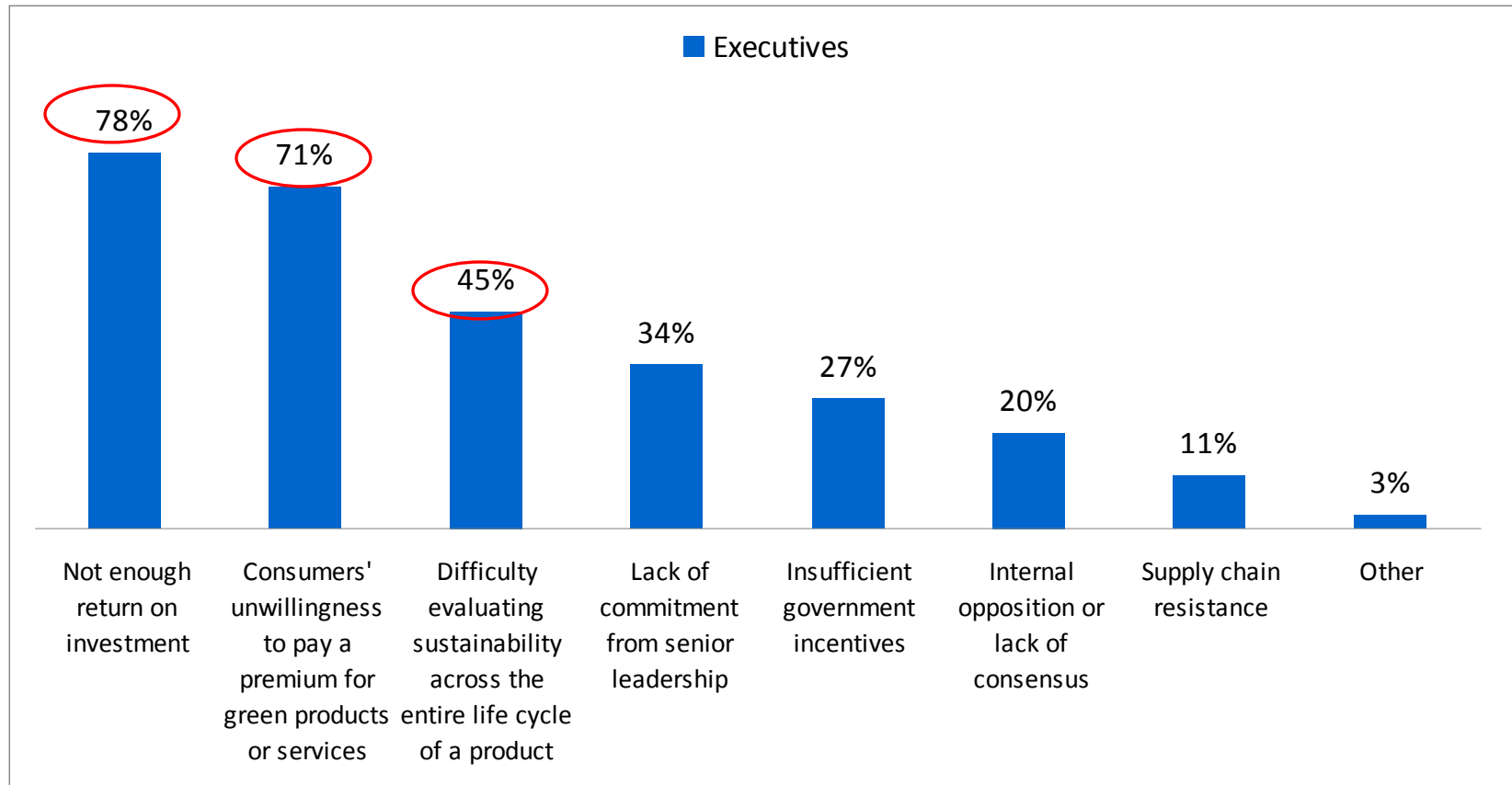
Detailed Findings

Only 29% of executives and 16% of consumers believe that a majority of businesses are committed to sustainability. Many consumers and executives believe only “some” businesses are committed to “going green.”



Q1700/Q1605: In your opinion, how many businesses are committed to "going green" - that is, improving the health of the environment by implementing more sustainable business practices and/or offering environmentally-friendly products or services?
 Base: All respondents (executives n=304, U.S. adults n=2,605).

Executives cite lack of ROI and consumers' unwillingness to pay as the top two barriers to more businesses "going green." More than 2 in 5 also cite difficulty evaluating sustainability across a product's life cycle.



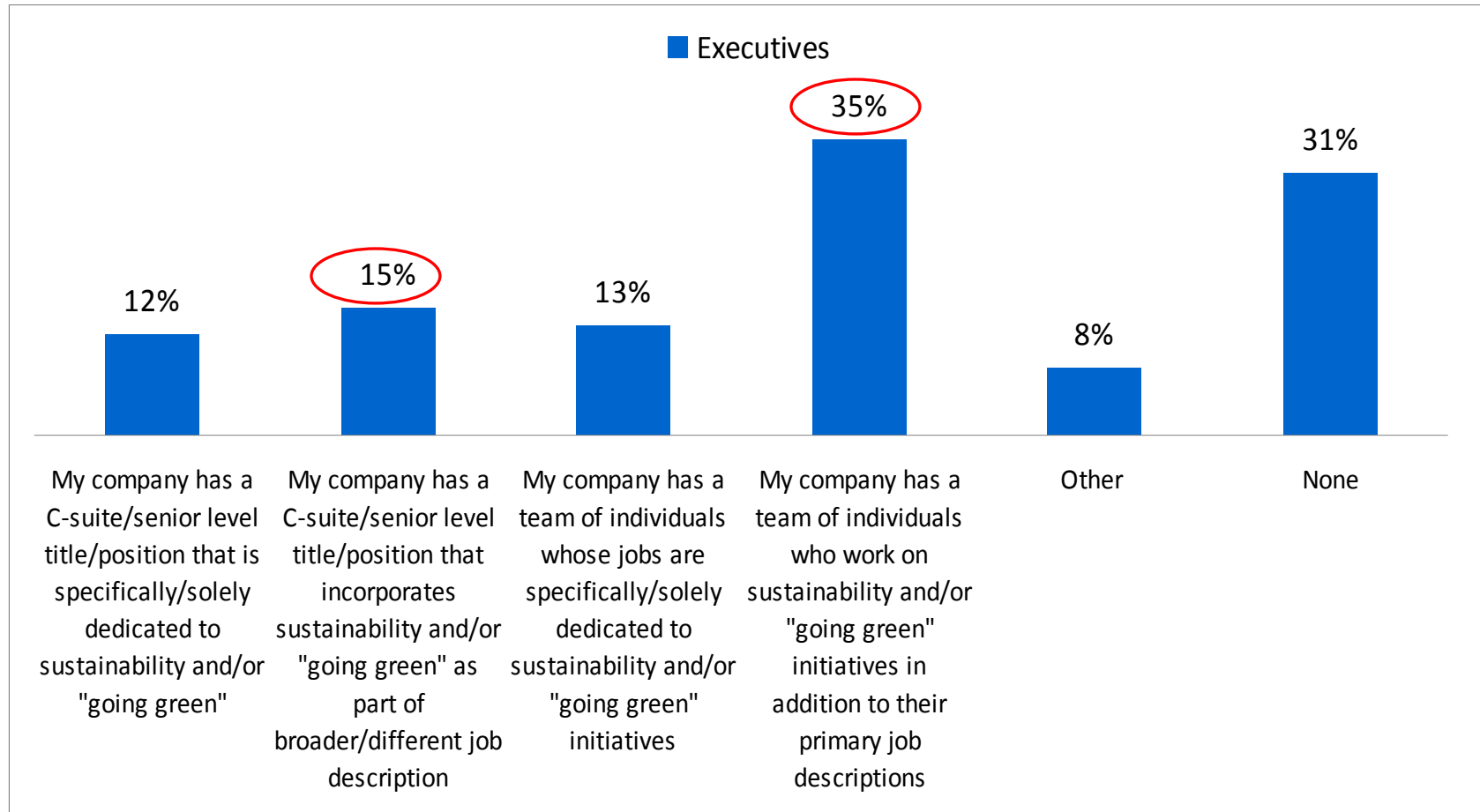
Q1705: What are the barriers, if any, to more businesses "going green"?

Base: All executives (n=304). "None" (1%) and "Not sure" (*) responses are not shown. An asterisk (*) indicates a percentage of less than 0.5%. Multiple responses were allowed.



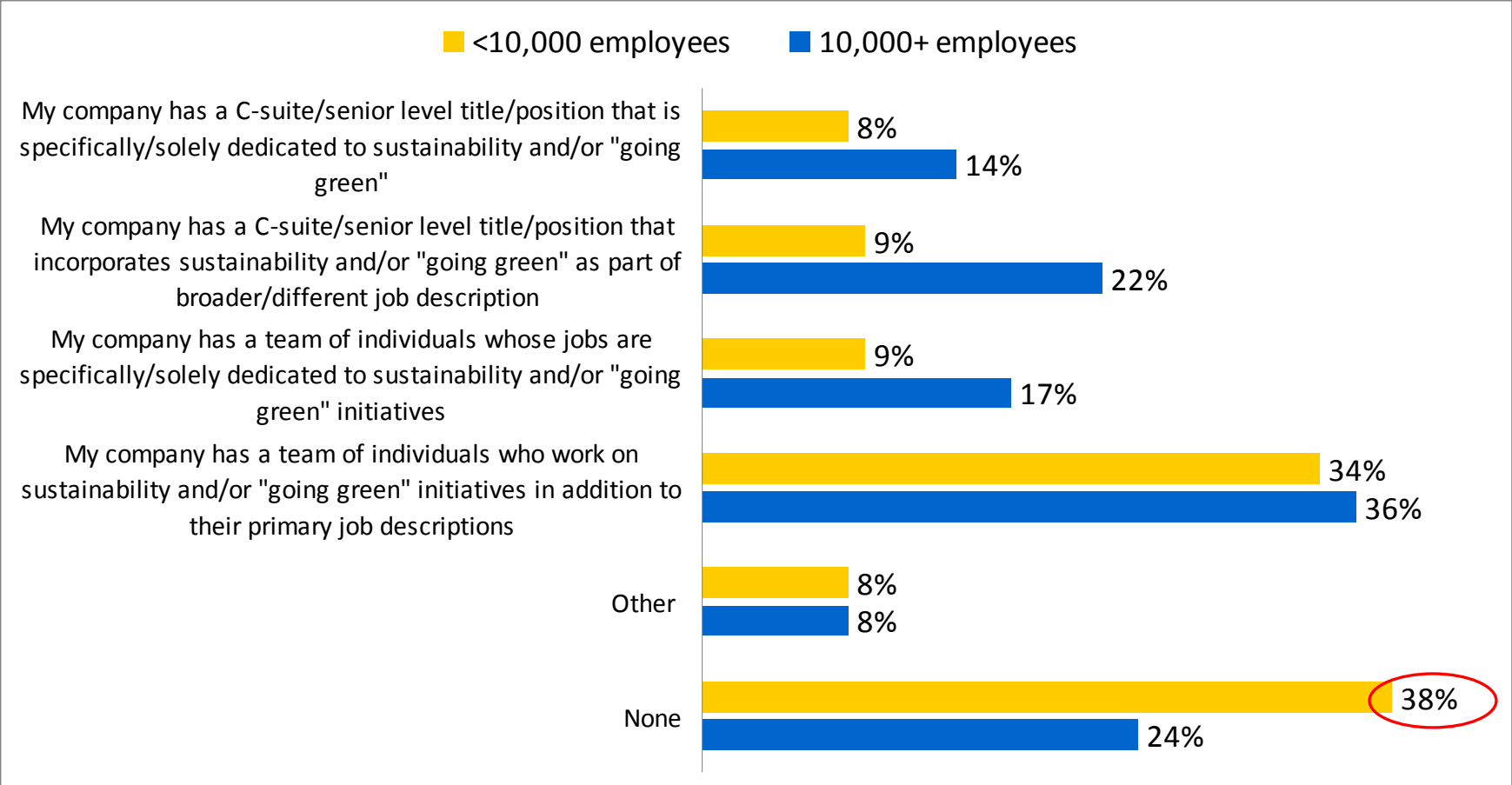
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While more than two-thirds of executives report that their companies have people responsible for sustainability, most have merely added green efforts to the primary duties of a team, or C-suite or senior level position.



Q1710: Is there anyone at your company who is responsible for sustainability and/or "going green" initiatives?
 Base: All executives (n=304). Multiple responses were allowed.

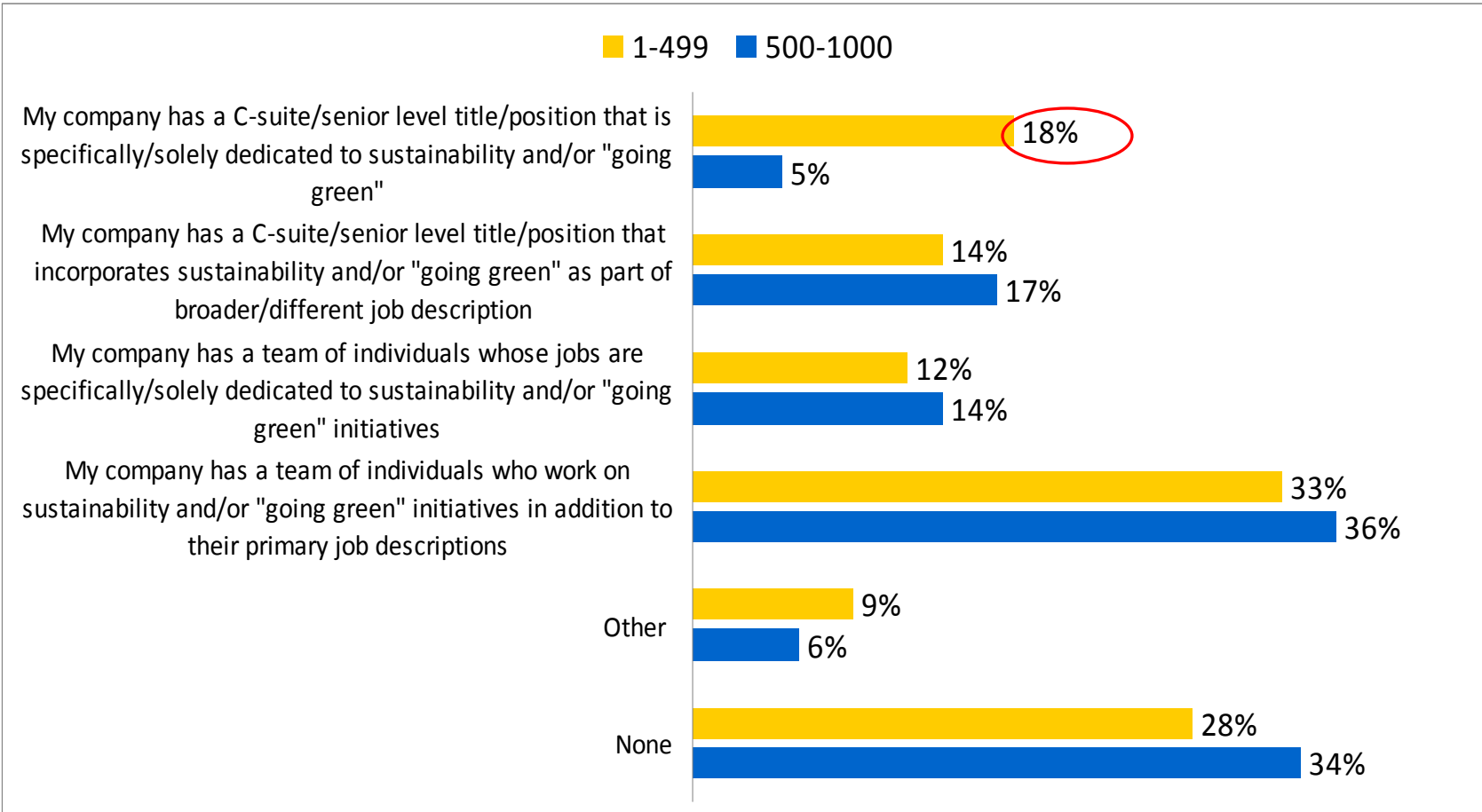
Larger F1000 companies are more likely to devote resources to sustainability than their smaller counterparts.



Q1710: Is there anyone at your company who is responsible for sustainability and/or "going green" initiatives?
 Base: All executives (<10K employees n=114, 10K+ employees n=190). Multiple responses were allowed.



Higher-ranked F1000 companies are more likely to have C-suite or other senior positions dedicated solely to “going green.”



Q1710: Is there anyone at your company who is responsible for sustainability and/or "going green" initiatives?
 Base: All executives (F1-499 n=152, F500-1000 n=152). Multiple responses were allowed.

Demographic Profile

Demographic Profile: F1000 Executives

Fortune 1000 Rank N=304

1-249	25%
250-499	25%
500-749	25%
750-1000	25%

Revenue

<\$2 billion	20%
\$2 billion to \$4.99 billion	37%
\$5 billion to \$9.99 billion	15%
\$10 billion to \$24.99 billion	12%
\$25 billion or more	16%

Number of Employees

<1,000	8%
1,000 to 2,499	4%
2,500 to 4,999	16%
5,000 to 9,999	21%
10,000 to 14,999	12%
15,000 to 19,999	7%
20,000 +	32%

Industry N=304

Banking and Finance	27%
Manufacturing	14%
Insurance	10%
Technology Services	7%
Business Services	6%
Real Estate	5%
Healthcare/Social Assistance	3%
Pharmaceutical	3%
Telecommunications	3%
Advertising/Marketing	2%
Engineering Services	2%
Retail Trade	2%
Travel	2%
Arts, Entertainment, Recreation	1%
Construction	1%
Education	1%
Transportation/Warehousing	1%
Utilities	1%
Wholesale Trade	1%
Other services	1%
Other	4%
Decline to answer	1%

Only mentions >1% listed

Region N=304

Northeast	38%
South	28%
Midwest	20%
West	13%
Other	2%

Gender

Male	85%
Female	15%

Age

<40	10%
40-49	36%
50-59	23%
60-69	11%
70+	1%
Decline to answer	20%
Mean Age	48.6

Job Title

C-Level (Net)	6%
Other Senior Management (Net)	40%
Vice President (Net)	51%
Other	2%



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