

2011 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, technology and general science, agribusiness and food, consumer lifestyle, and professional services** industries .
- G&S commissioned Harris Interactive® to conduct the **second annual 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”;
 - ❖ Responsibility for sustainability initiatives; and,
 - ❖ Motivations for “going green.”



Methodology

- All data collection was **conducted online**.
- A nationally representative sample of **2,031 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 February 7 and 9, 2011.
 - 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 **302 Fortune 1000 executives** was interviewed using the Harris Interactive *Executive Omnibus*, with the *LinkedIn* database as the sampling frame.
 - Data collected was conducted between February 8 and 21, 2011.
 - 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

– The majority (88%) of business leaders report their company is “going green.” However, only 29% of executives and 17% of consumers believe that a majority of businesses are committed to sustainability.

- Most executives report the needs to meet customer demand (42%), help reduce or reverse global climate change (34%) and meet executive leadership/shareholder demands (31%) as the chief reasons their organization is “going green.”
- Only about 1 in 10 (11%) executives note their company’s motivation is to respond to pressure from non-government organizations (NGOs) and special interest groups.
- Additionally, 12% of executives say their employer is not “going green.”

Executive Summary

- The plurality of both executives (53%) and consumers (50%) believe that only “some” businesses are committed to sustainability.
- Most executives cite insufficient return on investment (70%) and consumers’ unwillingness to pay a premium for green products or services (66%) as the primary obstacles to more businesses “going green.”
 - Additionally, more than 2 in 5 executives (44%) report difficulty in evaluating sustainability across the entire life cycle of a product as a barrier to “going green.”

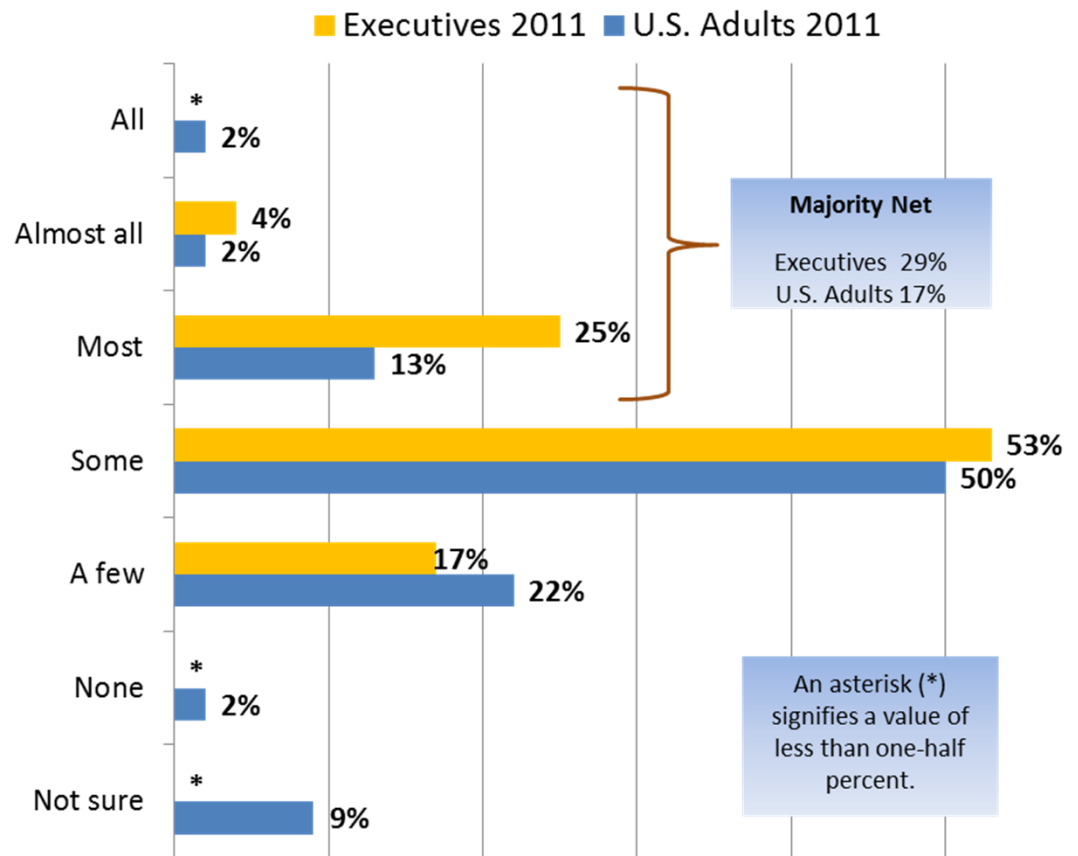
Executive Summary

– Although three-quarters of executives (75%) 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 (37%), or a C-suite or another senior level position (19%).

- Only about 1 in 10 (11%) report their company has a C-suite or other senior level title/position dedicated solely to sustainability.
- 17% indicate their company has a team of individuals dedicated solely to sustainability.
- One-quarter (25%) note there is no one at their company who is responsible for “going green” initiatives.

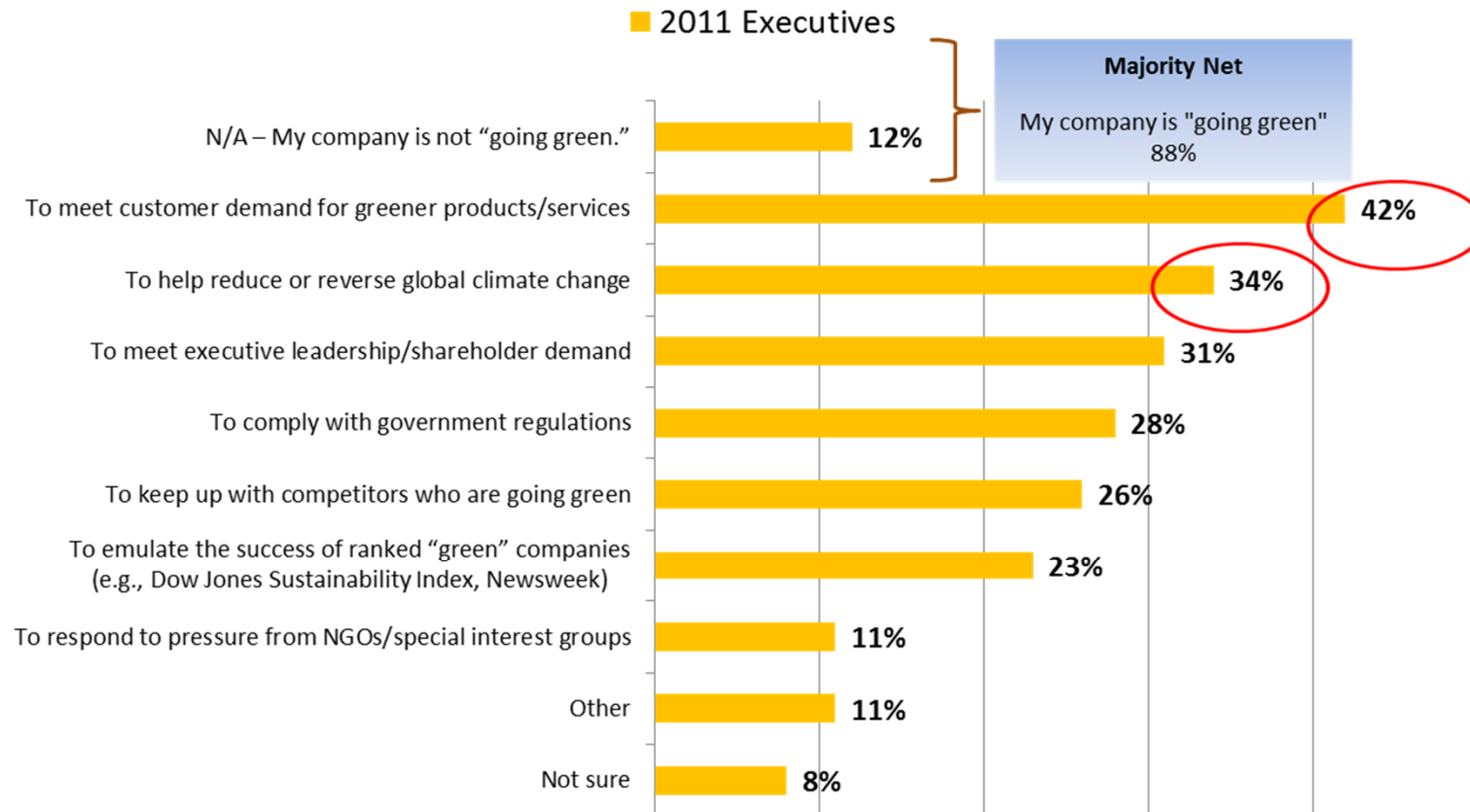
Detailed Findings

Only 29% of executives and 17% of consumers believe that a majority of businesses are committed to sustainability. Many executives and consumers believe only “some” businesses are committed to “going green.”



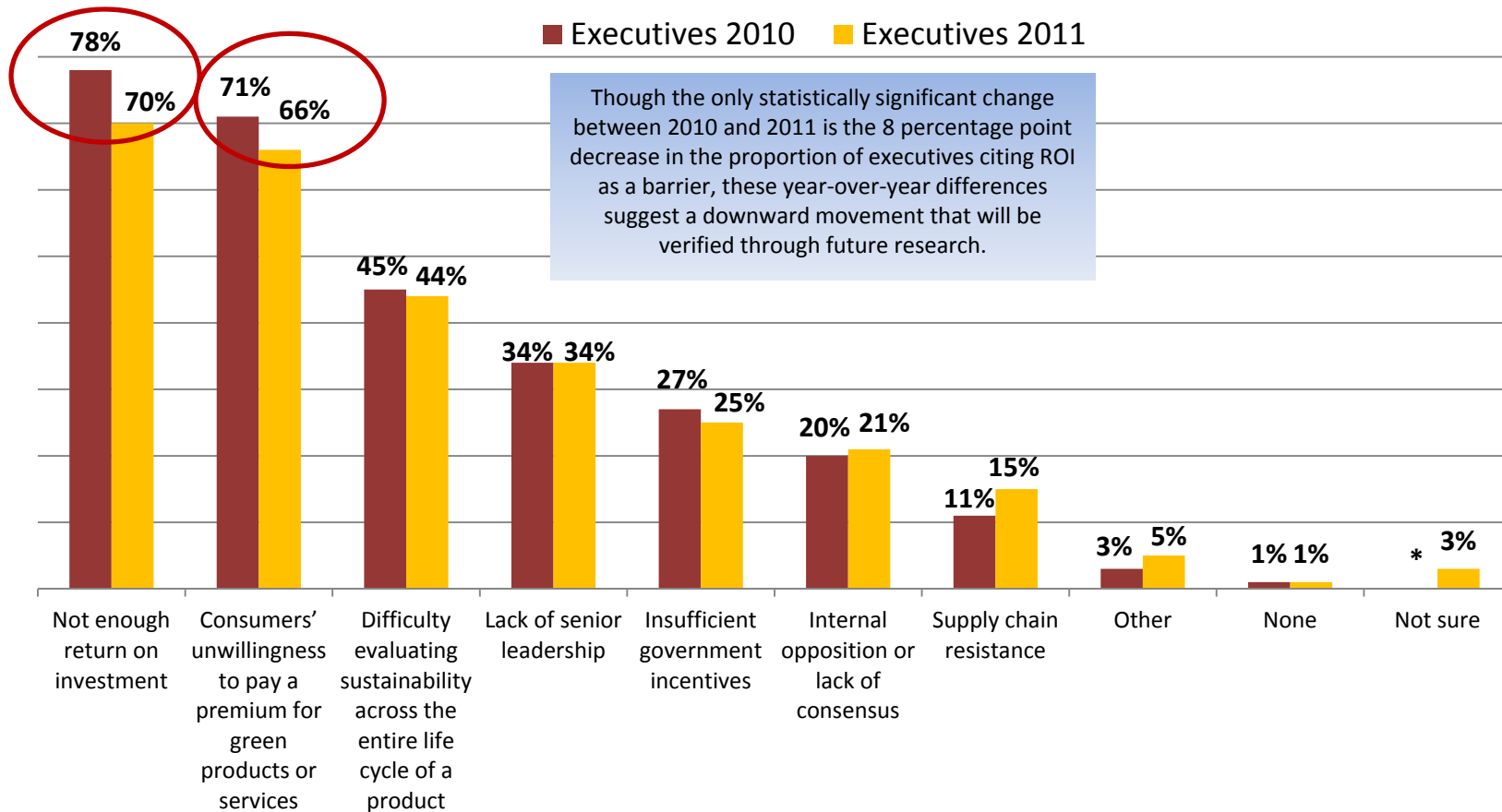
Q1700/Q1605: In your opinion, how many businesses are committed to "going green" - that is, improving the health of the environment by implementing more sustainable business practices and/or offering environmentally-friendly products or services?
Base: All respondents (executives n=302, U.S. adults n=2,031).

The majority (88%) of business leaders report their company is “going green.” Customer demand and climate change are the top drivers of their employer’s green efforts.



Q1715: For which of the following reasons, if any, is your company “going green”?
Base: All executives (n=302).
Multiple responses were allowed.

For two consecutive years, executives cite financial inefficiency and market reluctance as the top two barriers to more businesses “going green.”

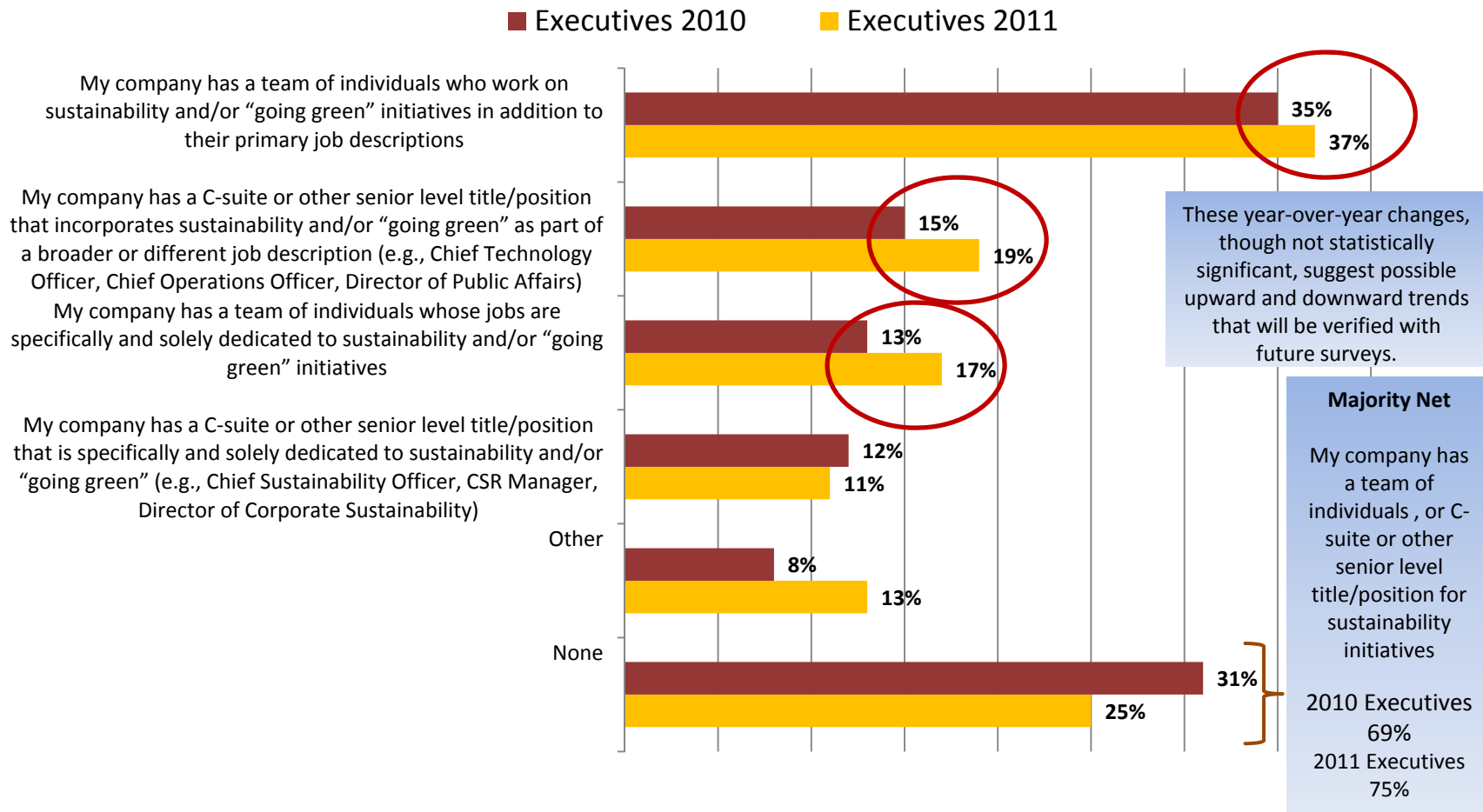


Q1705: What are the barriers, if any, to more businesses “going green”?

2010 Base: All executives (n=304). 2011 Base: All executives (n=302). An asterisk (*) indicates a percentage of less than 0.5%.

Multiple responses were allowed.

While three-quarters of executives indicate their company has people responsible for sustainability, most report that the efforts continue to coexist with other duties.



Q1710: Is there anyone at your company who is responsible for sustainability and/or "going green" initiatives?
 2010 Base: All executives (n=304). 2011 Base: All executives (n=302). Multiple responses were allowed.

Demographic Profile

Demographic Profile: F1000 Executives

Fortune 1000 Rank N=302

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

Revenue

<\$2 billion	18%
\$2 billion to \$4.99 billion	35%
\$5 billion to \$9.99 billion	16%
\$10 billion to \$24.99 billion	11%
\$25 billion or more	20%

Number of Employees

<1,000	2%
1,000 to 2,499	4%
2,500 to 4,999	15%
5,000 to 9,999	23%
10,000 to 14,999	15%
15,000 to 19,999	6%
20,000 +	36%

Industry N=302

Banking and Finance	28%
Manufacturing	14%
Technology Services	11%
Business Services	6%
Insurance	6%
Healthcare/Social Assistance	4%
Other services	4%
Other	3%
Real Estate	3%
Telecommunications	3%
Arts, Entertainment, Recreation	2%
Education	2%
Pharmaceutical	2%
Retail Trade	2%
Transportation/Warehousing	2%
Utilities	2%
Communications	1%
Military	1%
Printing Trade	1%
Wholesale Trade	1%

Only mentions >1% listed

Region N=302

Northeast	34%
South	27%
Midwest	24%
West	14%
Other	*

Gender

Male	85%
Female	15%

Age

<40	18%
40-49	39%
50-59	22%
60-69	4%
Decline to answer	18%
Mean Age	45.5

Job Title

C-Level (Net)	6%
Other Senior Management (Net)	42%
Vice President (Net)	51%
Other	1%

* Small base

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