



Source: Ipsos MORI, 2007  
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## Overview

Since concerns about climate change were first expressed back in the 1980s, there has never been more pressure on the human race to “go green” than there is today. We are bombarded with messages about the impact of carbon emissions every day, from magazine covers, to films such as Al Gore’s “An Inconvenient Truth.” Mandates and incentives to drive businesses to adopt environmentally-friendly policies are being proposed and debated around the world. But how is “going green” really affecting the way we live our lives? Does it impact the products we buy and the companies we work for? Who do we want to lead us towards greater environmental responsibility? How can new technologies help us? And what is the best way to go about making a positive impact within our workplaces?

How can new technologies help us? And what is the best way to go about making a positive impact within our workplaces?  
To answer these questions, TANDBERG teamed up with leading global research firm Ipsos MORI to conduct a survey of people’s attitudes in 15 countries. The survey aimed to discover global attitudes toward climate change, and particularly to examine how companies’ efforts to become more environmentally responsible are perceived by both consumers and their own employees. This survey is one of the largest global research projects into consumer attitudes toward climate change and its impact on corporate brands that has been conducted to date.

## Corporate environmental behavior and Brand Values



### Methodology

- Ipsos MORI interviewed members of the general public and workers across 15 markets: Australia, Brazil, Canada, China, France, Great Britain, Germany, Italy, Japan, Netherlands, Norway, Russia, Spain, Sweden and the United States
- Interviewing was conducted via omnibus survey in each market
- Interviews were completed between May and July 2007
- All results are nationally representative, unless otherwise marked (Brazil and China urban areas only)
- A total of 16,823 people were interviewed, representing a total global population of almost two billion people

### Corporate environmental responsibility and Brand reputation

The TANDBERG/Ipsos MORI survey revealed the importance of responsible environmental behavior for increasing corporate brand equity and competitive advantage.

More than half of global consumers interviewed said they would prefer to purchase products and services from a company with a good environmental reputation, and almost 80% of global workers believe that working for an environmentally ethical organization is important. That amounts to one billion consumers and over 700 million workers worldwide.

In fact, 24% of respondents believe that their individual action should be a key to driving environmental change, a sense of personal responsibility that is potentially borne out by their choice of consumer purchases and workplaces. Despite stating their preference to buy “green” products and work for environmentally responsible organizations, a surprising 32% of respondents admitted that they have not yet taken personal action to reduce climate change. Are they waiting for those products and services to become more readily available, or for governments and workplaces to step forward and set the priority?

## Environmental responsibility



Source: Ipsos MORI, 2007.

Over half of respondents felt that government should take the lead in limiting the effects of climate change, with 47% percent citing national government and 11% citing international institutions as the key drivers in the environmental movement. Respondents worldwide felt that government has a major influence on other stakeholders.

Workers in some markets cited competitive positioning and the fear of bad publicity as issues that would encourage their organizations to become more environmentally friendly, showing that external brand perception can indeed have a marked effect on whether a company chooses to "go green."

In fact, it was government policies, subsidies, and incentives that were rated the most likely to change corporate environmental behavior. Twelve percent of respondents felt that business/corporations should take the lead when it comes to limiting the effects of the climate change.

For example, developing and sourcing environmentally-friendly technologies was listed as a major factor leading to increased corporate environmental responsibility.

Recycling programs, water/waste reduction programs, and environmentally-friendly purchasing are already seen as being the most effective environmental initiatives in the workplace.



● Countries covered

The survey reveals some essential information for corporations that are looking to build their brand in specific parts of the world and with particular target markets.

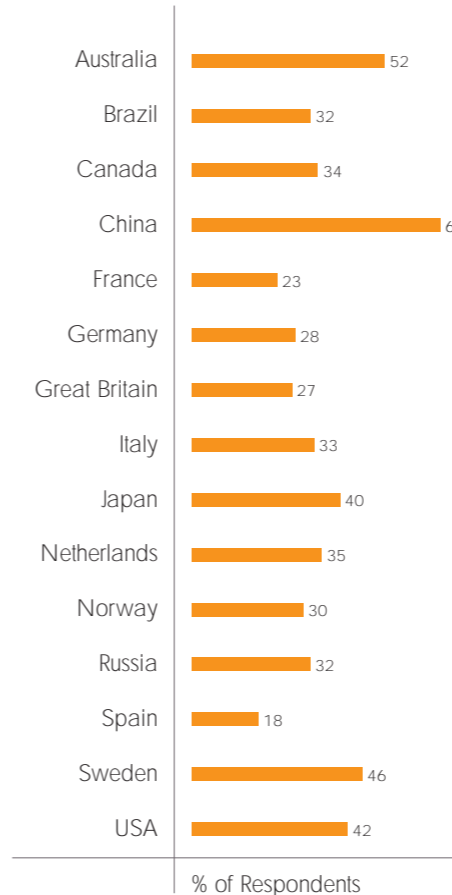
While there are some intriguing differences among all countries surveyed (all detailed in the charts below), and some other differences among certain demographic groups within individual countries, this survey indicates that large groups of potential customers, employees, partners, and investors across the world are consistently thinking about this issue on a variety of levels.

Companies should be aware that the "green" consumer or the "green" worker can appear in any place they may be doing business.

## Corporate environmental behavior and Brand Values



Source: Ipsos MORI, 2007.



### • Section 1

### Corporate environmental behavior and its impact on brand value

*The purchase of products and services*

Percentage of respondents agreeing to the statement "I would be more likely to purchase products or services from a company with a good reputation for environmental responsibility".

More than half of all respondents would be more likely to purchase products and services from a company with a good environmental reputation. This figure was particularly high in China, with 67% of respondents concurring. Australia was also high with 52%.

However, these numbers reduced considerably in Europe, with Germany, Great Britain and France recording 28%, 27% and 23% respectively. The United States, Sweden and Canada were in the middle with 42%, 46% and 34%. It is clear that buying products from environmentally responsible organizations is already important to consumers worldwide. Overall, the 53% who would be more likely to purchase products and services from a company with a good environmental reputation represents over one billion people just in the 15 countries covered.

With the increased focus on the environment, it's easy to imagine this trend increasing.

As it does so, it will give many companies little option to ignore their role in addressing climate change, as failure to do so will start to hurt them financially.

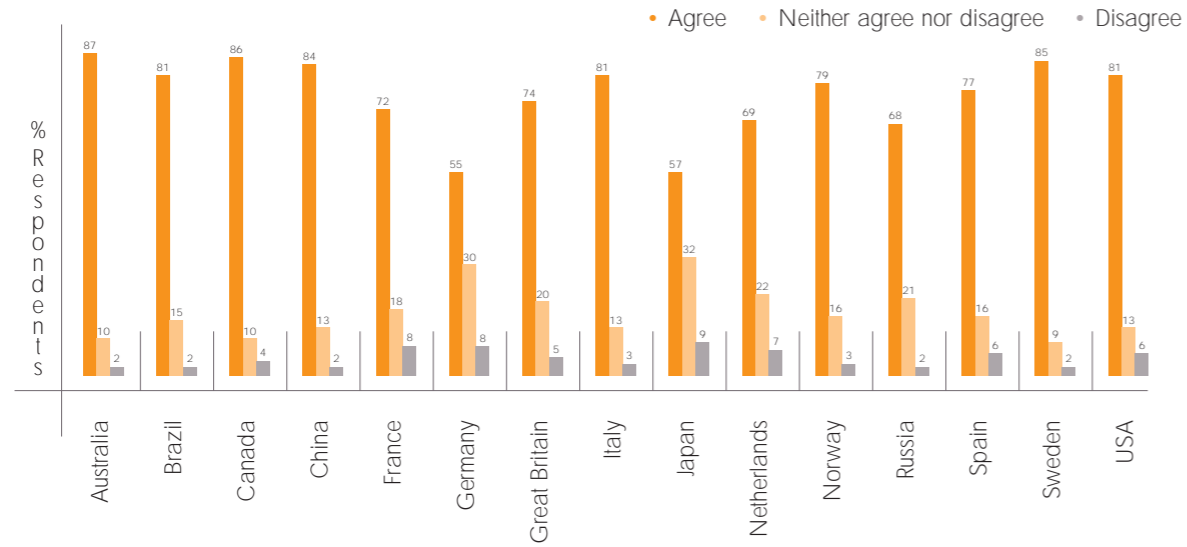
## Environmental responsibility



Source: Ipsos MORI, 2007.

### Appealing to prospective employees

Percentage of respondents saying how strongly they agree or disagree with the statement: "I would prefer to work for a company that has a good reputation for environmental responsibility". Across all the countries surveyed, 80% of workers said they would prefer working for an organization with a good reputation for environmental responsibility. Germany appeared to be the anomaly here with only 55% of respondents agreeing that working for an environmentally reputable company was important. Thirty percent of Germans surveyed neither agreed nor disagreed, perhaps because their organizations are already required to adhere to strict environmental regulations. It appears that individuals are more concerned about working for an environmentally conscious company than they are about buying products from one. This suggests that employees feel a significant sense of responsibility and association with their employer's actions concerning the environment. The impact on organizations' recruitment and retention, and the need to demonstrate green qualities to prospective employees as a key criterion to attract the best talent, should not be underestimated.



## Corporate environmental behavior and Brand Values

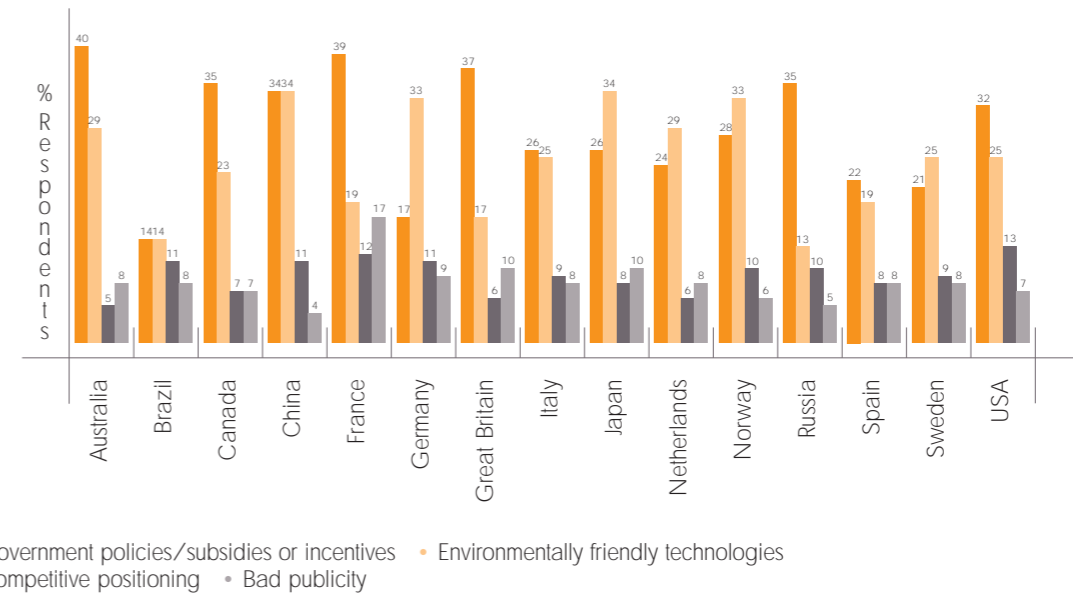


Source: Ipsos MORI, 2007.

### Encouraging organizations to become more environmentally responsible.

Percentage of respondents stating what they believed would be most likely to encourage their organization to become more environmentally responsible than it is today.

When asked what would be most likely to encourage their organization to become more environmentally responsible than it is today, two options were considered the most popular - government policies, subsidies or incentives came first in the United States, Great Britain, Australia, Canada, Russia, Spain and France, and the availability of environmentally-friendly technologies came first in Japan, Norway, Netherlands, Sweden and Germany. Respondents in China, Italy and Brazil voted for both options in roughly equal numbers.





# Environmental responsibility

Source: Ipsos MORI, 2007.

Interestingly, competitive positioning and the fear of bad publicity came in third and fifth places overall, showing that "going green" is considered to have a potential visible effect on the corporate brand and public perceptions of today's organizations. France was the country with the highest concern on each of these points, with 17% citing bad publicity, and 12% citing competitive positioning as being most likely to encourage their organization to be more environmentally responsible than it is today. Bad publicity was also seen as being important in Great Britain and Japan (by 10% in each case) and keeping up with or ahead of competitors was also seen as being key by 10% or more in the United States, China, Brazil, Germany, Norway and Russia. Interestingly, competitive positioning and the fear of bad publicity came in third and fifth places overall, showing that "going green" is considered to have a potential visible effect on the corporate brand and public perceptions of today's organizations. France was the country with the highest concern on each of these points, with 17% citing bad publicity, and 12% citing competitive positioning as being most likely to encourage their organization to be more environmentally responsible than it is today. Bad publicity was also seen as being important in Great Britain and Japan (by 10% in each case) and keeping up with or ahead of competitors was also seen as being key by 10% or more in the United States, China, Brazil, Germany, Norway and Russia.

## • Section 2 - Whose responsibility is it anyway?

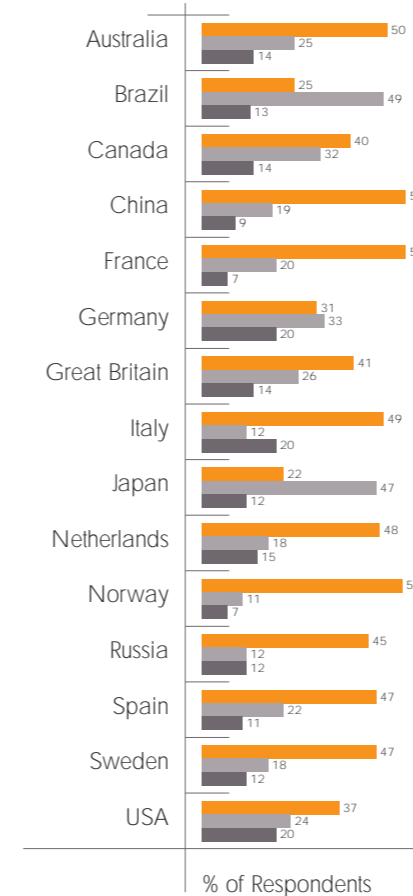
### Government vs. corporation

Respondents were asked who they thought should take the lead when it comes to limiting the effects of climate change. Almost half (47%) felt that national government should take the lead. These figures were particularly high in China, France and the Netherlands, with 57%, 55% and 54% of the vote. Conversely, significant proportions in Brazil, Japan and Germany felt that this responsibility was up to the individual (49%, 47%, 33%). Across all countries, almost one in four (24%) felt the individual should be the key. Across the board, 12% felt that businesses and corporations should lead environmental responsibility. This figure was higher in Germany, Italy and the United States (all 20%). As the environment has become an increasingly political issue in recent years, it is perhaps unsurprising that these results show that most respondents believe their country's government should take the lead in limiting the effects of climate change. However, in countries that are widely considered to be leaders in global business, such as the United States and Germany, the call for corporations to lead the way is higher.



# Corporate environmental behavior and Brand Values

Source: Ipsos MORI, 2007.



• National government • The individual • Businesses

## The Individual

Percentage of respondents who believe individuals should take the lead in limiting the effects of climate change compared with those who have taken personal action to reduce climate change.

It could have been expected that in those countries where some individual action on the environment is most common, leadership on the part of individuals is considered a key ingredient to climate change.

Along the same lines, it could have been expected that where individual participation has been low to date, the expectation for individuals to lead the charge moving forward is also low. However, these two variables were not in fact tied together.

In most countries, individual action is much higher than the expectation for individual leadership. It is possible that people believe they can be a part of the solution by their individual actions, but do not feel they should be in a leadership position to influence other stakeholders.

Across all countries, an average of 45% have taken personal steps to reduce climate change, but only 24% believed that individuals should take the lead.

Most notably, a high proportion of respondents in Canada (56%), Australia (55%) and China (52%) claimed they had taken personal steps to reduce their carbon footprint, despite the fact that comparatively fewer respondents in those countries believed that individuals should take the lead in reducing climate change (32%, 25% and 19% respectively).

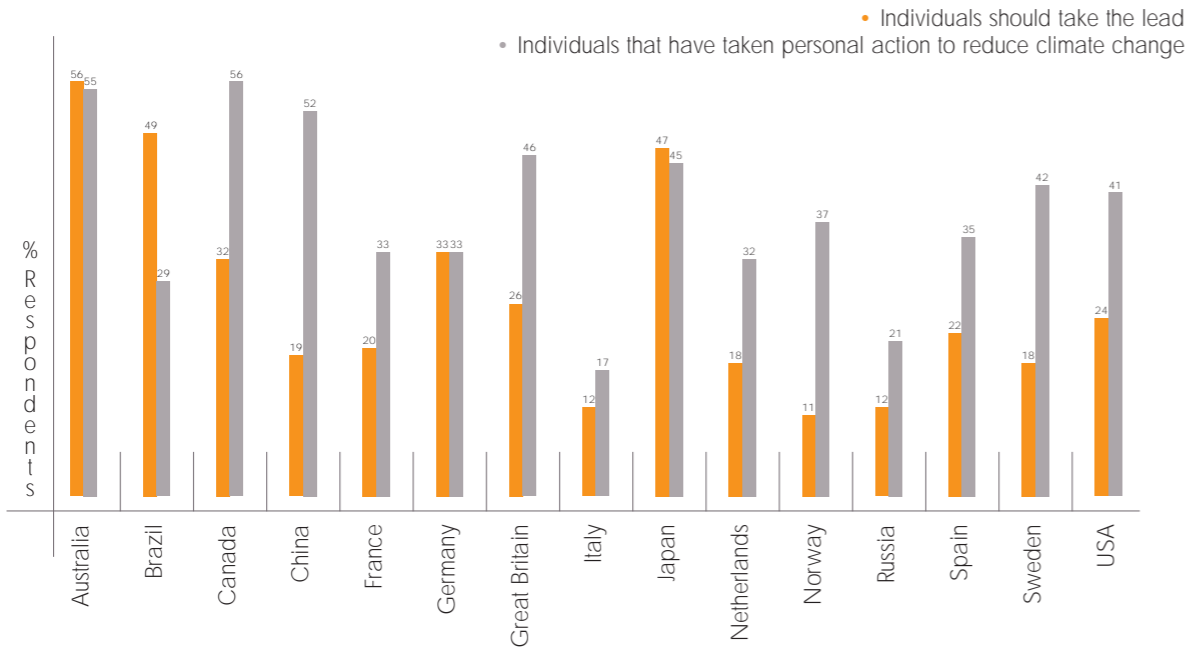
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# Corporate environmental behavior and Brand Values



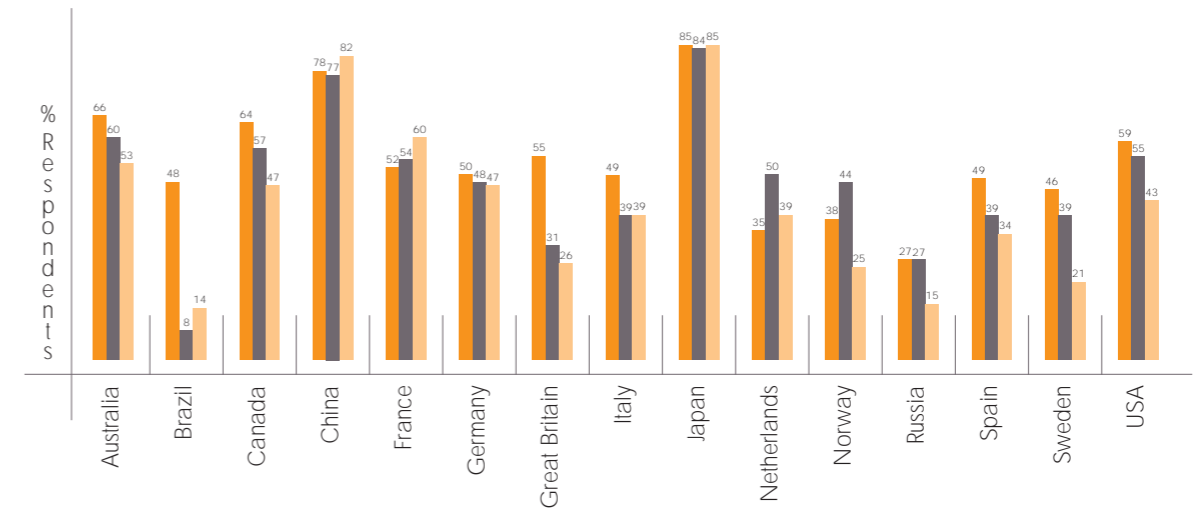
Source: Ipsos MORI, 2007.

## Section 3

### How can organizations be encouraged to be more environmentally responsible?

Percentage of respondents stating which environmental initiatives they considered as being most effective for their workplace (top three results).

- Recycling programs
- Environmentally friendly business materials
- Water/waste emissions reduction



# Environmental responsibility



Source: Ipsos MORI, 2007.

Respondents were asked which of a series of environmental initiatives they would consider to be the most effective for their workplace. Recycling programs were the most popular choice overall, with 65% of the vote.

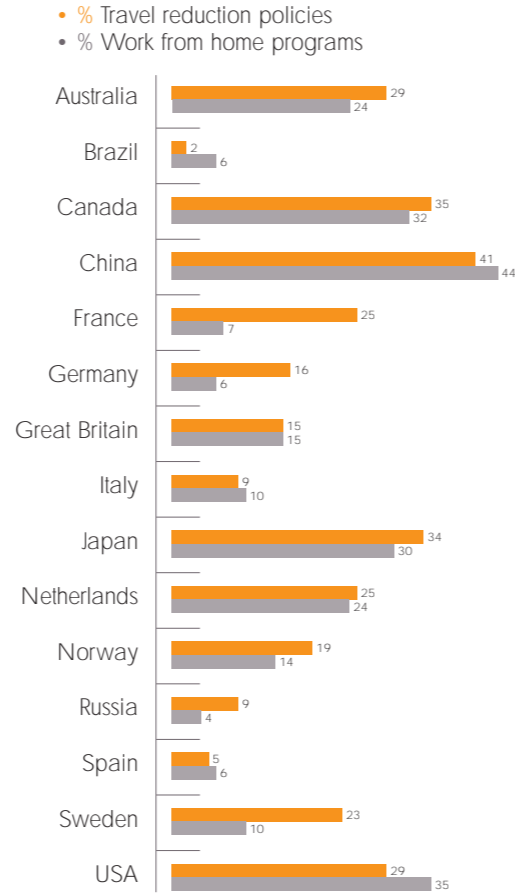
Other popular initiatives were the use of business materials that are good for the environment, e.g. recycled paper (60%), and the reduction of water and waste emissions (60%).

The popularity of recycling in the workplace is unsurprising as in many parts of the world offices already have some form of paper and/or can and bottle recycling program in operation.

Such programs are also highly visible and rely on the individual to make them a success, while decisions regarding, for example, the purchase of environmentally-friendly business materials and reducing waste, are usually the responsibility of certain departments or more senior management.

Over one fifth of respondents (21%) find that travel reduction policies are the most effective means of reducing their company's carbon footprint, and a further 18% believe working-from-home programs to be a good environmental initiative for their workplace. These options were particularly popular in Australia, Canada, China, Japan and the United States. Interestingly, respondents in Brazil, Italy, Spain and Russia were least likely to think that any of the environmental initiatives suggested would be effective in their workplace, and had the highest "don't know" and "none of the above" responses in the survey.

Reducing business travel and working from home are both popular and viable options for organizations looking to become more environmentally responsible. These initiatives reduce carbon emissions as well as raise productivity and cut costs. It is important for businesses considering these options to maintain the personal interaction among their employees and with their customers. Technologies that allow face-to-face interaction can raise the success rate of these programs.



# Corporate environmental behavior and Brand Values

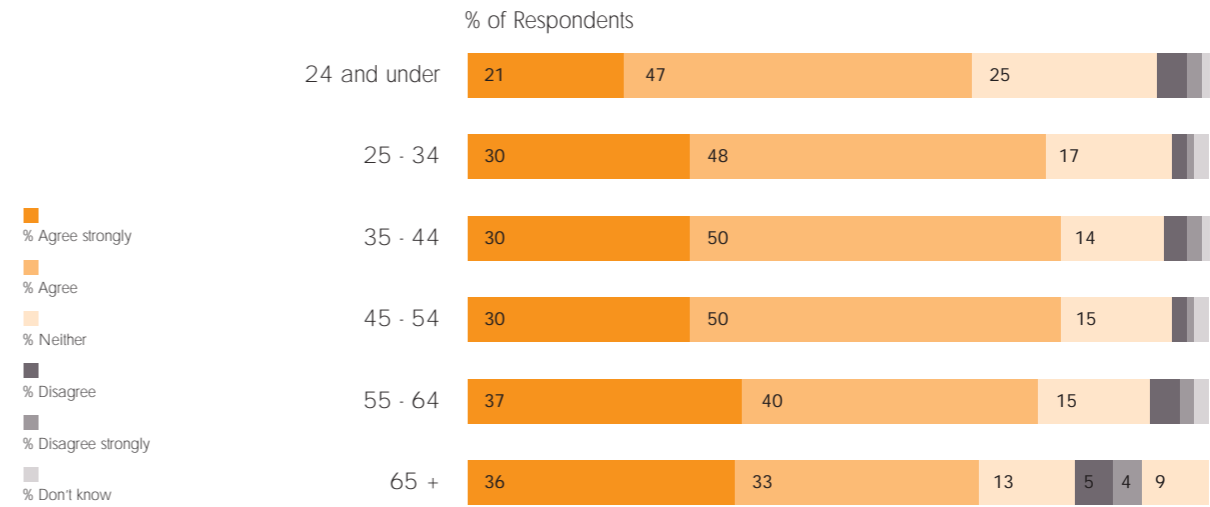


Source: Ipsos MORI, 2007.

## Section 4 The generational views on climate change

Viewing the survey results from a demographic perspective offers some interesting differences of opinion between generations. When asked how strongly they agreed or disagreed with the statement: "I would prefer to work for a company that has a good reputation for environmental responsibility," four-fifths of workers aged between 35 and 54 - a key talent pool across all countries - said they would prefer to work for a company with a good environmental reputation.

The demographic group that was least likely to agree strongly that they would prefer to work for a company with a good environmental reputation was those respondents aged 24 and under. This is surprising given that this age group has grown up in the shadow of climate change.



# Environmental responsibility

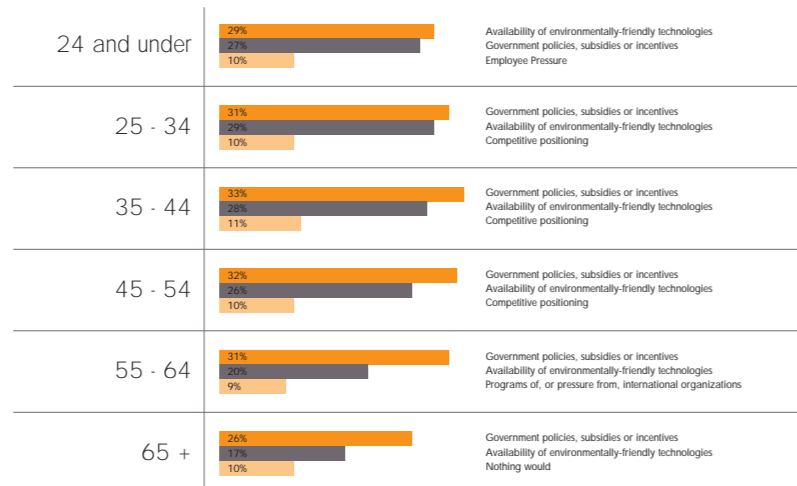


Source: Ipsos MORI, 2007.

When asked what would be most likely to encourage their organization to become more environmentally responsible than it is today, the availability of environmentally friendly technologies consistently ranked in the top two, and was first choice for respondents aged 24 and under.

It seems that today's younger generation considers advancements in environmentally friendly technologies to be a key factor in reducing carbon emissions and ensuring that organizations are encouraged to be more environmentally responsible. Having grown up with iPods in their pockets and mobile phones on their ears perhaps makes today's under -25s more disposed to technology and hence less fearful of it than older generations.

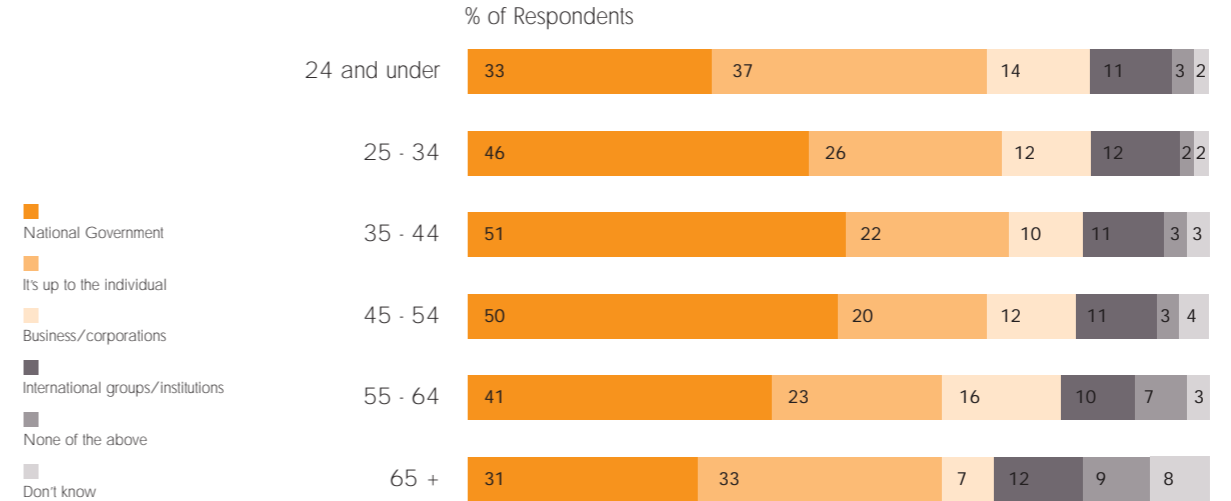
When asked whom they believed should take the lead in limiting the effects of climate change, those aged 25-64 were more likely to think that national governments should take the lead in reducing the impact of climate change, while those under 25 and the 65+ believed that it is primarily the responsibility of the individual.



# Corporate environmental behavior and Brand Values



Source: Ipsos MORI, 2007.



It appears that members of the younger generation are more willing to take personal responsibility for their carbon footprints. Interestingly, this viewpoint appears to come full circle over time, as the over 65s surveyed are the second most common demographic group to put individual responsibility above that of national governments.

However, despite the aforementioned differences in generational opinion, one of the most surprising aspects of the survey results was in fact the consistency of opinion between the different demographics interviewed. Generally speaking, the views of the individual demographic groups did not vary as much as could be reasonably presumed when conducting large scale, multi-country research of this kind.

This pattern suggests that the global message on climate change is reaching every generation and every demographic group, which can only be a good thing. But as time moves on it becomes ever more vital that this message is ingrained in our children, through education in schools and supporting and advising individuals as they grow up.

## Environmental responsibility



Source: Ipsos MORI, 2007.

### Conclusion

This survey, one of the largest of its kind, has revealed some important trends. Perhaps the most notable of these trends is the impact that taking action regarding climate change has on corporate brands from the perspectives of both customers and employees.

We are already seeing consumer buying patterns start to change, with sustainability of products gradually becoming as important to buyers as quality and cost.

Employees want to feel secure in the knowledge that the organizations they work for have a "green" agenda, and that they are implementing practices and programs to reduce their carbon footprint.

As time goes on we will doubtless see graduates choosing jobs with the most environmentally conscious companies, forcing an even more fierce competition among workplaces for the best talent.

Technologies that reduce energy consumption, waste, and unnecessary travel hold great promise for organizations that are seeking to enhance their "green" reputation and competitive advantage.

The adoption of "green" technologies is expected to continue as more companies recognize the need to implement measurable environmental programs and address the needs of the younger workforce.

Globally, young people are more likely to embrace the use of new technology to help address climate change.

The good news is that they have already become habituated with visual communication, having spent hours immersed in the world of online videos, interactive Web sites and open communication networks. More and more, their generation will expect on-demand, face-to-face communication in the workplace as well.

Fredrik Halvorsen, TANDBERG CEO, comments: "The technologies that will convince organizations to become more environmentally-friendly are those that also have a proven return on investment by building brand value and competitive advantage. We hope that the results of this survey mobilize more organizations to seek solutions to become more environmentally responsible."

## Corporate environmental behavior and Brand Values



Source: Ipsos MORI, 2007.

There is no doubt we are heading in the right direction to act together on a global scale against climate change.

The big question is, will we get there fast enough? Judging from the results of this survey, there appears to be large-scale agreement that governments have a bigger role to play than perhaps they do today.

This survey represents a significant call to action for world leaders. Citizens across the globe are looking for them to take greater responsibility, whether that is in the form of direct action against the big polluters, setting and sticking to rigid carbon emissions targets, or simply helping raise awareness of the situation and encouraging businesses and individuals to do more.

It is certainly true that our political leaders do not act in a vacuum. Looking at these survey results, maybe our planet's

biggest concern should be the apparent lack of personal responsibility taken by individuals and corporations who "talk the talk" of environmental consciousness but don't "walk the walk" by taking action.

With numerous campaigns about how to become carbon neutral, the message concerning climate change is certainly getting through to the population at large.

But unless individuals and companies are prepared to take personal action and be responsible for reducing their day-to-day carbon footprints, it's hard to see how we can collectively move forward in the short term and make a big enough difference to the planet.

One thing is very clear; we must all - both individuals and the organizations we work for - accept that we have to take direct action and tackle global warming together, and soon.

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