



2008 GREEN GAP SURVEY FACT SHEET

CONSUMPTION

Americans' personal behavior as it relates to the impact of their consumption on the environment:

| I am concerned about the impact of my consumption on the environment and am consuming less | 20% |
|--|-----|
| I am concerned, and while I'm not consuming less, I am consuming products that are more environmentally friendly | 39% |
| I am concerned, but I'm not consuming less or changing my buying habits | 25% |
| I am not concerned about the impact of my consumption on the environment | 16% |

When Americans see a product advertised as "green" or "environmentally friendly," they believe it means:

| The product has a positive [i.e., beneficial] impact on the environment | 48% |
|---|-----|
| The product has a lighter impact than other similar products | 18% |
| The product has a neutral impact on the environment | 14% |
| I don't know what it means | 10% |
| I don't believe it means anything | 7% |
| The product has a negative impact, but less than it used to | 4% |

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Americans consider the environmental impacts of their purchasing:

| Every time they shop | 9% |
|----------------------|-----|
| Regularly | 21% |
| Sometimes | 36% |
| Rarely | 20% |
| Never | 15% |

Americans consider the environmental impact of either making purchases or supporting companies in each of the following industries:

| Automotive and transportation | 71% |
|--|-----|
| Food and beverage | 62% |
| Electronics and household appliances | 61% |
| Health and beauty | 54% |
| Household goods and furniture | 53% |
| Retail stores | 50% |
| Footwear and apparel | 42% |
| Sports and entertainment | 37% |
| Financial services (e.g., banking, insurance, investing) | 32% |

Americans indicate the following factors are influential in their decisions to purchase a product or service that has an environmental benefit:

| It has a direct benefit to me (e.g., save money or time) | 82% |
|--|-----|
| There is a clear connection between the product/service and the environmental issue (i.e., a hybrid car and lower emissions) | 74% |
| It quantifies the actual environmental impact | 70% |
| The company has a history of strong environmental commitment | 68% |
| The company will take action to lessen my personal environmental impact | 64% |
| My friends or family recommended it | 63% |



| | |
|---|-----|
| It is endorsed with third-party certification (i.e., Certified Organic, FSC, Energy Star) | 63% |
| It provides me with an opportunity to get involved | 56% |
| It has been covered in the media | 48% |
| A celebrity I respect is supporting the initiative | 31% |

COMMUNICATIONS

Americans' beliefs about environmental messaging by companies:

| | |
|---|-----|
| Companies must not only say a product or service is good for the environment, they need to prove it | 90% |
| Companies that communicate about the environment are just trying to sell more products and services | 73% |
| Companies that communicate about the environment make me want to buy products from them | 65% |
| I understand the environmental terms companies use in their advertising | 61% |
| I am overwhelmed by the amount of environmental messages I hear and see | 52% |
| I trust companies to tell me the truth | 47% |
| I believe companies are accurately communicating information about their impact on the environment | 45% |

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The following are environmental messages companies may use to communicate about their products and services in three different industries. For each, respondents indicated what they would think about the message if they saw it while shopping.

| | Credible | Misleading | Need Additional Information | I Don't Know What the Message Means |
|---|----------|------------|-----------------------------|-------------------------------------|
| Food (e.g., FRUIT) | | | | |
| "All natural" | 27% | 31% | 35% | 8% |
| "Sustainably grown without pesticides and herbicides" | 45% | 14% | 33% | 9% |
| "Fair Trade Certified" | 19% | 16% | 36% | 29% |
| Paper Products (e.g., PAPER TOWELS) | | | | |
| "Environmentally friendly" | 36% | 19% | 37% | 9% |
| "Contains recycled content" | 47% | 15% | 31% | 8% |
| "Made with 80% post-consumer recycled paper" | 60% | 9% | 21% | 9% |
| Automotive (e.g., CARS) | | | | |
| "Environmentally friendly" | 29% | 20% | 42% | 9% |
| "Most fuel efficient vehicle in its class" | 27% | 24% | 41% | 8% |
| "Hybrid electric: 30% more efficient than gas" | 44% | 14% | 35% | 8% |

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When seeking additional information to determine whether an environmental message is credible, Americans will seek it via:

| Company Web site | 54% |
|--|-----|
| Environmental organization or other third-party Web site | 51% |
| Search engine | 48% |
| Product package | 45% |
| Television | 18% |
| 1-800 number | 16% |
| Blogs or message boards | 14% |
| In-store advertising | 13% |
| Salespeople | 10% |

Many companies and organizations are educating people about their environmental practices and impacts. When hearing these messages, Americans feel:

| Informed/Educated | 38% |
|-------------------------------|-----|
| Unaffected/Neutral/Disengaged | 18% |
| None of these | 18% |
| Empowered/Inspired to act | 11% |
| Confused/Overwhelmed | 8% |
| Cynical/Resentful | 6% |

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REGULATION

Americans believe the government needs to regulate environmental messaging by companies to ensure it is accurate:

| Yes | 59% |
|--------------|-----|
| No | 18% |
| I don't know | 23% |

Americans indicate the following are important in providing oversight to ensure environmental messaging by companies is accurate:

| Certification by third-party organizations | 80% |
|---|-----|
| Review and reporting by watchdog groups, news media, bloggers, etc. | 78% |
| Regulation by the government | 76% |
| Self-policing by industry or business groups | 75% |

For additional information about the survey, please contact Sarah Kerkian at Cone LLC (skerkian@coneinc.com).

About the survey:

The 2008 Green Gap Survey presents the findings of an online survey conducted February 21-22, 2008 by Opinion Research Corporation among 1,080 adults comprising 520 men and 560 women 18 years of age and older. The margin of error associated with a sample of this size is +/- 3%.

Cone

Cone LLC (www.coneinc.com) is a strategy and communications agency engaged in building brand trust. Cone creates stakeholder loyalty and long-term relationships through the development and execution of Cause BrandingSM, Brand Marketing, Corporate Responsibility, and Crisis Prevention and Management initiatives. Cone is a member of the Omnicom Group.

The Boston College Center for Corporate Citizenship

For 20 years The Boston College Center for Corporate Citizenship (www.bcccc.net) has provided research, executive education, and convenings on corporate citizenship topics. The center works with global corporations to help them define, plan and operationalize their corporate citizenship. The center functions as an educational institution, a think tank and an informational research center—all in one place. The center's goal is to help business leverage its social, economic, and human assets to ensure both its success and a more just and sustainable world.