

**Horizon Research**

# **Business and Consumer Behaviour 2013**

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## **EXECUTIVE SUMMARY**

This report summarises the results of the fifth annual Sustainable Business Council – Fairfax Media *Business and Consumer Survey*.

### **Methodology:**

The survey, conducted between April 30 and May 16, 2013, is of 2,152 respondents who are members of Horizon Research's online HorizonPoll national panel, representative of the national population aged 18+. Post-sample iterative rim weighting was used to match population averages for age, gender, ethnicity, education level, personal income and, to ensure a sample aligned with party vote support in the 2011 General Election. The maximum margin of error at a 95% confidence level is  $\pm 2.2\%$  overall. The survey distinguishes respondents who are employed to measure sustainable business practices by New Zealand and overseas owned organisations.

Questions from previous surveys were continued to enable result tracking. Key findings are summarised in bullet form below. Comparisons between the 5 surveys on all comparable questions are shown in Appendix 2.

### **Decline in sustainable business practice:**

Across a number of measures, the survey confirms an accelerating decline in organisations engaged in sustainable business practices in New Zealand.

While sustainable practice has been declining, there is a re-emergence of consumer support for organisations which behave sustainably.

The survey affirms the deep connection New Zealanders have to their nature environment and the way they relate that to business behaviour and policy: 87% think the country's environmentally pure image is important to provide a competitive advantage in overseas markets. Yet when given a forced yes or no choice of whether or not the country lives up to this image, 55% say no.

The survey for the first time measures environmental issues New Zealanders think should be given priority: water quality in lakes and rivers (74.6%) and farm run-off (68%) top the list.

In a new measure, the survey reveals the significant risk which organisation may face if customers find their regular brand or service provider is having a bad affect on the environment, people or society, or behaving unethically: 66.8% or 2.24 million adult consumers would switch. In the past year 23%, or about 789,600, have switched a brand or supplier for these reasons.

The survey reveals significant opportunities for enterprises which compete not only on price but also environmental and social factors.

While this sentiment is strong among consumers, the total percentage of organisations that are thought to have a reputation that relies on sustainable business practice has been declining at about 2.2% per annum since 2009.

At the same time there are significant increases in the number of people working for, or with, organisations who don't know what sustainable practices the organisations are engaged in. This indicates organisations are either not informing those who work with them, or are not engaged in sustainable practices or both. These practices relate to activities which can have a significant impact on the organisations, like procurement, supply chain management, brand value, market positioning and prospects and staff retention and advocacy for the organisation.

More organisations are focusing on profit first, rather than profit and balancing the needs of the community: 21.1% in 2013 compared with 18.1% in 2012.

The number dropping suppliers engaged unsustainable or unethical practices has fallen from 192% in 2009 to 8.9% in 2013, though some qualitative comment indicates that in some cases no further supplier changes have meant no further changes were needed.

Fewer organisations are thought to be engaged in a number of sustainable workplace activities. For example, there have been large declines in organisations offering flexible work options (63.1% in 2009, 47.6% in 2013). Attention to staff turnover and training has fallen from 43.6% in 2009 to 34.8% in 2013.

39.6% of respondents felt that their organisation was paying sufficient attention to the environment and sustainable development. This is down from 44.2% in 2012. The survey finds 44% of staff more likely to stay if an organisation behaves sustainably, 34.6% of those who work in organisations they feel are behaving poorly toward the environment and people is more likely to leave. Nearly four of every 10 of these employees would not recommend their organisation to others.

### **Key findings:**

#### **Organisations**

- 30% of organisations were thought to have a reputation that relies on sustainable business practice. There is an accelerated downward trend of 2.2% per annum in this measure since 2009.
- The level of organisations with a reputation that relies on sustainable business practice is now higher for New Zealand-owned organisations. This is a reversal of the position in the 2012 and 2011 surveys.
- The level of New Zealand-owned organisations that were thought to believe that sustainability was about being "green and fluffy", has dropped back to 2011 levels.
- Only 37% of organisations that are not New Zealand owned were thought to regard a supportive workplace as critical to a successful business.

#### **Sustainability**

- 53% of organisations are thought to behave sustainably (i.e. look after profits as well as the environment and people), down from 59.5% in 2012 and just below the 2011 level of 54%.
- The percentage of organisations thought to have a sustainable development strategy has dropped consistently since 2009. It is now at 27%, continuing the decline at an overall average rate of 3.0% per annum.
- 44% of respondents overall did not know if their organisations had a sustainable development strategy, slightly down on 2012 (46%) but still above 2011 at 39%.
- 37% of those in organisations with a sustainable development strategy said that their organisations implemented it in full – down from 55% in 2012. 43% said that they implemented some of it.
- Three times as many respondents as in 2012 were not sure, suggesting that organisations – in particular, New Zealand –owned organisations – are not communicating progress on implementing their sustainable development strategy to staff.
- 9% of organisations – down from 14% in 2012 - are said to have publically reported on the sustainable development progress of their New Zealand operations.

#### **Procurement and sustainability**

- 14% of organisation are said to currently have social/environmental procurement criteria. This is down from 12% in 2012.
- 25% of New Zealand-owned organisation are said to have no plans to introduce social/environmental procurement criteria in the future.
- 59% of respondents did not know whether their organisation included social/environmental criteria in its supplier terms and conditions.
- 9% of organisations were known to have deselected suppliers because of these behaviours in the past twelve months. This has fallen back to just below 2011 levels.
- New Zealand-owned organisations are tending to purchase more on whole of life cost rather than day-one price. This is a reversal from 2012. Organisations that are not New Zealand owned are thought to purchase more on day-one price.
- Overall, 16% of organisations were said to purchase solely or mostly on day-one price, down from 20% in 2012 and 23.5% in 2011. 20% of organisations that are not New Zealand owned are thought to purchase on day-one price.
- 24% were said to purchase solely or mostly on a whole of life cost basis, up from 17% in 2012 and 21% in 2011.
- 47% of respondents felt that businesses and the Government should purchase on a whole of life cost basis.
- 20% of respondents said that their organisation expected to make a profit from investment in specific sustainability initiatives.

### **Community and social activity**

- 71% of organisations have community or social activity involvement.
- Contributions of employee time, although higher in 2013, have declined by an average of 1.8% annually since 2009.
- The percentage of NZ owned organisations contributing financially to charities and community organisations has fallen back to 41%, 7% less than in 2012 and 3% less than in 2011.
- With organisations that were not New Zealand-owned the percentage contributing financially to charities and community organisations has fallen from 68% in 2011 and 52% in 2012 to 48% this year.
- Strategic partnerships are declining at 1.3% per annum, on average.
- 29% of organisations are said to have no involvement in more community or social activities.
- 33% of organisations were said to not measure their community involvement, a similar level to 2012.
- 33% of respondents said their organisation had strategic relationships with Government agencies. 36% had strategic relationships with community organisations...
- 40% of respondents whose organisation was not New Zealand owned

### **Emissions and resource use**

- 11% of respondents said their organisations had measured their carbon emissions.
- As in 2011 and 2012, New Zealand-owned organisations were far less likely to have measured their carbon emissions than other organisations.
- 13% of organisations were said to have developed a plan to reduce carbon emissions, down from 16% in 2011.
- As in 2012, 31% of New Zealand-owned organisations were said to have no intention to develop a plan to reduce emissions.
- Comparison with the 2012, 2011, 2010 and 2009 surveys shows a decrease of approximately 1.0% per annum over that time scale in the percentage of organisations that have carbon emission reduction plans.
- 34% of organisations were said to have initiatives that consider how they use other resources, like water and waste. This is effectively the same level as in 2012 and 2011.

### **Sustainable workplace**

- 55% of organisations were said to have a code of conduct and commitment to ethics, a similar level to 2012.
- Attention to turnover and retention of talent continues to be the lowest scoring sustainable workplace aspect.
- The average number of aspects per organisation were again lower than in the previous year, continuing the downwards trend from 2009 first reported for the 2011 survey.

- 32% of organisations were said to have made operational changes in the past year to reduce energy costs, environmental impact or become more sustainable. 19% were said to have no plans to make operational changes for this purpose.
- The most common change made remains as a recycling programme, selected by 79% of respondents (up from 71% in 2012 and the same as 2011).
- On average, 4 operational changes had been made by organisations in the past twelve months to reduce energy costs, environmental impact or become more sustainable, up from 3.4 in 2012.
- 40% of respondents (down from 44% in 2012 and 46% in 2011) felt their organisation was paying sufficient attention to the environment and sustainable development.
- For around 50% to 51% of respondents, whether their organisation was paying attention to the environment and sustainable development, or not, made no difference to whether they were likely to stay.
- Respondents have remained unsure about whether they would consider leaving any organisation whose corporate responsibility behaviour no longer met their expectations. 39% said that they would consider leaving in those circumstances, down from 41% in 2012 and 56% in 2011.
- 25% of respondents – the same level as 2012 - said that they would still recommend their organisation to others if it was environmentally irresponsible.

#### **Sustainability outcomes**

- “Reduced costs” remains the most valuable sustainability outcome for organisations, but a reduced level. The importance of this outcome continues to decline.
- “Protect your reputation” remains the second most valuable outcome, but at the lowest level since 2009.
- More organisations (21.3%) appear to be reporting their sustainable performance to their board
- Fewer organisations appear to be reporting their sustainable performance to their shareholders
- NZ owned organisations continue to be less likely than other organisations to report sustainable performance.

#### **Sustainability leadership and organisation membership**

- 87% of respondents said that they believed that companies in New Zealand should take leadership in sustainability issues – slightly down from 2012.
- Membership of sustainability-related organisations appears to have fallen, with only 8% of respondents saying that their organisation was a member – compared with 14% in 2012. The largest fall has come from non New Zealand owned organisations, where known membership has fallen from 20.5% in 2012 to 9.0% in 2013. Fewer New Zealand-owned organisations (8% versus 12% in 2012) are now known by their staff to be members.



### Personal purchasing

- 16% of respondents, down from 19% in 2012 and 24% in 2011 said that they considered sustainability all of the time when purchasing goods or services for themselves, their family or their organisation. This is the lowest level in the five years of these surveys.
- 66% said that they considered sustainability some of the time, up from 61% in 2012 and 58.5% in 2011.
- 18% said that they did not consider sustainability.
- 48% consider cost or price as the most important factor in purchasing decisions. 88% overall consider price when purchasing, compared with 90% in 2012 and 52% in 2011.
- “Local” is assuming more importance, rising from 46% in 2012 to 56% in 2013.
- 27% said that eco labels would make them more likely to buy the product, up from 24% in 2012.
- More people than in 2012 would switch brands if they found their regular brand or service provider was having a bad affect on the environment, people or society, or was behaving unethically. 67% now say they would switch, back to 2011 levels.
- 23.5% said that they had switched brand or to another service provider in the past 12 months because they had found their regular brand or service provider was having a bad affect on the environment, people or society, or behaving unethically.

### Sustainability and competitive advantage

- 83.7% of respondents felt that sustainably was important in providing New Zealand with a competitive advantage in global markets. Making up the 83.7% were 38.1% of respondents rating sustainability as very important and 45.6% rating it as important.
- 4% of respondents felt that New Zealand totally lived up to its “100% Pure” overseas marketing message. 53%, a similar level to 2012 and 2011, feel that it mostly lives up to the message.
- **Forced to choose between “Yes” and “No” on this question, 55% selected “No”.**
- Water quality of lakes and rivers was the primary area of concern, followed by related factors: Farm run-off, commercial and industrial discharges and waste disposal.
- 75% believe that water quality of lakes and rivers must be addressed.
- 63% said they would stop buying from companies discovered to be harming the environment or mistreating people or animals.
- 67% of respondents said that they would switch to another brand of product or service if they found their regular brand or service provider was having a bad affect on the environment, people or society, or behaving unethically.
- 24% of respondents had translated an intention to stop buying from companies they perceived were harming the environment or mistreating people or animals by switching to another brand of product or service in the past 12 months.
- 39% of people believe they have or can have some influence on the behaviour of companies which are harming the environment or mistreating people or animals.

## REPORT

### 1. Description of organisation

Respondents were asked to rate the organisations they worked for, or with, on a series of business practices using 3 descriptors for each business practice with one descriptor being “Something between these two options”. Descriptors were consistent with the 2012 survey.

#### 1.1 Sustainable business practice

In June 2012 we reported a decline in the total percentage of organisations that were thought to have a reputation that relies on sustainable business practice. This decline has accelerated, showing a downward trend of around 2.2% per annum since 2009. In 2012 the decline was primarily for businesses that are New Zealand owned; in 2013 the largest shift has been for companies that are not New Zealand owned. For these companies the relative figures have dropped from 47.9% in 2012 to 30.6% in 2013; i.e. 30.6% are perceived to have a reputation that relies on sustainable business practice.

This has turned around the 2012 and 2011 position where the percentage of businesses that were said to have a reputation that relied on sustainable business practice was noticeably higher for organisations that were not New Zealand owned.

The level of New Zealand-owned organisations that were thought to believe that sustainability was about being “green and fluffy”, has dropped back to 2011 levels.

Attitude towards sustainable business practice	Total 2013	Ownership		
		NZ Owned	Not NZ Owned	Don't know
Has a reputation which relies on sustainable business practice	30.2%	31.3%	30.6%	17.5%
Believes sustainability is only about being 'green and fluffy'	3.1%	3.5%	3.7%	2.7%
Something in between these options	39.0%	38.7%	34.9%	46.8%
None of the above	20.1%	19.6%	30.9%	33.0%

#### 1.2 Business focus

Overall, just under half of respondents felt that their organisation had some degree of balance between returns to investors and the organisation’s role in the community.

As in the previous two surveys, organisations that were not NZ owned were felt to be significantly less likely than NZ-owned organisations to balance returns with their role in the

community. However, the perception of non-NZ owned organisations being focused on returns within the law and regulations has dropped from 43.0% in 2012 to 37.8% in 2013.

The overall percentage for this business focus has declined to 18.5% - close to the 2011 level of 17.9% - from 21.5% in 2012. Overall, there is an upwards trend in the level of businesses thought to be focusing on highest returns since 2009, with an average increase of 1.0% per annum.

Business focus	Total 2013	Ownership		
		NZ Owned	Not NZ Owned	Don't know
Focuses on providing the highest possible returns to investors while obeying all laws and regulations	18.5%	16.4%	37.8%	6.4%
Generates returns to investors but is also balanced in its role in the community	18.9%	3.5%	10.4%	16.2%
Something in between these options	30.4%	38.7%	37.5%	29.4%
None of the above	32.1%	19.6%	14.3%	47.9%

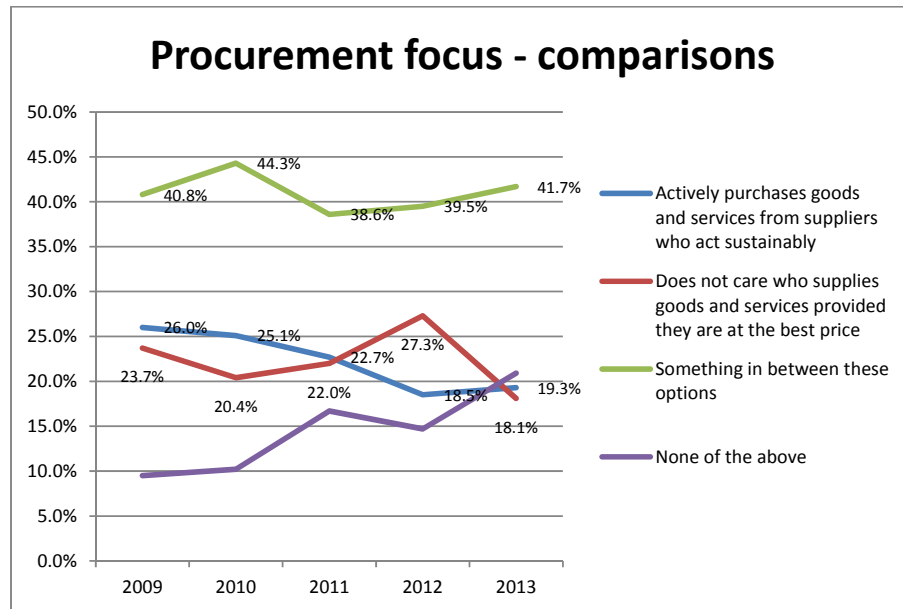
### 1.3 Procurement focus

The movement in purchasing from suppliers who act sustainably - 19.3% overall in 2013 from 18.5% overall in 2012 – is within the margin of error and is not significant. There is still a declining trend since 2009 evident on this measure, at the rate of 2% per annum.

The small increase is all from New Zealand-owned organisations. The percentage of non-New Zealand organisations perceived to buy from suppliers who act sustainably has plummeted from 38.3% in 2012 to 16.9% in 2013, close to the 2011 level of 17.9%. There has been a corresponding increase in the percentage on non-New Zealand owned organisations perceived as not caring who supplied goods or services provided that they were at the best price (increased from 15.8% to 36.1%).

Procurement focus	Total 2013	Ownership		
		NZ Owned	Not NZ Owned	Don't know
Actively purchases goods and services from suppliers who act sustainably	19.3%	20.4%	16.9%	11.2%
Does not care who supplies goods and services provided they are at the best price	18.1%	3.5%	36.1%	12.9%
Something in between these options	41.7%	38.7%	36.3%	37.8%
None of the above	20.9%	19.6%	10.7%	38.1%

As noted above, purchasing from suppliers acting sustainably shows a declining trend from 2009. The decline has halted in 2013, but that does not demonstrate a change to an upwards trend. The level of respondents who felt that their organisations are only concerned with best price dropped sharply in 2013 from 27.3% in 2012 to 18.1%. This largely related to a large drop in New Zealand-owned organisations perceived to buying solely on price.



### 1.4 Goals

Pursuit of customer satisfaction ahead of all other considerations as a goal has reduced from 46.0% in 2012 to 41.7% in 2013. This is still ahead of the 2011 level of 30.2%.

The perception of pursuit of profit as the top priority among organisations that are not New Zealand owned increased very significantly, from 8.0% in 2012 to 23.9% in 2013. By comparison, this perception has fallen marginally from 9.5% in 2012 to 8.2% in 2013 in respect of New Zealand-owned organisations.

Goals	Total 2013	Ownership		
		NZ Owned	Not NZ Owned	Don't know
Pursues customer satisfaction as the top priority ahead of all other considerations	41.7%	44.8%	23.6%	42.2%
Pursues profit as a top priority ahead of all other considerations	10.6%	3.5%	23.9%	12.7%
Something in between these options	35.0%	38.7%	44.3%	22.2%
None of the above	12.6%	19.6%	8.2%	22.8%

## 1.5 Employee focus

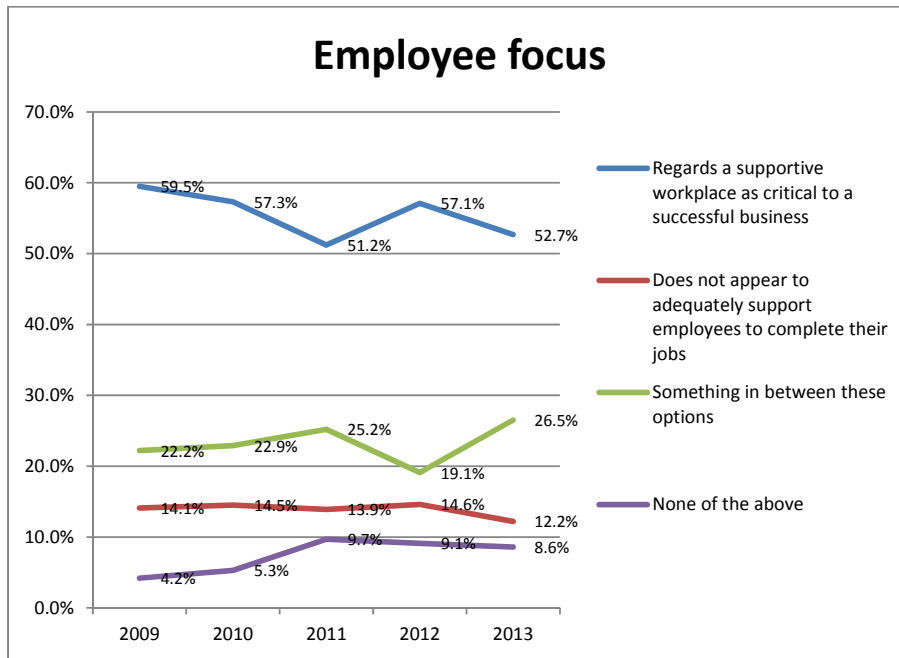
As with other measures, the percentage of respondents who said their organisation regards a supportive workplace as critical to a successful business fell back in 2013 from 57.1% in 2012 to 52.7%- just above the 2011 level of 51.2%.

Again, there has been a significant change in the perception of organisations that are not New Zealand owned. In 2012, 47.7% of these organisations were thought to regard a supportive workplace as critical to a successful business. In 2013, the corresponding figure is 37.2%. Conversely, 22.8% of respondents in these organisations feel that they do not appear to adequately support employees to complete their jobs, up from 15.4% in 2012.

There is a decline in the level of New Zealand-owned organisations that are perceived as not appearing to adequately support employees to complete their jobs, down to 11.0% from 15.3% in 2012.

Employee focus	Total 2013	Ownership		
		NZ Owned	Not NZ Owned	Don't know
Regards a supportive workplace as critical to a successful business	52.7%	55.2%	37.2%	52.7%
Does not appear to adequately support employees to complete their jobs	12.2%	11.0%	22.8%	5.4%
Something in between these options	26.5%	26.3%	30.9%	20.1%
None of the above	8.6%	7.5%	9.1%	21.8%

Overall, there is a long term downwards trend of around 1.4% per annum in the level of organisations that are perceived to regard a supportive workplace as critical to a successful business.



## 1.6 Comments

A sample of comments on respondents organisations follow:

*“The multi-million companies that don't pay tax, need to be more involved in employer/employee best practices.”*

*“As a casual employee it is difficult to know, of course, the organisation has a lot of nice slogans.”*

*“Our goal is to generate income while increasing the sustainability of our operation and our region. It is not a question of "balance".”*

*“Local government has different priorities to a business, but could certainly still do better on all areas of sustainability.”*

*“The organisation I work for has a government contracted business it must procure off. The price paid for goods is far from competitive.”*

*“We focus intensely on sustainable business practice but we don't use it at all for publicity as our clients don't need the sustainability message - just distracting in the context of our business. Thus we're very serious about sustainability and consider it essential to our business practice but not to our reputation but rather to the actual running and longevity of our business.”*

*“In this economic climate price of goods has to be a high priority even though it would be preferable to be totally sustainable. My employer believes that employees are lucky to have jobs and have to accept certain unfavourable conditions.”*

*“Am successful because I keep customers satisfied with service and top quality products.”*

## 2. Sustainability

### 2.1 Sustainable Development Strategy

As reported in 2012, the percentage of organisations thought to have a sustainable development strategy has dropped consistently since 2009. It has continued the decline in 2013 at an overall rate of 3.0% per annum.

The level of respondents who do not know if their organisations have such a strategy remains at over 40%.



43.0% of organisations that are not New Zealand-owned were said to have a sustainable development strategy, up from 27.8% in 2012. This shift has come from those who did not know whether their organisation had a sustainable development strategy or not.

The level of New Zealand-owned organisations with a sustainable development strategy has continued to fall (28.4% in 2012, 33.1% in 2011).

Does the organisation you work for or with have a sustainable development strategy?	Total 2013	Ownership		
		NZ Owned	Not NZ Owned	Don't know
Yes	27.4%	26.4%	43.0%	8.2%
No	28.8%	31.0%	22.4%	15.7%
Don't know	43.8%	42.5%	34.6%	76.1%

## 2.2 Implementation of sustainable development strategy

As in previous years, respondents who said that their organisation had a sustainable development strategy were asked if their organisation actually implemented it. Three times as many respondents as in 2012 were not sure, suggesting that organisations – in particular, New Zealand –owned organisations – are not communicating progress on implementing their sustainable development strategy to staff.

In comparison with 2012, fewer organisations with a sustainable development strategy were thought to be implementing all of it. In 2012 the responses indicated that New Zealand-owned organisations were far more likely to implementing in full than organisations that are not New Zealand. In 2013, this position has been reversed. Over half of the organisations that were not New Zealand-owned are thought to be implementing in full in comparison with 31.4% of New Zealand-owned organisations. In 2012 only 27.4% of organisations that were not New Zealand owned were thought to be implementing in full, compared with 65.0% of New Zealand-owned organisations.

Does your organisation actually implement its sustainable development strategy?	Total 2013	Ownership		
		NZ Owned	Not NZ Owned	Don't know
Implements all of it	36.8%	31.4%	53.0%	81.8%
Implements some of it	43.3%	47.0%	34.2%	0.0%
Does not implement it	0.1%	0.0%	0.0%	0.0%
Not sure	19.7%	21.6%	12.9%	18.2%

## 2.3 Sustainable Behaviour

As in previous studies, respondents were asked whether they thought that their organisation behaves sustainably (i.e. looks after profits as well as the environment and people). Results are similar to 2012, although the level of organisations thought to be behaving in this way has fallen from 59.5% to 53.0%.

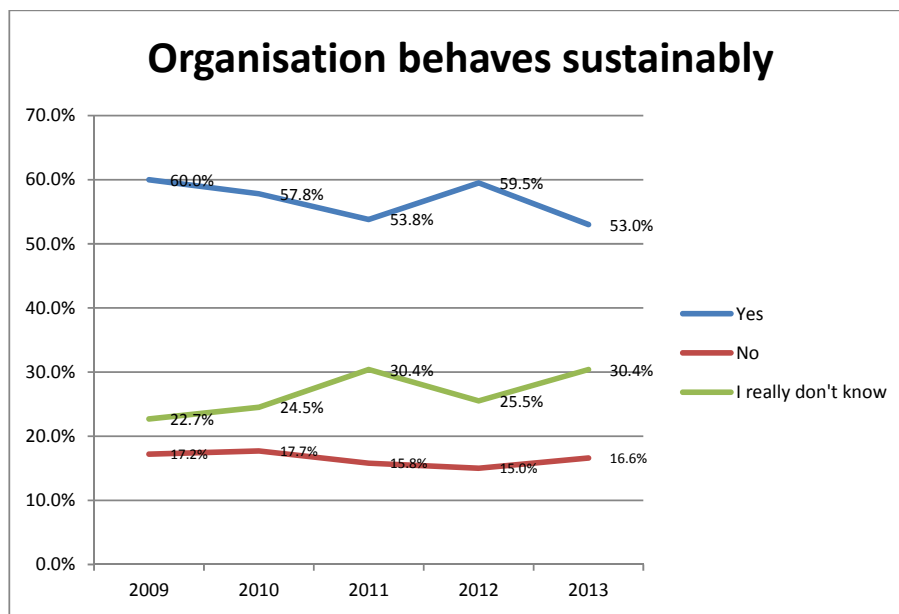
New Zealand owned organisations were perceived to be more likely to behave sustainably.

Would you say your organisation behaves	Total	Ownership
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sustainably (looks after profits as well as the environment and people)?	2013	NZ Owned	Not NZ Owned	Don't know
Yes	53.0%	56.3%	49.0%	23.2%
No	16.6%	15.9%	27.1%	3.6%
I really don't know	30.4%	27.8%	23.9%	73.2%

The overall trend on this measure of sustainable behaviour is downward, by an average of 1.2% per annum. After a lift in 2012 the percentage of organisations that are thought to behave sustainably is back at 2011 level. However, there is no corresponding lift in the percentage of organisations thought to be not behaving sustainably; the lift is in “Don’t know”.



The most frequently mentioned sustainable behaviours in respondents’ organisations were:

- recycling/reusing/maximising use of materials
- paperless communication
- energy management
- green building/environments
- sustainable travel and vehicle options, minimising travel/carbon footprint
- waste reduction
- purchasing sustainable/environmentally friendly products
- looking after staff/flexibility
- choosing whether to work with other organisations or not

## 2.4 Sustainable development report

This year, 60.7% of respondents did not know whether their organisation had publically reported on the sustainable development of their New Zealand operations, up from 56.7% in 2012. Only 8.6% said that their organisations had done so, down from 14.0% in 2012.

Overall, there has been a 5.4% drop in the level of organisations reporting publically on their sustainable development progress. The drop is evident across all organisations regardless of their ownership.

The drop may, however, be a result of lack of information on what organisations are actually doing. 75.9% of respondents from organisations that are not New Zealand owned did not know whether their organisations are reporting sustainable development progress.

Has your organisation publicly reported on the sustainable development progress of its New Zealand operations, either in separate reports or annual reports, during the past 12 months?	Total 2013	Ownership		
		NZ Owned	Not NZ Owned	Don't know
Yes	8.6%	9.1%	9.7%	1.3%
No - but we plan to	3.0%	3.5%	1.3%	0.2%
No, and no plans to	27.8%	31.6%	13.1%	10.6%
Don't know	60.7%	55.9%	75.9%	87.9%

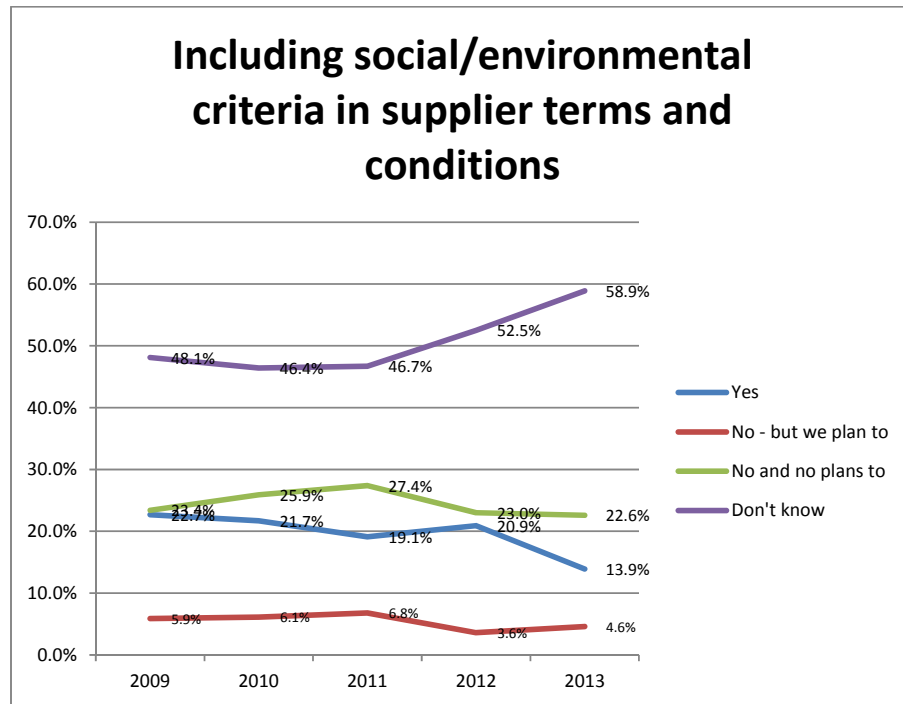
## 3. Procurement and Sustainability

### 3.1 Social/environmental criteria

Since this series of measures began in 2009, a high proportion of respondents have not known whether their organisations included social or environmental criteria in their supplier terms and conditions. This year, that level has reached 58.9%, having been trending up by 6% per annum since 2011.

After lifting in 2012, the percentage of organisations that are said to be including social or environmental criteria in their supplier terms and conditions has fallen to the lowest level since 2009. The long term trend is a decline of 1.8% per annum on average.

This appears to be another measure where lack of information being provided to staff may be masking sustainable development progress.



25.2% of New Zealand-owned organisation are said to have no plans to introduce these criteria in the future. This is up from 23.7% in 2012.

10. Does the organisation you work with or for include social/environmental criteria in its supplier terms and conditions?	Total 2013	Ownership		
		NZ Owned	Not NZ Owned	Don't know
Yes	13.9%	13.2%	21.9%	7.4%
No - but we plan to	4.6%	5.6%	1.2%	0.0%
No, and no plans to	22.6%	25.2%	13.0%	9.9%
Don't know	58.9%	56.0%	63.8%	82.7%

### 3.2 Effect of environmental, social or ethical behaviour

8.9% of organisations in New Zealand appear to have deselected suppliers in the past year because of their environmental, social or ethical behaviours. This is down from 13.0% in 2012, but correspondingly, the level of respondents who did not know has risen to 61.1% from 55.9% in 2012.

Identified deselection of suppliers has fallen back to just below 2011 levels. The biggest movement is among New Zealand-owned organisations, where deselection has fallen from 14.1% in 2012 to 9.6%.

Has the organisation you work for or with deselected suppliers in the past year because of their environmental, social or ethical behaviours?	Total 2013	Ownership		
		NZ Owned	Not NZ Owned	Don't know
Yes	8.9%	9.6%	8.7%	0.2%
No	30.1%	32.2%	24.1%	16.1%
Don't know	61.1%	58.2%	67.2%	83.7%

A range of reasons was given for de-selection of suppliers, but they were clustered most strongly around:

- **Ethics**
  - “Unethical financial investment practices.”*
  - “Have shoddy practices or could not justify their costs.”*
  - “Acted in an unethical manner in their business attitudes.”*
  - “Racist supplier... trying to not use them... currently trying to source alternative supplier.”*
  - “Show a disdain for people and the environment.”*
  
- **Lack of sustainability policy or proof of sustainable approach**
  - “It was BP because of its attitude to deep drilling.”*
  - “Not willing to take responsibility for ensuring packaging was recyclable.” “Disassociate and distance ourselves from people who portray an unacceptable image.”*
  - “Any suppliers/supplies that cannot supply evidence of their proven sustainability policy we will not use. We query and research companies independently of their policies also.”*
  - “Had no commitment to sustainability, used inappropriate materials, did not share values with our business.”*
  - “Any Japanese suppliers - their country inhumanely & un-necessarily kills whales and dolphins”*
  - “Found supplier of equivalent equipment with environment-friendlier component recycling process already in operation.”*
  
- **Poor products/supply**
  - “Offered products with excessive packaging and/or product origin unclear and/or product not produced responsibly.”*
  - “Bad international practices re supply of product”*
  - “Claim their product broken down in compost...not true...just said they were green to go on green bandwagon.”*

### 3.3 Organisational purchasing approach

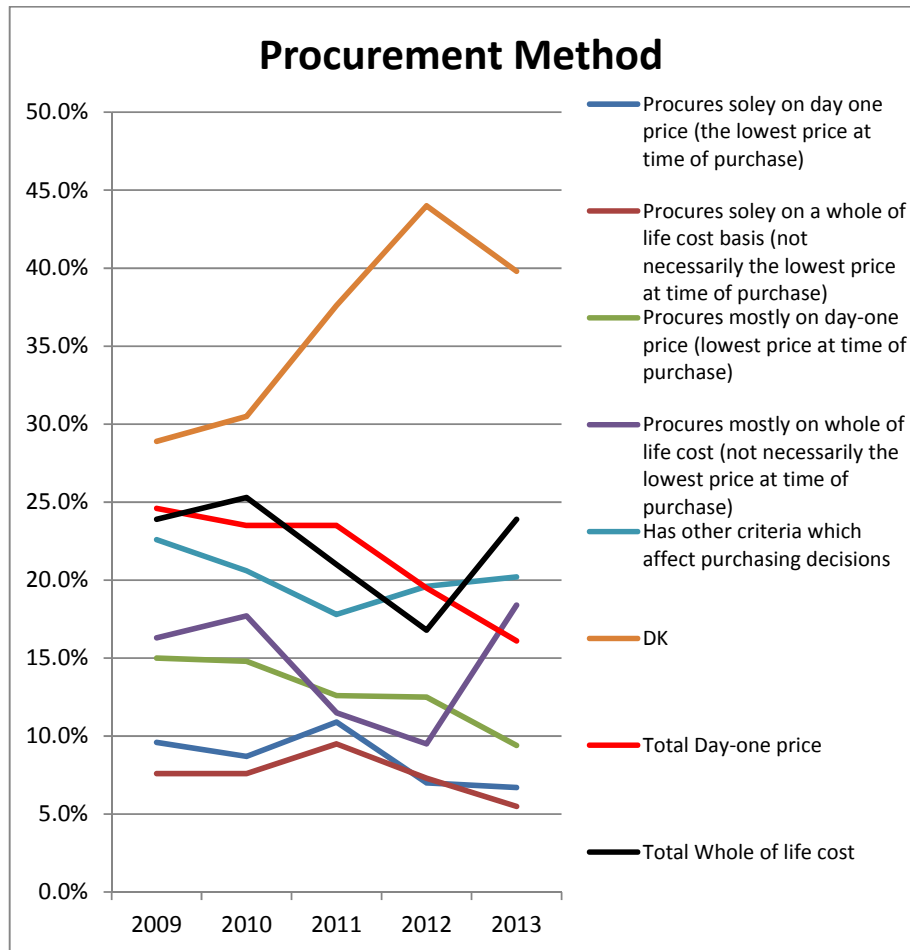
There has been some movement since 2102 in the way in organisations buy goods and services. There is a marginal reduction in the percentage of organisations who buy solely on day one price or solely on a whole of life cost basis, but overall, whole of life cost has become more important. However, this movement is driven by New Zealand-owned organisations; organisations that are not New Zealand owned are far less likely than in 2012 to purchase solely or mostly on a whole of life basis. These organisations' level of purchasing on day one price has nearly doubled, from 10.6% in 2012 to 19.7% in 2013.

Purchasing on a whole of life cost basis in NZ owned organisations is now slightly higher than in 2011, after a decline in 2012. They are now more likely than non-New Zealand owned organisations to buy on whole of life basis.

The percentage of respondents who did not know what approach was used has declined from 44% in 2012 to just under 40%.

Which of the following best describes the way in which your organisation buys goods and services?	Total 2013	Ownership		
		NZ Owned	Not NZ Owned	Don't know
Procures solely on day-one price (the lowest price at time of purchase)	6.7%	6.8%	8.6%	2.4%
Procures solely on a whole of life cost basis (not necessarily the lowest price at time of purchase)	5.5%	5.7%	7.6%	0.0%
Procures mostly on day-one price (lowest price at time of purchase)	9.4%	9.8%	11.2%	0.9%
Procures mostly on whole of life cost (not necessarily the lowest price at time of purchase)	18.4%	19.1%	9.0%	25.9%
Has other criteria which affect purchasing decisions	20.2%	20.9%	18.7%	13.0%
Don't know	39.8%	37.7%	45.0%	57.7%
Total day-one price basis	16.1%	16.6%	19.7%	3.4%
Total whole of life cost basis	23.9%	24.8%	16.7%	25.9%

The following chart shows the purchasing trends since 2009. Purchasing on day one price appears to have steadily declined since 2010.



As in previous years, respondents were asked in what ways environmental considerations had an impact on their organisation's decisions to buy goods and services. A selection of responses follows. In 2013 there appears to be a greater awareness of the need for sustainability than in 2012. 2012 appeared to have more pragmatism in the comments, while there was greater cost awareness in the 2011 comments.

*"We search for suppliers with the same ethics/principles as us and try to opt for the best fit with our corporate code of good practice."*

*"I try and buy local or at least NZ so the foot print of my purchases is minimal."*

*"None of us will have an economy if we don't have an environment - businesses should be leading the way. E.g. buying full spectrum daylight bulbs - they last longer, so good for the environment and provide full spectrum so good for employees, especially during winter.."*

*"The old govt 3 programme was fantastic for procurement and had all businesses striving to compete on sustainability. Scrapping this took us a decade backwards. Now it is extremely challenging to compete on enviro performance. It's simply too expensive to be sustainable and competitive."*

*“Stock holding limitations by suppliers can effect price and limit availability of the overall best option.”*

*“High impact - products should incorporate low-energy demand during construction, minimal raw materials and the raw materials should be recyclable.”*

*“If packaging is excessive, we don't buy. If we know the product is sourced/produced in an environmentally-unfriendly way, we don't buy.”*

Environmental considerations were not taken into account by all organisations, however:

*“I'm sure it contributes to the overall decision and may sway a provider if the options are close but probably not if the price was very different.”*

*“None really, for my bosses it's all about cost, the cheaper the better.”*

*“It tries to uphold a public image of sustainability as a marketing strategy, but really it isn't.”*

### 3.4 How business and government should buy

Respondents were asked whether they thought businesses and government should buy on whole of life cost or day-one price only. While 45.4% said they did not know, 47.2% thought that whole of life cost was the better option with only 7.4% choosing day one price. This is a marked contrast to the buying behaviour of the organisations they work for or with.

Do you think businesses and the Government should be buying on whole of life cost or day-one price basis only?	Total	Ownership		
		NZ Owned	Not NZ Owned	Don't know
Whole of life	47.2%	48.5%	54.0%	18.8%
Day-one price only	7.4%	8.2%	6.2%	0.0%
Not sure	45.4%	43.2%	39.8%	81.2%

## 4. Community and Social activities

### 4.1 Involvement

Respondents were asked what community or social activities their organisations were involved in. As in 2012 there is little difference in the level of involvement between New Zealand-owned and non-New Zealand owned organisations.

Overall, 71% of organisations have community or social activity involvement – slightly higher than in 2012. The percentage of non-NZ owned organisations with no involvement has dropped from 28% in 2012 to 20%.

As in the last 2 years, the most common involvement was in contributing financially to charities or community organisations. The percentage of NZ owned organisations contributing in this manner has fallen back to 41%, 7% less than in 2012 and 3% less than in 2011.

With organisations that were not New Zealand-owned the percentage has fallen from 68% in 2011 and 52% in 2012 to 48% this year.

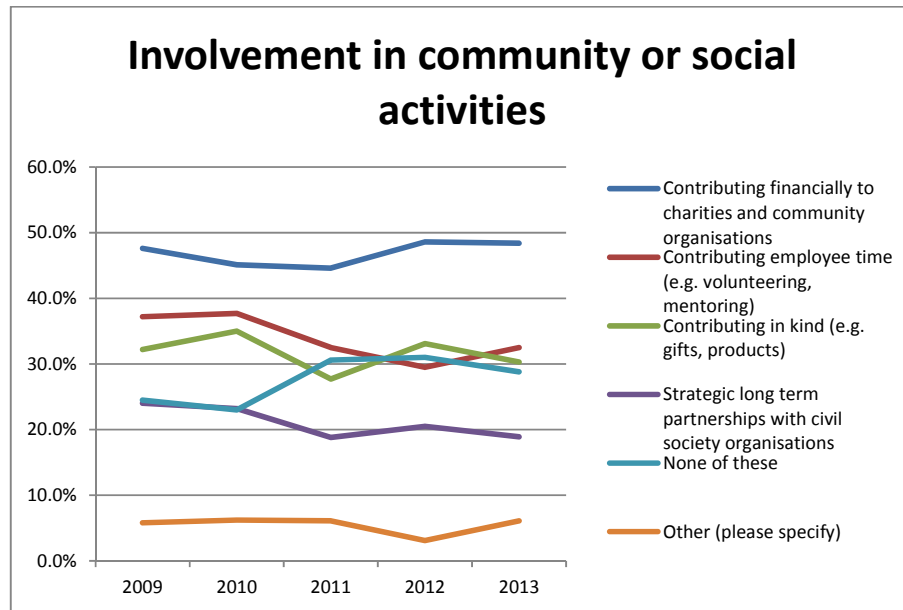
Organisations that contribute are now doing so in fewer ways: the 2013 survey shows that, on average, organisations contributed in 1.4 different ways, down from 1.95 in 2012.

What community or social activities is your organisation involved in?	Total 2013	Ownership		
		NZ Owned	Not NZ Owned	Don't know
Contributing financially to charities and community organisations	48.4%	41.3%	48.4%	26.2%
Contributing employee time (e.g. volunteering, mentoring)	32.5%	29.6%	22.6%	3.7%
Contributing in kind (e.g. gifts, products)	30.3%	25.0%	32.5%	17.0%
Strategic long term partnerships with civil society organisations	18.9%	17.9%	13.3%	5.8%
None of these	28.8%	23.3%	19.9%	45.8%
Other (please specify)	6.1%	5.8%	2.2%	7.3%

There are some long term movements in the percentage of organisations contributing in each of the measured ways:

- Contributions of employee time, although higher in 2013, have declined by an average of 1.8% annually since 2009.
- The percentage of organisations making financial contributions has grown by an average of 0.5% annually since 2009, but has not grown in 2013.
- Contributions in kind is the most variable of the contribution types, but has declined by an average of 0.5% annually since 2009.
- Strategic partnerships are declining at 1.3% per annum, on average.





## 4.2 Measurement

The overall percentage of organisations that measure their community involvement dropped to 22% in 2013 after being static at 28% for 2 years. As with other measures in this survey, the drop has been accompanied by an increase in the percentage of respondents who answered “Don’t Know”: up to 45% from 38% in 2012.

33% of respondents said that their organisations were did not measure their community involvement (34% in 2012 and 37% in 2011).

The percentage of New Zealand-owned organisations measuring their community involvement has dropped from 29.6% in 2012 to 22.9% in 2013. Measurement by non-New Zealand owned organisations, however, has risen to 26.4% (20.7% in 2012).

Does the organisation you work for or with measure its community involvement?	Total 2013	Ownership		
		NZ Owned	Not NZ Owned	Don't know
Yes	22.4%	22.9%	26.4%	10.5%
No	32.9%	34.1%	26.8%	29.3%
Don't know	44.7%	43.0%	46.8%	60.2%

## 4.2 Strategic relationships

61% of respondents said that the organisation they worked for or with had strategic relationships with government, non-government, community or social organisations. New

Zealand-owned organisations were more likely to have these relationships than non-New Zealand owned organisations.

Does your organisation have strategic relationships with any of the following?	Total 2013	Ownership		
		NZ Owned	Not NZ Owned	Don't know
Government	32.2%	37.5%	16.6%	7.0%
Non-government agency	21.3%	22.1%	31.9%	7.7%
Community organisation	36.2%	38.3%	37.5%	24.6%
Social services organisation	24.3%	26.8%	25.0%	4.1%
None of these	39.0%	34.8%	40.5%	66.3%
Other	2.8%	2.5%	2.2%	4.7%

## 5. Profit from investment in sustainability

Using the same question as in 2012, respondents were asked whether they thought that the organisation they worked for or with expected to make a profit from any investment it does or might make in specific sustainability initiatives (like producing products and services which are better for the environment or people).

32% of respondents this year said that this did not apply and 32% were unsure. The percentage of those who thought their organisation expected a profit was similar to 2012, but the percentage of those who thought their organisation that did not expect a profit from investment in sustainability objectives was 3.5% lower than in 2012. As in 2012, a higher percentage of respondents in non-NZ owned organisations said that their organisation expected to make a profit from investment in sustainability initiatives, and this level increased from 26% in 2012 to 34% in 2013.

Does the organisation you work for or with expect to make a profit from any investment it does or might make in specific sustainability initiatives (like producing products and services which are better for the environment or people)?	Total 2013	Ownership		
		NZ Owned	Not NZ Owned	Don't know
Yes	20.0%	19.6%	34.2%	3.0%
No	16.2%	17.9%	6.9%	11.2%
Does not apply	31.8%	33.3%	21.7%	29.6%
Not sure	31.9%	29.2%	37.3%	56.2%

## 6. Emissions and resource use

### 6.1 Measurement of carbon emissions

After increasing from 41% in 2011 to 49% in 2012, the percentage of respondents that who did not know whether their organisations had measured their carbon emissions increased further in 2103 to 50.8%.

Overall, the percentage of respondents who said that their organisation does measure its emissions fell from 13.5% in 2012 to 10.5% in 2013. This fall primarily came from organisations that were not New Zealand owned. 56.6% of respondents whose organisation was not New Zealand owned said they did not know whether measurement had been done or not – up from 47.5% in 2012.

The overall percentage of organisations that had not measured their emissions and had no plans to do so remained at the same level as in 2012.

Has the organisation you work for or with measured its carbon emissions (i.e. completed a carbon footprint)?	Total 2013	Ownership		
		NZ Owned	Not NZ Owned	Don't know
Yes	10.5%	10.3%	18.3%	0.5%
No - but we plan to	4.5%	5.0%	2.3%	1.3%
No, and no plans to	34.2%	36.1%	22.8%	30.2%
Don't know	50.8%	48.6%	56.6%	68.0%

As in 2011 and 2012, New Zealand-owned organisations were far less likely to have measured their carbon emissions than other organisations.

As in 2011 and 2012, the larger the organisation, the more likely it is to have measured its carbon emissions and the less likely it is to have no plans to do so. In 2013, respondents working in organisations with 21 to 100 employees are the least likely to know whether their organisation had measured its carbon emissions.

### 6.2 Plan to reduce carbon emissions

Results for this question were very similar to 2012 results.

As in 2012, 31% of New Zealand-owned organisations were said to have no intention to develop a plan to reduce emissions. This suggests a consistent drop from the 41% in 2011.

Has it developed a plan to reduce those emissions?	Total 2013	Ownership			Total 2012
		NZ Owned	Not NZ Owned	Don't know	
Yes	14.3%	14.2%	18.8%	7.6%	13.4%
No - but we plan to	4.3%	5.0%	1.7%	0.0%	6.3%
No and no plans to	29.9%	30.7%	23.6%	29.9%	29.0%
Don't know	51.5%	50.0%	55.9%	62.5%	51.2%

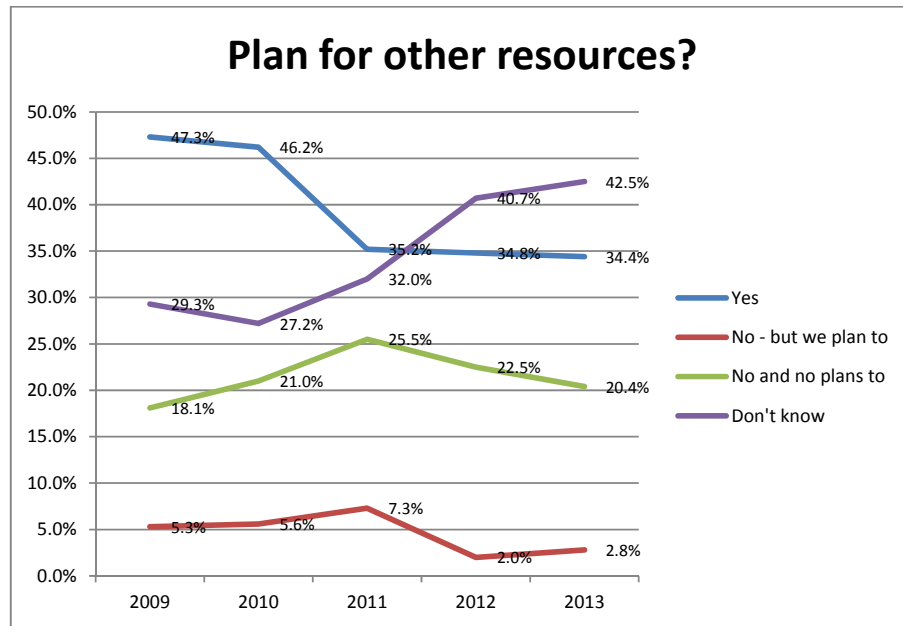
88% of those organisations that had already measured their carbon emissions had also already developed a plan to reduce them – this is an increase on the 80% level from 2102 and 2011. 81% of those who intended to measure their emission also intended to develop a plan to reduce them. This is an increase from 75% in 2012.

As in 2012, the larger the organisation, the more likely they are to have developed a plan to reduce carbon emissions and respondents working for or with organisations with 21 staff or more were less likely to know whether their organisation had plans to measure their carbon emissions

Comparison with the 2012, 2011, 2010 and 2009 surveys shows a decrease of approximately 1.0% per annum over that time scale in the percentage of organisations that have carbon emission reduction plans.

### 6.3 Plans covering other resources used

The percentage of organisations said to have initiatives that consider how they use other resources, like water and waste, was similar to the last two years. The decline noted last year in the percentage of organisations that do not currently have these plans and who do not intend to set up a plan has continued, with 20% of organisations now saying that they have no plans for these resources and do not intend to put any in place.



The percentage of smaller organisations with plans for other resources has now caught up with larger organisations. In previous years smaller organisations have lagged behind.

Initiatives for use of other resources	Total 2013	No. people employed by organisation			
		0 to 20 employees	21 to 100 employees	101 or more employees	Don't know
Yes	34.2%	35.3%	38.4%	36.1%	3.3%
No - but we plan to	2.8%	4.2%	3.5%	1.3%	0.0%
No and no plans to	20.5%	33.3%	13.2%	10.6%	7.6%
Don't know	42.5%	27.2%	45.0%	51.8%	89.1%

Comments on these question areas included:

*“We are very small and do not formally measure our emissions. We instead make decisions based on reducing our emission or waste etc. using a basic hierarchy of reduce, reuse or recycle. For example, we relocated our offices 2 years ago to be on a major PT route so that staff could get to and from work or appointments without the need for a private motor vehicle. We also have a “waste bin system” so that we can separate our office waste into recyclables, organic waste and batteries thereby reducing the waste that goes to landfill.”*

*“It's so easy for businesses to recycle, down cycle (wiped properly that business computer could be great for a home pc), compost, put in water butts for garden watering, encourage cycling or public transport to work, etc.”*

*“On a home office front, these initiatives are considered, but the most significant outcome is engaging with clients (large landowners) and encouraging them to undertake such initiatives.”*

*“We cannot avoid using heavy plant & equipment but we have work practices to avoid waste, manage spills etc. Water management is critical in work areas where damage can occur such as pollution of stream beds & distribution of chemicals etc.”*

*“Carbon emissions are a crock. We will not take part in any such schemes.”*

*“When we undertook carbon footprinting there was little appreciation of the whole-of-life approach we take. E.g. new vehicles were recommended rather than keeping existing vehicles well maintained. Inappropriate vehicles were suggested which would not have lasted well in the type of field work we do, which require 4WD. Consultants appeared to have an office based approach which was not well suited to our business type.”*

*“These are measured and there are policies and strategic plans to reduce the environmental footprint but there is as yet no commitment from senior management to actually implement and do anything.”*

*“Measuring carbon emissions is simply a huge con and an industry created out of nothing and is simply a new fashionable industry that only benefits a select few.”*

*“Carbon emissions and footprints have been in our discussions with a policy in place for it but as a small business we have controlled our carbon footprint to a degree that we do it by reducing the electric output of our machines, like computers, radios, office equipment by installing back generators to reduce power consumption and radiant emissions from our PC screens. Per rata ratio we have a good collection of plants and trees in our office per out capita of electronic equipment so that whenever we purchase another piece of electronic equipment we buy a plant to match its CPT output. We have 72 cubic m of office space which is quite small. For our size that is enough so if we multiply that with our CPT rating we only need 16 sizable plants to level out our Carbon footprint to almost which is around 30 cubic tons of CO2 for a small size business.”*

*“Very difficult for govt funded orgs to make what seem to be discretionary spending decisions; should be govt policy built into funding framework - looking to the future and not just re-election chances.”*

*“As a state education provider, the school I work for has not ventured down the path of measuring emissions and looking at our carbon footprint. The main reason is that sustainability is not a key feature of what makes a school competitive in the market that we are in.”*

*“I think all businesses should actively develop plans and initiatives to lower its carbon footprint and keep their staff involved and informed. I feel embarrassed about not knowing what my company is doing/not doing.”*

## 7. Sustainable workplace

### 7.1 Organisations with a sustainable workplace

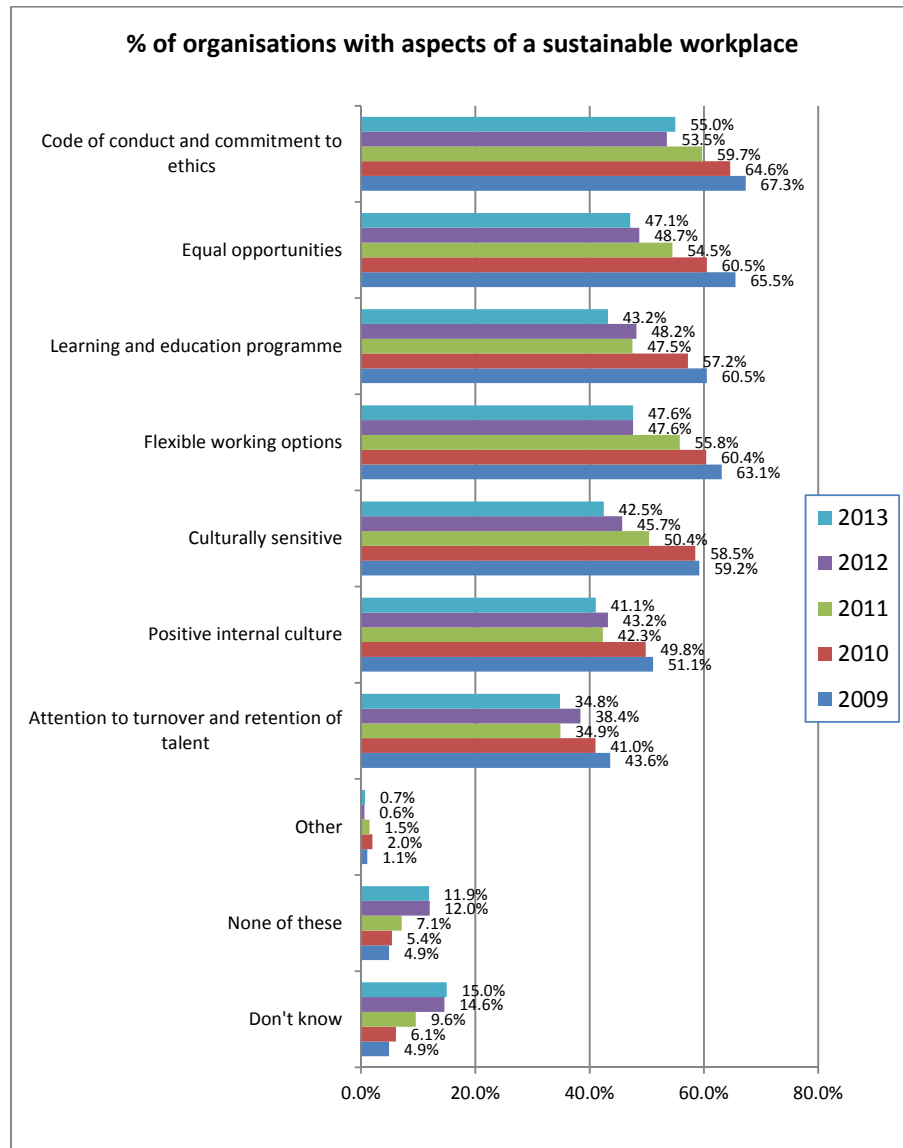
As in previous years, respondents were given a list of aspects of a sustainable workplace and asked which of them their organisation possessed. Results are very similar to 2012, with the exception of attention to staff turnover and retention of talent. This has dropped from 38.4% to 34.8%, with the entire drop coming from New Zealand-owned organisations.

What aspects of a sustainable workplace does your organisation possess?	Total 2013	Ownership		
		NZ Owned	Not NZ Owned	Don't know
Code of conduct and commitment to ethics	55.0%	55.5%	69.4%	29.9%
Flexible working options	47.6%	49.6%	51.5%	19.9%
Equal opportunities	47.1%	47.8%	62.9%	20.0%
Learning and education programme	43.2%	41.5%	59.7%	30.7%
Culturally sensitive	42.5%	43.3%	53.2%	22.3%
Positive internal culture	41.1%	42.0%	46.7%	18.9%
Attention to staff turnover and retention of talent	34.8%	36.4%	38.5%	20.3%
None of these	11.9%	12.4%	3.4%	23.6%
Don't know	15.0%	12.4%	13.5%	37.3%
Other	0.7%	0.7%	0.3%	3.7%
Average number of aspects	3.12	3.17	3.82	1.66

The average number of aspects per organisation were again lower than in the previous year, continuing the downwards trend from 2009 first reported for the 2011 survey.

Attention to staff turnover and retention of talent remains the lowest scoring aspect.

Comparisons between 2013 and prior years are shown on the chart below:



## 7.2 Operational changes for sustainability

Once again, a lower percentage of organisations were said to have made operational changes in the past year to reduce energy costs, environmental impact or become more sustainable (32.0% versus 37.7% in 2012 and 39.7% in 2011). Intention to do something in the next year was back up to 2009 to 2011 levels.

Making operational changes has trended down at 5% per annum, on average, since 2009. This may be because fewer organisations feel the need to make any changes, or that organisations feel that the necessary changes have already been made and embedded in their organisation and there is no need for further or continual change.



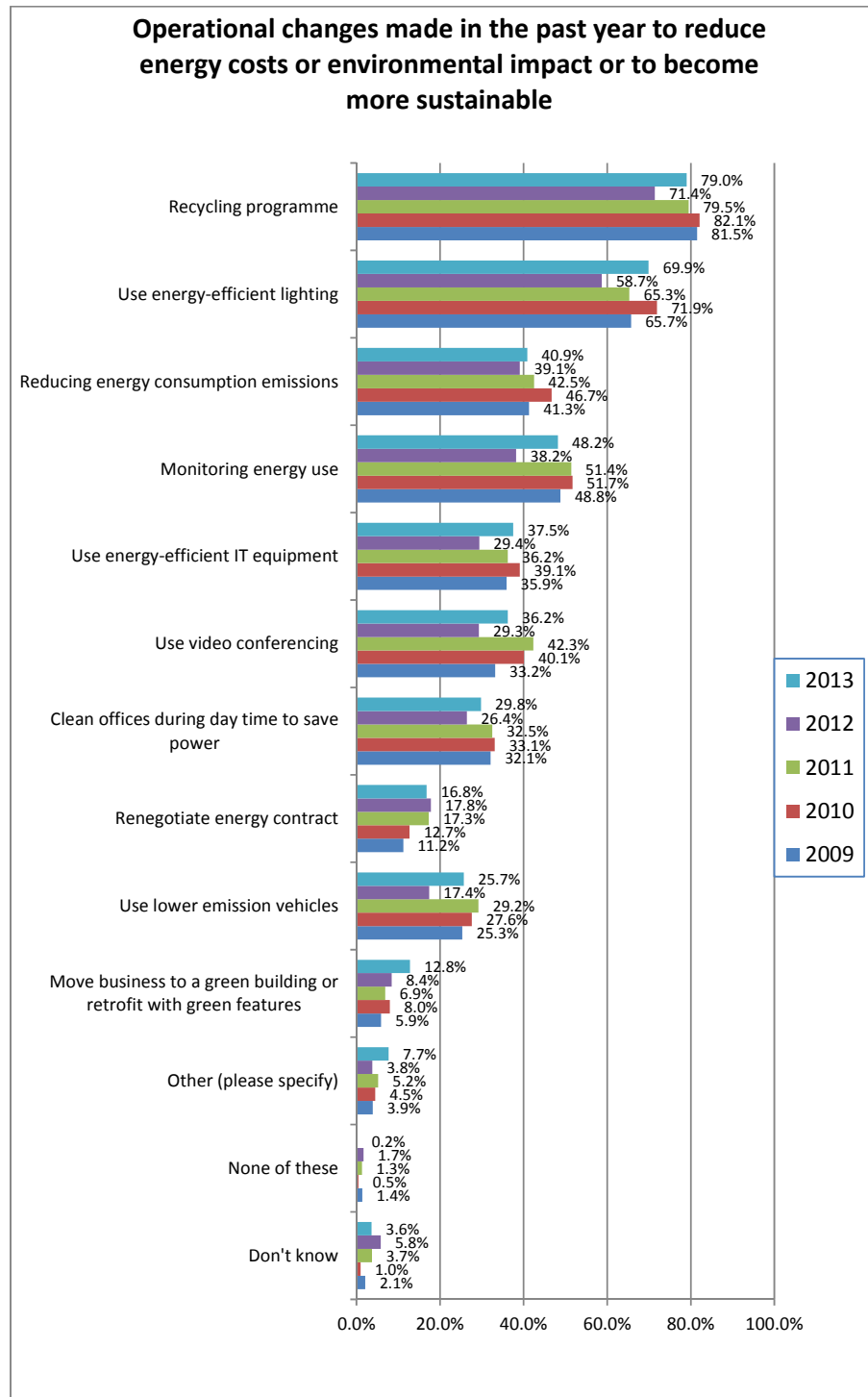
Has the organisation you work for or with made operational changes in the past year to reduce energy costs, environmental impact or become more sustainable?	Total 2013	Ownership		
		NZ Owned	Not NZ Owned	Don't know
Yes	32.0%	33.9%	31.5%	9.8%
No - but we plan to in the next year	5.7%	5.9%	7.6%	0.0%
No, and have no plan to make changes in the next year	18.9%	19.1%	21.5%	12.0%
Don't know	43.4%	41.1%	39.4%	78.3%

### 7.3 Operational changes made in past 12 months

After slowing in 2012, the level of change activity has lifted to close to 2011 levels.

The most common change remained a recycling programme, selected by 79% of respondents overall, followed by use of energy-efficient lighting (69.9% overall).

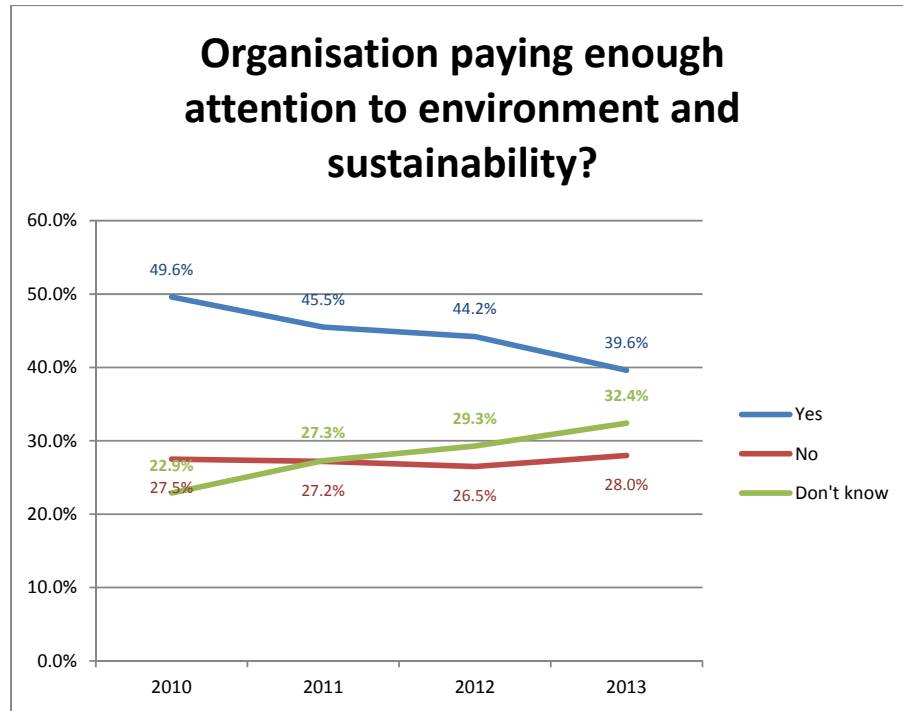
Year on year comparisons from 2009 are shown in the following chart:



On average, 4 operational changes had been made by organisations in the past twelve months to reduce energy costs, environmental impact or become more sustainable, up from 3.4 in 2012.

#### 7.4 Attention to sustainability and impact on staff stay/leave decisions

39.6% of respondents felt that their organisation was paying sufficient attention to the environment and sustainable development. This is down from 44.2% in 2012. There has been a steady decline of 3.1% per annum since the first measure of this in 2010. The 2013 is 10% below the 2010 level.



The results continue to show, as in 2012 and 2011, that the smaller the organisation, the more respondents feel that they are paying attention to the environment and sustainable development. Note that the overall decline in this measure is balanced by an increase in the percentage of people who answered “Don’t know”.

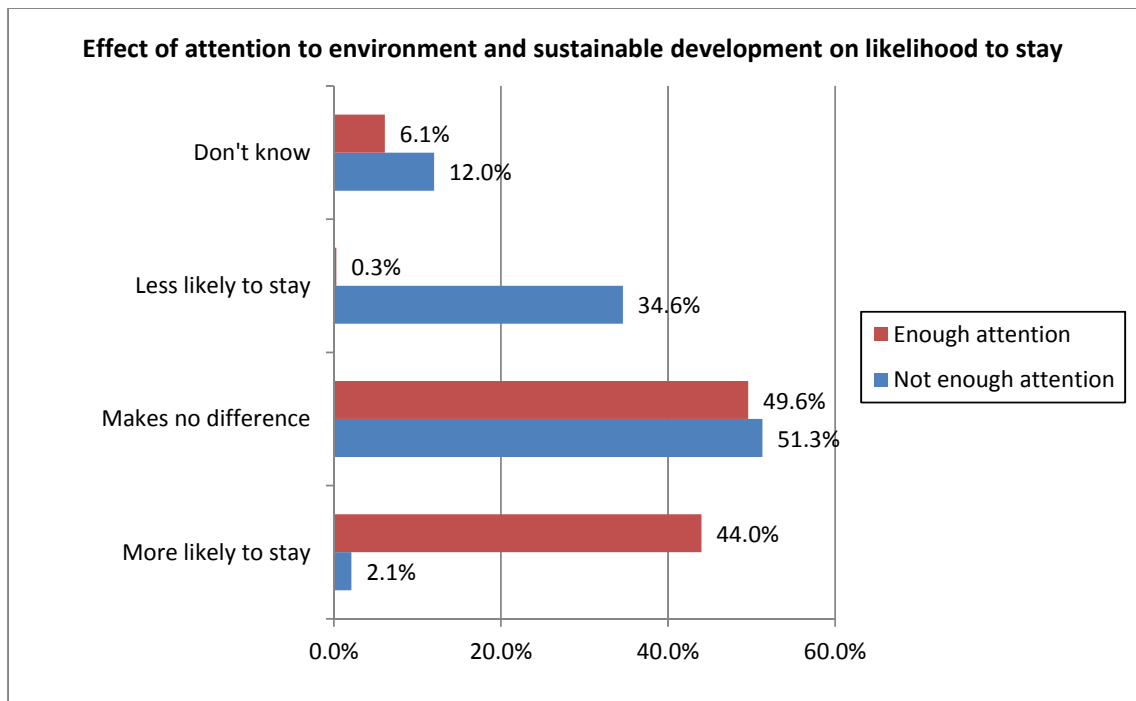
A higher percentage of respondents from non New Zealand owned companies than New Zealand –owned organisations felt that their organisation was not paying enough attention to the environment and sustainable development.

Do you think your organisation is paying enough attention to the environment and sustainable development?	Total 2013	Ownership		
		NZ Owned	Not NZ Owned	Don't know
Yes	39.6%	41.5%	40.5%	14.5%
No	28.0%	28.4%	38.8%	6.4%
Don't know	32.4%	30.1%	20.7%	79.0%

Results on the effect of organisations' attention to the environment and sustainable development on staff intention to stay with their organisation were very similar to 2011. For between 57% and 67% of respondents, whether their organisation was paying attention to the environment and sustainable development, or not, made no difference to whether they were likely to stay.

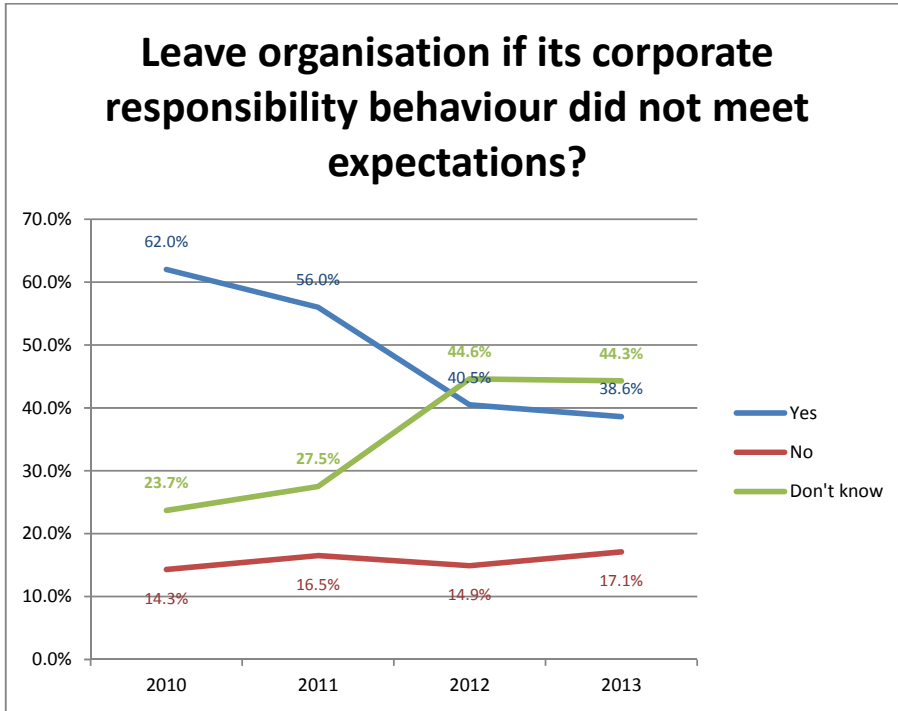
Paying attention to the environment and sustainable development appears to be having a greater impact on staff likelihood to stay with an organisation than in previous years. Respondents were less neutral, resulting in a 10% shift, with 34% being less likely to stay with an organisation perceived as not paying enough attention to these matters (24% in 2012) and 44% saying that paying attention to these matters made them more likely to stay (34% in 2012).

The following chart shows the overall effect.

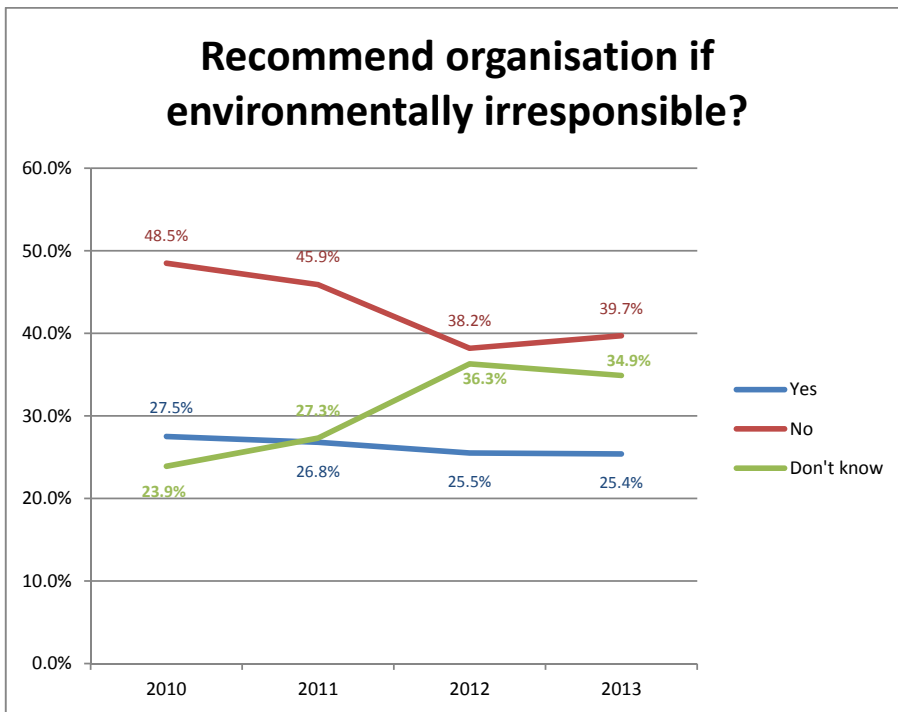


Respondents have remained unsure about whether they would consider leaving any organisation whose corporate responsibility behaviour no longer met their expectations. The level of "Don't know" response has remained at 44% and there is a small drop in the percentage of respondents who said "Yes".

On the other hand, the percentage that said that they would not consider leaving for those reason has risen to 17.1% from 14.9% in 2012.



25.4% of respondents said that they would recommend their organisation even if it was environmentally irresponsible – within 0.1% of the 2012 figure. There is a small lift in those who said that they would not recommend their organisation in those circumstances.



## 8. Sustainability outcomes and reporting

### 8.1 Outcomes

The sustainability outcomes measured in the past 4 years were measured again in the 2013 survey, with respondents asked which had been of most value to their organisation over the previous 12 months.

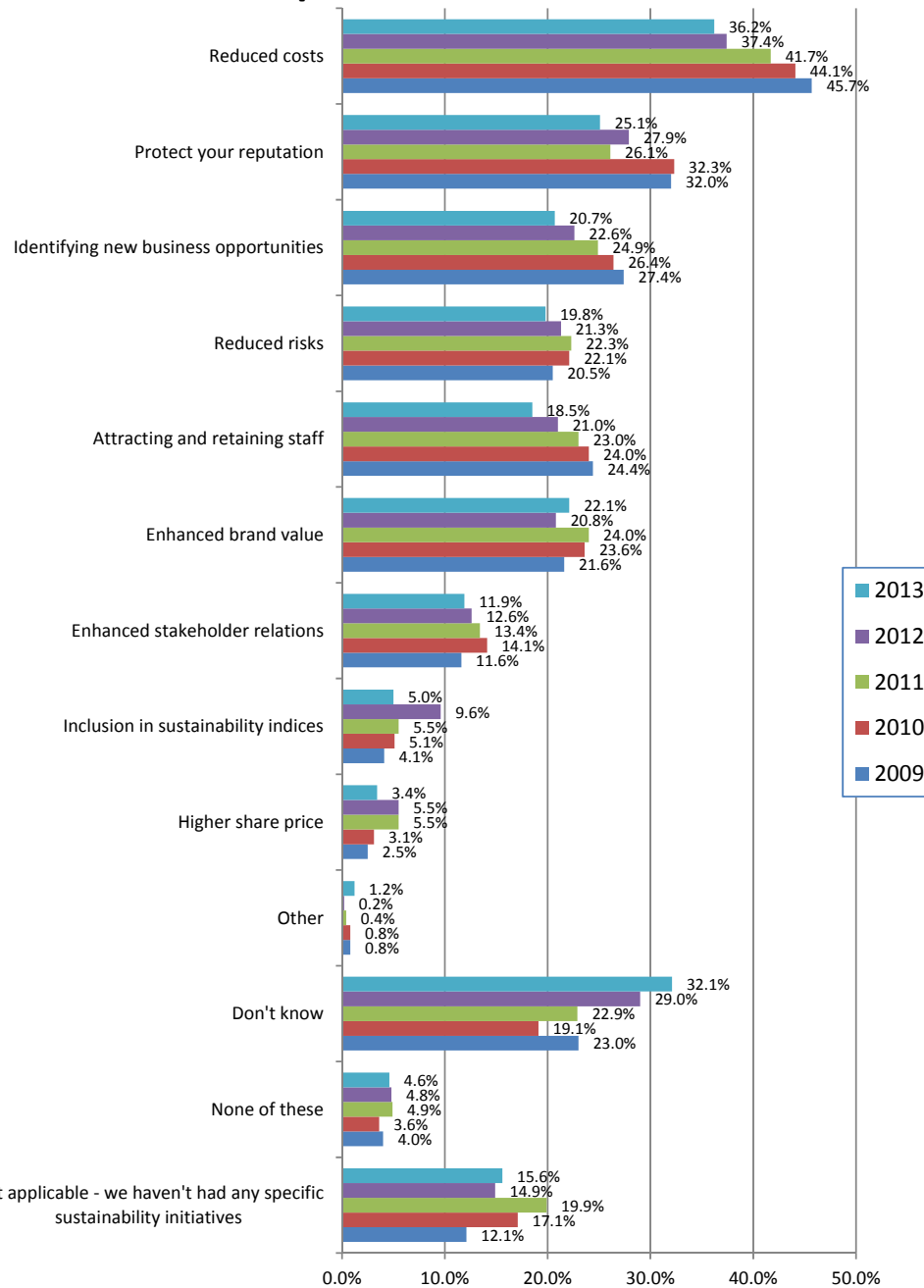
Four of the six most important outcomes measured have been declining in relative importance since 2009. On the other hand, the level of “Don’t know” has been increasing steadily.

“Reduced costs” remains that the most important outcome, but again it is at a reduced level.

“Protect your reputation” remains in second place, at 25.1% - the lowest level so far.

The following chart below shows comparisons between the five survey years:

## Sustainability outcomes of most value in past 12 months



### 8.1 Reporting sustainable performance

The question asked this year on reporting sustainable performance changed from those in previous years. Two measures can be directly compared:

- More organisations (21.3%) appear to be reporting to their board
- Fewer organisations appear to be reporting to their shareholders

To which of the following, if any does your organisation provide regular reports on its sustainable performance?	Total 2013	Ownership		
		NZ Owned	Not NZ Owned	Don't know
Board of directors	21.3%	22.3%	29.4%	4.3%
Shareholders	10.7%	9.0%	19.9%	2.5%
Staff	19.1%	19.8%	22.5%	2.5%
Customers	11.2%	12.0%	13.8%	1.7%
Others	4.9%	3.8%	1.8%	0.8%
None of these	28.1%	30.8%	13.9%	16.0%
Not sure	41.3%	36.7%	58.9%	78.9%

NZ owned organisations continue to be less likely than other organisations to report sustainable performance.

## 9. Sustainability leadership and organisation membership

### 9.1 Leadership

87% of respondents said that they believed that companies in New Zealand should take leadership in sustainability issues, down from 89% in 2012. Note that people in New Zealand-owned organisations are more likely to believe this.

Do you believe that companies in New Zealand should take leadership on sustainability issues?	Total 2013	Ownership		
		NZ Owned	Not NZ Owned	Don't know
Yes	86.8%	87.4%	84.1%	81.6%
No	13.2%	12.6%	15.9%	18.4%

### 9.2 Membership of sustainability-related business organisations

Membership of sustainability-related organisations appears to have fallen, with only 8% of respondents saying that their organisation was a member – compared with 14% in 2012. The largest fall has come from non New Zealand owned organisations, where known membership has fallen from 20.5% in 2012 to 9.0% in 2013. Fewer New Zealand-owned organisations (8% versus 12% in 2012) are now known to be members.

61% of respondents did not know whether their organisation was a member of a sustainability-related business organisation.



Does your organisation belong to any sustainability-related business organisations?	Total 2013	Ownership		
		NZ Owned	Not NZ Owned	Don't know
Yes	7.8%	8.2%	9.0%	0.0%
No - but we plan to	3.3%	4.0%	0.0%	0.0%
No - but we have in the past	3.1%	3.7%	0.8%	0.0%
No, and no plans to	24.7%	27.1%	13.2%	10.9%
I don't know	61.1%	56.9%	77.0%	89.1%

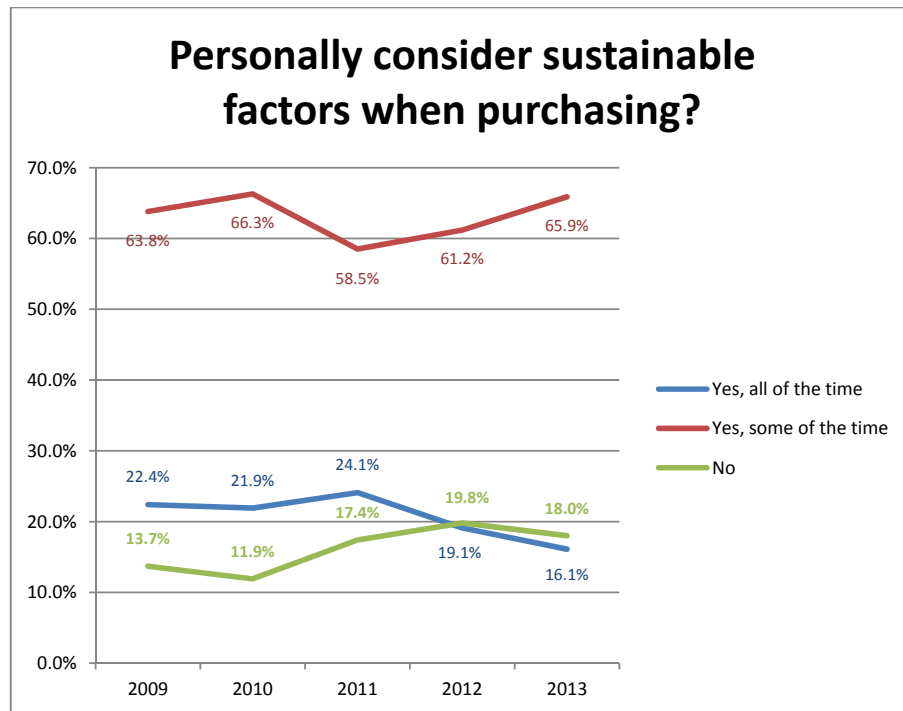
## 10. Personal purchasing

### 10.1 Taking sustainability into account

Respondents appear to be considering sustainability when purchasing goods or services for themselves, their family or their organisation less consistently than in previous years. 82% say they do consider sustainability, but only 16% consider it all the time, down from 19% in 2012.

This is the lowest level in the five years of these surveys.

The following chart illustrates the trends:

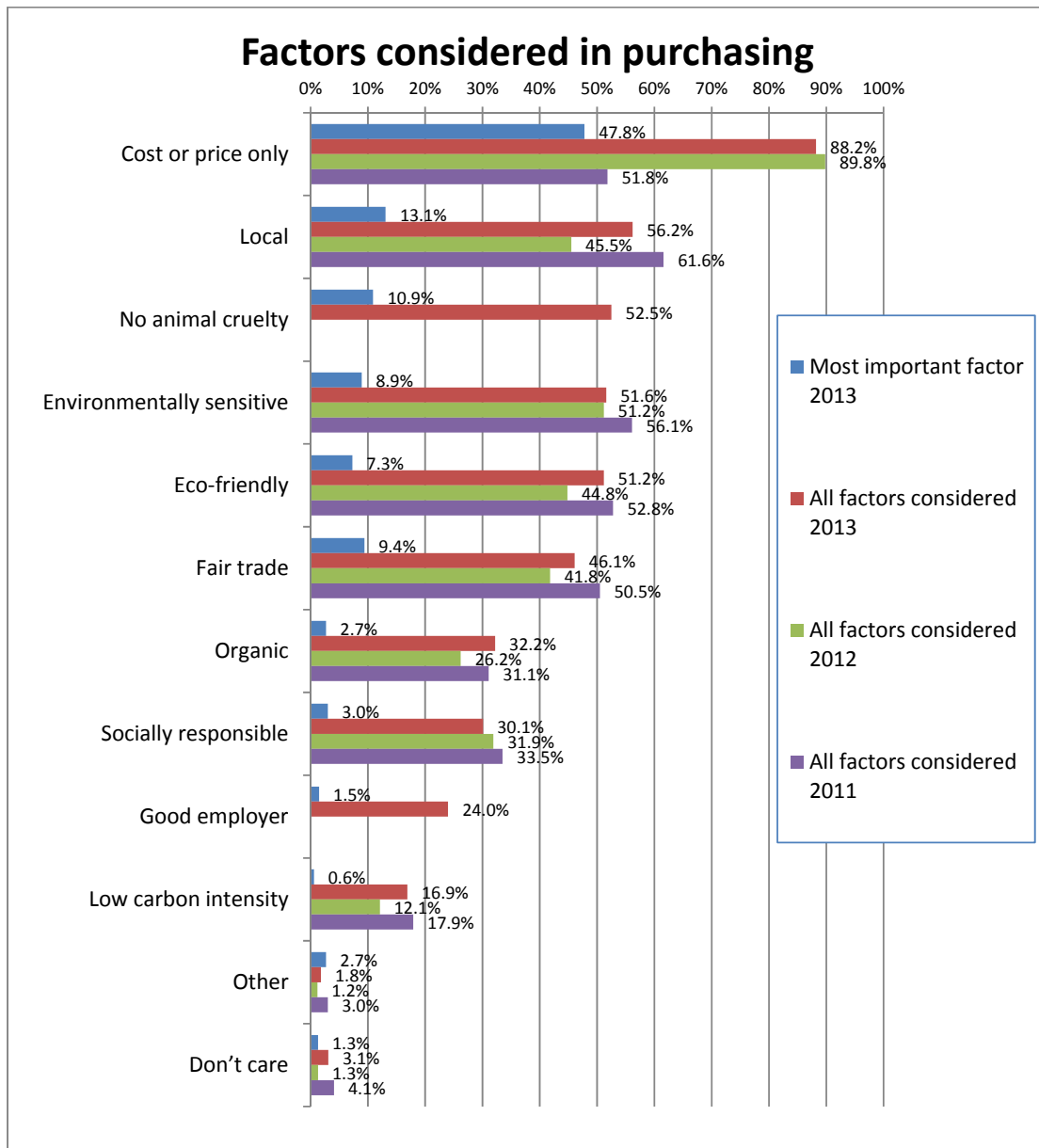


## 10.2 Factors considered

At 48%, “cost or price” remains easily the single most important consideration in respondents purchasing for themselves, their family or their organisation. While not as important as in 2012, it remains above the 2011 level.

“Local” is beginning to return to pre-2012 levels, at 13% and a new factor “No animal cruelty” come in third at 11%, followed by “fair trade at 9% and “environmentally sensitive” at just under 9%.

The chart below shows the most important factors compared with the likelihood of them being included in the range of considerations. 2012 and 2011 figures for all factors considered are included.



### 10.3 Effect of eco labels on purchasing

Over the five years of this monitor, respondents have been asked whether eco labels, certifying environmental friendliness, would make them more or less likely to buy a product. AS in the past four years, the most selected response was that it would depend on how much background information they knew about the label, although the level has reduced from 34% in 2012 to just under 30% in 2013.

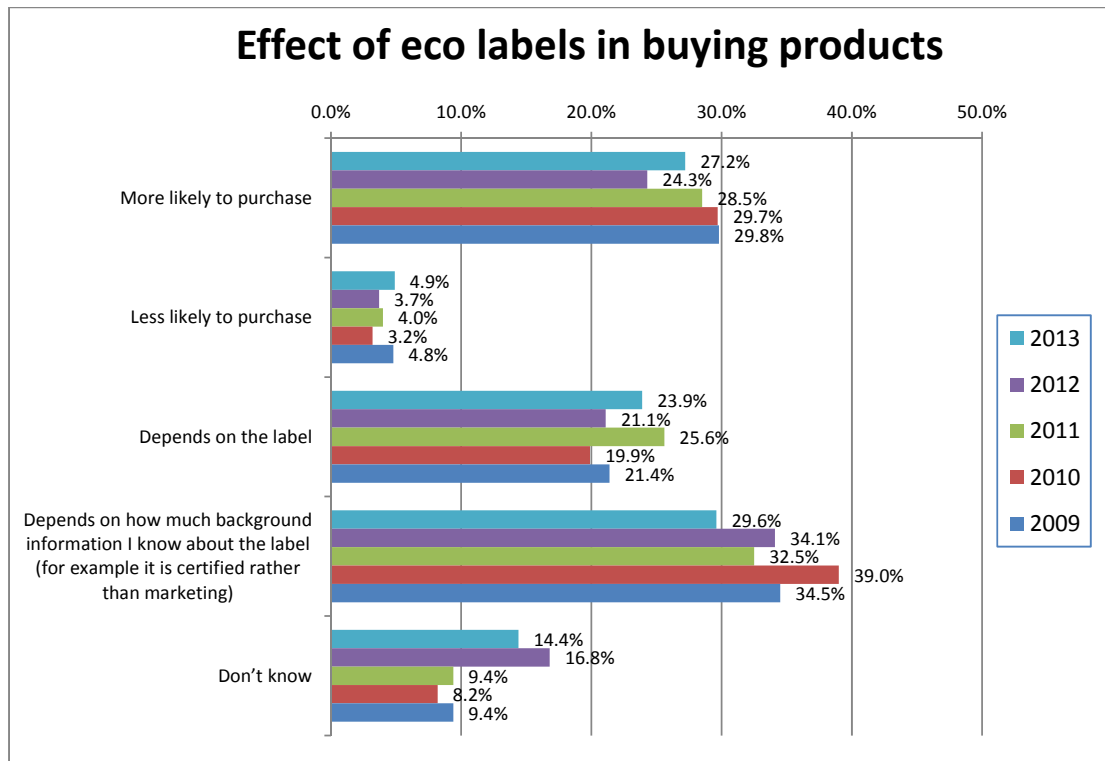
27% now say that an eco label would make them more likely to buy the product – up from 24% in 2012, but not yet at 2009 to 2011 levels.

A further 24% said that it would depend on the label.

5% said that it would make them less likely to purchase the product; this is similar to the levels in previous years.

51% of respondents who consider sustainability all of the time when purchasing are more likely to be encouraged to purchase products with eco labels. This group is around 21% of the market.

The following chart compares results from the five survey years:



#### 10.4 Effect on purchasing of manufacturer or service provider behaviour

More people than in 2012 would switch brands if they found their regular brand or service provider was having a bad affect on the environment, people or society, or was behaving unethically. 67% now say they would switch, back to 2011 levels.

Only 5% say that they would not switch.

92% of those who said that they consider sustainable factors when purchasing “all of the time” would switch. 70.0% of those who consider sustainable factors “some of the time” would switch, together with 29% of those who said that they do not consider sustainability when purchasing. All these figures are higher than in 2012, and people are generally surer that they would switch.

Would you switch to another brand of product or service if you found your regular brand or service provider was having a bad affect on the environment, people or society, or behaving unethically?	Total 2013	Consider sustainable factors		
		All of the time	Some of the time	No
Yes	66.8%	92.2%	70.4%	29.4%
No	5.2%	2.7%	4.3%	9.8%
Not Sure	28.0%	4.9%	24.8%	60.6%

23.5% said that they had switched brand or to another service provider in the past 12 months because they had found their regular brand or service provider was having a bad affect on the environment, people or society, or behaving unethically.

In the past 12 months have you switched to another brand of product or service because you found your regular brand or service provider was having a bad affect on the environment, people or society, or behaving unethically?	Total 2013	Consider sustainable factors		
		All of the time	Some of the time	No
Yes	23.5%	63.1%	19.5%	3.8%
No	76.5%	36.9 %	80.5%	96.2%

Respondents were asked what it was about the service or product that made them decide to switch. A selection of comments follows:

*“Slave labour in an Asian country.”*

*“Poor recycling performance on new milk bottles.”*

*"More than one product that I changed from was tested on animals. Will not buy anything with unnecessary packaging, which includes pre-packaged fruit/veggies, so will never buy those regardless of supplier or need."*

*"Buying less cheap clothes as have found out that they have been produced in sweatshops in India, Bangladesh. Going to op shops more as cheaper and often better quality."*

*"Stopped buying Sealord product as they masquerade as a NZ company when in fact their production is off shore in dodgy third world factories and their fishing fleet is manned by foreigners."*

*"Not fair trade, proven internationally."*

*"I changed energy provider to one generating the most energy using sustainable resources."*

*"We have a dry-clean carpet business and I had to switch suppliers because what they said wasn't true. They claimed to be part of a business they broke off from 2 years ago and I didn't know this. Will never do business with them again because they were unethical."*

*"Never buy Cadbury chocolate anymore; always buy Allpress coffee because a local company that is socially responsible re its suppliers."*

*"Do not buy Anchor milk anymore due to silly package which now has a mixture of plastics"*

*"Keeping an eagle eye on palm oil users. Avoiding purchasing products that use palm oil."*

*"Cadbury chocolate was using Palm Oil so I never now buy Cadbury."*

*"Cottonsoft toilet paper which uses rainforest timber, most brands of tuna which use unsustainable fishing practices, some products e.g. some brands of rice crackers whose packaging is not recyclable, Anchor milk whose new opaque packaging isn't as easily recycled in New Zealand, some bakery goods from Countdown that contain palm oil."*

*"Hosting service as stated before. CEO hunted endangered elephant species. Stopped buying all Nestle products for several reasons including their support of GE ingredients and their attempts to privatise water."*

*"We decided to only purchase locally grown vegetables as long as the prices were reasonably competitive. We will no longer purchase Chinese grown vegetables"*

*"Stopped buying "Kiwi Soft", "Cottonsoft", "Paseo", "Sorbent", "Quilton", and "Signature Range" toilet paper as it used unsustainable sources of trees for paper."*

*“An egg producer that was claiming to be free range was outed as having all its hens in cages.”*

*“I thought I was buying free range eggs but found out that only the farms whose eggs with SPCA tick are regularly inspected and meet the standards. Not all free range egg farms are up to standard. I now only buy eggs with the SPCA tick.”*

## **11. Sustainability and competitive advantage**

### **11.1 “Environmentally Pure”**

83.7% of respondents felt that sustainability was important in providing New Zealand with a competitive advantage in global markets. Making up the 83.7% were 38.1% of respondents rating sustainability as very important and 45.6% rating it as important.

Only 4% believe that it has no importance at all.

### **11.2 “Environmentally Pure”**

Respondents were again asked whether, in general, they thought that New Zealand lives up to its environmentally pure overseas marketing message. The 2013 results were similar to 2012 and 2011, although more people now believe that New Zealand does not live up to the message at all. That opinion has grown from 9% in 2012 to 16.8% in 2013 and is now above the 2011 level of 14.5%

4% of respondents felt that New Zealand totally lived up to its “100% Pure” overseas marketing message. 53%, a similar level to 2012, feel that it mostly lives up to the message. 27% felt that it slightly lives up to the message.

Forced to choose between “Yes” and “No” on this question, 55% selected “No”.

Most comments from respondents were negative. Many were about pollution of waterways and farm run-off. A selection of comments follows:

*“I think we try. I believe we can and should do more if this is what is important to us as a Country and what we advertise about ourselves.”*

*“Dairy farming is wrecking the water and soil of the country. There is no regard for the future as far as this goes and it is financially geared with the government seemingly uninterested in actively promoting responsibility by the farmers.”*

*“I think it has become obvious to New Zealanders and in overseas media that NZ is failing miserably in that area. The National government's policies on the protecting the*

*environment are abysmal. Encouraging offshore mining, changing the environmental impact policy, doing shady deals with 'big' business - even changing the LAW to enable potentially disastrous activities to be conducted in our land and waters - all this sends a strong message that NZ is no longer an environmental 'wonderland'. Shameful."*

*"John Key and Simon Bridges trying to mine and drill our pristine environment. So environmentally pure, ends up as a Tui ad. Yeah right!"*

*"We are under the illusion we are in a green country only because it appears that way and we believe our own PR message. It is all a sham."*

*"The majority of NZ does a reasonable job of looking after the environment but as with everything there are a few that don't that let down the rest."*

*"We lag way behind Europe with regard to legislation and the current right wing government is moving us closer to the US and China...the two countries with the worst record."*

*"Our waterways, land and air are all badly polluted, mainly due to our dirty farming methods."*

*"New Zealand is a very eco centred country and we are fortunate to have a considerable level of clean environment."*

*"Pure image is misleading when we have expanding waste and water quality issue nationwide, outside of the national parks."*

*"It's probably wrong to generalize but I feel NZ is ahead of many in the area on environmentally "pure" issues."*

*"It's probably wrong to generalize but I feel NZ is ahead of many in the area on environmentally "pure" issues."*

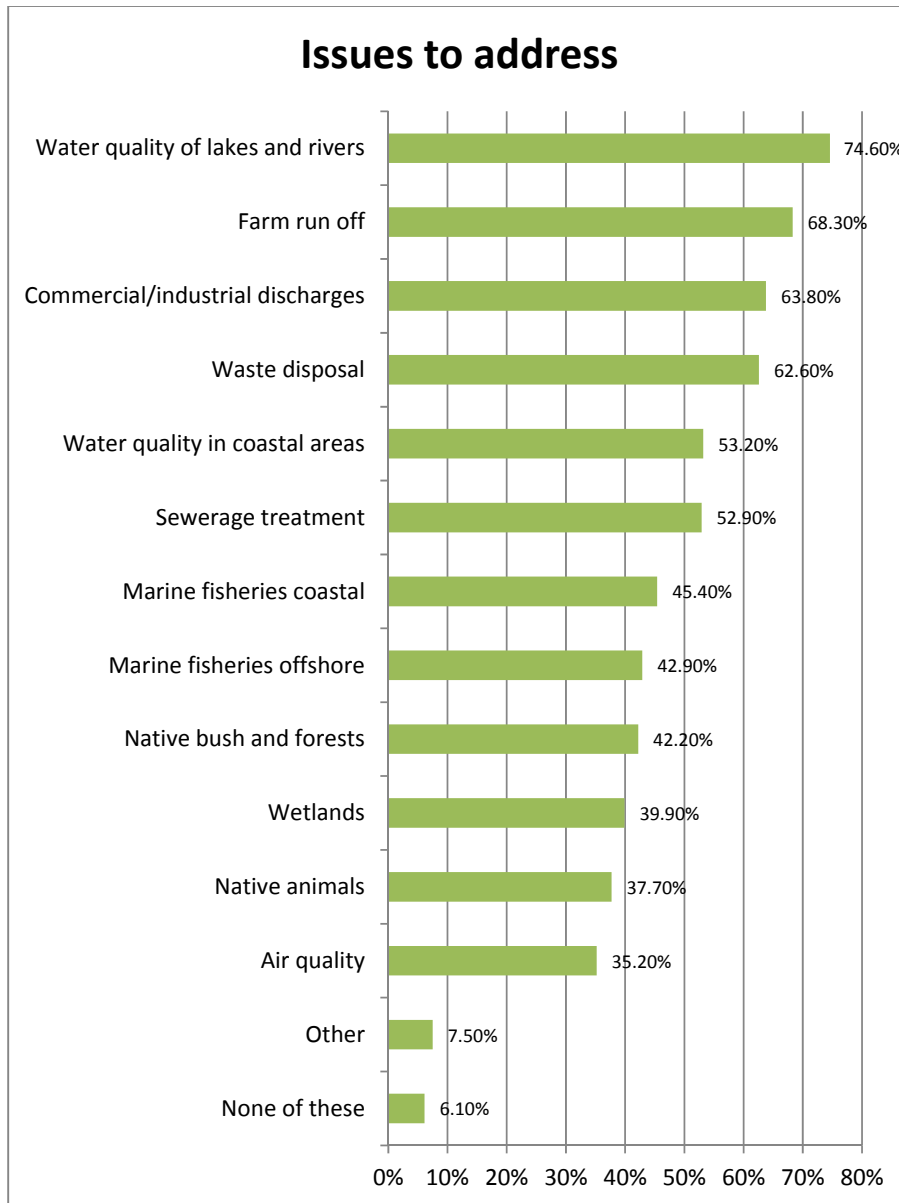
*"Deteriorating water quality issues are the most obvious outcome of poor environmental management, but equally the ingress of weedy exotic plants, the amount of rubbish discarded on roadways and mediocre recycling make the 'clean green' marketing push something of a farce."*

*"NZ is addressing the issues and not just sweeping them under the carpet. It takes time to change and improve large industry standards etc but we are on the right track mostly."*

*"We project this clean and green image when in reality we are no better than any other polluting, over consuming western country. The only difference is we have a lower population density which gives the impression we are clean and green. Things are getting worse not better."*

## 11.2 Action

Respondents were asked what New Zealand most needed to address to live up to its environmentally pure overseas marketing message. Water quality of lakes and rivers was the primary area of concern, followed by related factors: Farm run-off, commercial and industrial discharges and waste disposal.



## 11.3 Effect on companies, brands and products

There is little doubt that companies discovered by the public to be harming the environment or mistreating people or animals could face a backlash as a result of their behaviour. 63.2% of respondents said they would switch brands.



<b>In what way, if any, would your view of companies, their brands or their products change if you learned they were harming the environment or mistreating people or animals?</b>	<b>Total 2013</b>
It would make me feel better about them	4.8%
It would make no difference	3.6%
It would make me feel worse about them	36.2%
I would stop buying from them	63.2%
I would carry on buying from them	2.5%
I would keep buying from them but I would prefer them to stop the harmful behaviour	13.0%
Other	3.7%

To reinforce that, 66.9% of respondents said that they would switch to another brand of product or service if they found their regular brand or service provider was having a bad affect on the environment, people or society, or behaving unethically.

23.5% of respondents had translated an intention to stop buying from companies they perceived were harming the environment or mistreating people or animals by switching to another brand of product or service in the past 12 months.

In addition, 39% of people thought they have or can have some influence on the behaviour of companies which are harming the environment or mistreating people or animals. Those who believe they have or can have influence are the most likely to stop buying products from those companies.

<b>Do you think you have or can have any personal influence on the behaviour of companies which are harming the environment or mistreating people or animals?</b>	<b>Total 2013</b>
Definite influence	8.5%
Some influence	30.6%
Little influence	36.4%
No influence	17.6%
Not sure	7.0%

## APPENDIX 1 – METHODOLOGY

### Sample

This survey is of 2152 respondents who are members of Horizon Research's online HorizonPoll national panel, representative of the national population 18+ years.

Post-sample iterative rim weighting was used to match population averages for age, gender, ethnicity, education level, personal income and, to ensure a sample aligned with 2011 voter support, party vote in the 2011 General Election.

The maximum margin of error at a 95% confidence level is  $\pm 2.2\%$  overall.

### Dates

Respondents completed surveys between April 30 and May 16, 2013.

The June 2012 survey was conducted by Horizon Research and the June 2011, June to September 2010 and September 2009 surveys by ShapeNZ (wholly acquired by Horizon Research in 2012).

### Organisation size

Where analysis by organisation size has been referred to in the report, terminology used is:

- Up to 20 employees ("smaller organisations")
- 21 to 100 employees ("mid-sized organisations")
- 101 or more employees ("larger organisations")

### Analysis

All analysis shown in this report is taken from the weighted data.

### Respondent comments

All verbatim comments from respondents are captured in, and available from, the Horizon Research system.

## APPENDIX 2 – COMPARISONS WITH PREVIOUS SURVEYS

Attitude towards sustainable business practice	Survey year				
	2013	2012	2011	2010	2009
<b><u>Attitude towards sustainable business practice</u></b>					
Has a reputation which relies on sustainable business practice	30.2%	36.5%	37.8%	37.6%	40.7%
Believes sustainability is only about being 'green and fluffy'	3.8%	8.0%	3.1%	4.3%	3.1%
Something in between these options	44.5%	38.5%	39.0%	42.3%	40.7%
None of the above	21.5%	17.0%	20.1%	15.9%	15.5%
<b><u>Business focus</u></b>					
Focuses on providing the highest possible returns to investors while obeying all laws and regulations	18.5%	21.5%	17.9%	15.3%	16.5%
Generates returns to investors but is also balanced in its role in the community	18.9%	21.1%	22.2%	33.2%	34.3%
Something in between these options	30.4%	31.0%	27.4%	27.0%	26.1%
None of the above	32.1%	26.4%	32.6%	24.4%	23.2%
<b><u>Procurement focus</u></b>					
Actively purchases goods and services from suppliers who act sustainably	19.3%	18.5%	22.7%	25.1%	26.0%
Does not care who supplies goods and services provided they are at the best price	18.1%	27.3%	22.0%	20.4%	23.7%
Something in between these options	41.7%	39.5%	38.6%	44.3%	40.8%
None of the above	20.9%	14.7%	16.7%	10.2%	9.5%
<b><u>Goals</u></b>					
Pursues customer satisfaction as the top priority ahead of all other considerations	41.7%	46.0%	30.2%	29.3%	31.0%
Balances customer satisfaction with the organisation's need to make profits			36.4%	36.5%	36.1%
Pursues profit as a top priority ahead of all other considerations	10.6%	8.9%			
Something in between these options	35.0%	34.8%	23.1%	24.5%	23.5%
None of the above	12.6%	10.3%	10.4%	9.7%	9.5%

Attitude towards sustainable business practice	Survey year				
	2013	2012	2011	2010	2009
<b><u>Employee Focus</u></b>					
Regards a supportive workplace as critical to a successful business	52.7%	57.1%	51.2%	57.3%	59.5%
Does not appear to adequately support employees to complete their jobs	12.2%	14.6%	13.9%	14.5%	14.1%
Something in between these options	26.5%	19.1%	25.2%	22.9%	22.2%
None of the above	8.6%	9.1%	9.7%	5.3%	4.2%

Sustainable behaviour	Survey year				
	2013	2012	2011	2010	2009
<b><u>Does the organisation you work for or with have a sustainable development strategy?</u></b>					
Yes	27.4%	29.4%	32.4%	37.5%	38.7%
No	28.8%	25.0%	29.0%	30.0%	26.9%
Don't know	43.8%	45.6%	38.6%	32.4%	34.3%
<b><u>Would you say your organisation behaves sustainably (looks after profits as well as the environment and people)?</u></b>					
Yes	53.0%	59.5%	53.8%	57.8%	60.0%
No	16.6%	15.0%	15.8%	17.7%	17.2%
I really don't know	30.4%	25.5%	30.4%	24.5%	22.7%
<b><u>Has your organisation completed a Sustainable Development report covering your New Zealand operations?</u></b>					
Yes			10.6%	9.5%	10.3%
No - but we plan to			5.7%	6.2%	6.4%
No and no plans to			25.8%	30.8%	24.9%
Don't know			57.9%	53.5%	58.4%

Sustainable behaviour	Survey year				
	2013	2012	2011	2010	2009
<b>Has your organisation publicly reported on the Sustainable Development progress of its New Zealand operations, either in separate reports or annual reports, during the past 12 months?</b>					
Yes	8.6%	14.0%			
No - but we plan to	3.0%	3.2%			
No and no plans to	27.8%	26.1%			
Don't know	60.7%	56.7%			
<b>Does the organisation you work with or for include social/environmental criteria in its supplier terms and conditions?</b>					
Yes	13.9%	20.9%	19.1%	21.7%	22.7%
No - but we plan to	4.6%	3.6%	6.8%	6.1%	5.9%
No and no plans to	22.6%	23.0%	27.4%	25.9%	23.4%
Don't know	58.9%	52.5%	46.7%	46.4%	48.1%
<b>Has the organisation you work for or with deselected suppliers in the past year because of their environmental, social or ethical behaviours?</b>					
Yes	8.9%	13.0%	9.6%	13.0%	19.2%
No	30.1%	29.7%	34.6%	35.6%	33.5%
Don't know	61.1%	57.3%	55.9%	51.4%	47.4%

Community or social activities	Survey year
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	2013	2012	2011	2010	2009
<b>What community or social activities is your organisation involved in?</b>					
Contributing financially to charities and community organisations	48.4%	48.6%	44.6%	45.1%	47.6%
Contributing employee time (e.g. volunteering, mentoring)	32.5%	29.5%	32.5%	37.7%	37.2%
Contributing in kind (e.g. gifts, products)	30.3%	33.1%	27.7%	35.0%	32.2%
Strategic long term partnerships with civil society organisations	18.9%	20.5%	18.8%	23.2%	24.0%
None of these	28.8%	31.0%	30.6%	23.0%	24.5%
Other (please specify)	6.1%	3.1%	6.1%	6.2%	5.8%
<b>Does the organisation you work for or with measure its community involvement?</b>					
Yes	22.4%	27.9%	28.6%	29.9%	32.9%
No	32.9%	34.2%	37.1%	38.5%	33.5%
Don't know	44.7%	37.9%	34.3%	31.6%	33.6%

Procurement	Survey year				
	2013	2012	2011	2010	2009
<b>Which of the following best describes the way in which your organisation buys goods and services?</b>					
Procures solely on day one price (the lowest price at time of purchase)	6.7%	7.0%	10.9%	8.7%	9.6%
Procures solely on a whole of life cost basis (not necessarily the lowest price at time of purchase)	5.5%	7.3%	9.5%	7.6%	7.6%
Procures mostly on day-one price (lowest price at time of purchase)	9.4%	12.5%	12.6%	14.8%	15.0%
Procures mostly on whole of life cost (not necessarily the lowest price at time of purchase)	18.4%	9.5%	11.5%	17.7%	16.3%
Has other criteria which affect purchasing decisions	20.2%	19.6%	17.8%	20.6%	22.6%
Don't know	39.8%	44.0%	37.6%	30.5%	28.9%
TOTAL WHOLE-OF-LIFE	23.9%	16.8%	21.0%	25.3%	23.9%
TOTAL DAY ONE	16.1%	19.5%	23.5%	23.5%	24.6%

Profit from sustainability	Survey year				
	2013	2012	2011	2010	2009
<p><b>In your view, should the organisation you work for or with expect to make a profit from any investment it makes in specific sustainability initiatives (like producing products and services which are better for the environment or <u>people</u>)?</b></p> <p>Yes</p> <p>No</p> <p>Don't know</p>			42.9%	42.9%	44.7%
			24.0%	28.2%	25.1%
			33.1%	28.8%	30.3%
<p><b>Does the organisation you work for or with expect to make a profit from any investment it does or might make in specific sustainability initiatives (like producing products and services which are better for the environment or <u>people</u>)?</b></p> <p>Yes</p> <p>No</p> <p>Does not apply</p> <p>Not sure</p>	20.0%	21.8%			
	16.2%	19.7%			
	31.8%	23.4%			
	31.9%	35.1%			
<p><b>Have the profits or benefits of sustainability initiatives generally met your organisation's <u>expectations</u>?</b></p> <p>Yes</p> <p>No</p> <p>Don't know</p> <p>Not applicable - we haven't had any specific sustainability initiatives</p>			14.7%	26.5%	25.9%
			7.3%	8.7%	7.9%
			44.5%	42.5%	44.4%
			33.5%	22.3%	21.8%

Emissions and resources	Survey year				
	2013	2012	2011	2010	2009
<b>Has the organisation you work for or with measured its carbon emissions (i.e. completed <u>a carbon footprint</u>)?</b>					
Yes	10.5%	13.5%	14.2%	15.8%	12.8%
No - but we plan to	4.5%	3.1%	4.1%	7.8%	8.9%
No and no plans to	34.2%	34.4%	40.9%	36.8%	33.5%
Don't know	50.8%	49.0%	40.8%	39.7%	44.8%
<b>Has it developed a plan to reduce those <u>emissions</u>?</b>					
Yes	14.3%	13.4%	16.0%	19.0%	16.8%
No - but we plan to	4.3%	6.3%	7.8%	7.7%	8.9%
No and no plans to	29.9%	29.0%	36.5%	33.5%	29.2%
Don't know	51.5%	51.2%	39.8%	39.7%	45.1%
<b>Does your organisation have initiatives that consider how it uses other resources, like <u>water and waste</u>?</b>					
Yes	34.4%	34.8%	35.2%	46.2%	47.3%
No - but we plan to	2.8%	2.0%	7.3%	5.6%	5.3%
No and no plans to	20.4%	22.5%	25.5%	21.0%	18.1%
Don't know	42.5%	40.7%	32.0%	27.2%	29.3%



Sustainable workplace	Survey year				
	2013	2012	2011	2010	2009
<b>What aspects of a sustainable workplace does <u>your organisation possess</u>?</b>					
Flexible working options	47.6%	47.6%	55.8%	60.4%	63.1%
Learning and education programme	43.2%	48.2%	47.5%	57.2%	60.5%
Positive internal culture	41.1%	43.2%	42.3%	49.8%	51.1%
Culturally sensitive	42.5%	45.7%	50.4%	58.5%	59.2%
Code of conduct and commitment to ethics	55.0%	53.5%	59.7%	64.6%	67.3%
Equal opportunities	47.1%	48.7%	54.5%	60.5%	65.5%
Attention to turnover and retention of talent	34.8%	38.4%	34.9%	41.0%	43.6%
None of these	11.9%	12.0%	7.1%	5.4%	4.9%
Don't know	15.0%	14.6%	9.6%	6.1%	4.9%
Other (please specify)	0.7%	0.6%	1.5%	2.0%	1.1%
<b>Has the organisation you work for or with made operational changes in the past year to reduce energy costs, environmental impact or <u>become more sustainable</u>?</b>					
Yes	32.0%	37.7%	39.7%	48.1%	51.6%
No - but we plan to in the next year	5.7%	3.7%	5.5%	5.0%	5.9%
No and have no plan to make changes in the next year	18.9%	19.1%	20.9%	19.1%	15.6%
Don't know	43.4%	39.5%	34.0%	27.8%	26.8%
<b>What types of operational changes have been made in the past year to reduce energy costs or environmental impact or to become <u>more sustainable</u>?</b>					
Use energy-efficient lighting	69.9%	58.7%	65.3%	71.9%	65.7%
Reducing energy consumption emissions	40.9%	39.1%	42.5%	46.7%	41.3%
Clean offices during day time to save power	29.8%	26.4%	32.5%	33.1%	32.1%
Use lower emission vehicles	25.7%	17.4%	29.2%	27.6%	25.3%
Use video conferencing	36.2%	29.3%	42.3%	40.1%	33.2%
Recycling programme	79.0%	71.4%	79.5%	82.1%	81.5%
Monitoring energy use	48.2%	38.2%	51.4%	51.7%	48.8%
Use energy-efficient IT equipment	37.5%	29.4%	36.2%	39.1%	35.9%
Renegotiate energy contract	16.8%	17.8%	17.3%	12.7%	11.2%
Move business to a green building or retrofit with green features	12.8%	8.4%	6.9%	8.0%	5.9%
Reduced travel (commuting and to meetings, by any mode)	37.1%				
None of these	0.2%	1.7%	1.3%	0.5%	1.4%
Don't know	3.6%	5.8%	3.7%	1.0%	2.1%
Other (please specify)	7.7%	3.8%	5.2%	4.5%	3.9%

Attention to the environment and sustainable development	Survey year				
	2013	2012	2011	2010	2009
<b>Do you think your organisation is paying enough attention to the environment and sustainable <u>development</u>?</b>					
Yes	39.6%	44.2%	45.5%	49.6%	
No	28.0%	26.5%	27.2%	27.5%	
Don't know	32.4%	29.3%	27.3%	22.9%	
<b>Does your view that your organisation is <u>not</u> paying enough attention to the environment and sustainable development make you more or less likely to stay with the <u>organisation</u>?</b>					
More likely to stay	2.1%	2.1%	3.8%	3.6%	
Less likely to stay	34.6%	24.4%	32.0%	23.7%	
Makes no difference	51.3%	66.7%	59.8%	67.5%	
Don't know	12.0%	6.8%	4.4%	5.3%	
<b>Does your view that your organisation is paying enough attention to the environment and sustainable development make you more or less likely to stay with the <u>organisation</u>?</b>					
More likely to stay	44.0%	39.0%	40.6%	51.0%	
Less likely to stay	0.3%	0.0%	1.1%	0.8%	
Makes no difference	49.6%	57.3%	52.4%	46.2%	
Don't know	6.1%	3.7%	6.0%	2.0%	
<b>Would you recommend your organisation to others if it were environmentally <u>irresponsible</u>?</b>					
Yes	25.4%	25.5%	26.8%	27.5%	
No	39.7%	38.2%	45.9%	48.5%	
Don't know	34.9%	36.3%	27.3%	23.9%	
<b>Would you consider leaving any organisation whose corporate responsibility behaviour no longer meets your expectations?</b>					
Yes	38.6%	40.5%	56.0%	62.0%	
No	17.1%	14.9%	16.5%	14.3%	
Don't know	44.3%	44.6%	27.5%	23.7%	

Most valuable outcomes	Survey year				
	2013	2012	2011	2010	2009
<p><b>Thinking of the business case for sustainable development, please indicate which of the outcomes below have been of most value to your organisation over the past 12 months as a result of your sustainable development practices or initiatives?</b></p>					
Reduced costs	36.2%	37.4%	41.7%	44.1%	45.7%
Reduced risks	19.8%	21.3%	22.3%	22.1%	20.5%
Attracting and retaining staff	18.5%	21.0%	23.0%	24.0%	24.4%
Identifying new business opportunities	20.7%	22.6%	24.9%	26.4%	27.4%
Enhanced stakeholder relations	11.9%	12.6%	13.4%	14.1%	11.6%
Enhanced brand value	22.1%	20.8%	24.0%	23.6%	21.6%
Protect your reputation	25.1%	27.9%	26.1%	32.3%	32.0%
Higher share price	3.4%	5.5%	5.5%	3.1%	2.5%
Inclusion in sustainability indices	5.0%	9.6%	5.5%	5.1%	4.1%
None of these	4.6%	4.8%	4.9%	3.6%	4.0%
Not applicable - we haven't had any specific sustainability initiatives	15.6%	14.9%	19.9%	17.1%	12.1%
Don't know	32.1%	29.0%	22.9%	19.1%	23.0%
Other (please specify)	1.2%	0.2%	0.4%	0.8%	0.8%

Reporting	Survey year				
	2013	2012	2011	2010	2009
<b>Does your organisation prepare reports regularly for its chief executive officer on its <u>sustainable performance</u>?</b>					
Yes		17.5%	18.1%	19.8%	22.4%
No		34.9%	36.6%	39.6%	35.4%
Don't know		47.6%	45.3%	40.7%	42.1%
<b>Does your organisation report regularly to its <u>board on sustainable performance</u>?</b>					
Yes		19.7%	17.4%	20.1%	21.5%
No		22.5%	26.4%	27.0%	26.3%
Don't know		38.5%	38.6%	35.5%	35.6%
N/A		19.3%	17.6%	17.4%	16.7%
<b>Does your organisation report regularly to its <u>shareholders on sustainable performance</u>?</b>					
Yes		15.5%	13.8%	14.6%	15.6%
No		20.8%	26.3%	25.6%	25.2%
Don't know		39.8%	34.5%	33.1%	33.8%
N/A		23.9%	25.4%	26.7%	25.4%
<b>To which of the following, if any, does your organisation provide regular reports on its <u>sustainable performance</u>?</b>					
Board of directors	21.3%				
Shareholders	10.7%				
Staff	19.1%				
Customers	11.2%				
Others	4.9%				
None of these	28.1%				
Not sure	41.3%				

Personal purchasing	Survey year				
	2013	2012	2011	2010	2009
<b>Do you personally consider sustainable factors when purchasing goods or services for yourself, <u>your family or your organisation?</u></b>					
Yes, all of the time	16.1%	19.1%	24.1%	21.9%	22.4%
Yes, some of the time	65.9%	61.2%	58.5%	66.3%	63.8%
No	18.0%	19.8%	17.4%	11.9%	13.7%
<b>What factors do you consider when purchasing <u>products?</u></b>					
Environmentally sensitive	51.6%	51.2%	56.1%	60.0%	60.4%
Organic	32.2%	26.2%	31.1%	31.7%	31.2%
Fair trade	46.1%	41.8%	50.5%	56.7%	54.5%
Low carbon intensity	16.9%	12.1%	17.9%	19.7%	19.7%
Eco-friendly	51.2%	44.8%	52.8%	58.5%	57.9%
Local	56.2%	45.5%	61.6%	65.6%	63.4%
Cost or price	88.2%	89.8%	51.8%	46.5%	45.0%
Socially responsible	30.1%	31.9%	33.5%	39.7%	0.0%
No animal cruelty	52.5%				
Good employer	24.0%				
Don't care	3.1%	1.3%	4.1%	1.8%	2.2%
Other	1.8%	1.2%	3.0%	2.8%	3.1%
<b>Given a choice of just one, which single factor is most important to you when purchasing <u>products?</u></b>					
Environmentally sensitive	8.9%	6.0%	8.4%	11.6%	
Organic	2.7%	3.6%	3.1%	2.4%	
Fair trade	9.4%	8.4%	5.9%	8.2%	
Low carbon intensity	0.6%	1.2%	0.6%	0.6%	
Eco-friendly	7.3%	9.9%	10.3%	12.3%	
Local	13.1%	9.2%	12.2%	14.5%	
Cost or price only	47.8%	60.0%	45.1%	39.5%	
Socially responsible	3.0%	6.5%	8.2%	6.3%	
No animal cruelty	10.9%				
Good employer	1.5%				
Don't care	1.3%	1.1%	2.9%	1.0%	
Other	2.7%	1.3%	3.3%	3.5%	

Personal purchasing	Survey year				
	2013	2012	2011	2010	2009
<b>Do eco labels, certifying environmental friendliness, make you more or less likely to <u>buy a product?</u></b>					
More likely	27.2%	24.3%	28.5%	29.7%	29.8%
Less likely	4.9%	3.7%	4.0%	3.2%	4.8%
Depends on the label	23.9%	21.1%	25.6%	19.9%	21.4%
Depends on how much background information I know about the label (for example it is certified rather than marketing)	29.6%	34.1%	32.5%	39.0%	34.5%
Don't know	14.4%	16.8%	9.4%	8.2%	9.4%
<b>Would you switch to another brand of product or service if you found your regular brand or service provider was having a bad affect on the environment, people or society, or behaving <u>unethically?</u></b>					
Yes	66.8%	61.7%	67.2%		
No	5.2%	6.1%	6.0%		
Not sure	28.0%	32.3%	26.8%		