



Global WorkPlace Innovation

Sustainability @ Work

Creating Greener Workplaces

BEHAVIOUR CHANGE COMPANY INVESTMENT QUICK WINS

'We are ready for this'

'We just need to sort out the logistics'

'We're not ready for this yet'

What new sustainability initiatives could your company do?
Make a commitment to only procure sustainably certified products

Tell employees what the company is doing
Ask employees to do something

What new sustainability initiatives could your company do?
Invest in rainwater collection for toilets

Tell employees what the company is doing
Give feedback

What new sustainability initiatives could your company do?
Subsidising sustainable food in canteen

Host an event / a workshop / a launch

What new sustainability initiatives could your company do?
Turn flower beds in front of office into herb garden

Tell employees what the company is doing

What new sustainability initiatives could your company do?
Invest in renewable energy eg. wind turbines?

Tell employees what the company is doing

What new sustainability initiatives could your company do?
Make...

Consult employees for their opinions / feedback / ideas

Please give an example of something your organisation has done to promote sustainability in the workplace:
'Use your own mug' initiative to encourage people to use less disposable cups

Host an event / a workshop / a launch

Please give an example of something your organisation has done to promote sustainability in the workplace:
Water saving Campaign

Consult employees for their opinions / feedback / ideas

What new sustainability initiatives could your company do?
Centralising printing to help reduce paper consumption

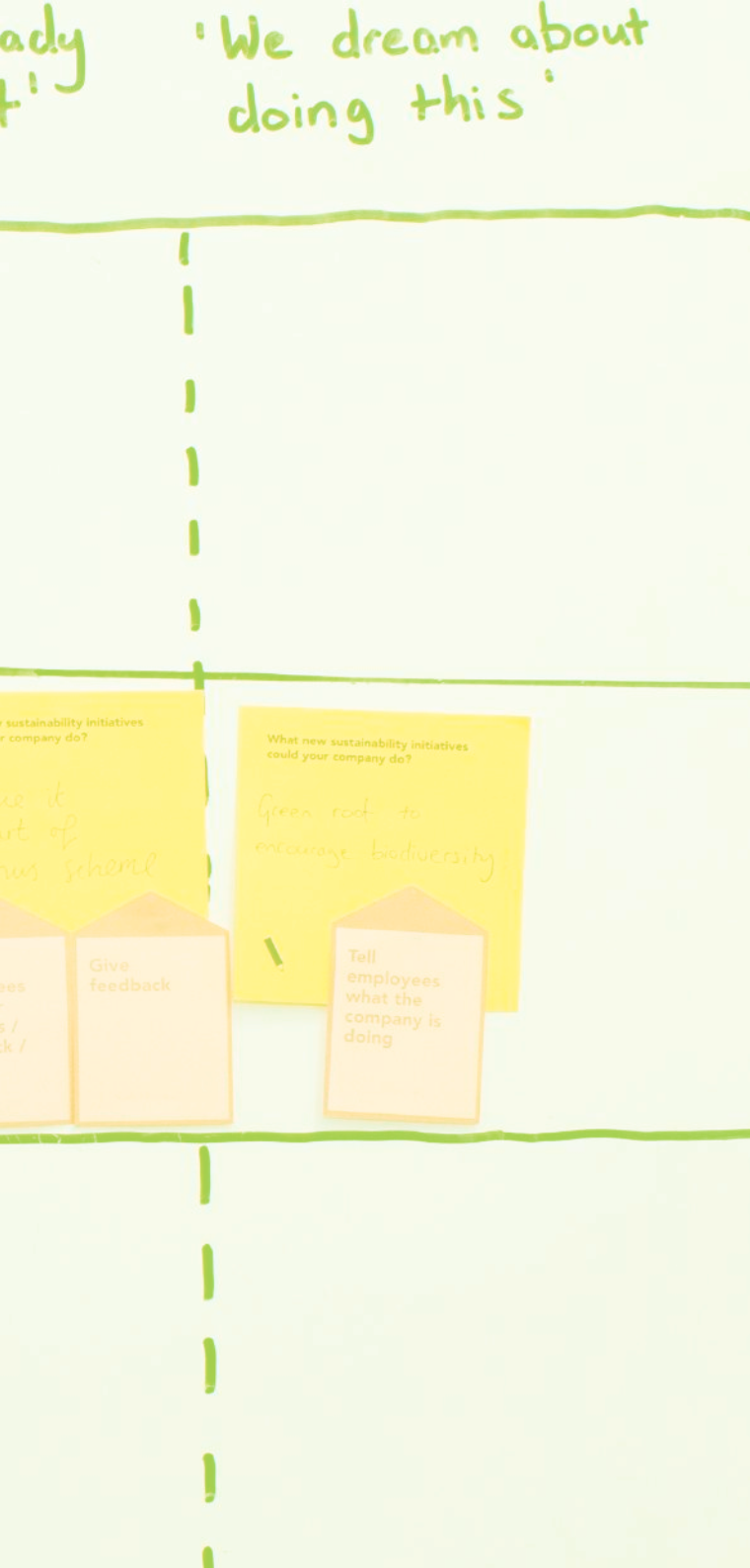
Tell employees
Ask employees to do

Please give an example of something your organisation has done to promote sustainability in the workplace:
Encourage people working late in the evening to cluster together so only a small area of building needs to be heated and lit.

Consult employees for their opinions / feedback / ideas

Please give an example of something your organisation has done to promote sustainability in the workplace:
Car sharing scheme

Ask employees to do something
Consult employees for their opinions / feedback / ideas



sus·tain·a·bil·i·ty

[suh-stey-nuh-bil-i-tee]

The quality of not being harmful to the environment or depleting natural resources, and thereby supporting long-term ecological balance.

Executive Summary

Executives, take note. Organizations wishing to develop a more sustainable workplace are most likely to succeed if they demonstrate strong leadership and a tangible commitment which employees can respond to. Executives hold the key to improving sustainable cultures in the workplace: the attitude of Executives towards taking action on sustainability will heavily influence the outcome. Our survey demonstrated that as employees we believe we are all responsible for sustainability and we want to work in an organization which enables us to behave sustainably. But we don't want to be burdened with it, and we don't want it to impact upon our existing working patterns.



Overview

The Sustainable Cultures in the Workplace survey was established to better understand what sustainability in the workplace should mean and identify ways in which people can become more engaged in creating more sustainable workplaces and working patterns. The survey was carried out online and accessed through the Johnson Controls Global Workplace Innovation website. It was distributed globally to over 4,000 respondents with 4,087 responses received. Responses were gathered over a three week period in May 2013.

A global report and six individual country reports have been prepared. The results are grouped into different sections to cross-reference responses across similar questions:

Key findings

- About the country respondents
- Attitudes to sustainability
- Investing in sustainability
- Taking action.

Summary

As employees, we believe we are all responsible for sustainability and we want to work in an organization which enables us to behave sustainably. But we don't want to be burdened with it, and we don't want it to impact upon our existing working patterns. Organizations wishing to develop a more sustainable workplace are mostly likely to succeed if they demonstrate strong leadership and a tangible commitment which employees can respond to. Executives hold the key to improving sustainable cultures in the workplace: the attitude of Executives towards taking action on sustainability will heavily influence the outcome. Executives, take note.

Most respondents are at the beginning of their sustainability journey and significant improvements could be made. For now, however, organizations should seek to implement a balance of quick wins and long-term goals; company-driven initiatives and employee-led changes to build a lasting and diverse platform for change.

Key Points

Emerging Trends

- Western countries have some of the best – and worst – examples of sustainable cultures. The USA and Australia were good, but the UK – and Germany in particular – were further behind
- Strong leadership around sustainability is essential for driving change
- Executives across the globe are reluctant to let sustainability impact financial goals and working patterns and practices
- No clear trends across other job responsibilities emerged
- Females behave slightly more sustainably than males
- Support for sustainability increases with age
- Some industry sectors are more advanced in sustainable practices than others. The Building and Services/FM industries were good, but the Food & Beverages industry and the Public Sector frequently scored below global averages

Attitudes to Sustainability

- 34% of respondents are Campaigners, 27% are Housekeepers, 21% are Libertarians and 18% are Pragmatists
- Although 67% of respondents would like to work in an organization where employees take the lead in initiating sustainable practices, 28% are undecided about it. Indian respondents were the most keen and the Food sector was the least keen. Executives were also very keen
- Only 33% of respondents would consider a company's environmental record when applying for jobs. UK respondents were the least likely to, but the Building industry was the most likely to check. Most Executives would not check records but most Managers would

Investing in Sustainability

- Only 36% of respondents disagree that sustainability should not impact a company's ability to compete. The Services/FM sector disagreed the most while Executives felt most strongly that competitiveness was more important. Many sub-categories and countries agreed with Executives, including Managers.
- 71% of respondents agree that companies should prioritize investment in lowering the environmental impact of working practices. Indian respondents had the highest level of agreement and Trainees had the lowest. Executives and Managers had average levels of agreement.
- 86% of respondents agree that sustainability needs to be about long-term investment. The over 60's agreed the most and German respondents had the lowest level of agreement. Executives and Managers had average levels of agreement.

Taking Action

- Companies looking to reduce the amount of waste going to landfill are likely to be well supported by employees: 51% of respondents would sort their own waste into centralized recycling bins. The Food industry and the USA are the most supportive of this option. However, there is still a lack of support for more aggressive solutions: India was the only sub-category to favor zero-waste targets. Executives and Managers showed above average support for this approach as well.
- 45% of respondents would support employee subsidies for public transport but want their car parks kept so people can still drive if they want. The Food industry showed the most support for this approach, and the Building industry were least in favor.
- Homeworking is still a divided issue for respondents. USA respondents are in favor of this approach but Executives are not. Managers have average levels of support.
- 34% of respondents would lower carbon emissions from energy use by maximizing natural light, using low energy lighting and renewable energy and lighting only the spaces that are needed. The Building industry was the most supportive of this approach. Many sub-categories and countries preferred other approaches, including Executives.





Sustainable for All

Creating a greener
workplace for the
multi-generational
workforce

Introduction

The way we work is hurting our environment. At the heart of the problem lies the office, where leaving lights on, buildings empty or ICT and air-conditioning running is no longer acceptable. With customers demanding sustainability, employees expecting it and governments legislating for it, companies are looking for ways they can reduce the carbon footprint of their workplaces.

The background

The Johnson Controls Oxygenz global survey (Oxygenz in 2010) uncovered a marked preference among employees to work for 'an environmentally aware organisation'. What does this mean in practice? And how can organisations' deliver an environmentally aware workplace?

Johnson Controls Global WorkPlace Innovation and the Institute for Building Efficiency set up a research study to investigate the key issues in partnership with the Helen Hamlyn Centre for Design at the Royal College of Art (RCA), London. The two-year study, Sustainable Cultures, aims to get a better understanding of what a sustainable workplace means and so identify ways to better support employees and workplace managers in translating their desire for greener offices into real actions.

The early research

The research immediately showed that people have many diverse opinions on what sustainability in the workplace should mean. Opinions were based on peoples' perceptions of the various costs and benefits of being sustainable, both for the company and the individual.

For the company, the costs include any initial investment as well as the impact on the company's ability to compete with other less sustainable organisations. For the individual, costs include inconveniences to their lifestyles, changes to workplace standards, alterations to their ways of working, effects on their status and the curtailment of individual choice.

The model of sustainability cultures

The research team identified a framework with four different workplace cultures in terms of attitudes toward sustainability, based on beliefs about relative costs to the company and employees (low to high). These four cultures represented the majority opinion within the companies, the types of sustainable policies they might consider, and the conditions under which they might implement them.

In identifying the four cultures, the research team did not intend to place them in a hierarchy or suggest that some are better than others. They simply all exist, and each one has its own advantages and disadvantages.

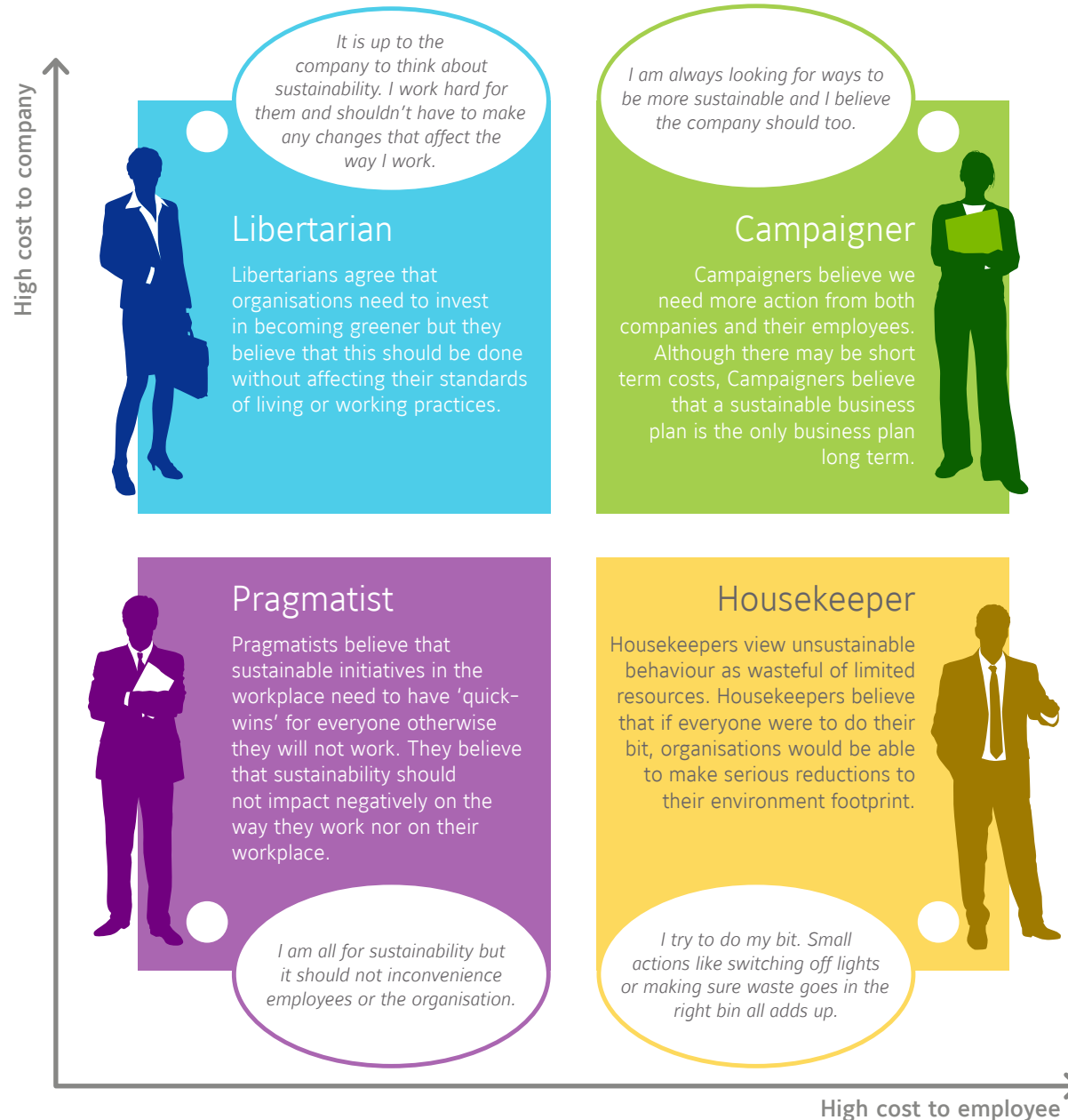
A Campaigner culture, for example, might generate more environmental benefits in the long run, but a Pragmatist initiative, because it is easier to put in place, may have a quicker uptake.

The four cultures are not mutually exclusive: different cultures can exist within one company, as well as in different departments, and tensions often arise because of this. Libertarians may see the Housekeeping camp as small-minded and as a threat to competitive edge, while Campaigners and Housekeepers may dislike the Libertarian attitude, judging their employees to be lazy, wasteful and spoiled.

Nor are these cultures static: Companies can evolve from one to another over time, and individuals may change their views as their circumstances change, such as when they assume a new role new responsibilities.

The culture model is shown on the following page.

The Culture Model



Libertarians believe sustainable measures are important, but should not affect the employees way of working. A libertarian culture might have subsidised public transport with parking options; waste reduction targets or investments in renewable energy products

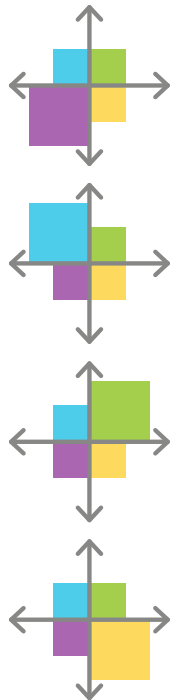
Campaigners expect matched efforts from company and employees. A campaigner culture might have free public transport and no parking; zero waste policies and use of only recyclable materials and targets to generate it's own energy.

Pragmatists believe that employees should not bear costs that become gains to the company. A pragmatist culture might have desk sharing and home working; recycle old IT equipment or switch to a renewable energy supplier.

Housekeepers focus on changing behaviours and finding ways to save or make do. A housekeeper culture might encourage employees to carpool; have centralise waste and recycling bins and reduce energy spend by adjusting sources.

Working with the cultures

Understanding the prevailing cultures within countries, organisations or teams enables us to develop strategies and tools to engage people in more sustainable practices. Below are indicative examples of how organisations with different prevailing sustainability cultures might focus their efforts and investments.



Majority Pragmatist culture: These companies might consider how to expand their activities into the other quadrants, investing more time and money in green initiatives.

Majority Libertarian culture: Organisations which have a mainly Libertarian culture see that they are taking the lead on sustainability by investing in green technology but need new ways to engage their employees.

Majority Campaigner culture: These companies have a good spread of other cultures, but focus their policies around matched efforts between the company and its employees.

Majority Housekeeper culture: Organisations with this predominant culture need to consider how to make investments which support their employees efforts.

The survey

Since the development of the culture model an on-line survey “Sustainable Cultures in the Workplace” has been implemented to understand what steps can be taken to engage people in creating more sustainable workplaces and workstyles.

The Sustainability Cultures in the Workplace survey was carried out online and accessed through the Johnson Controls Global Workplace Innovation website. Invitations to complete the survey were sent to a cross section of industries, job responsibilities and ages to gain a representative sample of attitudes to sustainability. Responses were gathered over a 3 week period in May 2013.

The reports

A report on the global findings of the survey has been separately published. An individual country report has been prepared for the six major countries involved in the study:

- Australia
- India
- China
- United Kingdom
- Germany
- United States

Each country report presents the findings for the individual country and comparisons with the global trends. Key findings for each country are also summarised.

The results are grouped into key themes to cross-reference responses across similar questions:

- About the country respondents
- Attitudes to sustainability
- Investing in sustainability
- Taking action.

About Johnson Controls

Johnson Controls Global WorkPlace Solutions is the leading global facilities management solutions provider. With over 50 years experience in the facilities management business, Johnson Controls has the expertise to deliver comprehensive Workplace strategies that support your global facility portfolio. Our approach to facilities management outsourcing is unique. We work with clients to understand their business needs and then we create tailored solutions designed to meet those needs. We are accountable for implementing our solutions and then for guaranteeing the outcomes promised by our recommendations. What we deliver are comprehensive solutions that are good for our customers' organisations.

About Global WorkPlace Innovation

Global WorkPlace Innovation (GWi) is the research and development programme of Global WorkPlace Solutions and aims to drive innovation and thought leadership in workplace solutions, globally; support customers' needs and deliver advanced solutions. GWi also aims to challenge the status quo, leading change and delivering added value through innovation excellence.

About the Institute for Building Efficiency

The Institute for Building Efficiency is an initiative of Johnson Controls providing information and analysis of technologies, policies, and practices for efficient, high performance buildings and smart energy systems around the world. The IBE leverages the company's 125 years of global experience providing energy efficient solutions for buildings to support and complement the efforts of non-profit organisations and industry associations. The IBE focuses on practical solutions that are innovative, cost-effective and scalable.

About the Helen Hamlyn Centre for Design

The Helen Hamlyn Centre for Design at the Royal College of Art undertakes design research and projects with industry that will contribute to improving people's lives. It is the largest and longest-running centre for design research at the Royal College of Art, London. It collaborates with business and academic partners to develop innovative research methods – and exchanges knowledge via education, events, publications and industry collaboration.

About the authors

Dr. Marie Puybaraud

Marie has been director of Global WorkPlace Innovation for Johnson Controls since 2004. She is an expert in the field of Workplace Innovation. Marie is leading roughly 15 annual projects and initiatives to successful completion and disseminating the findings both internally across the global business and externally through marketing and communication activities. A regular speaker to the media, she combines her expertise and corporate experience to transfer knowledge to the audience and the wider community. She is an active member of CoreNet, a member of Property EU, Stars, Strathmore Who is Who, and the Continental Broadcast Network.



Clare Beck

Clare is a workplace consultant with Johnson Controls. She has 15 years of experience working in the private, public and voluntary sectors both in the UK and beyond. Clare has worked with a number of clients to develop successful workplace solutions which support business objectives and are easily embedded and measured for effectiveness.

Focused
on grass
roots



Friendly



Local



“ The good building is not one that hurts the landscape, but one which makes the landscape more beautiful than it was before the building was built. ”

– Frank Lloyd Wright

Key Findings

Campaigners expect matched efforts from company and employees. Housekeepers focus on changing behaviours and finding ways to save or make do. Pragmatists believe that employees should not bear costs that become gains to the company. Libertarians believe sustainable measures are important, but should not affect the employees way of working.

34%
of us are
Campaigners

21%
of us are
Libertarians

18%
of us are
Pragmatists

27%
of us are
Housekeepers

Key findings

Emerging Trends

- Western countries have some of the best – and worst – examples of sustainable cultures. The USA and Australia were good, but the UK – and Germany in particular – were further behind.
- Strong leadership around sustainability is essential for driving change.
- Executives across the globe are reluctant to let sustainability impact financial goals and working patterns and practices.
- No clear trends across other job responsibilities emerged.
- Females behave slightly more sustainably than males.
- Support for sustainability increases with age.
- Some industry sectors are more advanced in sustainable practices than others. The Building and Services/FM industries were good, but the Food & Beverages industry and the Public Sector frequently scored below global averages.

Attitudes to Sustainability

- 34% of respondents are Campaigners, 27% are Housekeepers, 21% are Libertarians and 18% are Pragmatists.
- The Building industry had the highest proportion of Campaigners; the Healthcare sector had the highest percentage of Housekeepers; Consultants sector had the highest proportion of Libertarians and Trainees had the highest percentage of Pragmatists.
- Although 67% of respondents would like to work in an organization where employees take the lead in initiating sustainable practices, 28% are undecided about it. Indian respondents were the most keen and the Food sector was the least keen. Executives were also very keen.
- Only 33% of respondents would consider a company's environmental record when applying for jobs. UK respondents were the least likely to, but the Building industry was the most likely to check. Most Executives would not check records but most Managers would.
- The world is divided about whether or not employees should not be burdened with implementing sustainable practices on top of their existing workloads. Indian respondents felt the most strongly that they should not and 51-60 years disagreed the most. Executives strongly agreed that employees should not be burdened.
- Only 28% of respondents disagree that sustainability initiatives should not impact on the way that people work and a further 30% are undecided. The Services/FM sector disagreed the most but Indian respondents felt the opposite. Executives strongly agreed that working patterns should not be impacted.
- 58% of respondents believe sustainability is everyone's responsibility. The Services/FM sector felt the strongest, but Chinese respondents felt it was employees' responsibility. Executives had far less support than average.
- 81% of respondents agree: employees should be actively involved in making working practices more sustainable. Indian respondents agreed the most and the Food sector had the lowest agreement. Both Executives and Managers strongly agreed.

Investing in Sustainability

- Only 36% of respondents disagree that sustainability should not impact a company's ability to compete. The Services/FM sector disagreed the most while Executives felt most strongly that competitiveness was more important. Many sub-categories and countries agreed with Executives, including Managers.
- 71% of respondents agree that companies should prioritize investment in lowering the environmental impact of working practices. Indian respondents had the highest level of agreement and Trainees had the lowest. Executives and Managers had average levels of agreement.
- 86% of respondents agree that sustainability needs to be about long-term investment. The over 60's agreed the most and German respondents had the lowest level of agreement. Executives and Managers had average levels of agreement.

Taking Action

- Companies looking to reduce the amount of waste going to landfill are likely to be well supported by employees: 51% of respondents would sort their own waste into centralized recycling bins. The Food industry and the USA are the most supportive of this option. However, there is still a lack of support for more aggressive solutions: India was the only sub-category to favor zero-waste targets. Executives and Managers showed above average support for this approach as well.
- 45% of respondents would support employee subsidies for public transport but want their car parks kept so people can still drive if they want. The Food industry showed the most support for this approach, and the Building industry were least in favor.
- Homeworking is still a divided issue for respondents. USA respondents are in favor of this approach but Executives are not. Managers have average levels of support.
- 34% of respondents would lower carbon emissions from energy use by maximizing natural light, using low energy lighting and renewable energy and lighting only the spaces that are needed. The Building industry was the most supportive of this approach. Many sub-categories and countries preferred other approaches, including Executives.

Global Respondents

- Over 4,000 respondents completed the survey.
- 17% of respondents are from the USA, 14% from the UK, 14% from China, and 13% each from India, Germany and Australia.
- 50% of respondents are male.
- The largest age group is 31-40 year olds with 35% of respondents.
- 26% of all respondents are Managers.
- 5% of all respondents are Executives.
- 30% of all Executives come from India.
- 19% of all Managers come from China.
- Over 60% of all respondents work in Technology, Public sector, Manufacturing, Finance, Healthcare or Services/FM.
- The Technology sector makes up 17% of respondents.
- 28% of all Public sector workers come from the UK.
- 27% of all Technology workers come from China.
- 23% of all Healthcare workers come from Australia.
- 21% of all Finance workers come from India.



Sustainability campaigners exist in all industries, at all levels of responsibility and all ages groups

About the Respondents

The Sustainability Cultures in the WorkPlace survey was carried out online and accessed through the Johnson Controls Global WorkPlace Innovation website. Invitations to complete the survey were sent to a cross section of industries, job responsibilities and ages to gain a representative sample of attitudes to sustainability across the globe. Responses were gathered over a 3 week period in May 2013.

27%
of respondents
are managers

17%
of respondents work
in the technology
sector

51%
of respondents
were male

12%
of respondents
work in the
public sector

36%
of respondents were
between 31-40
years old

Respondents by age

Overall Global Results

4087 people from across the world took part in the survey: 50% of whom were male. The age of respondents ranged from 18-60 years old. See Figure 03 for the breakdown of ages by country.

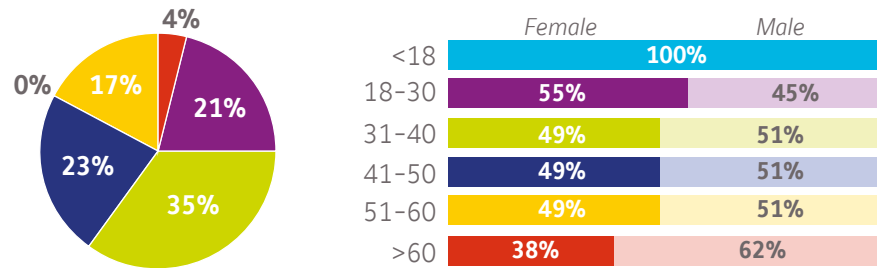


Figure 01: Respondents by age – overall global results (and male-female split)

Respondents by job responsibility

Overall Global Results

There was a good mix of responses from across the different areas of job responsibilities. See Figure 04 for the breakdown of ages by country.

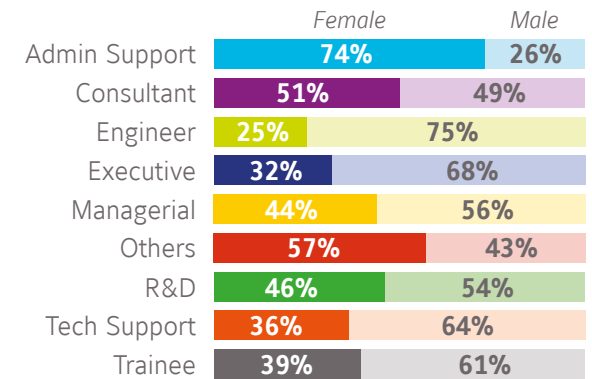


Figure 02: Respondents by job responsibility – overall global results (and male-female split)

Respondents by age

Country Breakdown

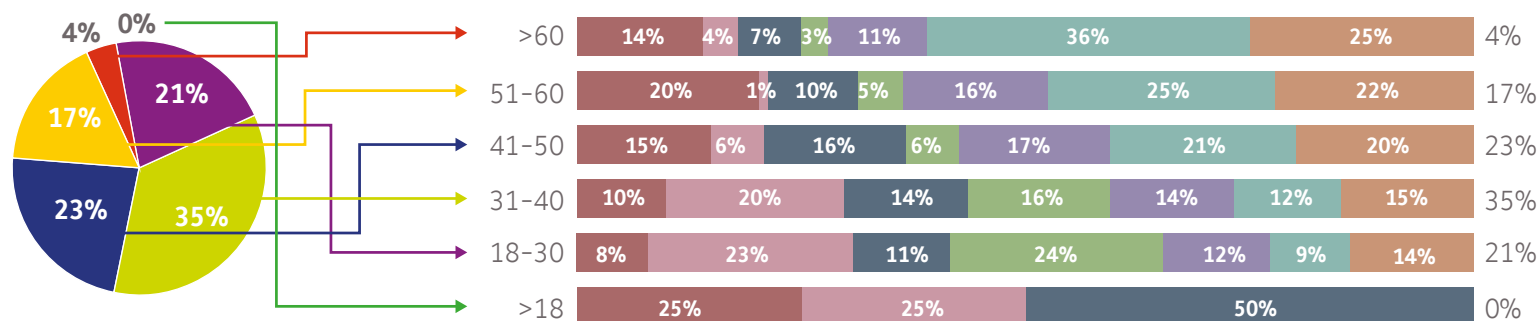


Figure 03: Respondents by age – country breakdown

Respondents by job responsibility

Country Breakdown

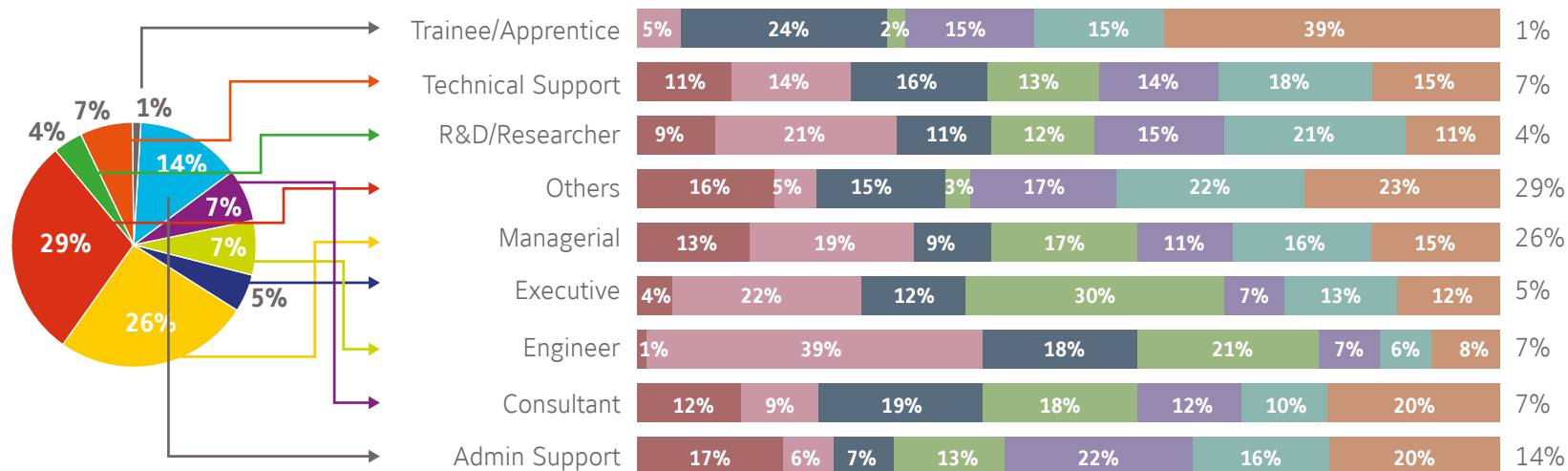


Figure 04: Respondents by job responsibility – country breakdown

- Australia
- China
- Germany
- India
- UK
- USA
- Other

Respondents by industry sector

Overall Global Results

There was a good mix of responses from across the different areas of job responsibilities. See Figure 04 for the breakdown of ages by country responsibilities. See Figure 04 for the breakdown of ages by country.

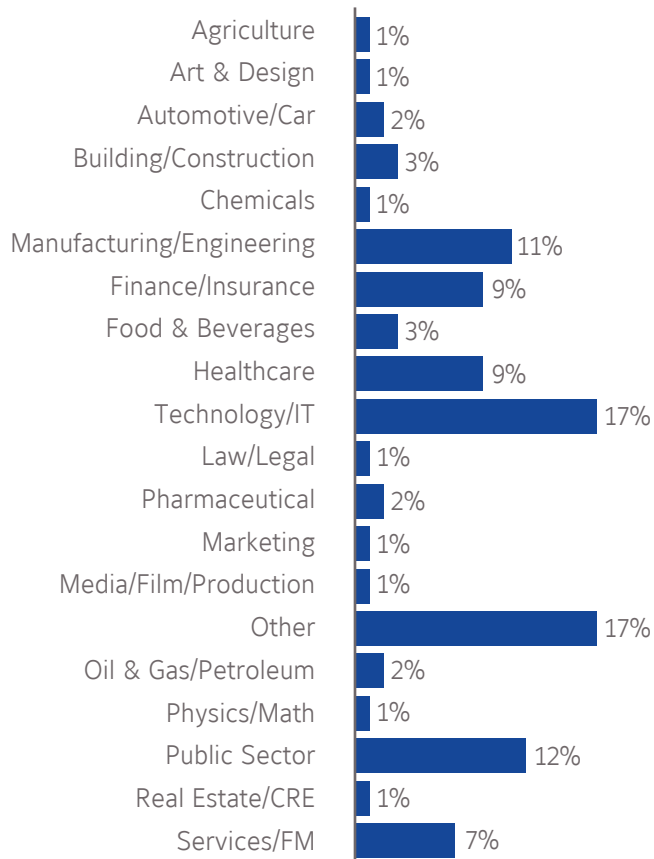


Figure 05: Respondents by industry sector – overall global results

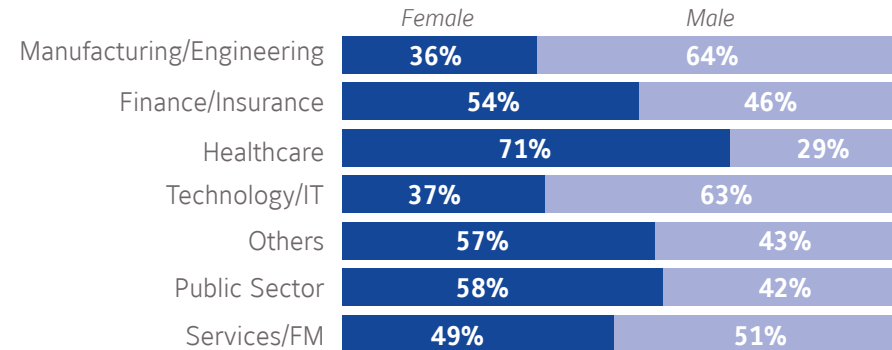


Figure 06: Respondents by industry sector – male-female split

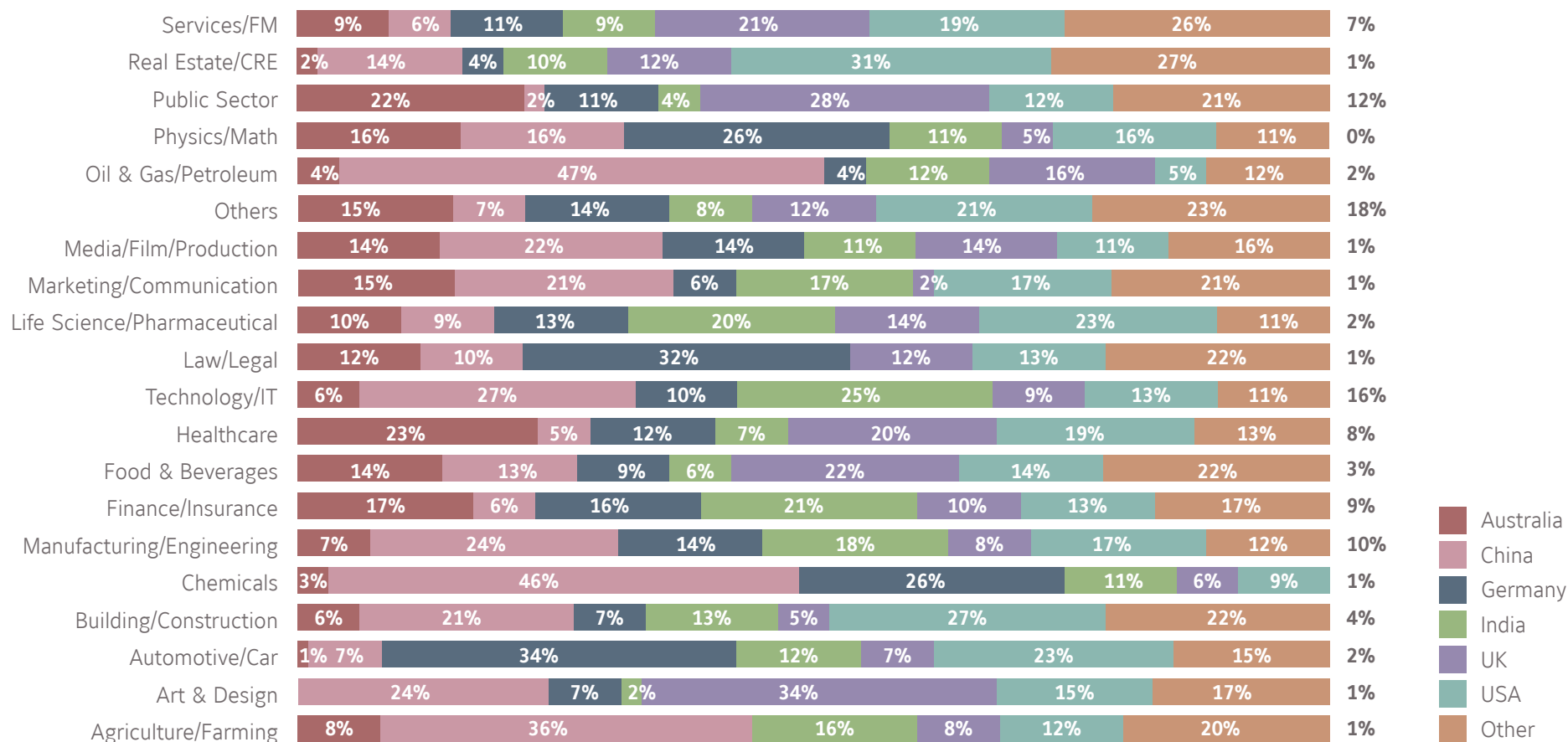
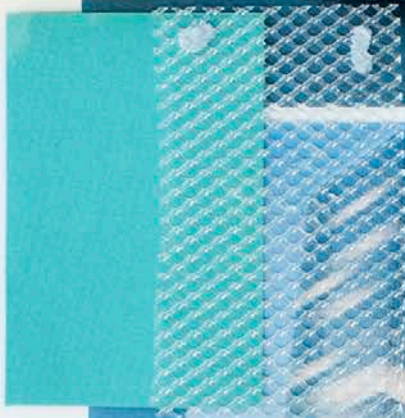


Figure 07: Respondents by industry sector – country breakdown

good
ideas ✓



Ambition

Innovation



Catalyst
for
change



Com
lit



The UK sees itself as a mainly Campaigner culture. But it's much more Libertarian and Pragmatist than it thinks.

Attitudes to Sustainability

When asked, most people will say they act or behave sustainably. But what role do they believe sustainability should play in working life? Who should be responsible for leading sustainability and how much inconvenience are workers willing to take for the greater good? Are respondents really willing to walk the talk?

Only
28%
are happy for sustainable practices to impact upon how they work

Only
81%
agree that employees should be actively involved in making working practices more sustainable

Only
33%
of respondents would check a company's environmental record before applying for a job

Attitudes to sustainability at work

34% of global respondents are Campaigners, 27% are Housekeepers, 21% are Libertarians and 18% are Pragmatists.

Based on their answers to the survey questions, respondents have been categorised as one of the sustainability culture types below:

- Campaigners: I am always looking for ways to be more sustainable and I believe the company should too.
- Housekeepers: I try to do my bit. Small actions, like switching lights off or making sure waste goes into the right bin all add up.
- Libertarians: It is the company's responsibility to think about sustainability. I work hard for them and shouldn't have to make any changes that affect the way I work.
- Pragmatists: I am all for sustainability but it should not inconvenience employees or the organisation.

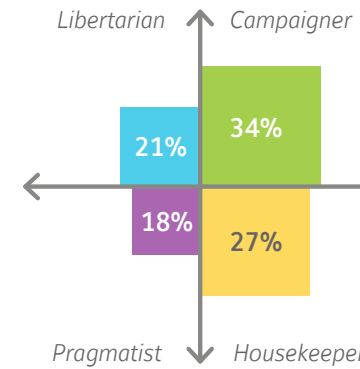


Figure 08: Attitudes to sustainability – overall global results

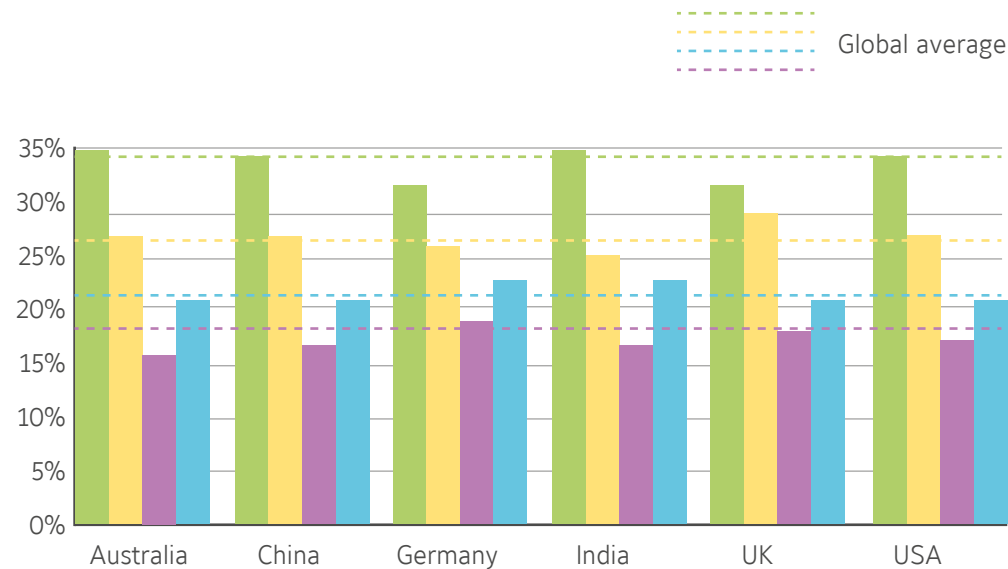


Figure 09: Attitudes to sustainability – analysis by country

Overall, all countries, age groups, job responsibilities, genders and industry sectors were a majority of Campaigners.

Australia had the highest proportion of Campaigners at 35.2%. The UK had the most Housekeepers at 28.7%. Germany had the highest proportion of both Pragmatists and Libertarians at 18.9% and 23.4% respectively. This was the highest proportion of Pragmatists and Libertarians of any of the sub-categories.

Campaigners were most prevalent in the over 60's (36.8%) and 51-60 year olds had the greatest percentage of Housekeepers (28.2%). And 31-40 year olds had the highest proportion of both Pragmatists and Libertarians (17.7% and 21.8%).

Attitudes to Sustainability by Age					
	18-30	31-40	41-50	51-60	60+
% of total	21%	35%	23%	17%	4%
Campaigner	34%	33%	34%	36%	37%
Housekeeper	27%	27%	28%	28%	28%
Pragmatist	17%	18%	17%	16%	15%
Libertarian	22%	22%	21%	20%	20%

Figure 10: Attitudes to sustainability – analysis by age

Analysis by job responsibility showed that Consultants had the highest percentage of both Campaigners (36.8%) and Libertarians (22.7%). Administrative staff had the largest proportion of Housekeepers at 28.8% and Trainees had the greatest percentage of Pragmatists at 18.5%.

And lastly, of all the major industry sectors, the Building industry had the highest proportion of Campaigners at 38.5%. This was the highest level of Campaigners of any of the sub-categories. The Healthcare industry had the greatest percentage of Housekeepers. At 29.1%, this also was the highest score from any sub-category. The Manufacturing industry yielded the highest percentage of Libertarians (22.4%) and the Food sector had the highest level of Pragmatists at 18.4%.

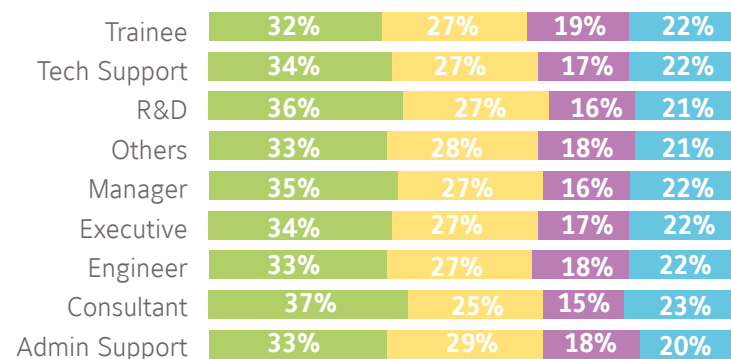


Figure 11: Attitudes to sustainability – analysis by job responsibility

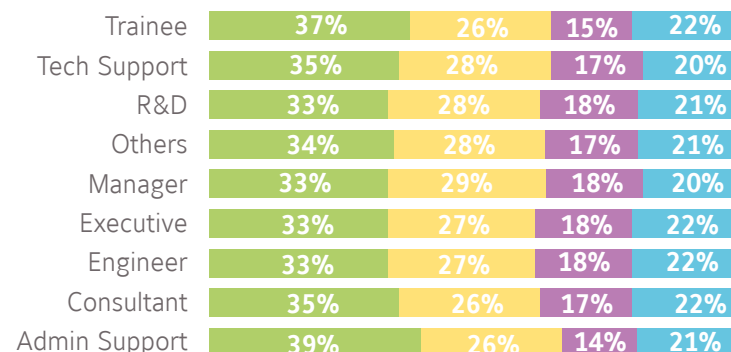


Figure 12: Attitudes to sustainability – analysis by industry sector

Leading Sustainability

58% of respondents believe sustainability is everyone's responsibility.

We asked respondents who should take the lead on sustainability within an organization:

- Option A: a dedicated sustainability team: leave it up to the experts.
- Option B: the company and senior management: it should be top down.
- Option C: employees: we all need to take personal responsibility.
- Option D: everyone at all levels: it needs to be embedded in how we do business.

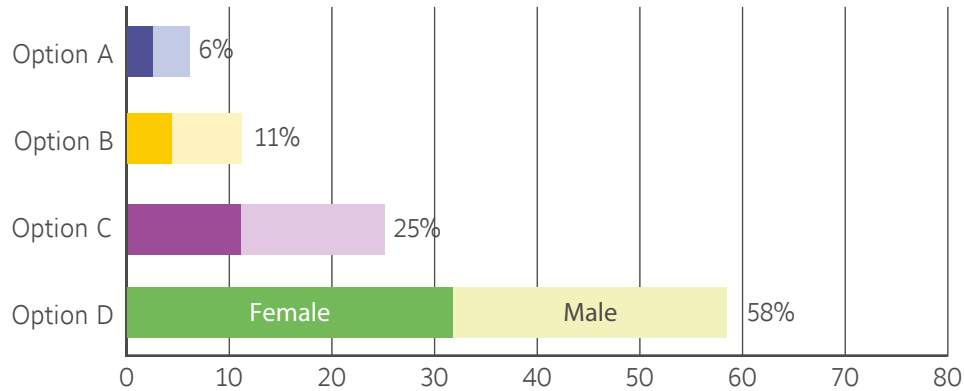


Figure 13: Opinions on who should lead sustainability – overall global results

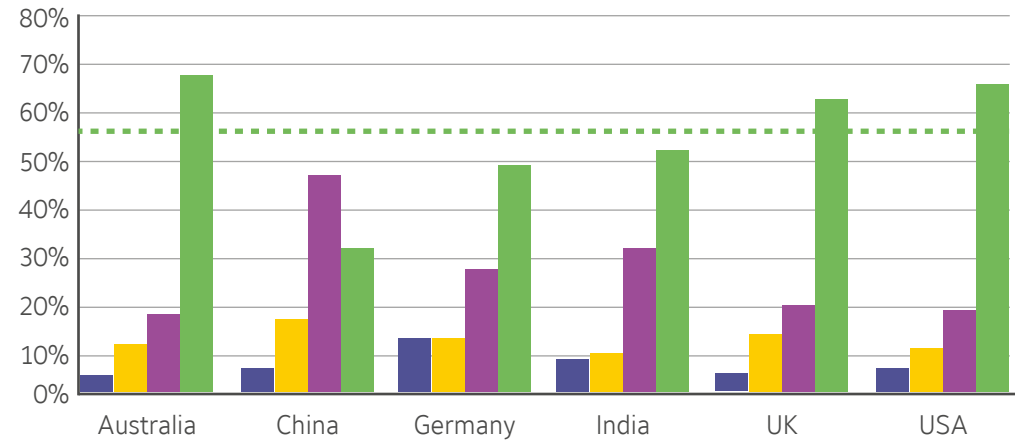


Figure 14: Opinions on who should lead sustainability – analysis by country

Overall, all age groups, job responsibilities, genders and industry sectors were in agreement: sustainability is everyone’s responsibility. However, China overall voted for option C: sustainability is employees responsibility at 47% and option D (Everyone) at only 32%.

Of the remaining countries that preferred option D (Everyone), Australia had the highest score at 68% and Germany had the lowest score with just 48%. There was a marked difference between the responses of Males and Females: Males scored option D (Everyone) at 52% whereas Females scored it at 63%.

Generally, support for option D (Everyone) increased with age. The lowest scoring group were 31-40 year olds (54%) and the highest scoring age group was the over 60’s, at 65%.

Leading Sustainability Attitudes by Age					
	18-30	31-40	41-50	51-60	60+
% of total	21%	35%	23%	17%	4%
Option A	7%	7%	6%	4%	6%
Option B	11%	12%	11%	10%	10%
Option C	27%	27%	22%	23%	19%
Option D	55%	54%	61%	63%	65%

Figure 15: Opinions on who should lead sustainability – analysis by age

Analysis by job responsibility yielded a wide range of results: the highest support for option D (Everyone) came from Technical Support staff at 63%. Engineers recorded the lowest level of support of any sub-group with only 41% support. Both Executives and Managers scored below average support: Executives significantly so at 46% (Managers scored 57%). Interestingly, both scored well above average for option C (Employees) at 36% and 31% respectively.

And lastly, of all the major industry sectors, Services/FM scored the highest support at 72% and Technology was the lowest scoring sector at 49% support.

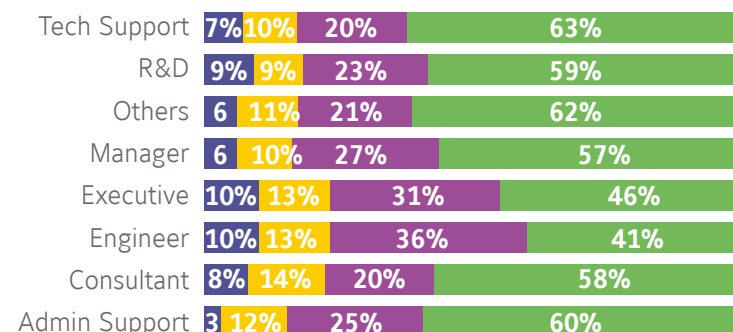


Figure 16: Opinions on who should lead sustainability – analysis by job responsibility

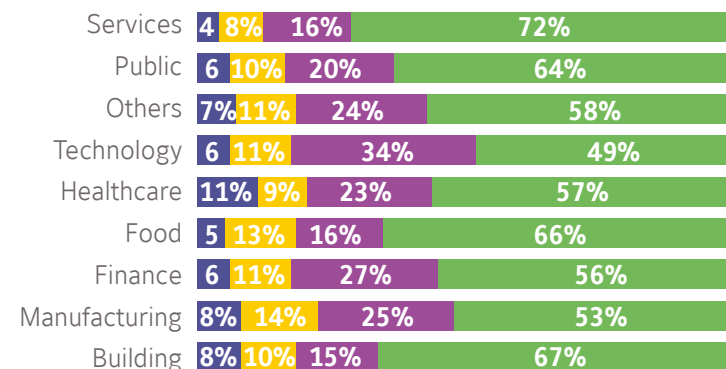


Figure 17: Opinions on who should lead sustainability – analysis by industry sector

Employees Leading Sustainable Initiatives

Although 67% of respondents would like to work in an organization where employees take the lead in initiating sustainable practices, 28% are undecided about it.

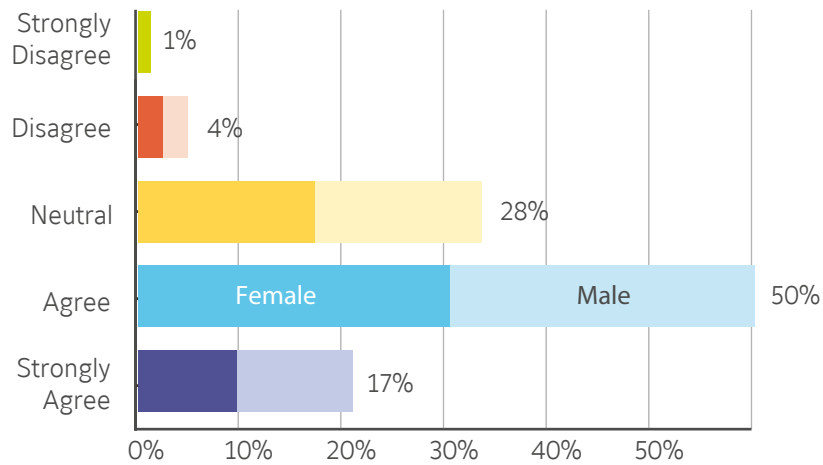


Figure 18: Attitudes to employees initiating sustainable practices – overall global results

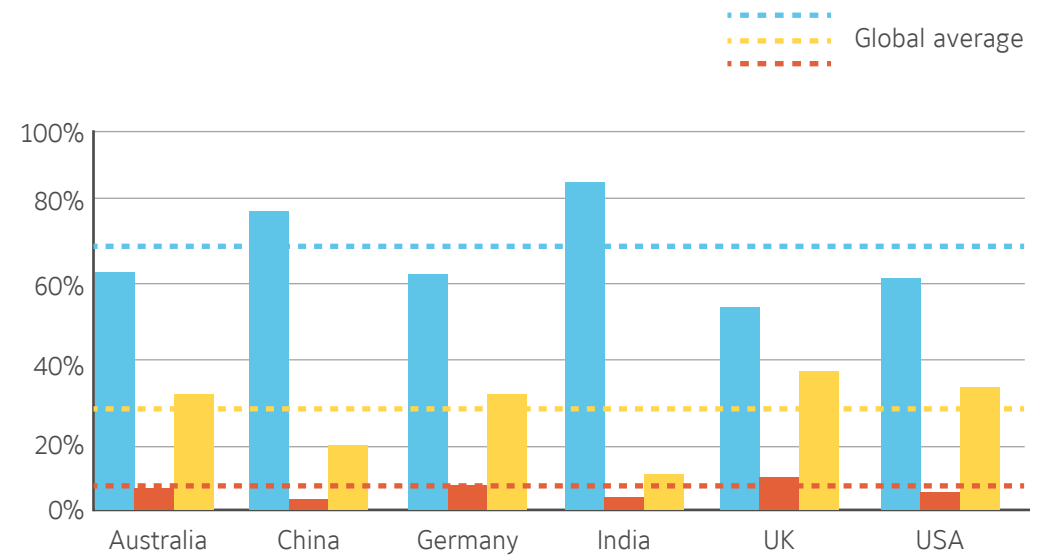


Figure 19: Attitudes to employees initiating sustainable practices – analysis by country

All age groups, job responsibilities, genders and industry sectors were in majority agreement with the statement "I would like to work in an organization where employees take the lead in initiating sustainable practices".

There was very little difference between the responses of Males and Females (Males scored 68% and Females scored 67%). India had the highest level of support with the statement, scoring 88%. This was the highest level of support recorded by any sub-category. The UK was the country with the lowest level of agreement at just 53%. This was the joint lowest score of any sub-category.

Generally, agreement with the statement decreased with age. The lowest scoring age group were the over 60's scoring 60% agreement. By contrast, 18-30 year olds scored 71% agreement.

Employees Leading Sustainability Initiatives Attitudes by Age					
	18-30	31-40	41-50	51-60	60+
% of total	21%	35%	23%	17%	4%
Agree	71%	70%	65%	61%	60%
Disagree	6%	5%	6%	6%	2%
Neutral	23%	25%	29%	33%	38%

Figure 20: Attitudes to employees initiating sustainable practices – analysis by age

Analysis by job responsibility provided some encouraging results: the highest scoring group were Executives – at 78% – and Managers also scored above the global average with 76%. The lowest scoring job responsibility category was 'Others' at 57% agreement.

And lastly, of all the major industry sectors, the Technology sector scored the highest support at 78% and the Food sector was the lowest scoring 53% support. Along with the UK, this was the lowest level of support recorded.

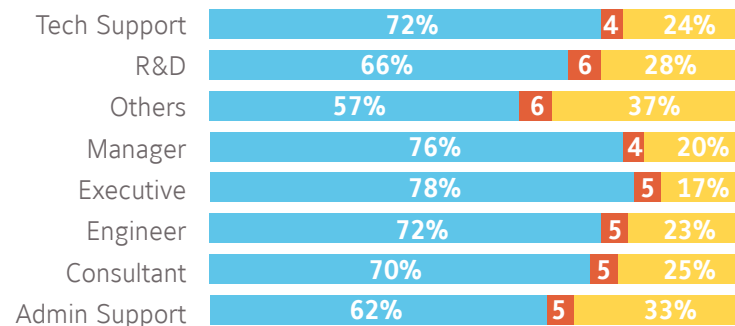


Figure 21: Attitudes to employees initiating sustainable practices – analysis by job responsibility

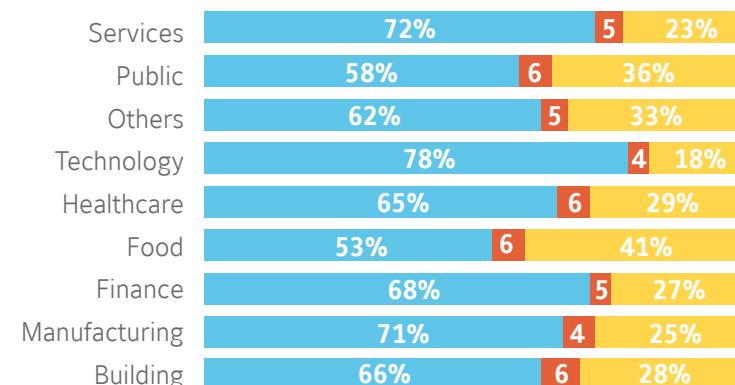


Figure 22: Attitudes to employees initiating sustainable practices – analysis by industry sector

Employee Involvement

81% of respondents agree: employees should be actively involved in making working practices more sustainable.

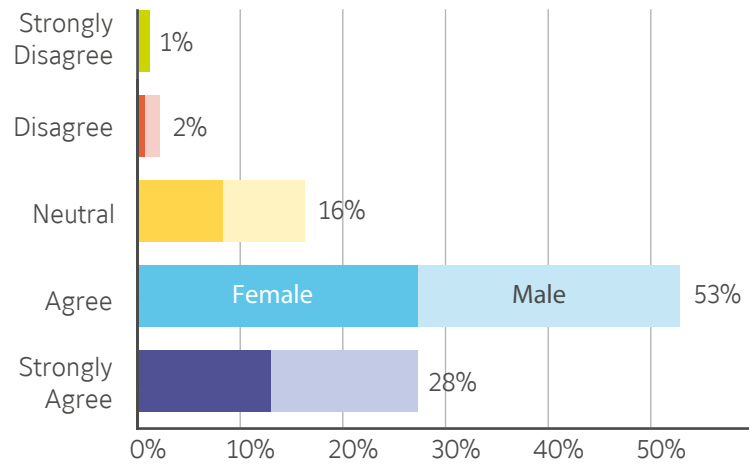


Figure 23: Attitudes to employees being actively involved in sustainability – overall global results

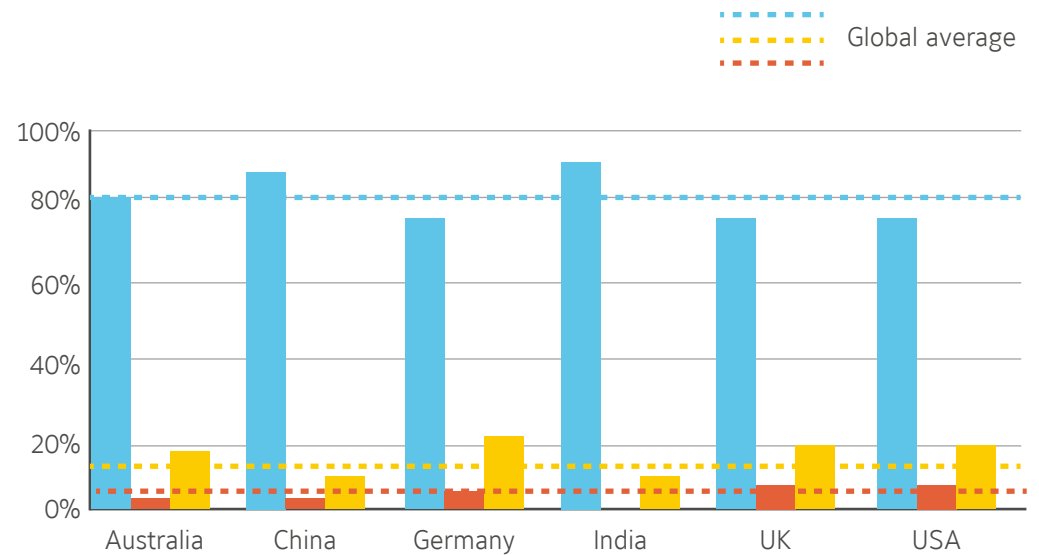


Figure 24: Attitudes to employees being actively involved in sustainability – analysis by country

All age groups, job responsibilities, genders and industry sectors were in majority agreement with the statement "Employees should be actively involved in making their working practices more sustainable".

There was very little difference between the responses of Males and Females (Males scored 80% and Females scored 81%). India had the highest level of support with the statement, scoring 92%. This was the highest level of support recorded by any sub-category. Germany was the country with the lowest level of agreement at just 74%.

Generally, agreement with the statement decreased with age. The lowest scoring group were 51-60 year olds scoring 76% agreement. By contrast, 18-30 year olds scored 84% agreement. The exception to this was the over 60's group, who scored 83%.

Employee Involvement Attitudes by Age					
	18-30	31-40	41-50	51-60	60+
% of total	21%	35%	23%	17%	4%
Agree	84%	83%	77%	76%	83%
Disagree	3%	3%	5%	4%	1%
Neutral	13%	14%	18%	20%	16%

Figure 25: Attitudes to employees being actively involved in sustainability – analysis by age

Analysis by job responsibility provided some encouraging results: once again the highest scoring group were Executives – at 90% – and Managers also scored above the global average with 85%. The lowest scoring job responsibility category was 'Others' at 73% agreement. This was the joint lowest score recorded for agreement.

And lastly, of all the major industry sectors, the Finance and Technology sectors scored the highest support at 87%. Once again, the Food sector was the lowest scoring 73% support. Along with 'Other' Job Responsibility, this was the lowest level of support recorded.

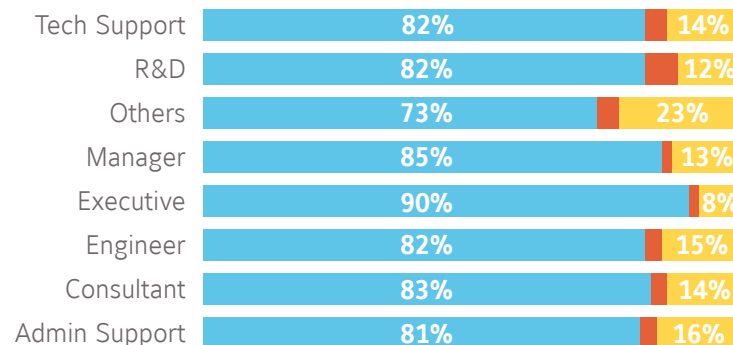


Figure 26: Attitudes to employees being actively involved in sustainability – analysis by job responsibility

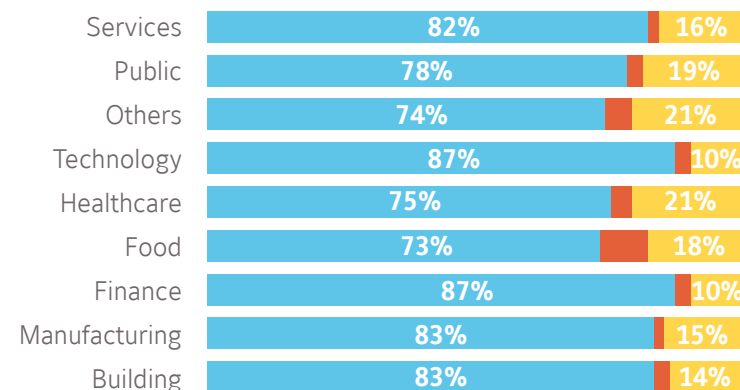


Figure 27: Attitudes to employees being actively involved in sustainability – analysis by industry sector

Burdening Employees with Sustainable Practices

The world is divided about whether or not employees should not be burdened with implementing sustainable practices on top of their existing workloads.

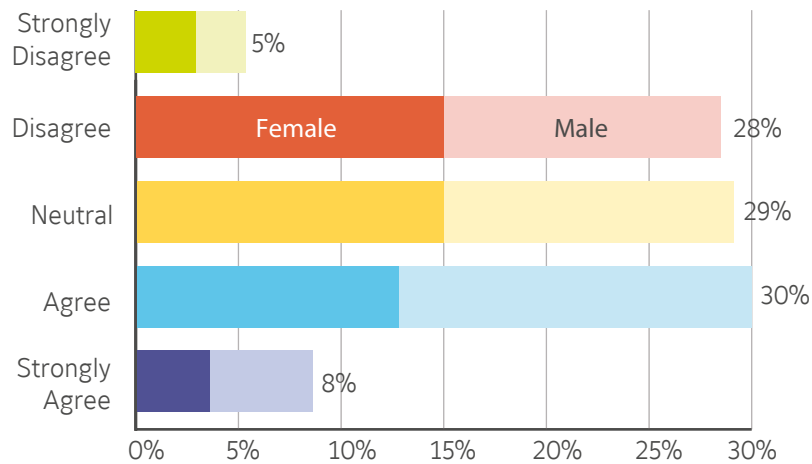


Figure 28: Attitudes to burdening employees with sustainable practices – overall global results

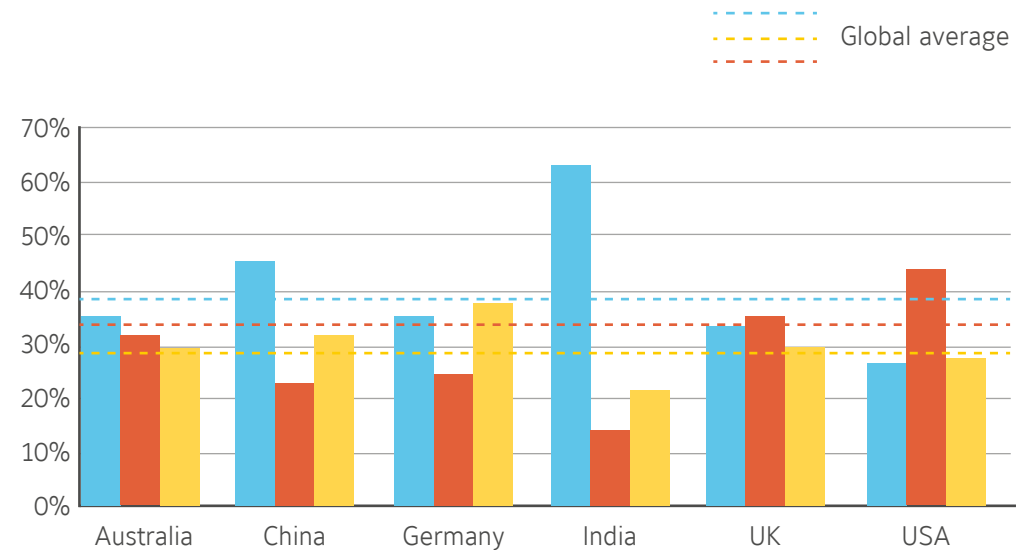


Figure 29: Attitudes to burdening employees with sustainable practices – analysis by country

There was a very divided response to the statement “Employees should not be burdened with implementing sustainable practices on top of their existing workloads”. Globally, 38% agreed, 33% disagreed and 29% were undecided.

Males and 18-50 year olds all agreed with the statement. All job responsibilities agreed with the exception of ‘Others’. The only industry sectors not to agree were Building, Public Sector and Services/FM. And the only countries which did not have overall agreement were the UK and the USA. India had the highest score of any sub-category for agreeing with the statement at 63%.

There was a clear split in responses between Males and Females. Males scored 43% agreement and 30% disagreement. Contrastingly, Females scored 33% agreement and 37% disagreement.

Employee Involvement Attitudes by Age					
	18-30	31-40	41-50	51-60	60+
% of total	21%	35%	23%	17%	4%
Agree	43%	44%	35%	27%	27%
Disagree	27%	27%	35%	47%	45%
Neutral	30%	29%	30%	26%	28%

Figure 30: Attitudes to burdening employees with sustainable practices – analysis by age

Generally, disagreement increased with age. Of the age groups that did agree with the statement, 31-40 year olds had the highest level of agreement at 44%. 51-60 year olds had the highest level of disagreement with the statement at 47%. This was the highest recorded score for disagreement of any sub-category.

Analysis by job responsibility provided some concerning results with only the ‘Others’ disagreeing. The highest level of agreement came from Executives at 51%. The ‘Others’ category scored disagreement at 35%. And lastly, of all the major industry sectors, the Technology sector scored the highest level of agreement at 50%. The Building sector scored the highest level of disagreement at 44%.

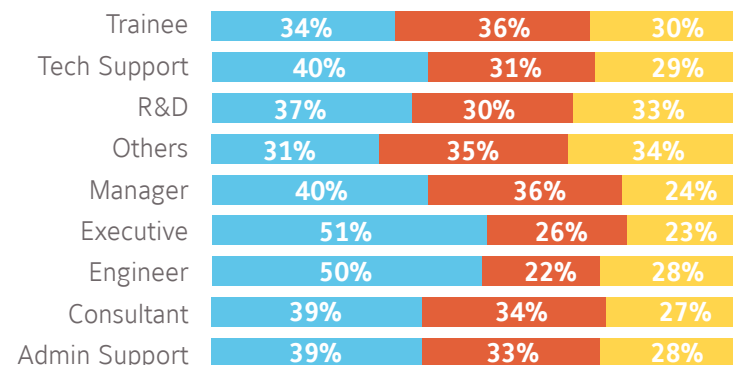


Figure 31: Attitudes to burdening employees with sustainable practices – analysis by job responsibility

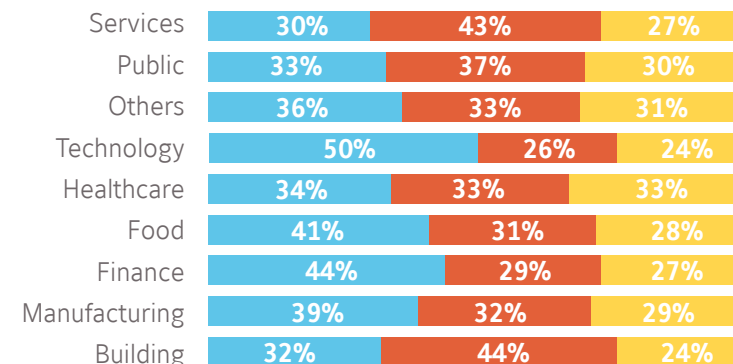


Figure 32: Attitudes to burdening employees with sustainable practices – analysis by industry sector

The Impact of Sustainability on Working Patterns

Only 28% of respondents disagree that sustainability initiatives should not impact on the way that people work, and a further 30% are undecided.

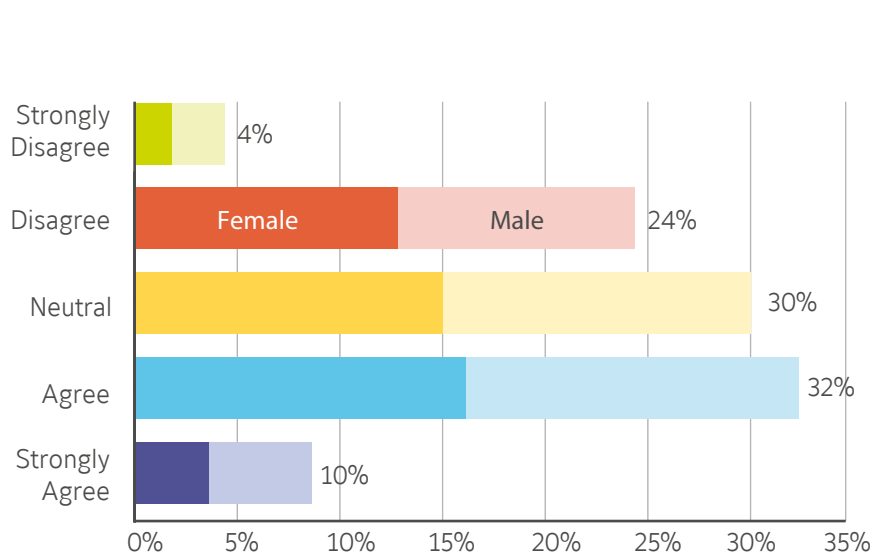


Figure 33: Attitudes to sustainability impacting how people work - overall global results

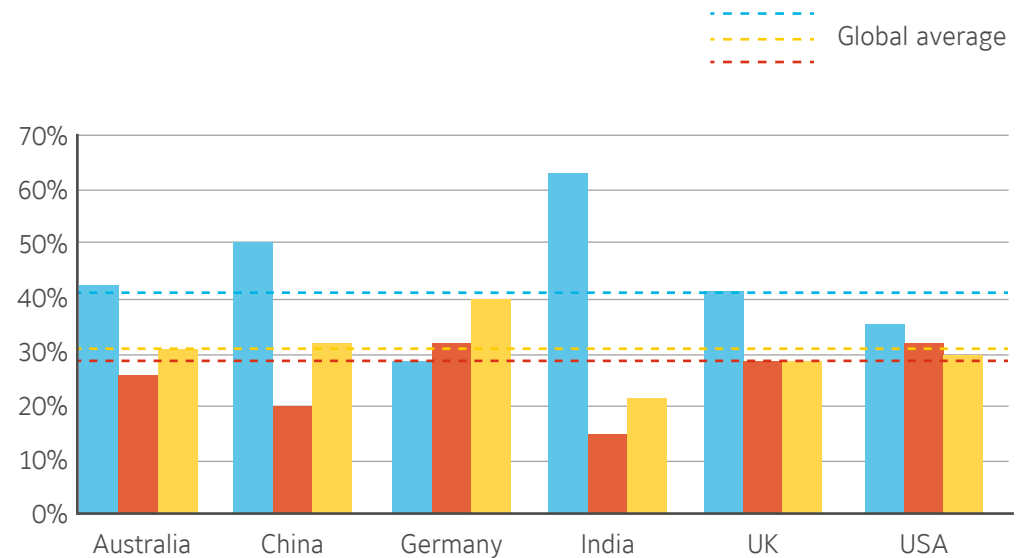


Figure 34: Attitudes to sustainability impacting how people work - analysis by country

Once again there was a divided response to the statement “Sustainability initiatives should not impact on the way that I work”. Globally, 42% agreed, 28% disagreed and 30% were undecided.

The vast majority of sub-categories had an overall majority of support for the statement. The only groups which disagreed overall were R&D staff, Trainees and the Services/FM sector. Germany was the only country which disagreed.

There was very little difference between the responses of Males and Females (Males scored 43% and Females scored 40% agreement). India was the country which had the highest level of agreement with the statement, scoring 63%. This was the highest level of agreement recorded by any sub-category. And as the only country to disagree, Germany scored 33% disagreement.

Employee Involvement Attitudes by Age					
	18-30	31-40	41-50	51-60	60+
% of total	21%	35%	23%	17%	4%
Agree	45%	43%	42%	37%	34%
Disagree	25%	25%	30%	35%	34%
Neutral	30%	32%	28%	28%	32%

Figure 35: Attitudes to sustainability impacting how people work – analysis by age

Generally, agreement decreased with age. The age group which agreed the most were 18-30 year olds at 45%. The over 60’s, while not having a majority agree or disagree still scored 34% disagreement.

In the job responsibility categories, the group who were most in agreement were Executives at 53%. Trainees disagreed the most, scoring 37% for disagreement. Managers scored around the average for agreement. And lastly, of all the major industry sectors, the Technology sector scored the highest level of agreement at 56%. The Services/FM sector scored the highest level of disagreement at 40%. This was the highest level of disagreement of any sub-category.

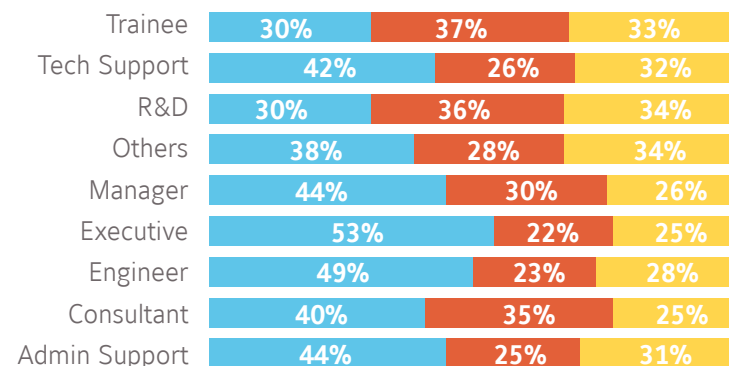


Figure 36: Attitudes to sustainability impacting how people work – analysis by job responsibility

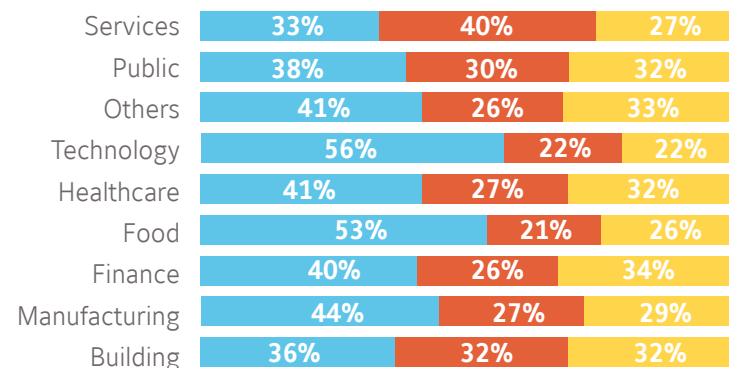


Figure 37: Attitudes to sustainability impacting how people work – analysis by industry sector

Company Environmental Records

Only 33% of respondents would consider a company's environmental record when applying for jobs.

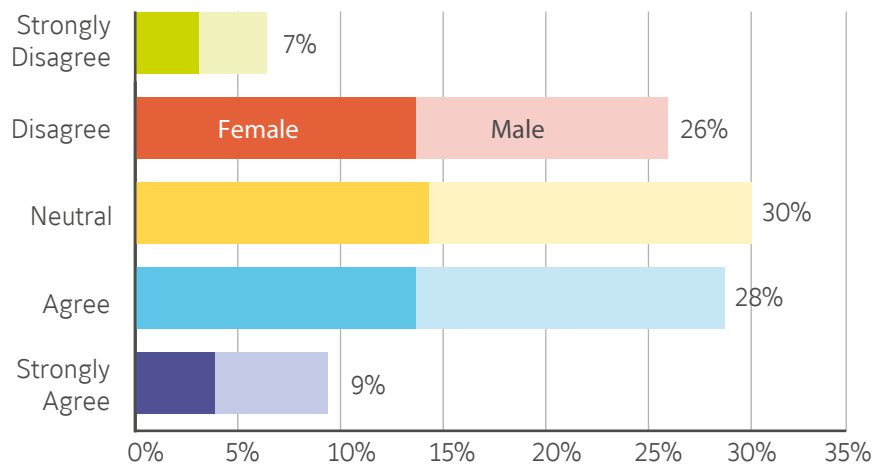


Figure 38: Attitudes to checking company environmental records – overall global results

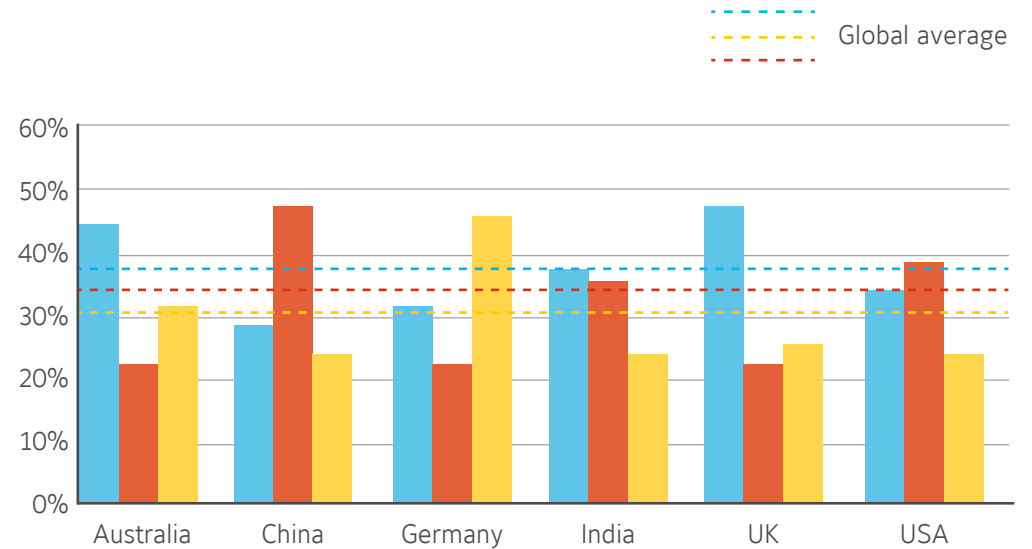


Figure 39: Attitudes to checking company environmental record – analysis by country

It appears that across the globe, sustainability is not yet a differentiator for prospective employees. Only 33% of respondents disagreed with the statement “I wouldn’t think to consider a company’s environmental record when applying for jobs”. 37% agreed and 30% were undecided.

There was significant variation in the sub-categories – particularly across job responsibilities – with many groups scoring higher for disagreement with the statement. Males and Females scored similar results with 32% (Males) and 35% (Females) disagreeing.

China scored the highest level of disagreement of any country at 47%. The UK was the poorest country, with 48% of respondents agreeing with the statement. This was the highest level of agreement recorded in any category.

Employee Involvement Attitudes by Age					
	18-30	31-40	41-50	51-60	60+
% of total	21%	35%	23%	17%	4%
Agree	38%	39%	37%	34%	30%
Disagree	32%	33%	34%	32%	42%
Neutral	30%	28%	29%	34%	28%

Figure 40: Attitudes to checking company environmental records – analysis by age

Once again, agreement decreased with age. 31-40 year olds agreed the most at 39% and the over 60’s had the highest level of disagreement at 42%.

As highlighted, job responsibility responses varied significantly. Admin staff, Executives, Others and Technical Support staff all agreed with the statement. Executives had the highest level of agreement at 44%. Engineers, Managers, R&D staff and Trainees all disagreed with the statement. Of this group, Trainees had the highest level of disagreement at 41%. Consultants scored the same for both agreement and disagreement.

Of all the major industry sectors, Healthcare and the Public sectors scored the highest level of agreement at 44%. The Building sector scored the highest level of disagreement at 52%. This was the highest level of disagreement of any sub-category.

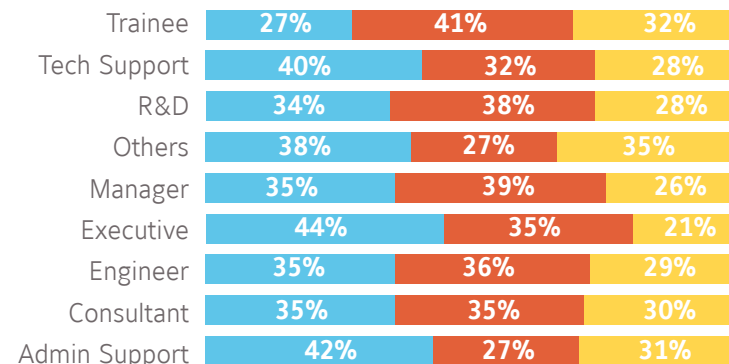


Figure 41: Attitudes to checking company environmental records – analysis by job responsibility

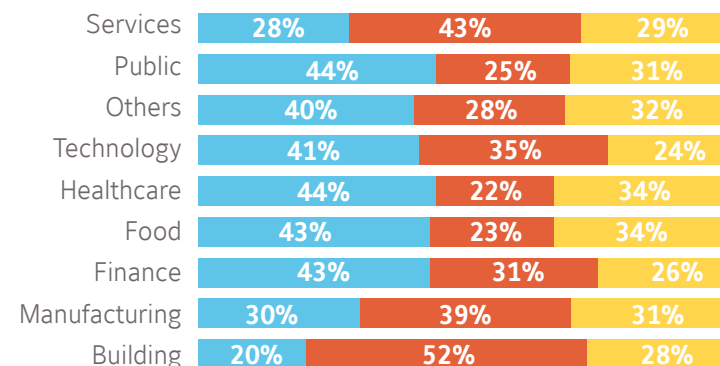
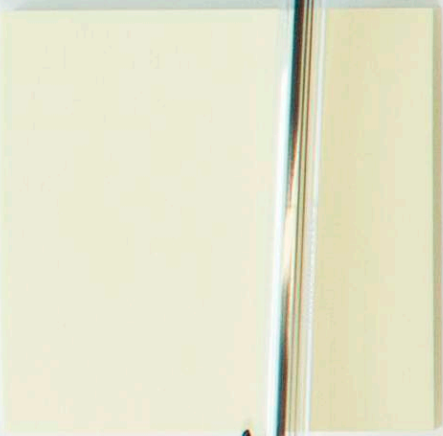


Figure 42: Attitudes to checking company environmental records – analysis by industry sector

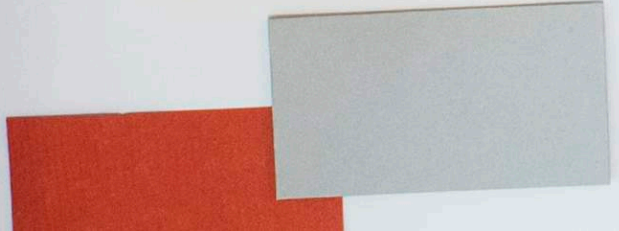


Collaboration



Doing things differently

Sustainability at its core



All age groups, job responsibilities, genders and industry sectors were agreed: sustainability needs to be a long-term investment.

Investing in Sustainability

Sustainability appears to be on the boardroom agenda of most organisations. But how important is it compared to the bottom line? How willing are organisations to finance sustainability initiatives and at what cost? When asked about the financial implications of implementing more sustainable operations some interesting results appeared.

89%

of Managers believe sustainability needs to be a longterm investment

71%

agree that investment in sustainability should be prioritized

59%

of Executives believe sustainability should not impact an organization's competitiveness

Prioritizing Investment in Sustainability

71% of respondents agree that companies should prioritize investment in lowering the environmental impact of their organization's work practices.

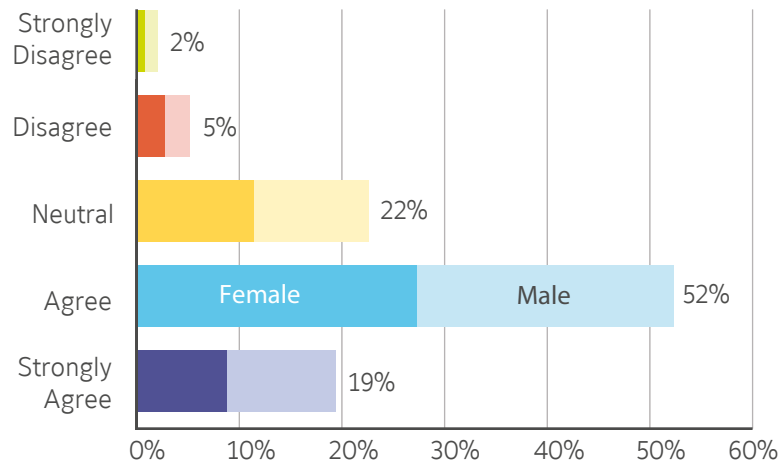


Figure 43: Attitudes to prioritizing investment in lowering environmental impact – overall global results

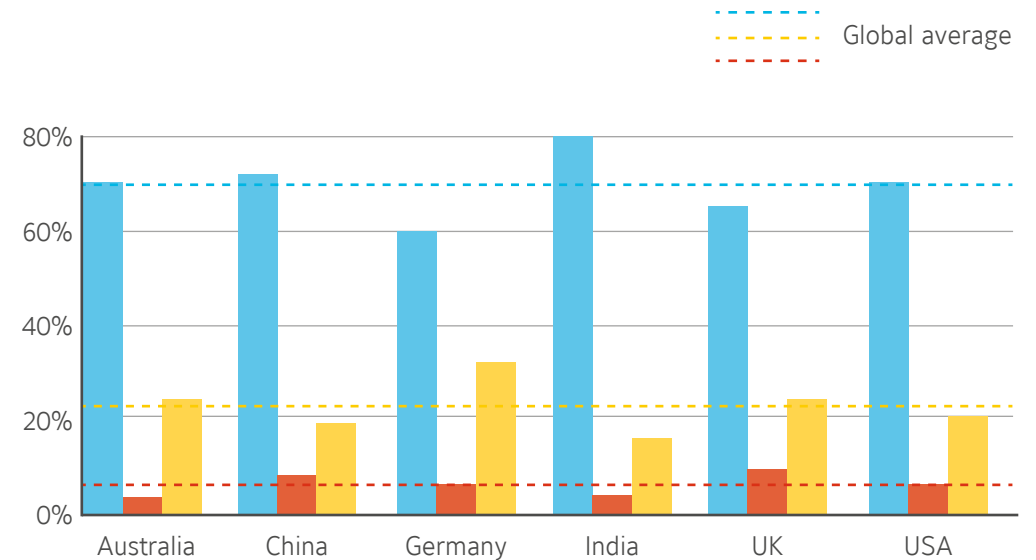


Figure 44: Attitudes to prioritizing investment in lowering environmental impact – analysis by country

All age groups, job responsibilities, genders and industry sectors were in agreement: sustainability needs prioritized investment.

There was very little difference between the responses of Males and Females (Males scored 70% and Females scored 73%). India had the highest level of agreement with the statement, scoring 80%. Germany had the lowest score with just 61% of Germans agreeing.

No overall trend emerged in the levels of agreement by age groups, with all levels recording broadly similar results. The lowest scoring group were 41-50 year olds (70%) and the highest scoring age group was the over 60's, at 77%.

Employee Involvement Attitudes by Age					
	18-30	31-40	41-50	51-60	60+
% of total	21%	35%	23%	17%	4%
Agree	73%	71%	70%	71%	77%
Disagree	6%	6%	8%	7%	4%
Neutral	21%	23%	22%	22%	19%

Figure 45: Attitudes to prioritizing investment in lowering environmental impact – analysis by age

Analysis by job responsibility provided some encouraging results: the highest scoring group were Executives – at 76% – and Managers also scored above the global average with 75%. Trainees recorded the lowest score of any sub-group with only 55% agreement. Strong support at leadership level will put organizations which wish to develop a more sustainable workplace in a strong position.

And lastly, of all the major industry sectors, both Manufacturing and Technology scored the highest results at 76% each. The lowest scoring sector was the Public Sector, recording support at 68%.

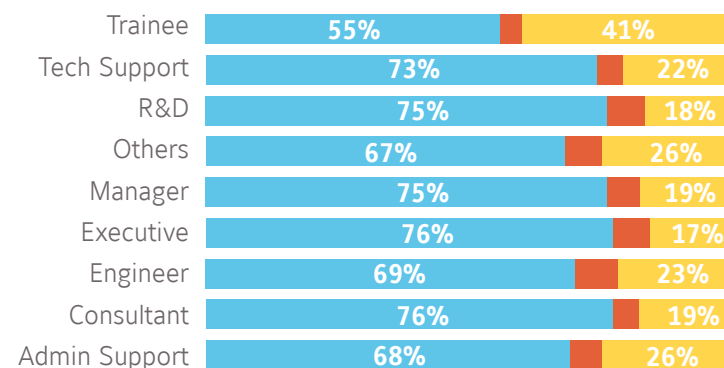


Figure 46: Attitudes to prioritizing investment in lowering environmental impact – analysis by job responsibility

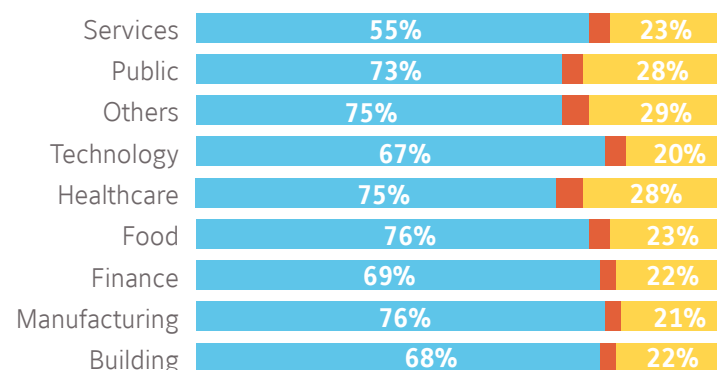


Figure 47: Attitudes to prioritizing investment in lowering environmental impact – analysis by industry sector

Long Term Investment in Sustainability

86% of respondents agree that sustainability shouldn't just focus on short-term cost savings, it needs to be about long-term investment.

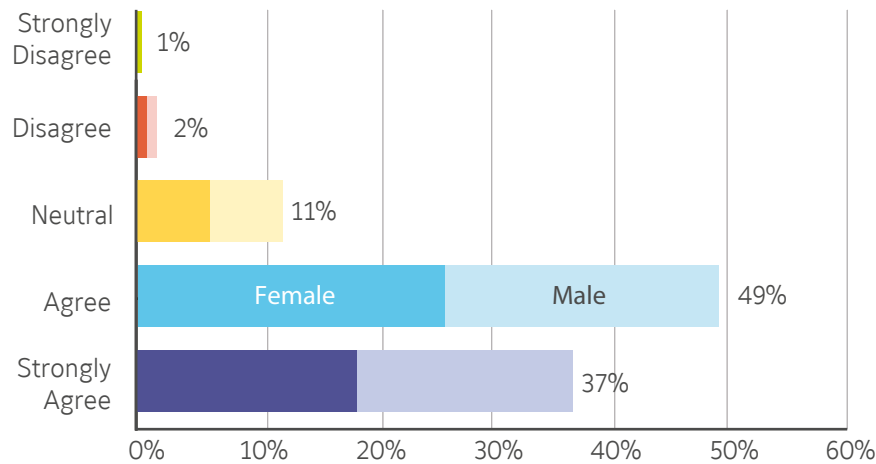


Figure 48: Attitudes to long-term investment in sustainability – overall global results

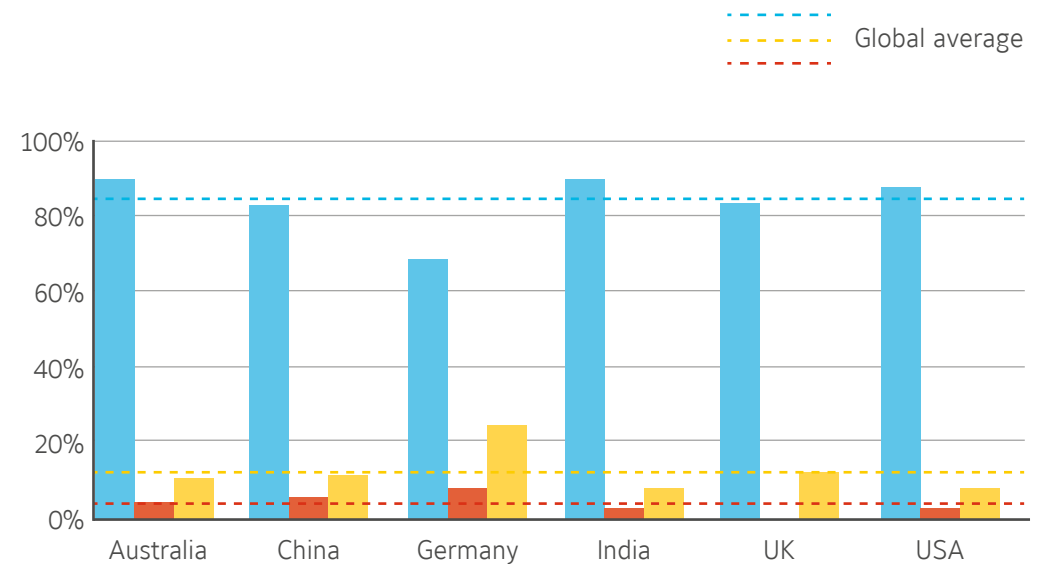


Figure 49: Attitudes to long-term investment in sustainability – analysis by country

All age groups, job responsibilities, genders and industry sectors were in agreement: sustainability needs long-term investment.

There was very little difference between the responses of Males and Females (Males scored 84% and Females scored 89%). Australia had the highest level of agreement with the statement, scoring 91%. Germany had the lowest score with just 70% of Germans agreeing.

Agreement with the statement increased with age, although all age groups recording similar results. The lowest scoring group were 18-40 year olds (85%) and the highest scoring age group was the over 60's, at 92%. This was the highest level of agreement of any sub-category.

Employee Involvement Attitudes by Age					
	18-30	31-40	41-50	51-60	60+
% of total	21%	35%	23%	17%	4%
Agree	85%	85%	87%	88%	92%
Disagree	3%	4%	3%	3%	2%
Neutral	12%	11%	10%	9%	16%

Figure 50: Attitudes to long-term investment in sustainability – analysis by age

Analysis by job responsibility provided some encouraging results: the highest scoring groups were Managers and Technical Support staff at 89%. At 85%, Executives scored slightly lower agreement than the global average. Engineers recorded the lowest score of any sub-category with only 80% agreement.

And lastly, of all the major industry sectors, the Services/FM sector had the highest level of agreement at 91%. The lowest scoring sector was the Food Sector, recording agreement at 85%.

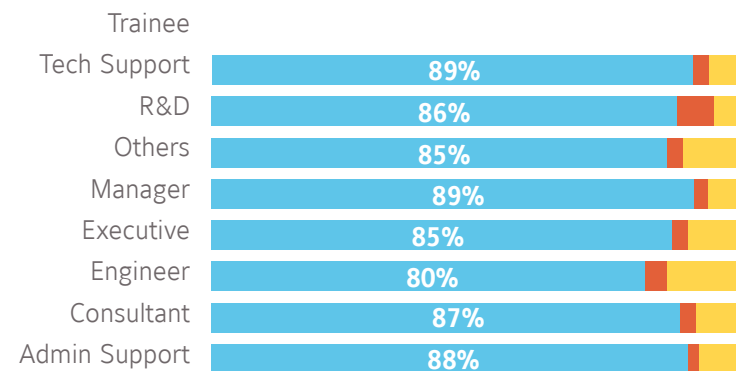


Figure 51: Attitudes to long-term investment in sustainability – analysis by job responsibility

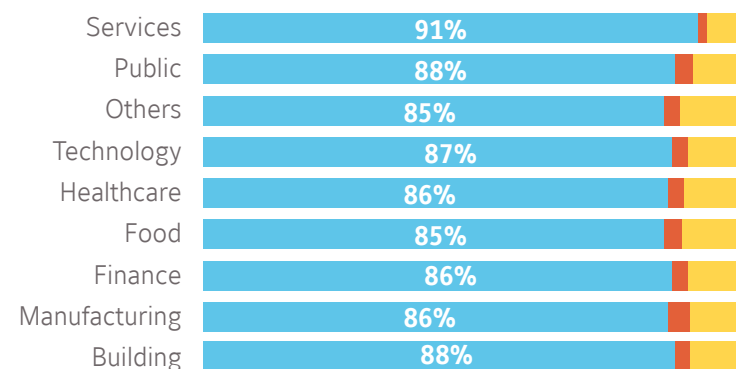


Figure 52: Attitudes to long-term investment in sustainability – analysis by industry sector

Balancing Sustainability and Competitiveness

38% agree that sustainability should not impact a company's ability to compete?

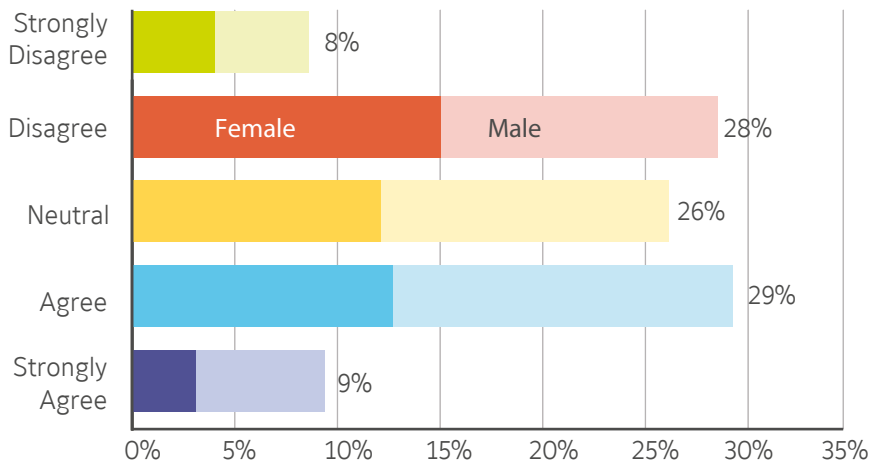


Figure 53: Attitudes to sustainability affecting competitiveness – overall global results

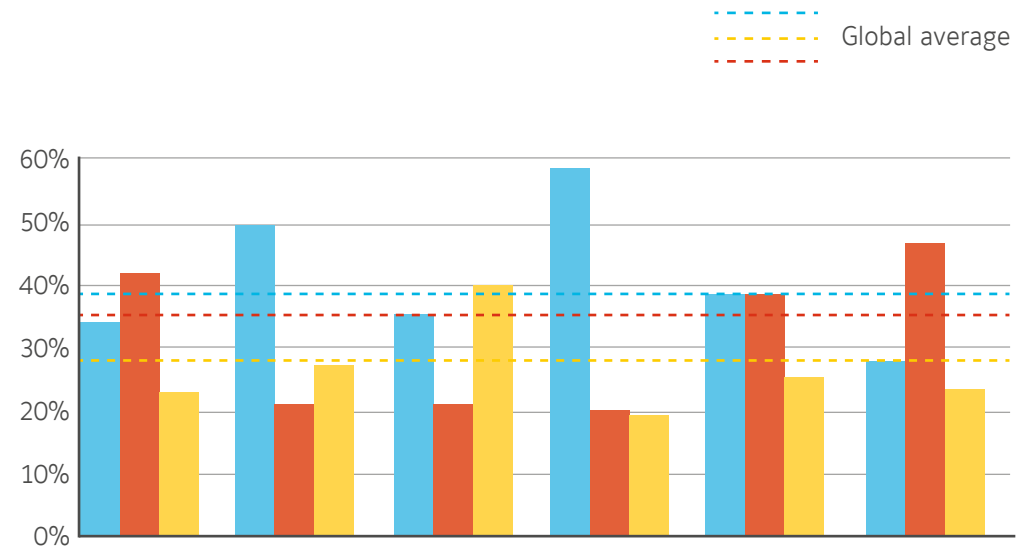


Figure 54: Attitudes to sustainability affecting competitiveness – analysis by country

Opinion was very divided about the impact sustainability should have on a company's ability to compete. Overall, Males agreed with the statement (at 43%) but Females disagreed (at 42%).

India had the highest level of agreement with the statement, scoring 59%. The USA had the highest level of disagreement at 49%. Generally, disagreement increased with age. 18-40 year olds agreed with the statement, but older age groups all disagreed. The highest score for disagreement came from the over 60's, at 48%.

Employee Involvement Attitudes by Age					
	18-30	31-40	41-50	51-60	60+
% of total	21%	35%	23%	17%	4%
Agree	42%	43%	34%	32%	27%
Disagree	32%	31%	39%	45%	48%
Neutral	26%	26%	27%	23%	25%

Figure 55: Attitudes to sustainability affecting competitiveness – analysis by age

Analysis by job responsibility provided similarly diverse results. Engineers, Executives and Managers all agreed with the statement, with all other job types disagreeing. The group most in agreement were Executives. At 59%, this was the highest level of agreement of any sub-category. Managers scored 44%. Of the job types which disagreed, Consultants had the highest level of disagreement at 40%.

And lastly, of all the major industry sectors, the Technology sector had the highest level of agreement with the statement at 51%. Manufacturing, Finance and Healthcare all agreed with the statement also. The Services/FM sector had the highest level of disagreement at 51%. This was also the highest level of disagreement of any sub-category.

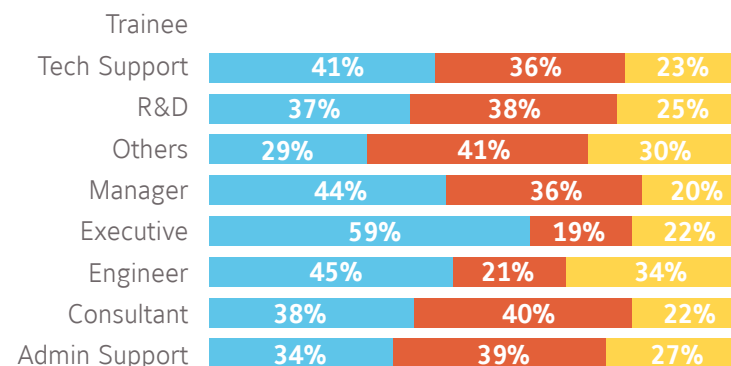


Figure 56: Attitudes to sustainability affecting competitiveness – analysis by job responsibility

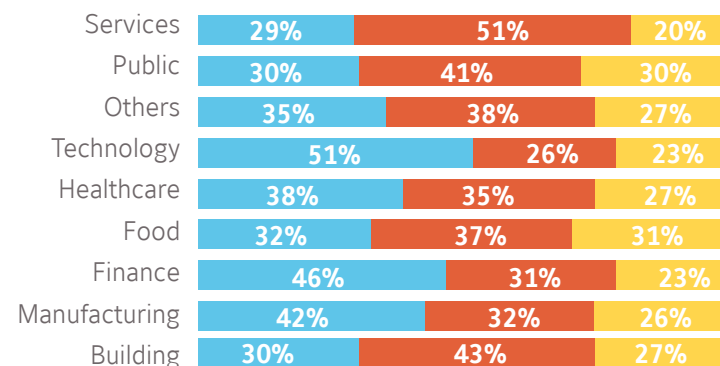


Figure 57: Attitudes to sustainability affecting competitiveness – analysis by industry sector

Sensible

368 million
gallons of water
to drink

1.8 billion
gallons replenishing
ground water

2 billion
gallons of water
to the sea

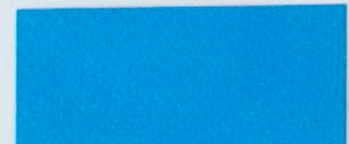
553 million
gallons replenishing
ground water

Making
things
easier

Practical



OK



Creating

Building

Employees want choices for commuting: car parks, subsidised public transport or working from home

Taking Action

Talk is cheap. Anyone can say they support sustainability, but how far will they actually go to make it a reality? Is it up to an organisation to make all the changes? Or is it up to the employee to bear the efforts of change? And does big change mean big costs? We asked employees just how far they were prepared to go in four key areas of sustainability: reducing carbon emissions; reducing waste; commuting and recycling.

84%

of people would dispose of disposable paper cups for good

51%

of employees would sort their own rubbish

Reducing carbon emissions should be a mix of quick wins and long term investments

Reducing Carbon Emissions

34% of respondents would lower carbon emissions from energy use by maximizing natural light, using low energy lighting and renewable energy and lighting only the spaces that are needed.

We asked respondents to select which option they would support if an organization wants to lower its carbon emissions from energy use:

- Option A: switch to energy saving light bulbs: it's a quick win that pays for itself in the long run.
- Option B: switch to energy saving light bulbs but invest in on-site renewable energy such as solar panels or a wind turbine as well.
- Option C: install energy saving light bulbs, but also put up signs reminding people to switch off lights.
- Option D: rearrange the office space to make better use of natural light; invest in low energy lighting and on-site renewable energy; only light a proportion of the building at evening and weekends so the whole building isn't lit-up for only a handful of people.

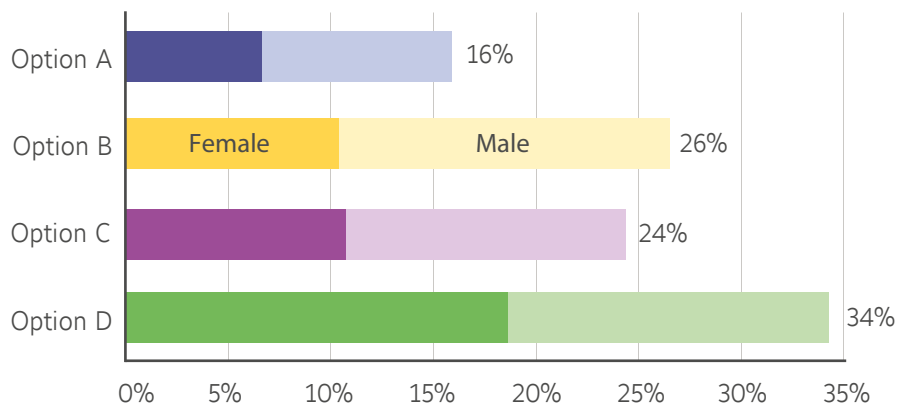


Figure 58: Preferred approach to reducing carbon emissions – overall global results

Responses to this issue varied across all of the groups with option B (low energy lighting and renewables), option C (low energy lighting and signage) and option D (maximize natural light, low energy lighting, renewables etc) all favored by at least one sub-category.

Results by country varied also: although most countries preferred option D (maximize natural light, low energy lighting, renewables etc) overall, China preferred option C (low energy lighting and signage) (scoring 29%) and Germany preferred option B (low energy lighting and renewables) (scoring 34%). Of the countries which preferred option D, the USA had the highest support at 40%.

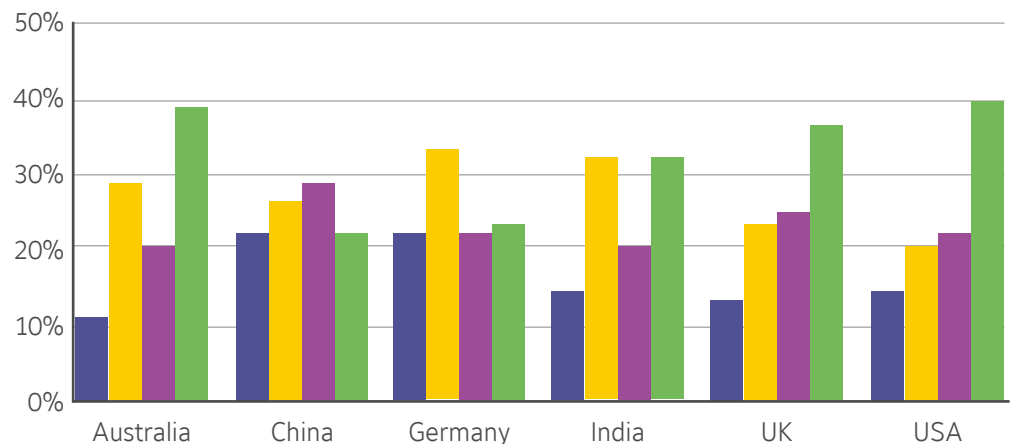


Figure 59: Preferred approach to reducing carbon emissions – analysis by country

Support for option D (maximize natural light, low energy lighting, renewables etc) increased with age. The lowest scoring group were 18-30 year olds (29%) and the highest scoring age group was the over 60's, at 43%. Males and Females scored similar results.

Leading Sustainability Attitudes by Age					
	18-30	31-40	41-50	51-60	60+
% of total	21%	35%	23%	17%	4%
Option A	18%	19%	15%	12%	7%
Option B	28%	27%	25%	24%	28%
Option C	25%	24%	23%	23%	22%
Option D	29%	30%	37%	41%	43%

Figure 60: Preferred approach to reducing carbon emissions – analysis by age

Analysis by job responsibility yielded more varied results: while most categories favored option D (maximize natural light, low energy lighting, renewables etc), Engineers and Executives favored option C (low energy lighting and signage) with scores of 31%. Consultants were most in favor of option D, scoring it at 45% and Managers scored it at 39%.

And lastly, of all the major industry sectors only Food, Healthcare and 'Others' voted against option D (maximize natural light, low energy lighting, renewables etc). These sectors all preferred option C (low energy lighting and signage), scoring 32%, 31% and 29% respectively. The building sector scored the highest level of support for option D of any sub-category at 52%.

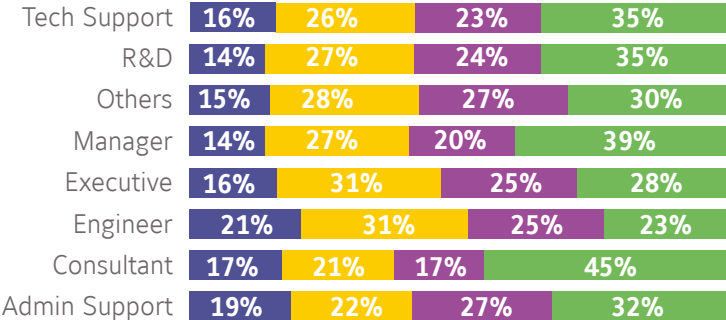


Figure 61: Preferred approach to reducing carbon emissions – analysis by job responsibility

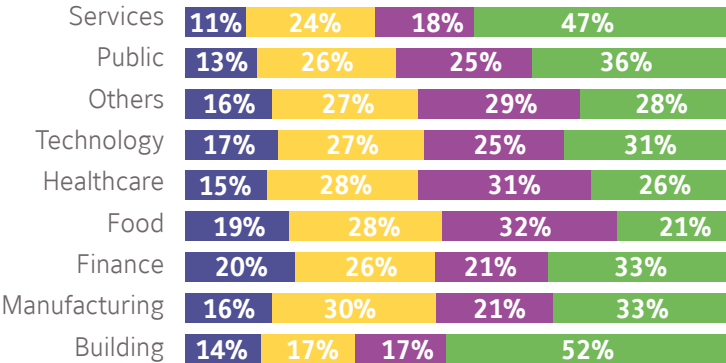


Figure 62: Preferred approach to reducing carbon emissions – analysis by industry sector

Reducing Waste

Companies looking to reduce the amount of waste going to landfill are likely to be well supported by employees: 51% of respondents would sort their own waste into centralized recycling bins.

We asked respondents to select which option they would support if an organization wants to reduce the amount of waste it sends to landfill:

- Option A: placing a default message at the bottom of e-mails that asks the recipient not to print it out.
- Option B: pay for rubbish to be sorted on collection ensuring any materials that can be recycled are recycled.
- Option C: move all bins to a centralized location on each floor, asking employees to sort their waste into relevant recycling bins.
- Option D: introducing a company-wide zero-waste target and specify employees to only use materials that are 100% recyclable.

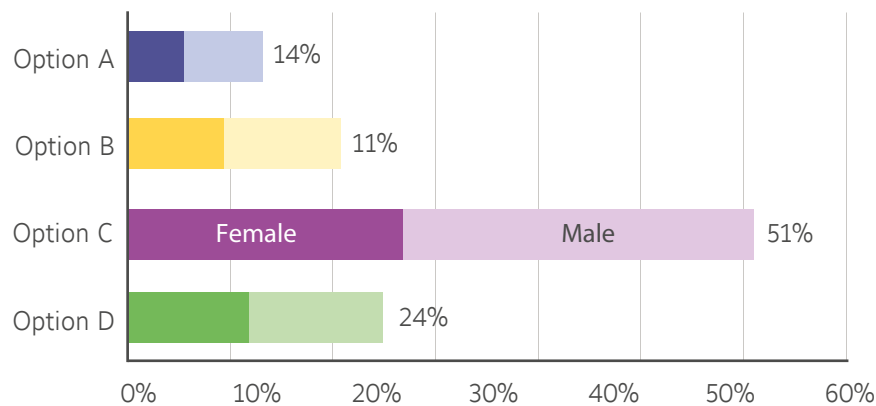


Figure 63: Preferred approach to reducing waste – overall global results

Responses to this issue were consistent in favoring option C (self-sorting into centralized recycling bins). Of real concern is the lack of support for more aggressive solutions such as option D (zero-waste targets) which only scored 24% support.

The only exception to this pattern was India which favored option D (zero-waste targets) with an impressive 43%. Of the countries which preferred option C, the USA showed the highest level of support at 60%.

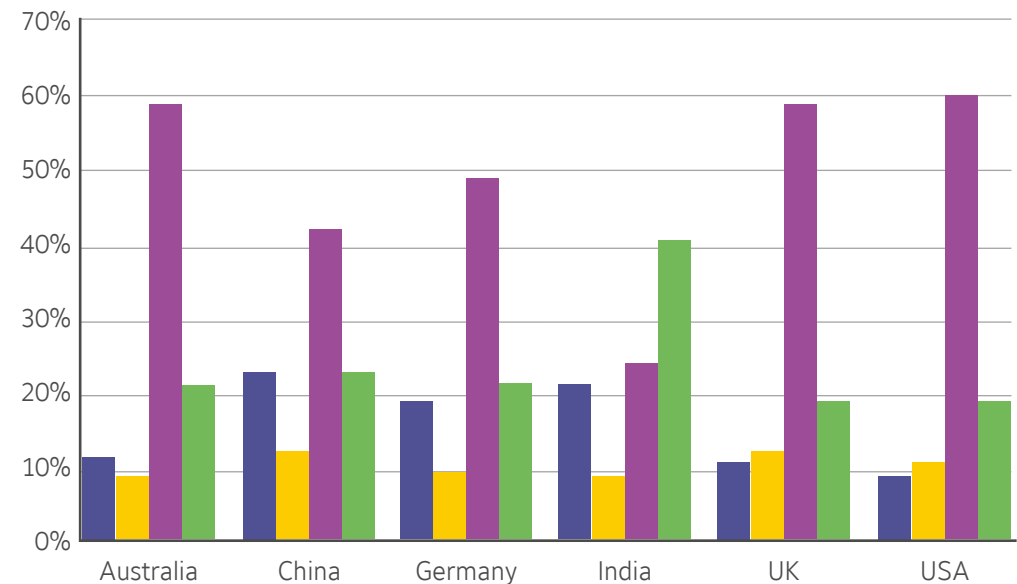


Figure 65: Preferred approach to reducing waste – analysis by age

Support for option C (self-sorting into centralized recycling bins) increased with age. The lowest scoring group were 18-30 year olds (47%) and the highest scoring age group was the over 60's, at 57%. The over 60's also scored option D (zero-waste targets) the highest of any age group at 28%. Males and Females scores varied slightly with Males scoring option C at 48% and Females scoring it at 55%.

Leading Sustainability Attitudes by Age					
	18-30	31-40	41-50	51-60	60+
% of total	21%	35%	23%	17%	4%
Option A	18%	16%	13%	9%	6%
Option B	11%	11%	11%	9%	9%
Option C	47%	49%	53%	59%	57%
Option D	24%	24%	24%	23%	28%

Figure 65: Preferred approach to reducing waste – analysis by age

All sub-categories of job responsibility preferred option C (self-sorting into centralized recycling bins). Administrative staff showed the highest support at 56%, and Consultants were the least supportive at 42%. Interestingly however, Consultants showed the highest level of support for option D (zero-waste targets) of any job type, scoring this at 31%. Executives and Managers both preferred option C scoring it at 44% and 48% respectively. Both groups also showed above average support for Option D scoring this at 29% and 27% each.

And lastly, all the major industry sectors preferred option C (self-sorting into centralized recycling bins). The Food sector showed the highest level of support at 60% and the Technology sector showed the lowest level of support at 43%. Again, the Technology sector (along with the Manufacturing sector) was the sector most in favor of option D scoring this at 28%.

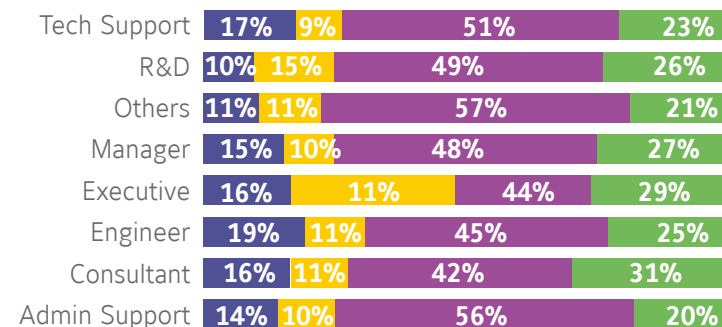


Figure 66: Preferred approach to reducing waste – analysis by job responsibility

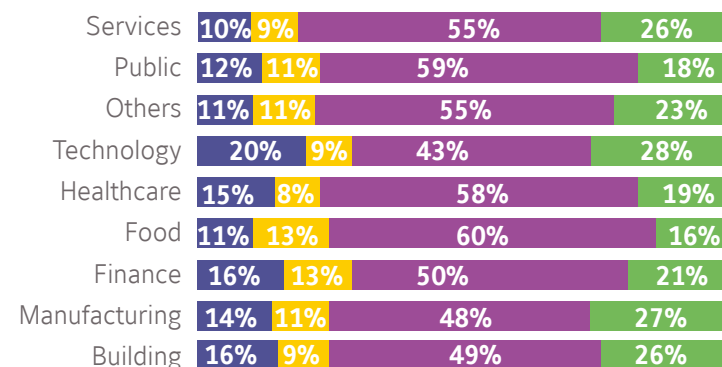


Figure 67: Preferred approach to reducing waste – analysis by industry sector

Changing Commuting Habits

45% of respondents would support employee subsidies for public transport but want their car parks kept so people can still drive if they want.

We asked respondents to select which option they would prefer if an organization wanted to change employees commuting habits to save emissions:

- Option A: working from home once a week.
- Option B: subsidize employees' use of public transport but keep the car park so people can still drive if they want.
- Option C: limit parking and encourage employees to car-share.
- Option D: subsidizing a switch to public transport use and changing the car park into a community football pitch.

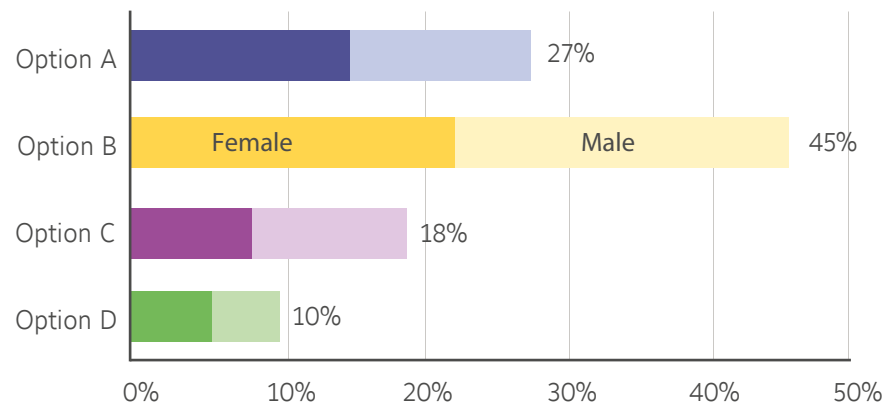


Figure 68: Preferred approach to changing commuting habits - overall global results

Overall, all countries, age groups, job responsibilities, genders and industry sectors preferred option B (subsidized public transport & car parking). There was very little appetite for aggressive solutions such as option D (subsidized public transport and no car park) which scored only 10% support. And the issue of homeworking was a divisive one which garnered varying levels of support across the sub-categories.

China showed the most support for option B (subsidized public transport & car parking) at 50% and India showed the least support at 40%. Attitudes to homeworking (option A) varied greatly across countries with China showing only 14% support but the USA showing 41% support - the highest support for homeworking of any sub-category.

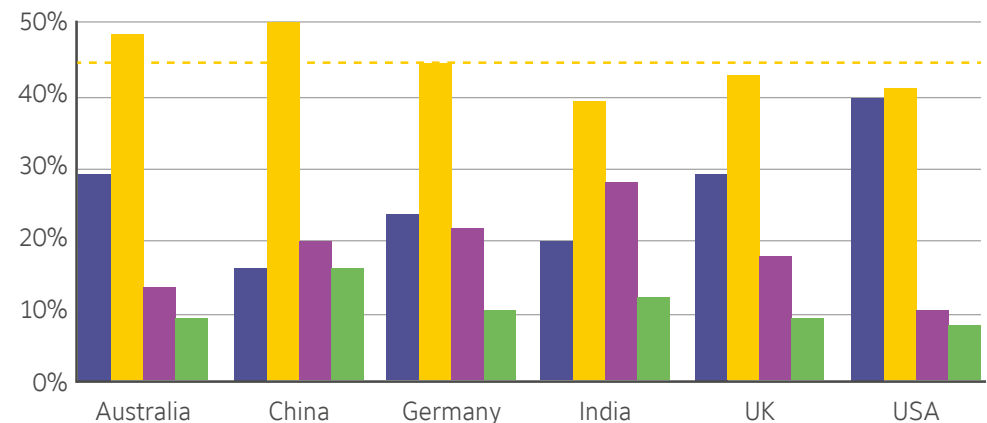


Figure 69: Preferred approach to changing commuting habits - analysis by country

Support for option B (subsidized public transport & car parking) was very consistent across the age groups. 51-60 year olds scored the highest support at 47% but the lowest level of support was only 44%, which was recorded by both 31-40 year olds and the over 60's. Males and Females also scored very similar results.

Opinions on homeworking (option A) were more varied. The over 60's were the most keen age group at 34% and 18-30 years were the least supportive scoring a below average 23%.

Leading Sustainability Attitudes by Age					
	18-30	31-40	41-50	51-60	60+
% of total	21%	35%	23%	17%	4%
Option A	24%	26%	31%	29%	34%
Option B	45%	44%	46%	47%	44%
Option C	20%	19%	14%	17%	14%
Option D	11%	11%	9%	7%	8%

Figure 70: Preferred approach to changing commuting habits – analysis by age

Analysis by job responsibility also produced consistent support for option B (subsidized public transport & car parking). R&D staff scored the highest level of support at 51%. The lowest score was 41% which was given by both Engineers and Technical Support staff. Executives and Managers were in line with overall results scoring option B at 45% and 44% respectively.

Again, homeworking (option A) yielded a more divided response. Technical Support staff were most in favor of this at 34%. However, Executives across the globe clearly do not support this as a viable option for changing commuting habits, scoring it at only 13%. Managers were more in line with the overall opinion, scoring 27%.

And lastly, analysis by industry sector provided the greatest variation in levels of support. The Food sector scored the highest level of support for option B (subsidized public transport & car parking) of any sub-category at 55%. Conversely, the Building sector had the lowest level of support of any sub-category at 35%.

Homeworking opinion was also varied across industry sectors. The Services/FM sector were most in favor, scoring option A at 34%. The lowest score for homeworking was only 2% below the average at 22%. This was recorded by the Healthcare sector.

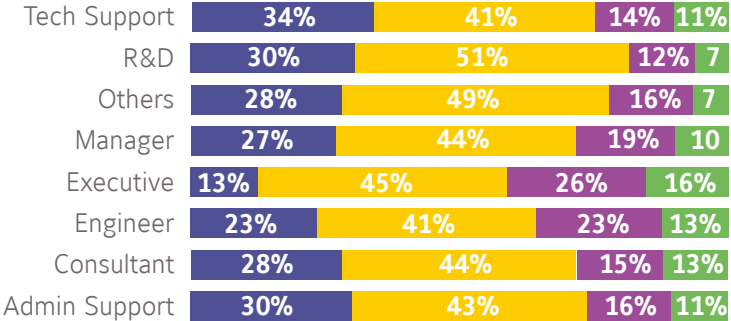


Figure 71: Preferred approach to changing commuting habits – analysis by job responsibility

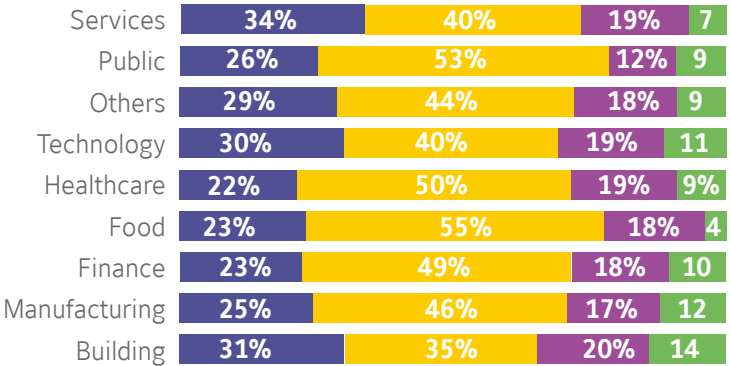



Figure 72: Preferred approach to changing commuting habits – analysis by industry sector





“ The activist is not the man who says the river is dirty. The activist is the man who cleans up the river. ”

– Ross Perot

Conclusions

We believe we are all responsible for sustainability and we want to work in an organisation which enables us to behave sustainably. But we don't want to be burdened with it, and we don't want it to impact upon our existing working patterns. Organisations wishing to develop a more sustainable workplace are mostly likely to succeed if they demonstrate strong leadership and a tangible commitment which employees can respond to. Executives hold the key to improving sustainable cultures in the workplace: the attitude of Executives towards taking action on sustainability will heavily influence the outcome. Executives, take note!

Conclusion

Emerging Trends

The analysis of the results has seen the emergence of a number of key trends which have been summarized below:

- Western countries have some of the best – and worst – examples of sustainable cultures. The USA and Australia both demonstrated good sustainable behaviors, but the UK – and Germany in particular – were behind the rest of the world in some responses.
- Strong leadership around sustainability is essential for driving change. Organizations where Executive support is weak will struggle to gain the support and momentum of employees efforts.
- Executives across the globe are reluctant to let sustainability impact financial goals and working patterns and practices. They also strongly believe in the need for employees to take an active role in developing sustainable cultures.
- No clear trends across other job responsibilities emerged. The most promising results typically came from Research and Development staff, Technical Support staff and Administrative staff. Engineers, however, tended to show the least support for sustainable practices.
- Females behave slightly more sustainably than males. Males and females scored similar results in many areas, but crucially, on issues that created divided opinion amongst respondents (such as competitiveness) females consistently demonstrated more sustainable attitudes.
- Support for sustainability increases with age. While younger generations show good levels of support for aspects of sustainability, in almost all cases, the older generations outperformed their younger counterparts. And with many countries seeing an ageing workforce, this is a positive sign that sustainable practices will be well supported.
- Some industry sectors are more advanced in sustainable practices than others. The Building and Services/FM industries consistently stood out as sectors which demonstrated more advanced sustainable behaviors and attitudes. Conversely, the Food & Beverages industry and the Public Sector frequently scored below global averages.
- There is room for improvement in every country, industry sector, job type, age and gender. Respondents have a higher opinion of their sustainability credentials than their attitudes and actions demonstrate.



Attitudes to Sustainability

We believe we are all responsible for sustainability and we all want to work in an organization which enables us to behave sustainably. But we don't want to be burdened with it, and we don't want it to impact upon our existing working patterns. So where exactly are we on the sustainability cultures model?

Little variation across the sustainability culture types is evident amongst the respondent sub-categories. All are mostly Campaigners, then Housekeepers, then Libertarians then Pragmatists. The Building industry had the highest proportion of Campaigners; the Healthcare sector had the highest percentage of Housekeepers; Consultants sector had the highest proportion of Libertarians and Trainees had the highest percentage of Pragmatists.

The majority of respondents agreed that sustainability was everyone's responsibility. Only Chinese respondents answered differently (believing it was employees' responsibility). And again, there was a strong consensus that employees should be actively involved in implementing sustainable practices. Furthermore, two thirds of us want to work in an organization where employees take the lead in initiating sustainable practices.

The world is divided however, over the impact sustainable practices should have on working life and how much employees should be burdened. One third feel employees shouldn't be impacted, another third think they should and the final third are undecided. This uncertainty was evident in the variety of responses across the sub-categories. A clear trend, however, was the strong Executive response that employees should not be impacted.

And lastly, it is evident that environmental sustainability is not yet a differentiator for prospective employees looking for a new job. Only one third of respondents would consider a company's environmental record. Interestingly, most Executives would not check the records but most Managers would.

These results suggest that employees believe they play an important role in making workplaces more sustainable, but their opposition to changing working patterns and increasing workloads must be carefully managed. Organizations wishing to develop a more sustainable workplace are mostly likely to succeed if they demonstrate strong leadership and a tangible commitment which employees can respond to. Executives, take note.



Investment in Sustainability

The results for questions relating to investment in sustainability show good agreement about investment but conflicting attitudes towards competitiveness. Respondents were asked to rate agreement on:

- The need to prioritize investment
- The need for investments to be long-term
- The need to balance sustainability investment against continued competitiveness.

Encouragingly, the vast majority of respondents agreed that investment in sustainability should be both a priority and a long-term investment. On both aspects, agreement levels of Executives and Managers were in line with the average.

The issue of balancing sustainability and competitiveness, however, divided respondents. Overall, a small majority (38%) supported the statement "sustainability should not impact a company's ability to compete – it should not be expected to make changes for the sake of the environment if its competitors aren't also doing so". Another 36%, however, disagreed. Sub-categories and countries were equally divided with an even split between those who agreed and those who disagreed. Crucially, however, the sub-category which scored the highest level of agreement was Executives. Managers also agreed with the statement.

These conflicting results suggest that employees are looking to their companies to demonstrate leadership in sustainability through prioritized and sustained investment.

Taking Action

No amount of good intentions will make a difference to sustainability if we do not follow through with actions. Respondents were asked which actions they would be prepared to take to tackle the following issues:

- Reducing carbon emissions
- Reducing waste sent to landfill
- Changing commuting habits to reduce vehicle emissions.

Preferred approaches to reducing carbon emissions varied across sub-categories but the preferred option (selected by one third of respondents) was the most comprehensive approach. Worryingly, however, Executives preferred a more simplistic solution.

Respondents across the globe are happy to sort their own waste for recycling, but only Indian respondents were supportive of more aggressive solutions such as implementing zero-waste targets. Encouragingly, Executives and Managers showed above average support for this approach as well.

Nearly half of all respondents support public transport subsidies, but want to retain the right to drive to work. There was very little support for more aggressive solutions such as removing car parks. And lastly, Homeworking is still a divided issue for respondents. While many sub-categories are keen, Executives are not.

Once again, the attitude of Executives towards taking action on sustainability will heavily influence the outcome. The results suggest that where Executives takes the lead, employees will follow.

Final Recommendations

Executives hold the key to improving sustainable cultures in the workplace. Employees across the world are willing to play their part in driving change but want matched efforts from their organizations. Most respondents are at the beginning of their sustainability journey and significant improvements can be made. For now, however, organizations should seek to implement a balance of quick wins and long-term goals; company-driven initiatives and employee-led changes to build a lasting and diverse platform for change.



AGILE WORKING
- THIN BUILDINGS

Please give an example of something your organisation has done to promote sustainability in the workplace:

Ensuring all machinery is set to power down automatically each evening.

Please give an example of something your organisation has done to promote sustainability in the workplace:

Phasing out bottled water - encouraging everyone to drink tap water instead

Example of something your organisation has done to promote sustainability in the workplace:

IN AVAILABLE
FOR CAFE CUPS

Please give an example of something your organisation has done to promote sustainability in the workplace:

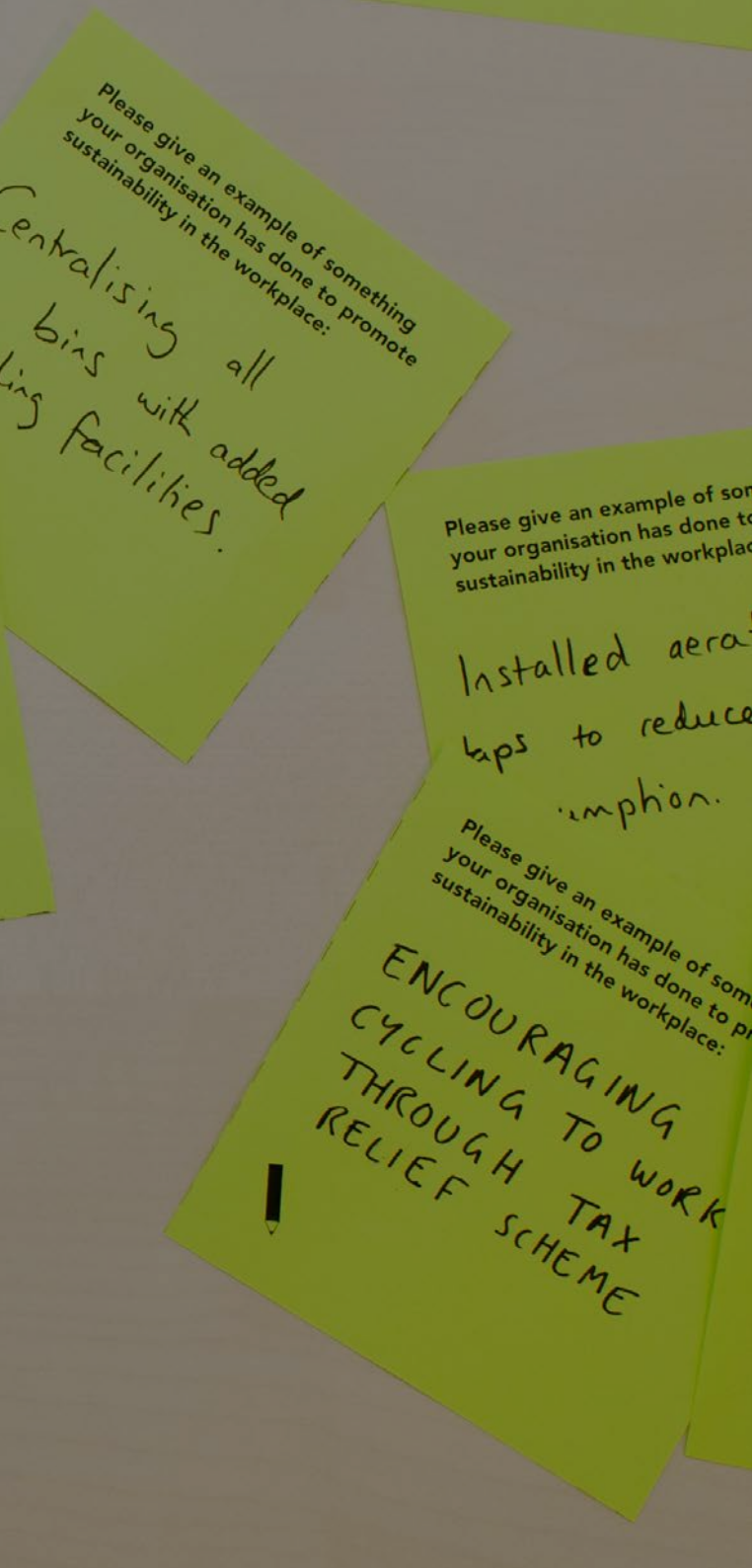
E-mail footer -
"think before you print"
added to all messages

Please give an example of something your organisation has done to promote sustainability in the workplace:

INVESTING IN
LOW EMISSION
COMPANY CARS

Please give an example of something your organisation has done to promote sustainability in the workplace:

Implementation of
smart metering system.



Appendix

This appendix contains additional information about global respondents, summarises the survey results and provides a comparison with global results.

Respondent Gender, Age Group and Job Responsibility

Sector	Global	Australia		China		Germany		India		UK		USA	
Male	50%	39% ▼	11%	56%	06% ▲	61%	11% ▲	54%	04% ▲	47%	03% ▼	48%	02% ▼
Female	50%	61% ▲	11%	44%	06% ▼	39%	11% ▼	46%	04% ▼	53%	03% ▲	52%	02% ▲
Sector	Global	Australia		China		Germany		India		UK		USA	
<18	00%	00% ►	00%	00%	00% ►	00%	00%	00%	00% ►	00%	00% ►	00%	00% ►
18-30	21%	14% ▼	07%	36%	15% ▲	18%	03% ▼	39%	18% ▲	18%	03% ▼	12%	09% ▼
31-40	35%	26% ▼	09%	51%	16% ▲	37%	02% ▲	43%	08% ▲	33%	02% ▼	24%	11% ▼
41-50	23%	28% ▲	05%	10%	13% ▼	30%	07% ▲	11%	12% ▼	27%	04% ▲	30%	07% ▲
51-60	17%	27% ▲	10%	02%	15% ▼	13%	04% ▼	06%	09% ▼	19%	02% ▲	25%	08% ▲
>60	04%	05% ▲	01%	01%	03% ▼	02%	02% ▼	01%	03% ▼	03%	01% ▼	09%	05% ▲
Sector	Global	Australia		China		Germany		India		UK		USA	
Administrative support	14%	18% ▲	04%	06%	08% ▼	8%	06% ▼	13%	01% ▼	21%	07% ▲	13%	01% ▼
Consultant	07%	07% ►	00%	05%	02% ▼	11%	04% ▲	10%	03% ▲	06%	01% ▼	04%	03% ▼
Engineer	07%	01% ▼	06%	21%	14% ▲	10%	03% ▲	12%	05% ▲	04%	03% ▼	03%	04% ▼
Executive	05%	02% ▼	03%	09%	04% ▲	05%	01% ▼	13%	07% ▲	03%	02% ▼	04%	02% ▼
Managerial	26%	27% ▲	01%	36%	10% ▲	19%	07% ▼	35%	09% ▲	20%	06% ▼	24%	02% ▼
Others	29%	36% ▲	07%	10%	19% ▼	33%	04% ▲	07%	22% ▼	34%	05% ▲	38%	09% ▲
R&D/researcher	04%	03% ▼	01%	06%	02% ▲	03%	01% ▼	03%	01% ▼	04%	00% ►	05%	01% ▲
Technical support	07%	06% ▼	01%	07%	00% ►	09%	02% ▲	07%	00% ►	07%	00% ►	08%	01% ▲
Trainee/apprentice	01%	00% ▼	01%	00%	01% ▼	02%	01% ▲	00%	01% ▼	01%	00% ►	01%	00% ►

Respondent Industry Sector

Sector	Global	Australia		China		Germany		India		UK		USA	
Agriculture/Farming	01%	00%	01% ▼	02%	01% ▲	00%	01% ▼	01%	00% ►	00%	01% ▼	00%	01% ▼
Art & Design	01%	00%	01% ▼	02%	01% ▲	01%	00% ►	00%	01% ▼	03%	02% ▲	01%	00% ►
Automotive/Car	02%	00%	02% ▼	01%	01% ▼	05%	03% ▲	02%	00% ►	01%	01% ▼	03%	01% ▲
Building/Construction	04%	02%	02% ▼	06%	02% ▲	02%	02% ▼	04%	00% ►	02%	02% ▼	06%	02% ▲
Chemicals	01%	00%	01% ▼	03%	02% ▲	02%	01% ▲	01%	00% ►	00%	01% ▼	00%	01% ▼
Manufacturing/Engineering	10%	05%	05% ▼	18%	08% ▲	11%	01% ▲	14%	04% ▲	05%	05% ▼	11%	01% ▲
Finance/Insurance	09%	13%	04% ▲	04%	05% ▼	11%	02% ▲	14%	05% ▲	06%	03% ▼	07%	02% ▼
Food & Beverages	03%	03%	00% ►	02%	01% ▼	02%	01% ▼	01%	02% ▼	04%	01% ▲	02%	01% ▼
Healthcare	08%	15%	07% ▲	03%	05% ▼	08%	00% ►	05%	03% ▼	12%	04% ▲	10%	02% ▲
Technology/IT	16%	07%	09% ▼	1%	15% ▲	12%	04% ▼	31%	15% ▲	10%	06% ▼	12%	04% ▼
Law/Legal	01%	01%	00% ►	01%	00% ►	04%	03% ▲	00%	01% ▼	01%	00% ►	01%	00% ►
Life Science/Pharmaceutical	02%	01%	01% ▼	01%	01% ▼	02%	00% ►	03%	01% ▲	02%	00% ►	02%	00% ►
Marketing/Communication	01%	01%	00% ►	02%	01% ▲	00%	01% ▼	01%	00% ►	00%	01% ▼	01%	00% ►
Media/Film/Production	01%	01%	00% ►	01%	00% ►	01%	00% ►	01%	00% ►	01%	00% ►	01%	00% ►
Other	18%	22%	04% ▲	10%	08% ▼	21%	03% ▲	11%	07% ▼	15%	03% ▼	23%	05% ▲
Oil & Gas/Petroleum	02%	01%	01% ▼	06%	04% ▲	01%	01% ▼	02%	00% ►	02%	00% ►	01%	01% ▼
Physics/Math	00%	01%	01% ▲	01%	01% ▲	01%	01% ▲	00%	00% ►	00%	00% ►	00%	00% ►
Public Sector	12%	22%	10% ▲	02%	10% ▼	10%	02% ▼	03%	09% ▼	24%	12% ▲	09%	03% ▼
Estate/CRE	01%	00%	01% ▼	01%	00% ►	00%	01% ▼	01%	00% ►	01%	00% ►	02%	01% ▲
Services/FM	07%	05%	02% ▼	03%	04% ▼	06%	01% ▼	05%	02% ▼	11%	04% ▲	08%	01% ▲

Attitudes to Sustainability

Question	Global		Australia		China		Germany		India		UK		USA	
Classification	Campaigner	34%	35%	01% ▲	34%	00% ►	32%	02% ▼	35%	01% ▲	32%	02% ▼	34%	00% ►
	Housekeeper	27%	28%	01% ▲	28%	01% ▲	26%	01% ▼	25%	02% ▼	29%	02% ▲	28%	01% ▲
	Pragmatist	18%	16%	02% ▼	17%	01% ▼	19%	01% ▲	17%	01% ▼	18%	00% ►	17%	00% ►
	Libertarian	21%	21%	00% ►	21%	00% ►	23%	02% ▲	23%	02% ▲	21%	00% ►	21%	00% ►
Who should take the lead on sustainability?	Option D	58%	68%	10% ▲	32%	26% ▼	48%	10% ▼	52%	06% ▼	63%	05% ▲	66%	08% ▲
	Option C	25%	17%	08% ▼	47%	22% ▲	28%	03% ▲	31%	06% ▲	19%	06% ▼	18%	07% ▼
	Option B	11%	11%	00% ►	15%	04% ▲	12%	01% ▲	09%	02% ▼	13%	02% ▲	10%	01% ▼
	Option A	06%	04%	02% ▼	06%	00% ►	12%	06% ▲	08%	02% ▲	05%	01% ▼	06%	01% ▼
I'd like to work for a company where employees lead sustainability	Agree	67%	63%	04% ▼	80%	13% ▲	63%	04% ▼	88%	21% ▲	53%	14% ▼	62%	05% ▼
	Disagree	05%	05%	00% ►	04%	01% ▼	06%	01% ▲	02%	03% ▼	08%	03% ▲	05%	00% ►
	Neutral	28%	32%	04% ▲	16%	12% ▼	31%	03% ▲	10%	18% ▼	39%	11% ▲	33%	05% ▲
Employees should be involved in making working practices more sustainable	Agree	81%	80%	01% ▼	88%	07% ▲	74%	07% ▼	92%	11% ▲	75%	06% ▼	75%	06% ▼
	Disagree	03%	03%	00% ►	03%	00% ►	03%	00% ►	01%	02% ▼	05%	02% ▲	05%	02% ▲
	Neutral	16%	17%	01% ▲	09%	07% ▼	23%	07% ▲	07%	09% ▼	20%	04% ▲	20%	04% ▲
Employees shouldn't be burdened with sustainable practices on top of work	Agree	38%	36%	02% ▼	45%	07% ▲	36%	02% ▼	63%	25% ▲	34%	04% ▼	27%	11% ▼
	Disagree	33%	34%	01% ▲	22%	11% ▼	26%	07% ▼	15%	18% ▼	36%	03% ▲	45%	12% ▲
	Neutral	29%	30%	01% ▲	33%	04% ▲	38%	09% ▲	22%	07% ▼	30%	01% ▲	28%	01% ▼
Sustainability shouldn't impact on how I work	Agree	42%	43%	01% ▲	51%	09% ▲	27%	15% ▼	63%	21% ▲	43%	01% ▲	36%	06% ▼
	Disagree	28%	25%	03% ▼	21%	07% ▼	33%	05% ▲	15%	13% ▼	28%	00% ►	33%	05% ▲
	Neutral	30%	32%	02% ▲	28%	02% ▼	40%	10% ▲	22%	08% ▼	29%	01% ▼	31%	01% ▲
I wouldn't consider the environmental record when applying for jobs	Agree	37%	45%	08% ▲	28%	09% ▼	31%	06% ▼	38%	01% ▲	48%	11% ▲	34%	03% ▼
	Disagree	33%	24%	09% ▼	47%	14% ▲	24%	09% ▼	36%	03% ▲	25%	08% ▼	39%	06% ▲
	Neutral	30%	31%	01% ▲	25%	05% ▼	45%	15% ▲	26%	04% ▼	27%	03% ▼	27%	03% ▼

Investing in Sustainability

Question	Global		Australia		China		Germany		India		UK		USA	
Companies should prioritise investment in sustainability	Agree	71%	72%	01% ▲	73%	02% ▲	61%	10% ▼	80%	09% ▲	65%	06% ▼	73%	02% ▲
	Disagree	07%	04%	03% ▼	08%	01% ▲	06%	01% ▼	05%	02% ▼	10%	03% ▲	06%	01% ▼
	Neutral	22%	24%	02% ▲	19%	03% ▼	33%	11% ▲	15%	07% ▼	25%	03% ▲	21%	01% ▼
Sustainability should be about long-term investment	Agree	86%	91%	05% ▲	84%	02% ▼	70%	16% ▼	90%	04% ▲	86%	00% ►	90%	04% ▲
	Disagree	03%	02%	01% ▼	05%	02% ▲	07%	04% ▲	02%	01% ▼	01%	02% ▼	02%	01% ▼
	Neutral	11%	07%	04% ▼	11%	00% ►	23%	12% ▲	08%	03% ▼	13%	02% ▲	08%	03% ▼
Sustainability should not impact a company's ability to be competitive	Agree	38%	34%	04% ▼	50%	12% ▲	37%	01% ▼	59%	21% ▲	37%	01% ▼	28%	10% ▼
	Disagree	36%	42%	06% ▲	22%	14% ▼	22%	14% ▼	21%	15% ▼	38%	02% ▲	49%	13% ▲
	Neutral	26%	24%	02% ▼	28%	02% ▲	41%	15% ▲	20%	06% ▼	25%	01% ▼	23%	03% ▼

Taking Action

Question	Global		Australia		China		Germany		India		UK		USA	
Actions to lower carbon emissions	Option D	34%	39%	05% ▲	22%	12% ▼	23%	11% ▼	33%	01% ▼	37%	03% ▲	40%	06% ▲
	Option B	26%	28%	02% ▲	27%	01% ▲	34%	08% ▲	32%	06% ▲	24%	02% ▼	21%	05% ▼
	Option C	24%	21%	03% ▼	29%	05% ▲	22%	02% ▼	20%	04% ▼	25%	01% ▲	24%	00% ►
	Option A	16%	12%	04% ▼	22%	06% ▲	21%	05% ▲	15%	01% ▼	14%	02% ▼	15%	01% ▼
Actions to reduce waste sent to landfill	Option C	51%	59%	08% ▲	43%	08% ▼	50%	01% ▼	25%	26% ▼	58%	07% ▲	60%	09% ▲
	Option D	24%	21%	03% ▼	22%	02% ▼	22%	02% ▼	43%	19% ▲	19%	05% ▼	19%	05% ▼
	Option A	14%	12%	03% ▼	22%	08% ▲	18%	04% ▲	22%	08% ▲	11%	03% ▼	10%	04% ▼
	Option B	11%	08%	03% ▼	13%	02% ▲	10%	01% ▼	10%	01% ▼	12%	01% ▲	11%	00% ►
Actions to reduce emissions from commuting	Option B	45%	49%	04% ▲	50%	05% ▲	46%	01% ▲	40%	05% ▼	43%	02% ▼	42%	03% ▼
	Option A	27%	29%	02% ▲	14%	13% ▼	24%	03% ▼	20%	07% ▼	29%	02% ▲	41%	14% ▲
	Option C	18%	13%	05% ▼	20%	02% ▲	20%	02% ▲	28%	10% ▲	19%	01% ▲	11%	07% ▼
	Option D	10%	09%	01% ▼	16%	06% ▲	10%	00% ►	12%	02% ▲	09%	01% ▼	06%	04% ▼
Actions to reduce disposable paper cups	Option C	40%	43%	03% ▲	52%	12% ▲	30%	10% ▼	26%	14% ▼	39%	01% ▼	43%	3% ▲
	Option B	24%	26%	02% ▲	20%	04% ▼	40%	16% ▲	22%	02% ▼	23%	01% ▼	19%	05% ▼
	Option D	20%	19%	01% ▼	23%	03% ▲	23%	03% ▲	26%	06% ▲	18%	02% ▼	16%	04% ▼
	Option A	16%	12%	04% ▼	05%	11% ▼	07%	09% ▼	26%	10% ▲	20%	04% ▲	22%	06% ▲



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