



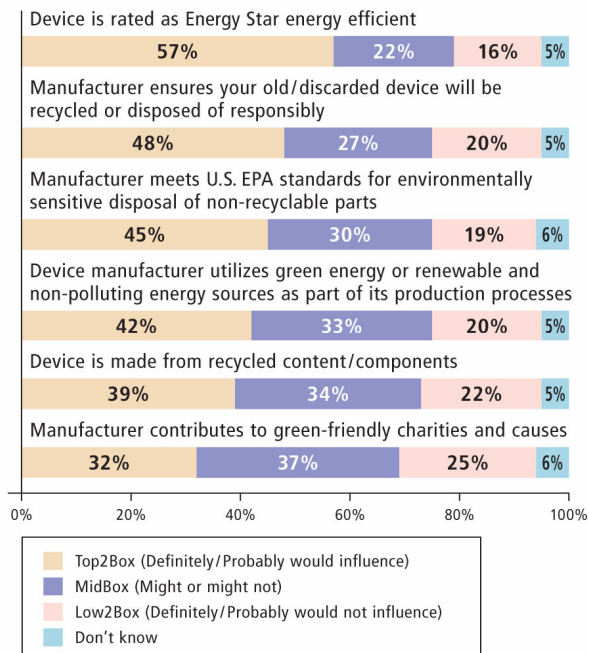
## Painting Tech's 'White Space' Green

### *Tech Firms See Intensifying Need To Address Environmental Factors*

**New York, NY, September 5, 2007** – 'Green' or environmentally sensitive Tech products and practices are emerging as a new element of Tech brand positioning and consumer consideration, according to survey results recently released by Ipsos.

The survey asked a broad spectrum of online Americans about the importance they place on a half-dozen different green Tech practices, and the degree to which they view each in a long list of Tech brands as environmentally sensitive in their approach to business. Taken together, the results indicate that while green factors are emerging as a critical-mass consumer consideration, the potential to claim a green leadership position is much more fragmented across the Tech brandscape.

#### Green Factors Impacting Tech Brand Consideration



Source: Ipsos Insight © Ipsos Insight 2007  
Base: All U.S. respondents who have personally owned/used some technology devices and have Internet access (n=909)

When consumers were asked to rate the importance of each of six green practices in influencing their Tech purchase preferences, over half (57%) rated the presence of the Energy Star label as influential. Following closely behind in purchase influence were manufacturer commitment to discarding older Tech products in an environmentally friendly manner (48%), and meeting EPA standards for these product disposals (45%). At least one-third of the respondents rated each of the other three factors as influential as well, including green energy inputs to production, manufacturing that incorporates recycled components, and contributions to environmental causes.

Says Todd Board, SVP of Ipsos Insight's Media, Entertainment & Technology practice, "As these green issues emerge as more mainstream considerations, what's striking is their overall consistency regardless of age, gender, income, or where people live. However, it is interesting to note that college-educated Americans



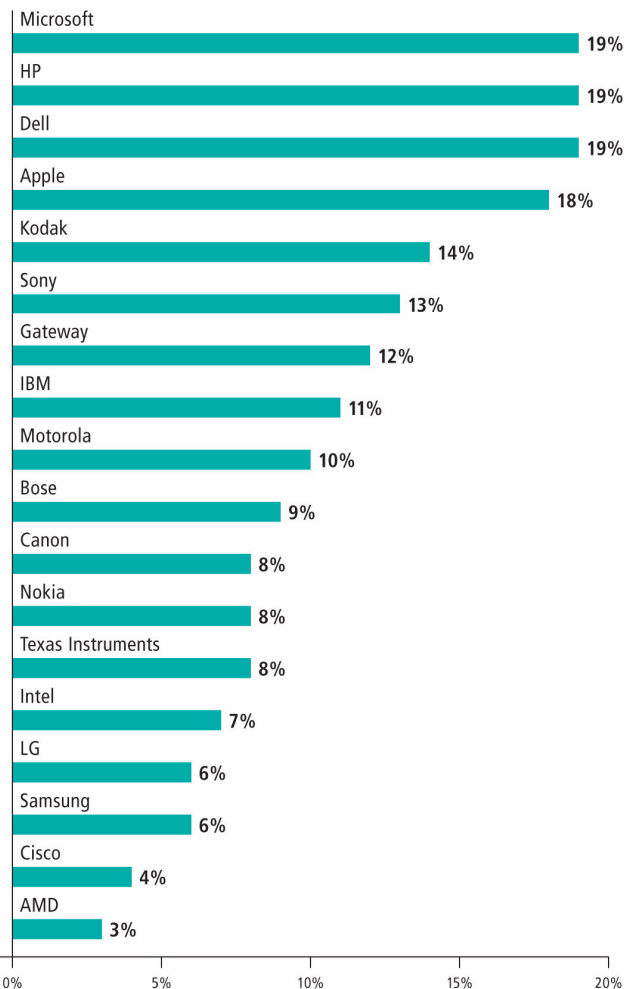
place more value on each of these factors, except contributions to environmental causes, than other Americans do. We also see more importance placed on the Energy Star rating among Americans with incomes over \$50,000. So the influence of these environmentally friendly purchase factors is a bit more prominent among more socially influential consumers.”

In the survey’s other main finding, respondents were presented with a long list of leading Tech brands and asked which (if any) they would associate with having green or environmentally friendly business practices. The first tier were all brands – Dell, HP, Microsoft, and Apple – that consumers encounter regularly, either in their personal lives, at work, or in the news. A second tier included venerable Tech brands reflecting very different fortunes in recent years – Kodak, Sony, Gateway, IBM, and Motorola.

Says Board, “To some extent the rank order of these brand mentions seems to mirror their prominence in the Tech landscape, if you factor in Apple’s increased exposure in recent years. At the same time, it’s something of a ‘halo index,’ in that there’s precious little information available to consumers for them to really assess how green one Tech firm is versus another. So when we see a Kodak, Sony or IBM emerge here, to some extent we’re seeing more generalized brand affinity being transferred to this green dimension. Of all the brands here who might see an unexpected opportunity, Gateway may be the most intriguing.”

Adds Board, “These results, along with other data we see, convince me that at least for American consumers this is emerging as a key issue – probably

### Tech Brands Perceived as Greenest



55% of respondents perceived no brands as green

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Base: All U.S. respondents who have personally owned/used some technology devices and have Internet access (n=909)





not a universal factor any time soon, but important enough to enough Americans to matter to Tech firms. The interesting paradox for the market leaders, or those who would be, is that this may rapidly become a table-stakes expectation for many consumers – ‘of course, I expect prominent brand X to care about the environment and act accordingly.’ However, while this is emerging as a cost-of-entry issue, it isn’t clear that any one Tech firm can carve out sustainable differentiation around green behaviors and positioning. Our data suggest a bit more skepticism about Tech brand commitments to green issues among younger Americans than among those age 55-plus.”

“One last point is that while American consumers use Tech products from brands based all over the world, brands that are headquartered in the U.S. dominate the more prominent green mentions – Japan-based Sony is the only exception. These U.S.-based brands have manufacturing and R&D facilities deployed globally, dealing with a highly variable patchwork of local expectations regarding environmentally friendly practices. This suggests that as American consumers increasingly value green Tech practices, and have related expectations for U.S.-based Tech brands, it’s increasingly important for these brands to monitor their environmentally-oriented practices worldwide. When that article inevitably hits the newswires about their manufacturing in a faraway place, they want it to be good news.”

## **Methodology**

*Data were drawn from an online survey conducted by Ipsos Insight, among a nationally representative sample of age 18+ adults, drawn from its U.S. online panel. Data collection occurred over April 3 through April 6, 2007.*

*Of the total survey respondent base of N=1,295, 91% (N=1,183) reported personal ownership and/or use of at least one in a list of technology devices (see list below). Among this base of N=1,183 device owners/users, respondents were asked the questions highlighted in this release.*

*The list of qualifying products used/owned in order to be asked the ‘green’ question sequence included the following:*

*Apple iPod or other Apple brand portable MP3/media player*

*Non-Apple branded portable MP3/media player*

*Smartphone device such as a Blackberry or Treo capable of streaming video*

*Standard cellphone or wireless handset*

*Notebook or Tablet PC*

*Latest-generation video game console such as a Nintendo Wii, Microsoft X-Box 360 or Sony Playstation 3*

*Portable Gaming Device such as a Sony PSP or Nintendo DS*

*Digital Video Recorder or TiVo*

*High-Definition Television (Plasma, LCD or DLP)*



*Personal/home printer capable of printing photos*

*Digital Camera*

*High Definition Camcorder*

*Portable Navigation Device (GPS)*

*High Definition DVD Player (such as Blu-Ray or HD-DVD)*

*High Definition Radio Receiver (HD-Radio)*

**For more information on this new release, please contact:**

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