

International Survey Highlights

Business Attitudes Towards Sustainability

Attitudes towards sustainability amongst companies around the world are revealed in the results of an international research study conducted for Dow Corning Corporation by the independent market research company Harris Interactive.



Summary of Findings

- Waste reduction is considered the most important environmental issue in the USA; Brazil; Italy; Germany and China. Korea and India place more importance on developing green/environmentally friendly products.
- Overall, the use of renewable/cleaner energy sources is considered less important than waste reduction or developing green/environmentally friendly products.
- Health and safety of employees, customers and suppliers is the most important driver of environmental and sustainability decisions in all countries except Korea, where the long term business sustainability was rated higher.

- Overall, customers and the government are the two main influencers on a company's sustainability and environmental decisions.
- Environmental/sustainability factors have a strong influence on selection of suppliers in all geographies – this is strongest in India where half of respondents say it is a critical factor in selection.

Survey Methodology

Telephone interviews were conducted in Germany; Italy; Korea; China; United States and Brazil in local languages. The results were aggregated to show a regional (Europe, Asia, Americas) and global perspective. A separate study was conducted in India and results were reported separately. Participants were drawn from a cross-section of companies ranging from fewer than 50 employees to more than 5,000 employees and with annual sales ranging between less than \$10 million to more than \$50 million.

The number of participants by country was as follows:

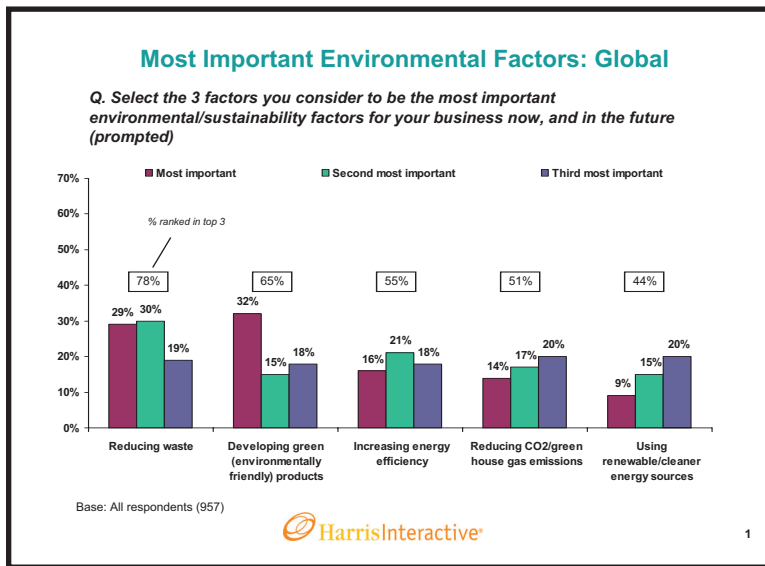
Europe	Americas	Asia	India
Germany 126	USA 187	China 293	India 135
Italy 113	Brazil 127	Korea 111	

The respondents were responsible within their company for purchasing and/or specifying the use of silicone materials. Their titles varied between Technical Manager, Raw Materials Purchasing Manager, Director of Operations, Director of Finance, R&D Manager, Production/Plant Manager, Product Line Manager and Business Unit Director.

Respondents were drawn from manufacturing companies in a wide range of industries. These included electronics; construction; beauty and personal care; automotive and textiles.

The charts included in this summary reflect the responses of the 957 respondents from Europe, Americas and Asia. They exclude data from the 135 India respondents.

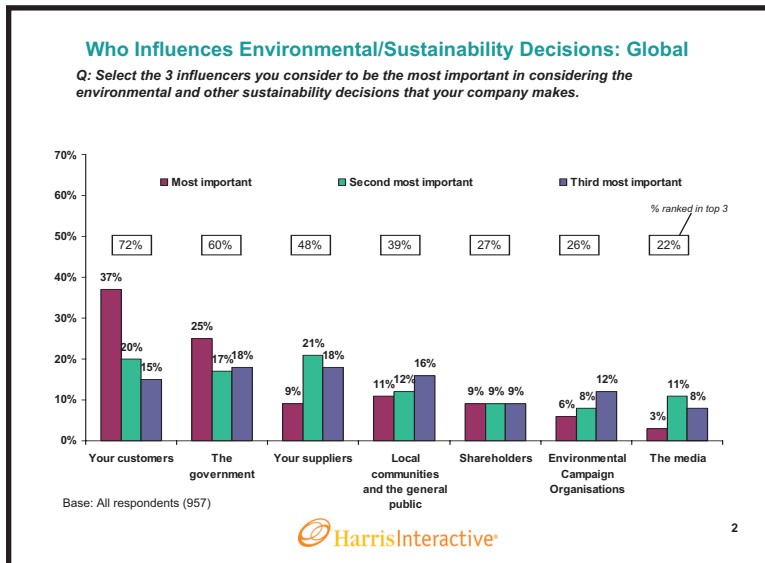
Sustainability Priorities



Key Findings

- Greater similarity found between Europe and Americas than Asia.
- *Waste reduction* ranked lower in Asia than other geographies – *development of green/environmentally friendly products* is seen as most important by 50% of managers in Asia (65% in Korea & 45% in China).
- Six out of ten respondents in China identified *increasing energy efficiency* as a top priority.
- Globally, *use of renewable or cleaner energy sources* is considered least important.

Who Influences Sustainability Decisions?

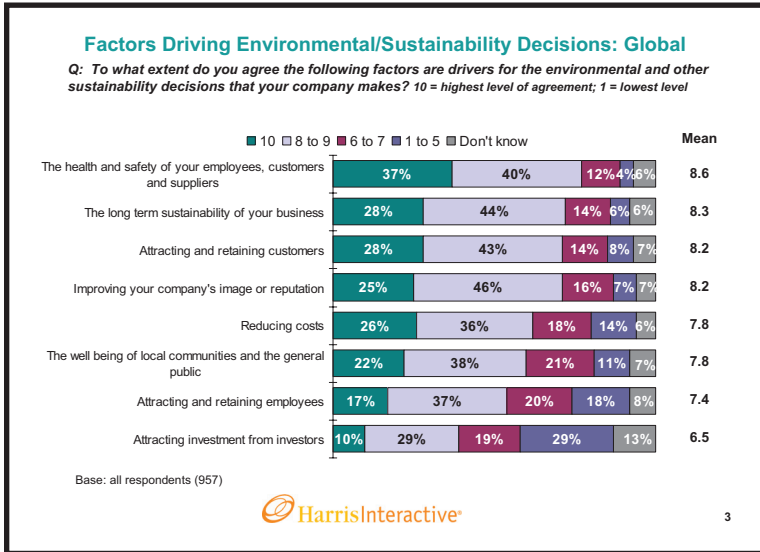


Key Findings

- Overall, *customers* and *the government* are the two main influencers on a company's sustainability and environmental decisions.
- More than 7 out of 10 respondents in Asia ranked *the government* as one of the top three influencers, with *customers* second and *suppliers* third. *Local communities and the general public* were perceived as being the least important.
- In contrast, European respondents considered *customers* to be the most important, followed by *local communities and the general public*, *the government* and *suppliers*.

- In the United States, *customers* were clearly considered most important followed by the *government* and *suppliers*. In Brazil, *customers* were also considered most important, followed closely by *local communities & the general public*.
- Overall, the environmental/sustainability influencers considered least important were *shareholders*, *environmental campaign organizations*, and *the media*. However, *environmental campaign organizations* were considered relatively highly in Korea.
- Similar to the global average, *government and customers* are regarded as the most important influencers on environmental/sustainability decisions in India.

Factors Driving Environmental and Sustainability Decisions



Key Findings

- Company reputation is not considered as a key factor in driving environmental/sustainability decisions.
- Managers in Europe, the Americas, China and India, consider the *health, safety of employees, customers and suppliers* the most important factor.
- In Korea, *the long term sustainability of their business* is considered as most important.
- *Attracting and retaining employees* is rated of less importance (apart from in China, where this factor was rated relatively highly).

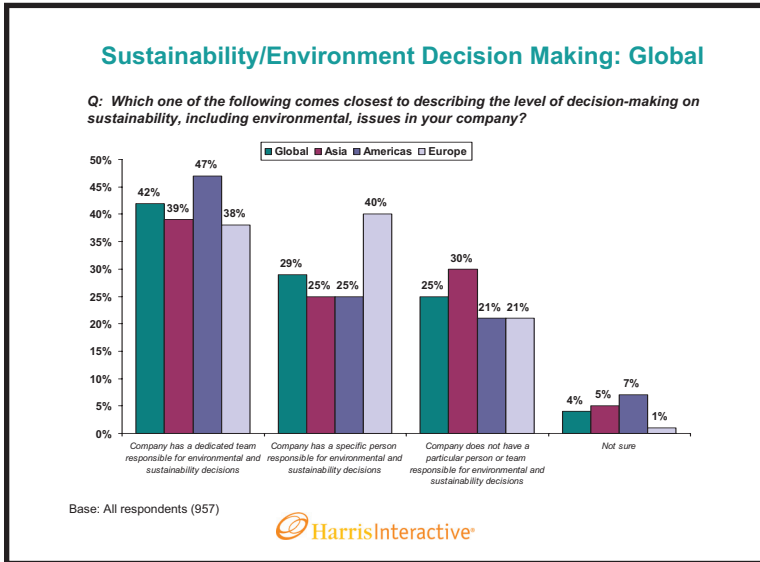
Impact of Environmental & Sustainability Factors on Supplier Selection



Key Findings

- Environmental/sustainability factors are more likely to be a *critical* influence on supplier selection in the Americas than in both Asia and Europe. Where 36% of those in the Americas agreed this is a 'critical influence'; the level dropped to 29% in Asia and 24% in Europe.
- 50% in India regard environmental/sustainability factors a critical influence – the highest proportion of the seven countries surveyed.

Responsibility for Sustainability Decision Making



Key Findings

- It is more common in the Americas than Asia or Europe, to have a *dedicated team* responsible for environmental and sustainability decisions.
- In Europe more than other regions surveyed, it is more usual for responsibility to be assigned to a specific person.
- For many companies in Asia, responsibilities are either not defined or are spread widely across the enterprise – 30% of respondents said they have neither a particular person or team responsible.
- In India there are balanced proportions in terms of level of decision-making: 35% have a dedicated team, 33% a specific person, and 31% no particular person or team.

About Harris Interactive®

Harris Interactive Inc. (www.harrisinteractive.com), based in Rochester, New York, and in London, UK, is the 13th largest and the fastest-growing market research firm in the world, most widely known for the Harris Poll® and for its pioneering leadership in the online market research industry. Long recognized by its clients for delivering insights that enable confident business decisions, the company blends the science of innovative research with the art of strategic consulting to deliver knowledge that leads to measurable and enduring value.

About Dow Corning

Dow Corning provides performance-enhancing solutions to serve the diverse needs of more than 25,000 customers worldwide. A global leader in silicon-based technology and innovation, offering more than 7,000 products and services, Dow Corning is equally owned by The Dow Chemical Company and Corning Incorporated. More than half of Dow Corning's sales are outside the United States.

Learn about Dow Corning's commitment to sustainability at www.dowcorning.com/sustainability

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