



SED Pulse Survey: COVID-19's Impact on Sustainability Goals and Workplace Restart

January 2021

Methodology

Smart Energy Decisions created this survey to ascertain current policies and opinions related to sustainability targets and restarting workplace operations amid restrictions due to the COVID-19 pandemic.

- An electronic survey was sent to large electric power users at commercial, industrial, institutional, and municipal organizations in the SED database.
- The survey was fielded on January 14-18, 2021
- A total of 157 responses are included in these results, representing 143 unique organizations.

Survey Respondents

3M Company
7-Eleven, Inc.
AFRD Georgia
Albertsons Companies, Inc.
Alectra Utilities Corporation
Allegis Group, Inc.
Allergan, Plc
Anne Arundel County
Auburn University
Aurora Public Schools
Bank of America
Bloomberg L.P.
Bucknell University
Bucks County Community College
Catalytic Combustion Corporation
CBRE Group, Inc.
CertainTeed
Chevron Corp.
Cisco
Citrix Systems, Inc.
City of Fort Collins
City of Newburyport
City of Newport News
City of Philadelphia
City of Toronto
Coe College
Cold Max Group
Colgate-Palmolive Company

Cook County
County of Fairfax, Virginia
County of Lackawanna, PA
Crown Metal Packaging Canada LP
Cushman & Wakefield, Inc.
Deerfield Ag Services Inc.
Dept of Mines, Minerals & Energy,
Commonwealth VA
Dollar Tree/Family Dollar
Duffy Properties
Ephrata Manor/UCC Homes
Federal Aviation Administration
FedEx Ground
Frontier Communications
Fulton County Schools
GAP, Inc.
GCC Cemento
Genentech, Inc.
General Motors
Georgia College & State University
Gerdau Ameristeel Corporation
Glen Rave , Inc.
Golden Rain Foundation
GSA
Hansen Technologies
Hexion Inc.
Hill's Pet Nutrition

Hilton Hotels Corporation
Home Depot
Honda
Huntley Community School District
IBM Corporation
Impact Dimensions
Intel Corp.
JLL Mexico
JM Family Enterprises, Inc.
Johnson & Wales University
Kawasaki
Key Bank
Knotel
Lawrence Berkeley National
Laboratory
Lehigh University
Limbach Company
Lockheed Martin, Corp.
Lush Cosmetics
Marriott International, Inc.
Marsh & McLennan Companies
Maryland Department of the
Environment
McCormick & Company
Merck
Merrick
Michelin

Survey Respondents (cont.)

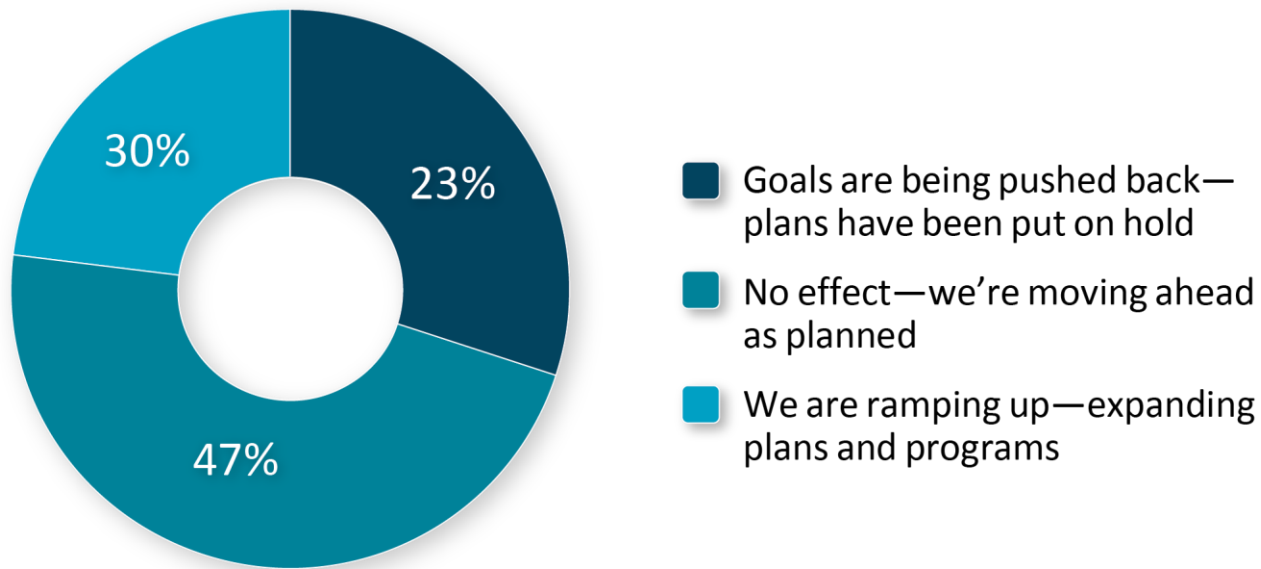
Michigan State University
MN Department of Commerce
Mohawk Industries
Montgomery County Public
Schools
National Renewable Energy
Laboratory
New Apostolic Church
Nike Inc.
NYU Tandon School of Engineering
O-I (Owens Illinois), Inc.
OpenText
Oshkosh, Corp.
Owens Corning, Inc.
Park School of Baltimore
Pennsbury School District
Port of San Diego
Port of Seattle
Procter & Gamble Co.
Raley's
Saint-Gobain
Sheetz
Shiloh Industries
Sidpec

Smith & Nephew Plc
Solvay
Sprint
SSM Health Care Corporation
Staples
State of Florida—Department of
Corrections
State of Michigan
Suffolk County Community College
Sun Chemical Corp.
Sunnybrook Health Sciences
Sunrise Senior Living Inc.
Taheri Architecture, Inc.
Target
Tarpon Industries
The City of Calgary
The Kroger Co.
The Moody Church
Town of Banff
Town of Berwick
Town of Coventry, RI
Towson University
TRC Companies, Inc.
TX Department of Transportation

Tyson Foods
U.S. Department of Energy
U.S. Department of Housing and
Urban Development
U.S. Environmental Protection
Agency
UNFI
Unionville Chadds Ford School
District
United States Energy Association
United States Forest Service
United States Navy
University of Alabama at
Birmingham
University of California, San Diego
VA Div. of Energy
VFS LLC Finance
Voya Financial
Vutility
W.W. Grainger, Inc.
Weis Markets
West Chicago
Wyndham

A majority are moving ahead – or even expanding – sustainability plans during 2021.

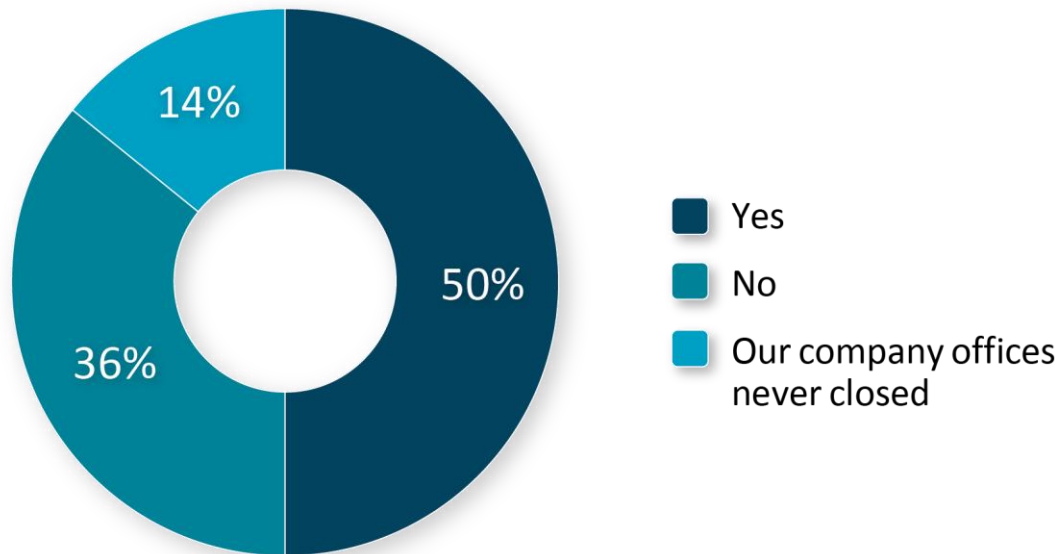
WHICH OF THE FOLLOWING BEST DESCRIBES THE IMPACT COVID-19 HAS HAD ON YOUR COMPANY'S 2021 SUSTAINABILITY PLANS?



Base: Total respondents • Source: Smart Energy Decisions Market Research, 2021

One-half of responding companies have a stated return policy.

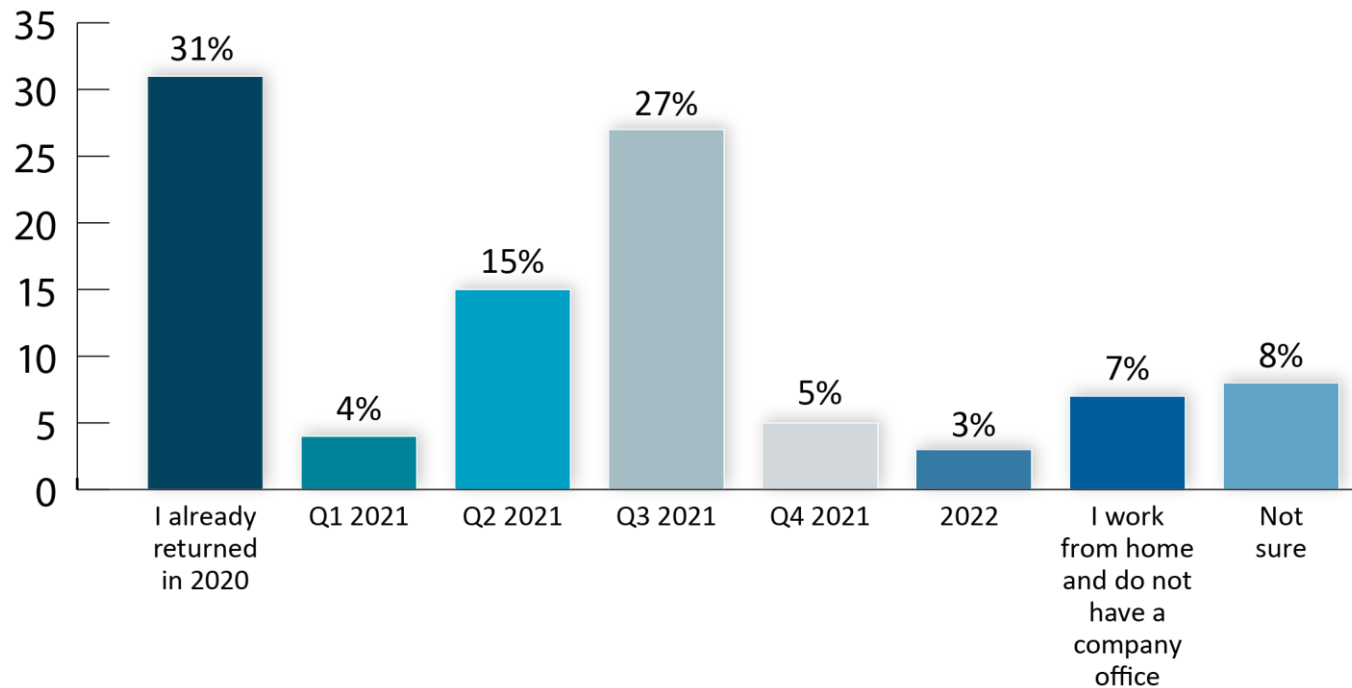
HAS YOUR COMPANY ANNOUNCED A POLICY REGARDING
STAFF RETURNING TO COMPANY OFFICES?



Base: Total respondents • Source: Smart Energy Decisions Market Research, 2021

One-half of workers expect to be in their office by June.

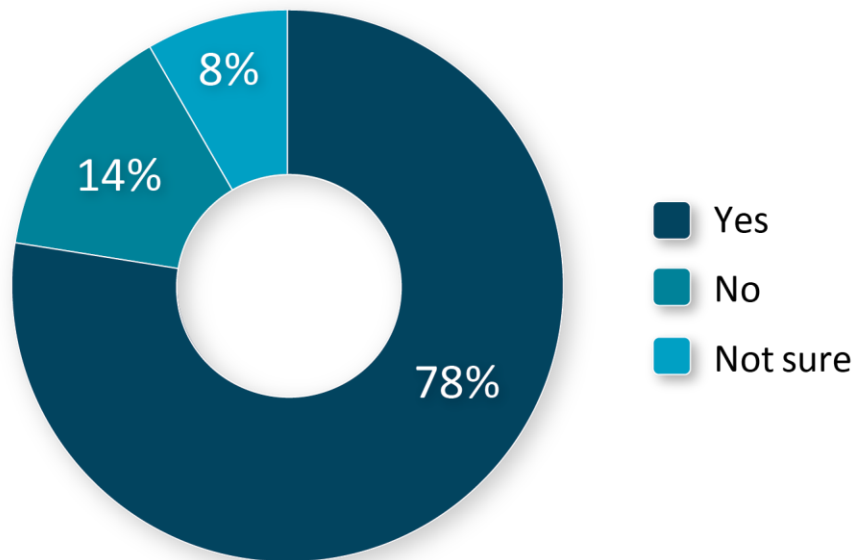
WHEN DO YOU THINK YOU PERSONALLY WILL RETURN TO YOUR COMPANY OFFICE?



Base: Total respondents • Source: Smart Energy Decisions Market Research, 2021

More than three-quarters of responding companies currently have a travel ban in place.

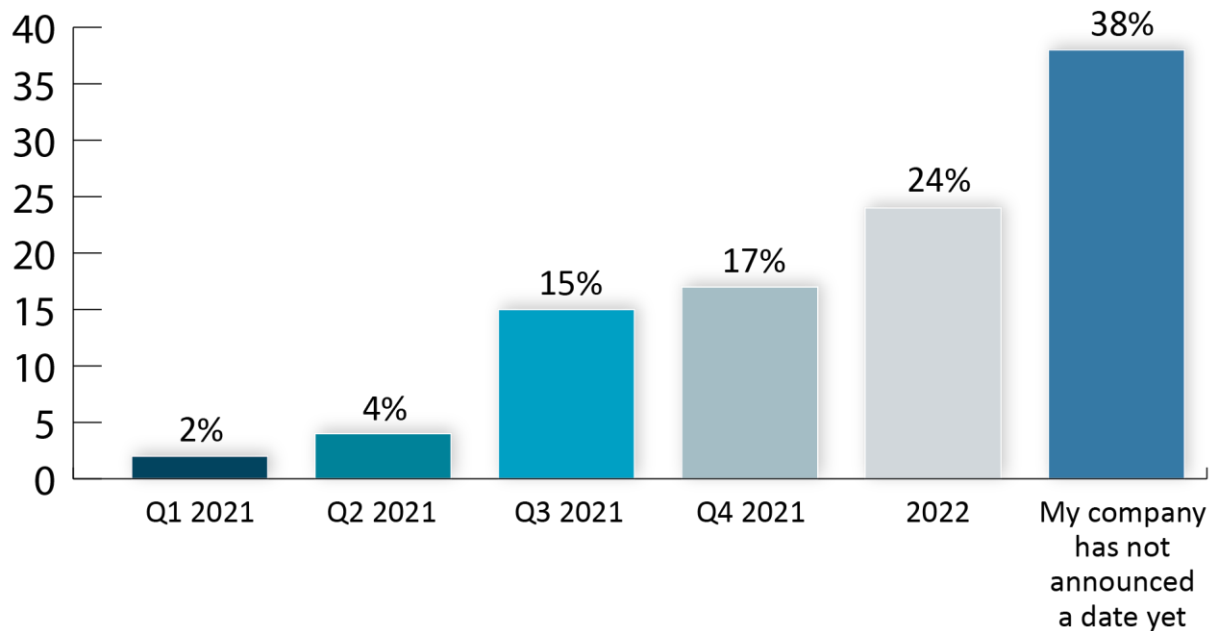
DOES YOUR COMPANY CURRENTLY HAVE A TRAVEL BAN ON NON-ESSENTIAL TRAVEL OR A BAN ON TRAVELING TO GATHERINGS OF 50+ PEOPLE?



Base: Total respondents • Source: Smart Energy Decisions Market Research, 2021

One-quarter expect to be grounded for all of 2021 while more than one-third do not yet have a date to return to travel.

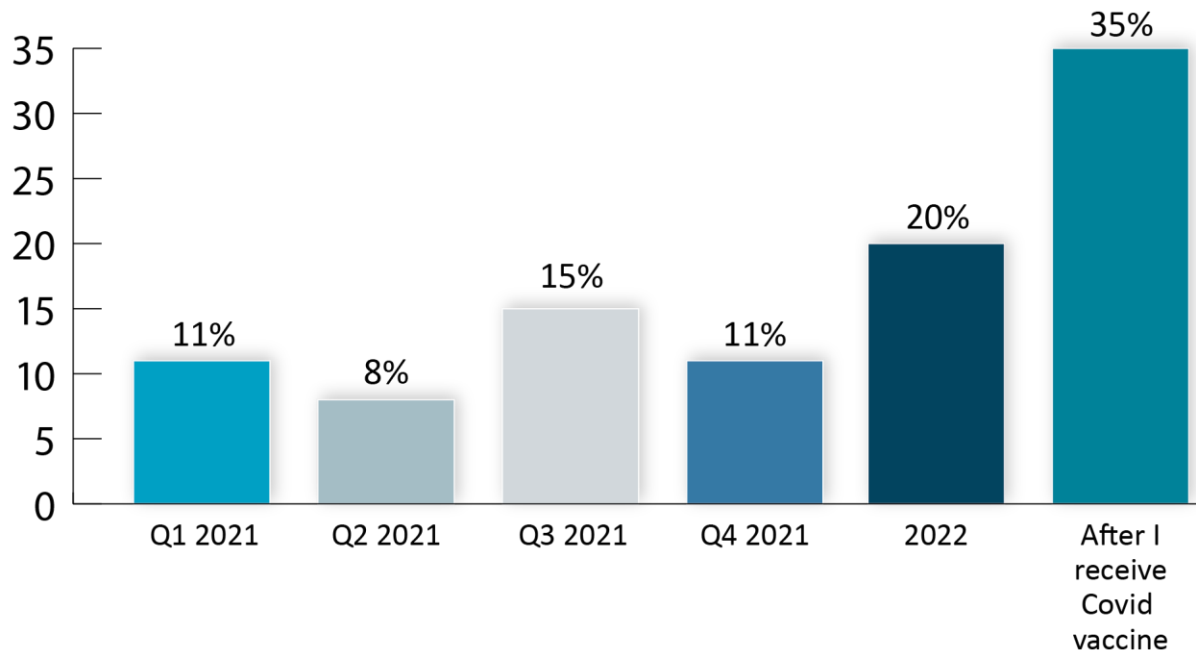
BASED ON THAT TRAVEL BAN, WHEN DO YOU EXPECT TO BE ABLE TO TRAVEL TO INDUSTRY EVENTS/CONFERENCES?



Base: Respondents currently under a travel ban • Source: Smart Energy Decisions Market Research, 2021

A majority of respondents won't travel without the vaccine.

WITHOUT REGARD TO YOUR COMPANY TRAVEL POLICY, WHEN WILL YOU PERSONALLY FEEL SAFE TRAVELING TO INDUSTRY EVENTS/CONFERENCES?



Base: Total respondents • Source: Smart Energy Decisions Market Research, 2021

Conclusions

- A majority of large power users are moving forward with their sustainability goals as planned, while some report being able to expand the scope of their plans.
- One-half of respondents report their organization has a policy regarding when staff can return to the office. Yet we have seen these dates rescheduled in response to COVID outbreaks and vaccine distribution.
- For more than one-third of respondents, the decision to return to work and travel depends solely on availability of the vaccine.



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