



Kyocera

Engagement with the environment

Survey Results

2008



## Are companies really that bothered ... ?

- 57% of businesses have an environmental policy in place; whilst one fifth (18%) don't know whether their company has an environmental policy or not
- 68% of business have put environmental measures in place and only 53% have both an environmental policy and measures
- Waste paper recycling (86%), reducing paper use (74%) and recycling printer toner cartridges (72%) are still the top 3 environmental activities undertaken by companies
- However, just 27% reported that their company is looking to achieve carbon neutral status

***“UK BUSINESSES TAKE ‘LIGHT GREEN’ APPROACH TO ENVIRONMENTAL ISSUES”***

# Executive Summary



## The momentum of environmental change

- 39% feel the desire to be environmentally responsible comes from the company board or management, 37% feel it comes from external factors whilst 22% believe it comes from employees
- 50% believe senior management are responsible for ensuring the company complies with environmental policy/measure whilst 34% believe its an environmental group or committee
- However, the majority (50%+) of respondents feel that the best way to reduce wasted resources is through personal endeavour

***“POLICEY AND PROCESSES NEED TO BE STRENGTHENED TO REMOVE THIS BURDEN OF RESPONSIBILITY“***

***“BOTTLENECK TO TOP DOWN GREEN POLICIES MUST BE REMOVED”***

# Executive Summary



## Individual concern and company action

- 77% of people feel they are concerned about environmental issues whilst only 54% feel their company is concerned about environmental issues
- Individual concern is led by concern about 'Rising Energy Prices' (86%) and 'recycling' (75%)
- Individuals see a green company as one that makes use of recycling (86%), uses energy efficient products (83%) and uses sustainable products (76%)
- Budget constraints (54%) are the biggest barrier to companies becoming more 'green' whilst lack of attention paid to engaging employees (40%) is the second biggest barrier
- However, 60% of respondents believe that current concerns around the economic downturn will encourage more people to act in an environmentally conscious way as the cost of fuel and resources increases (65% IT Managers)

***“COST PRESSURES ON BEING GREEN SQUEEZE BOTH SIDES OF THE ENVIRONMENTAL EQUATION”***

# Executive Summary



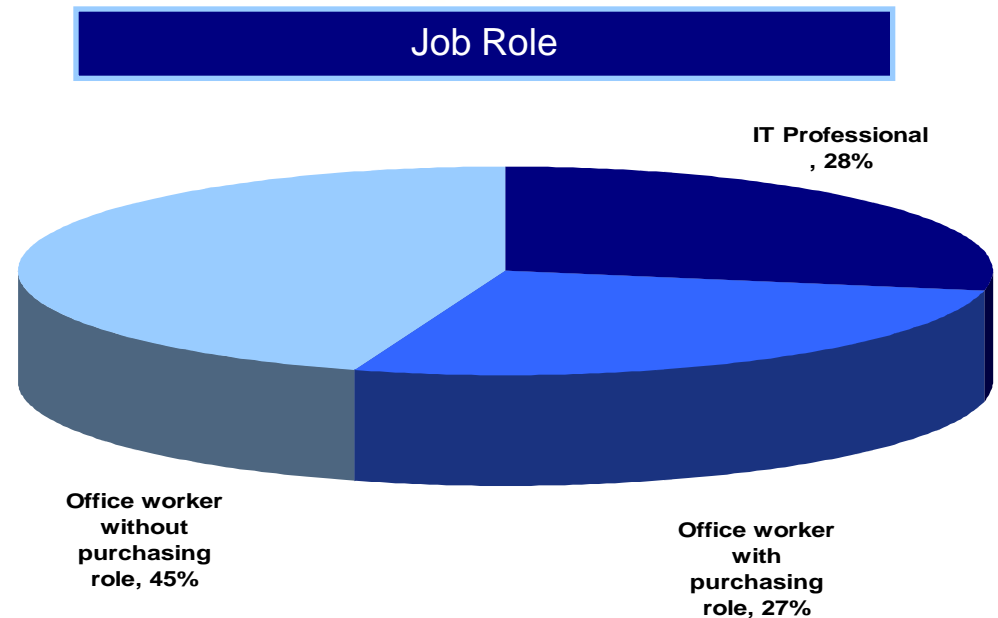
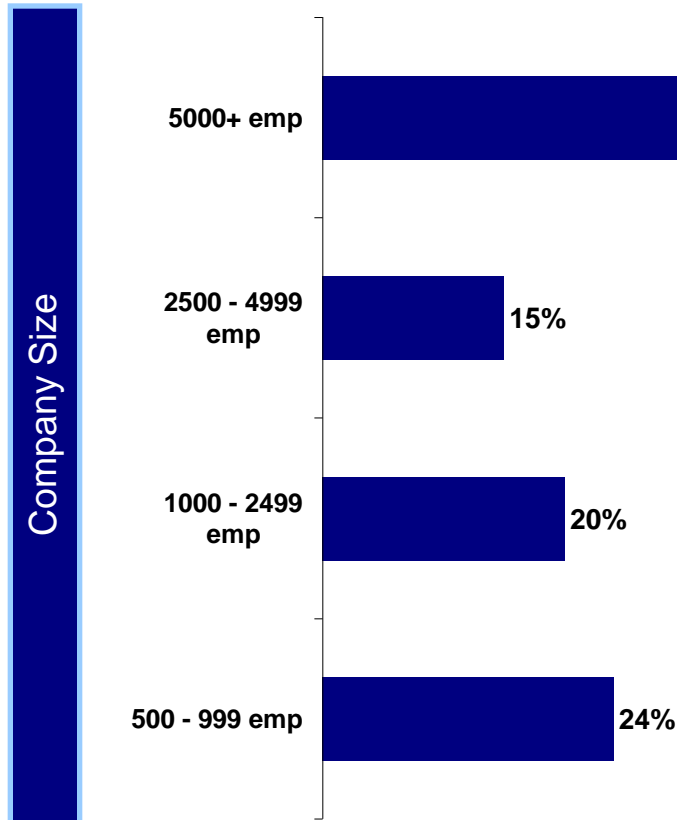
## Supplier management

- Less than a third (29%) are diligent in scrutinising suppliers for environmental credibility
- 39% use ISO14001 in their choice of IT supplier whilst 32% use Energy Star – no single measure over 50% mark
- Biggest influence on scrutinising IT suppliers' environmental credentials is 'advertising and marketing materials' (36%)
- In the IT sector, companies considered 'green' include Sun, Nokia, HP, Dell, IBM, Apple and Microsoft

**“KNOWLEDGE GAP MUST BE CLOSED ON APPROACH TO ENVIRONMENTAL SUPPLIER STRATEGY”**

# Sample breakdown

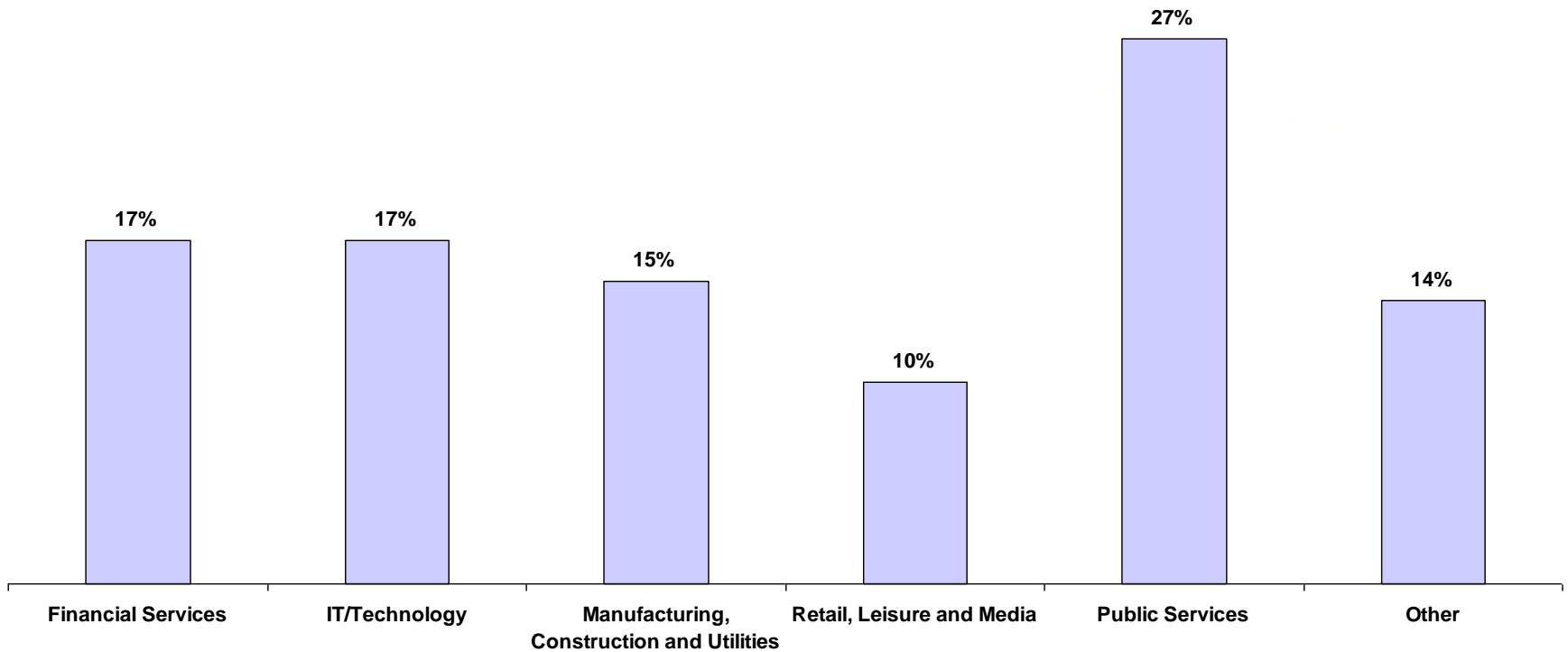
369 online interviews with UK employees conducted in May/June 2008



## Sample breakdown (2)



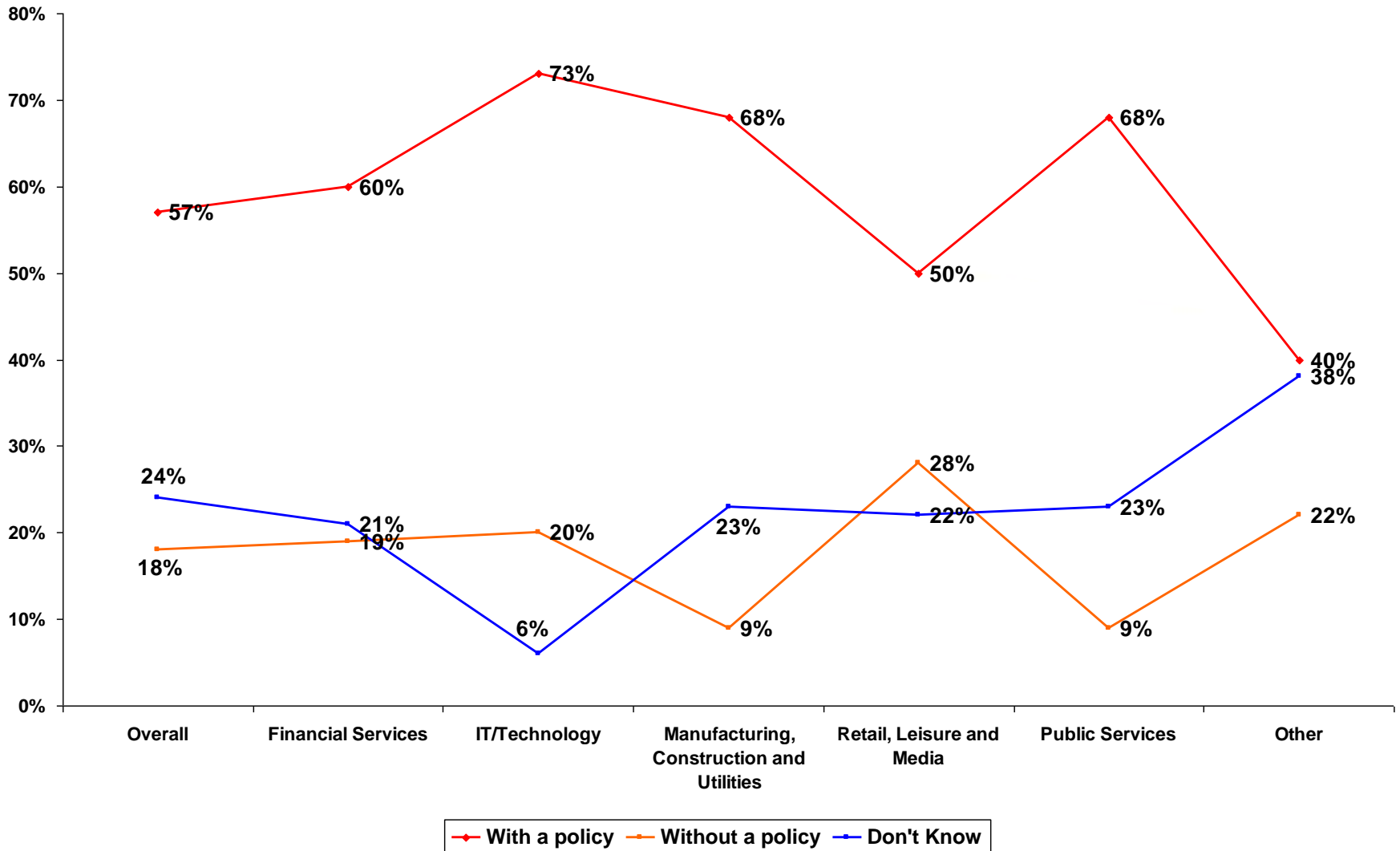
### Business Sector



# Sample breakdown (3)



## Environmental policy uptake



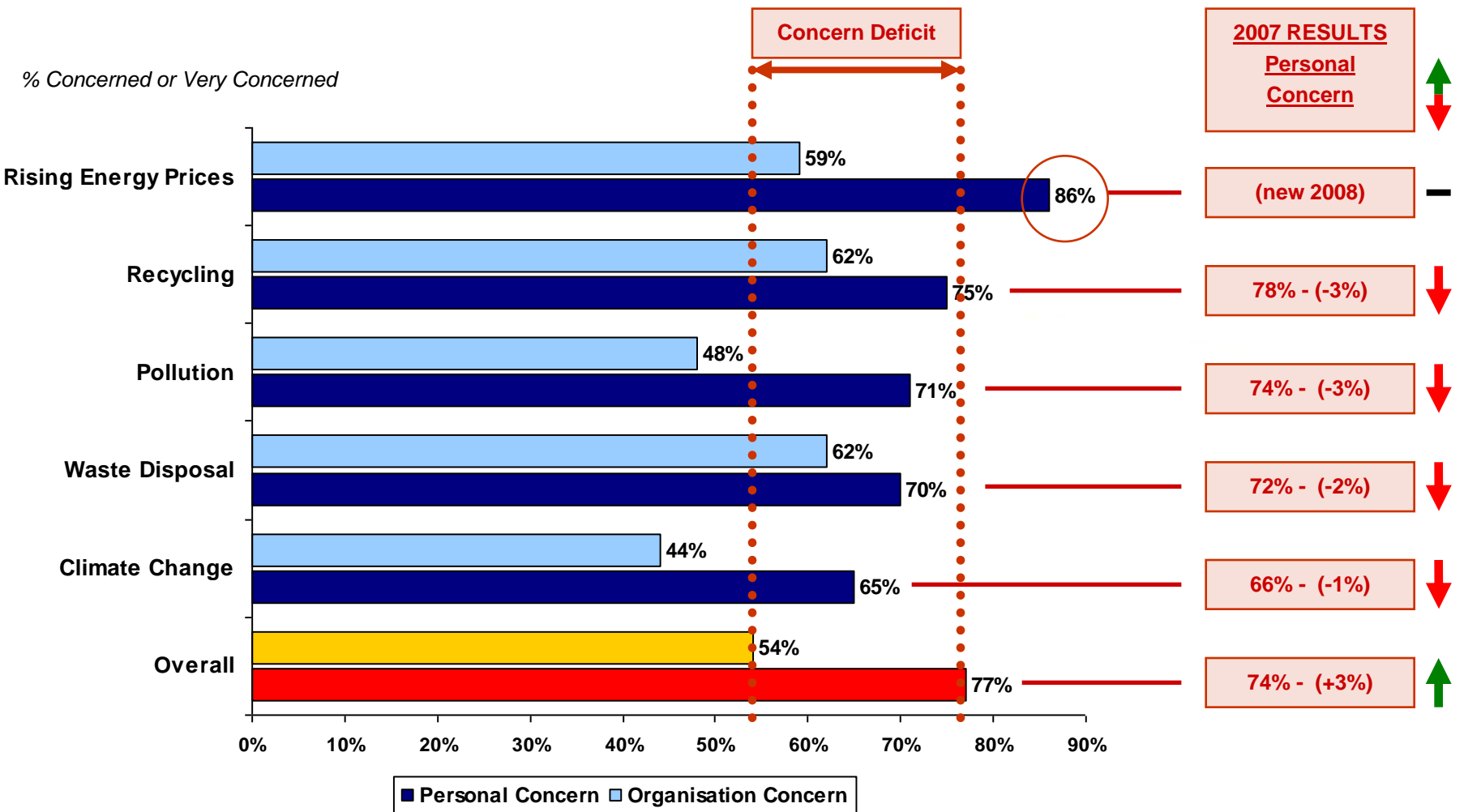


## Environmental Policy and Action

# Environmental Policy



Respondents appear to be more concerned about environmental issues than their organisation, led by concern about rising energy prices

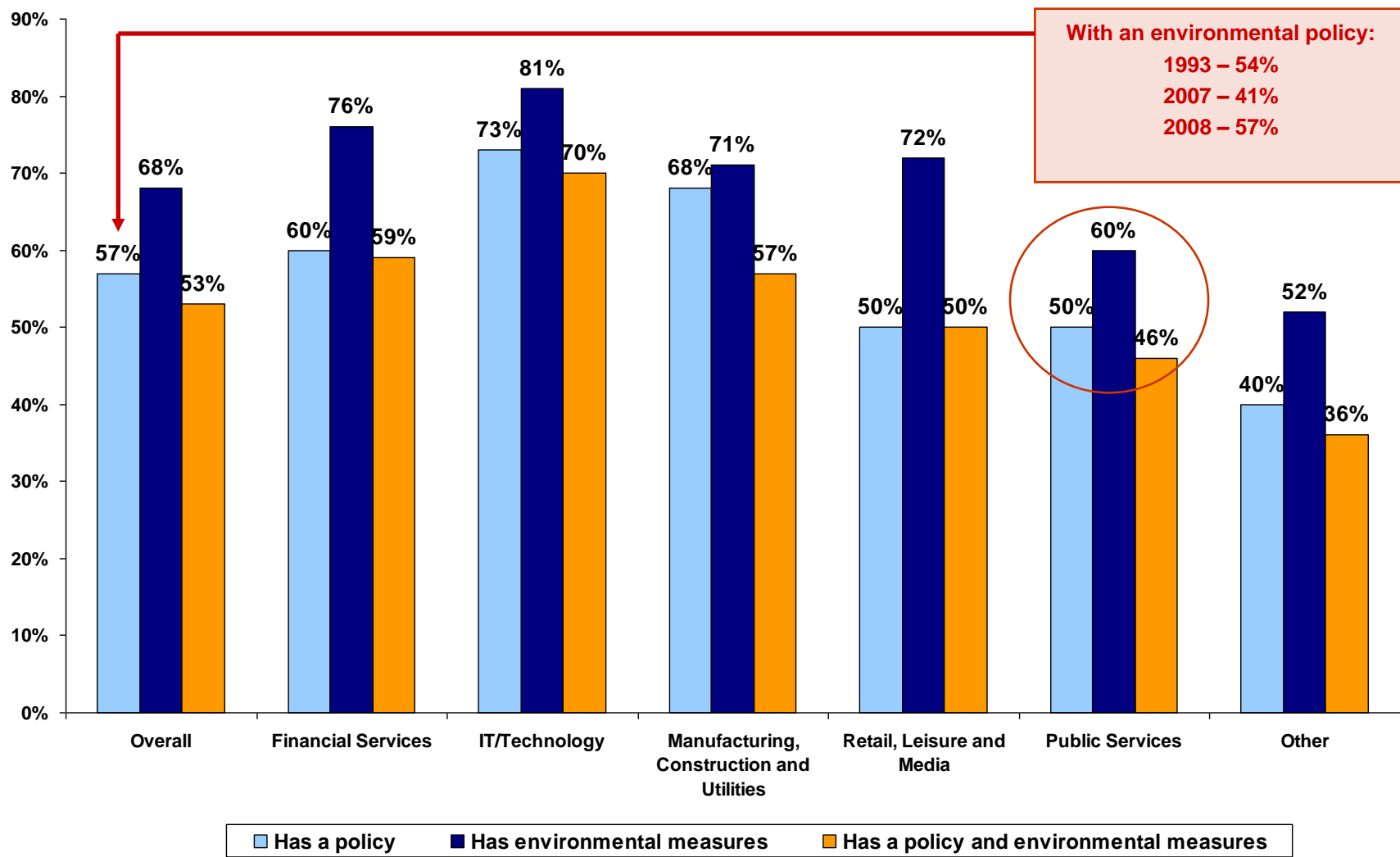


Q1. How concerned are you personally about these environmental issues?  
 Q2. How concerned do you think your organisation is about these environmental issues?

# Environmental Policy



Despite the need for government directives, the public sector is the least likely to have an environment policy/measures



Q3. Does the company you work for have a clearly stated environmental policy?  
 Q4. Whether or not you have a specify policy, does your company have company wide environmental measures in place?

# Environmental Policy

Momentum source to be environmentally responsible



**39% - Company Board or Management**

**15% - Customer Pressure**

**22% - External Legislation**



**22% - Employees**

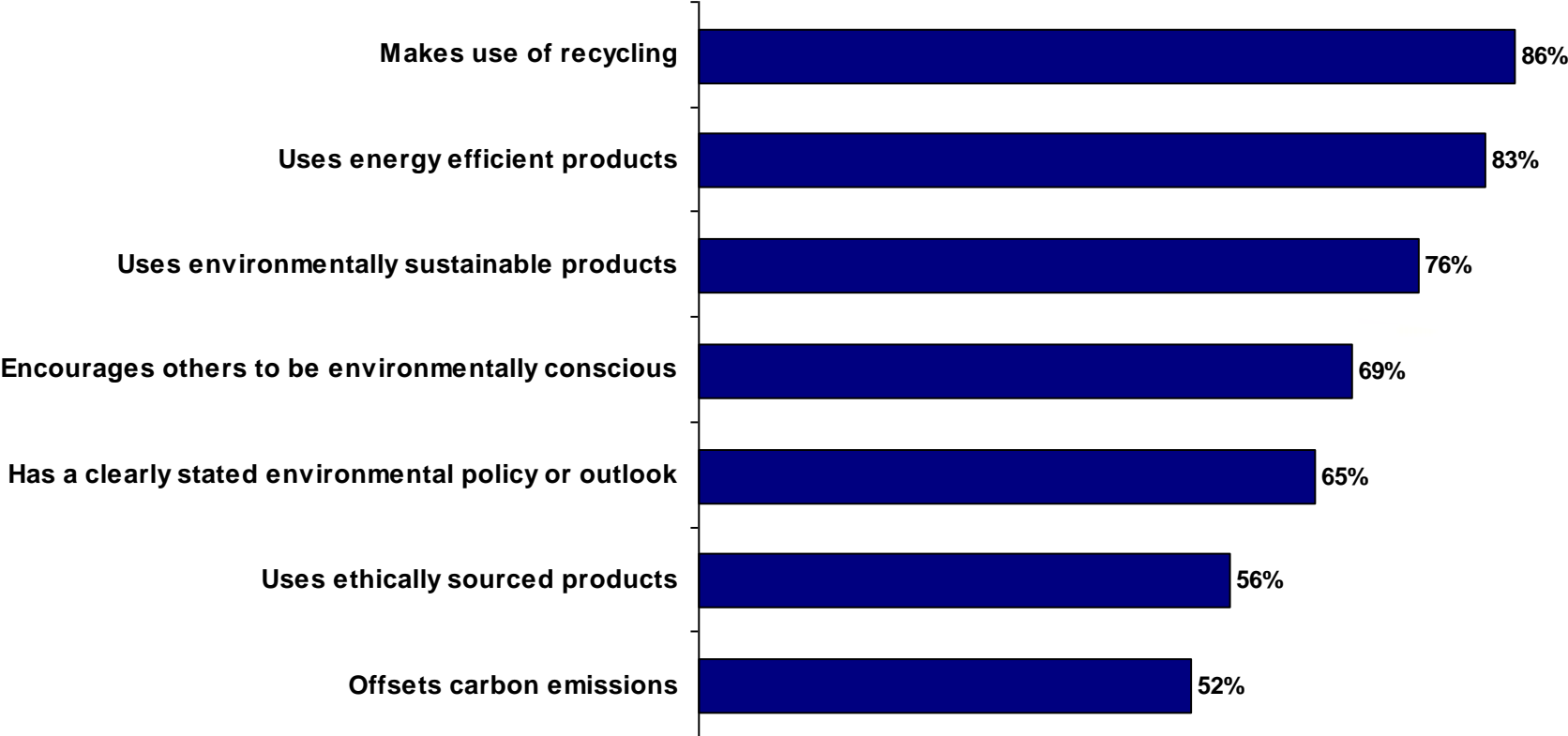
**2% - Other**

Q5. Where do you think the momentum (i.e. the desire to be environmentally responsible) comes from within your organisation?

# Environmental Policy



The top 2 constituents of a green company are that it makes use of recycling and uses of energy efficient products



# Environmental Policy

The 'green' company winners



Q7. What companies in the IT sector come to mind as being green?

# Environmental Policy



Reducing paper use and recycling printer toner cartridges are the top 2 environmental activities

	Overall	Financial and business services	IT/Technology	Manufacturing, construction and utilities	Retail, media and leisure	Public Sector
Reducing paper use	74%	87%	69%	64%	83%	72%
Recycling printer toner cartridges	72%	71%	67%	63%	69%	78%
Recycling PCs/Other hardware	56%	54%	55%	61%	50%	60%
Reducing energy use	56%	62%	52%	63%	58%	56%
Using energy efficient office equipment	41%	49%	42%	48%	33%	32%
Reducing water use	33%	25%	41%	38%	42%	34%
Environmentally conscious travel options where possible	31%	28%	30%	32%	19%	34%
Using environmentally conscious suppliers	25%	24%	36%	27%	25%	20%
Offsetting carbon emissions	18%	24%	25%	18%	14%	14%

Q8. In which of the following environmental activities does your company engage?

# Environmental Policy



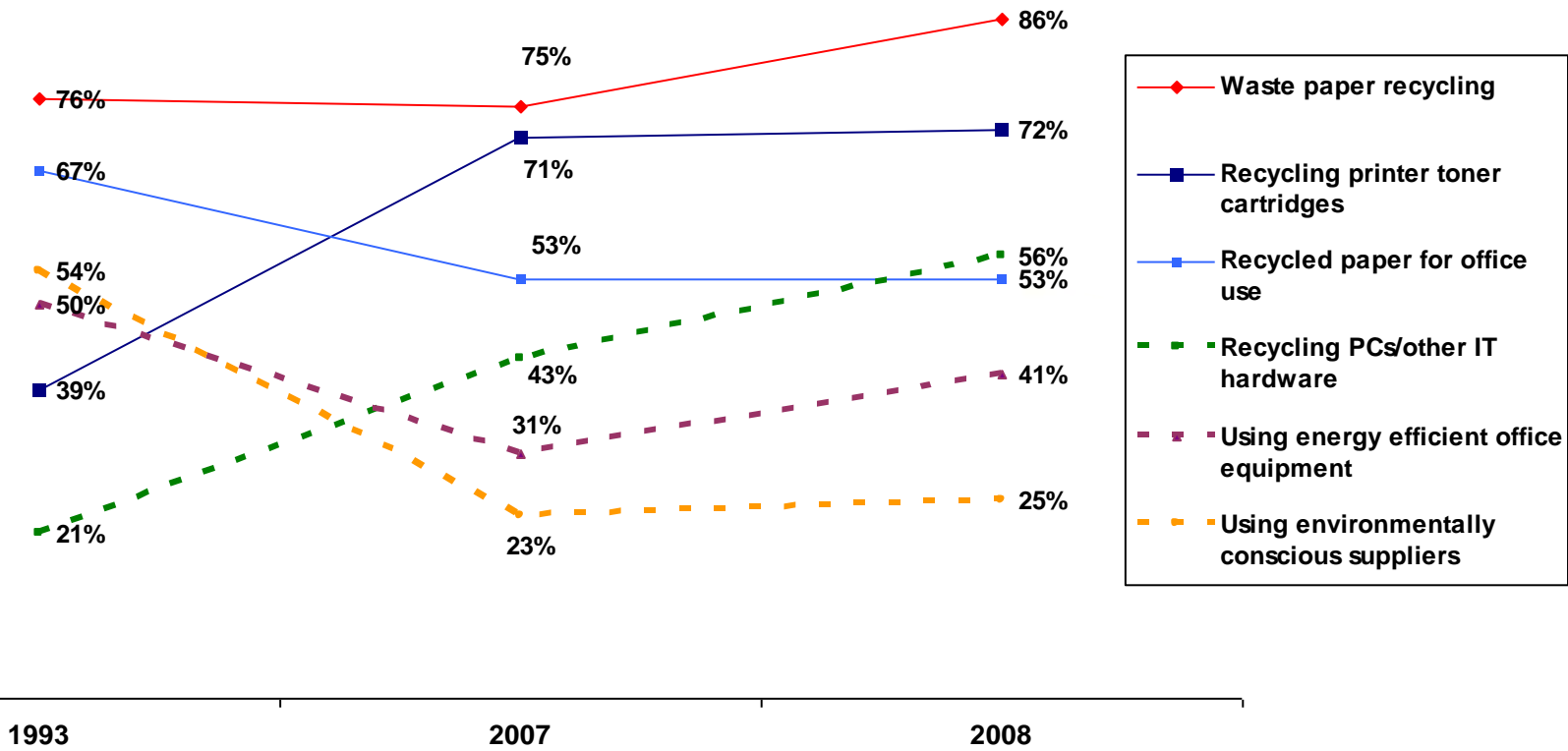
Waste paper recycling and using double sided printing are the top 2 environmental activities

	Overall	Financial and business services	IT / Technology	Manufacturing, construction and utilities	Retail, media and leisure	Public Sector
Waste paper recycling	86%	81%	81%	91%	78%	88%
Using double-sided printing	54%	62%	45%	39%	47%	59%
Using recycled paper for office use	53%	48%	50%	55%	44%	61%
Encouraging print preview to reduce wasted printing	37%	33%	20%	39%	39%	43%
Encouraging on-screen proofing of written material	34%	30%	20%	43%	22%	46%
Reducing print use by setting printers to economy printouts	32%	37%	28%	32%	33%	31%
Using paper from sustainable forests	30%	32%	33%	30%	39%	29%
Controlling printouts with built in user codes to record usage	26%	24%	39%	20%	19%	26%
Using paper certified with an environmental mark	21%	25%	27%	18%	17%	19%

Q9. In addition to these points, does your office environmental activity include any of the following?

# Environmental Policy

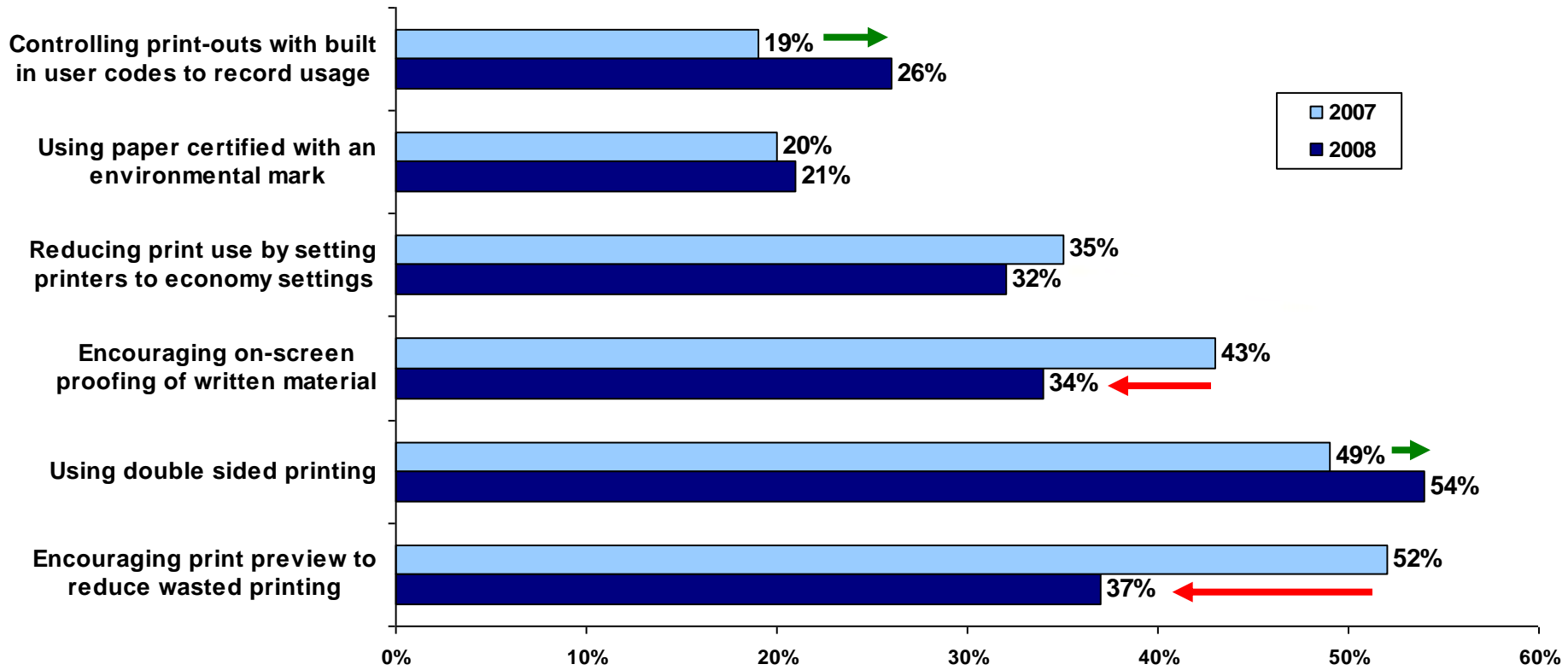
Comparisons: 1993, 2007 and 2008



Q8. In which of the following environmental activities does your company engage?

# Environmental Policy

Comparisons: 2007 and 2008



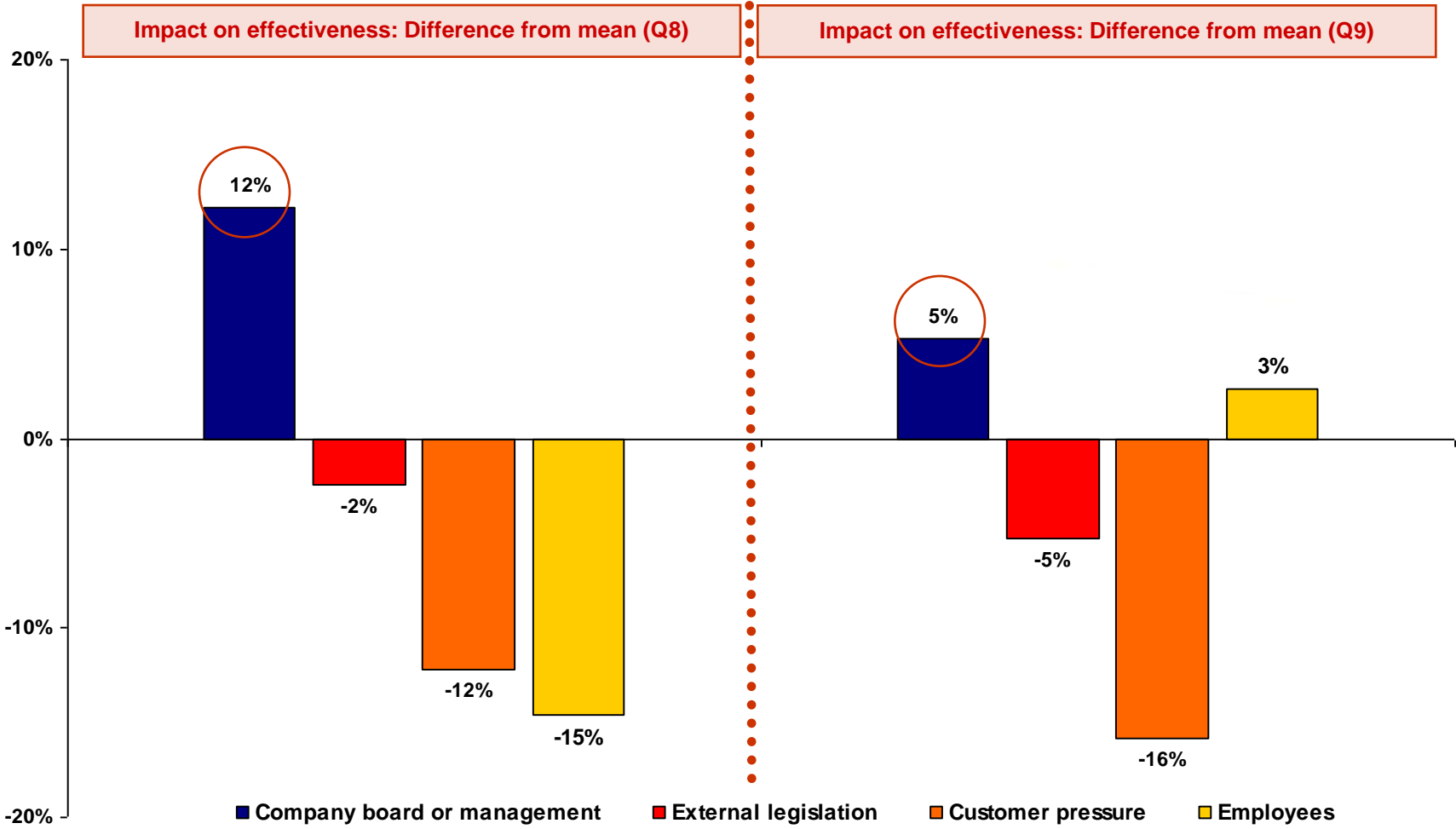
Q9. In addition to these points, does your office environmental activity include any of the following?

# Environmental Policy



Environmental policies need to be implemented from the top down to be the most effective

Effectiveness is rated on number of environmental activities undertaken by a company



Q8. In which of the following environmental activities does your company engage?  
Q9. In addition to these points, does your office environmental activity include any of the following?

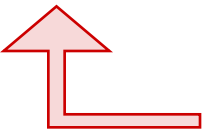
# Environmental Policy



Two thirds of printed material is wasted through various means; this could be reduced by individuals making more effort

**How can this percentage be reduced?**

	<b>% Wasted everyday</b>	<b>Made more effort</b>	<b>Policy mandate</b>	<b>Control systems</b>	<b>Don't Know</b>
Printing documents single-sided rather than double-sided	20%	45%	23%	30%	13%
Preferring to read on paper, rather than on screen	13%	50%	21%	12%	24%
Printing for proofreading, rather than on screen	10%	50%	22%	14%	21%
Printing the wrong document	9%	68%	8%	11%	17%
Printing too many copies of a document	9%	54%	15%	23%	15%
Forgetting to collect printouts from the printer	6%	58%	13%	11%	22%
<b>TOTAL WASTAGE</b>	<b>67%</b>				



**Reductions lie with individual effort**

Q10. In your day to day use, what percentage of the material you print out each week is 'wasted' by either ... ? (percentage)  
 Q11. Do you think the percentage could be reduced if you a) made more of an effort b) these systems were mandated by your environmental policy c) automated control systems were implemented?

# Environmental Policy

Environmental action groups and an ideas forum are the top 2 ways that companies encourage their employees to be environmentally conscious



	Overall	Financial and Business Services	IT/Technology	Manufacturing, Construction and utilities	Retail, media and leisure	Public Sector
Incentive schemes for employees to reduce environmental impact at home	23%	20%	46%	17%	23%	14%
Incentive schemes to encourage compliance with initiatives at work	32%	31%	46%	37%	39%	23%
Creation of an environmental action group or team	46%	57%	39%	41%	46%	48%
New ideas forum or chance to contribute ideas and actions	45%	49%	43%	44%	35%	48%
Recognition or awards for environmental ideas	26%	39%	17%	30%	23%	25%

Q12. Please indicate which of the following, if any, your organisation has in place as part of encouraging employees to be environmentally conscious?

# Environmental Policy

Responsibility to comply with environmental policy/measures



**50% - Snr. Management**

**16% - A board representative**



**34% - Environmental group or committee**

**20% - Human resources committee**

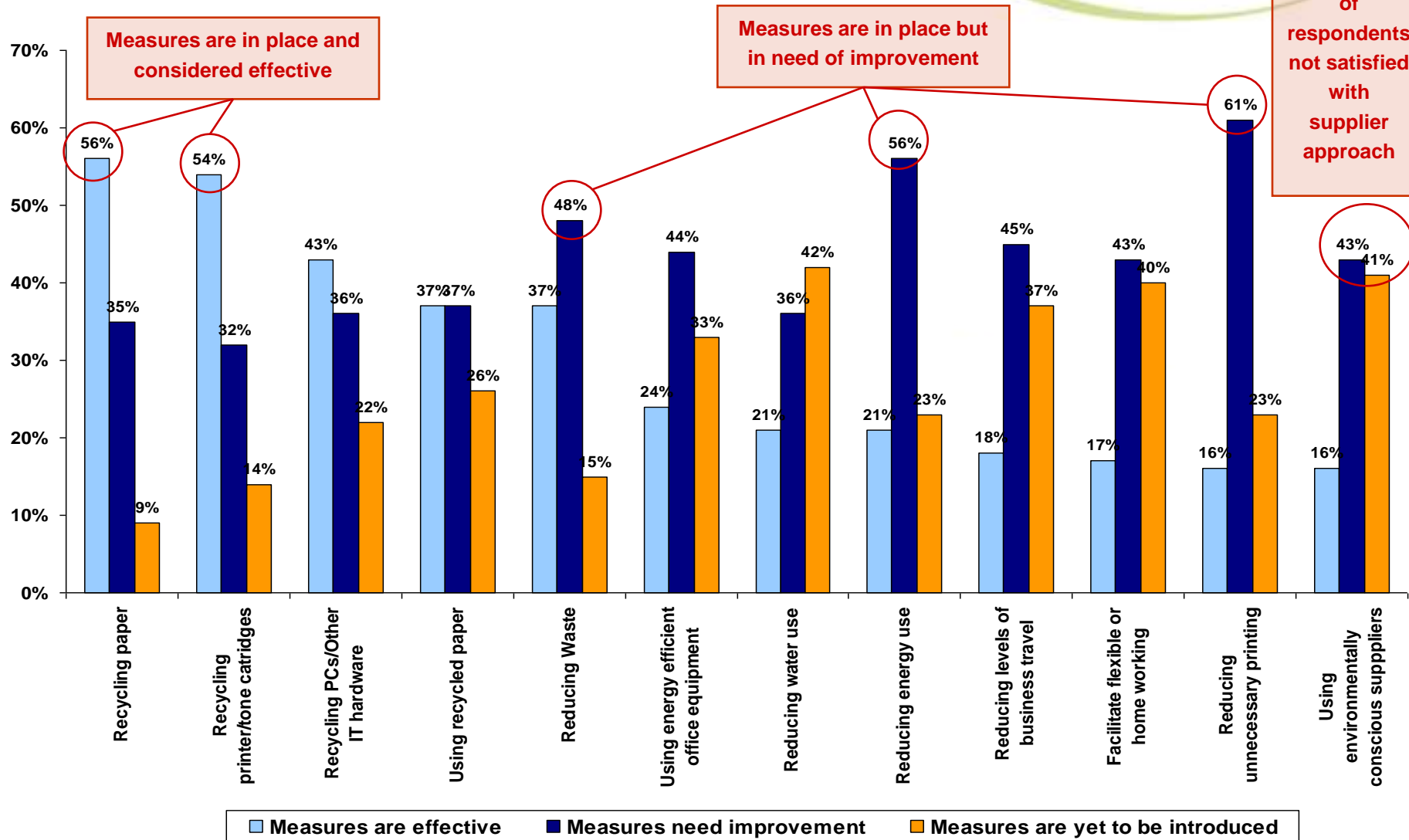
**12% - Operations department**

**8% - Other**

Q13. Who is responsible for ensuring the company complies with the environmental policy or measures you have in place?

# Environmental Policy

Recycling paper is in place and effective across a number of businesses but reducing unnecessary printing needs improvement

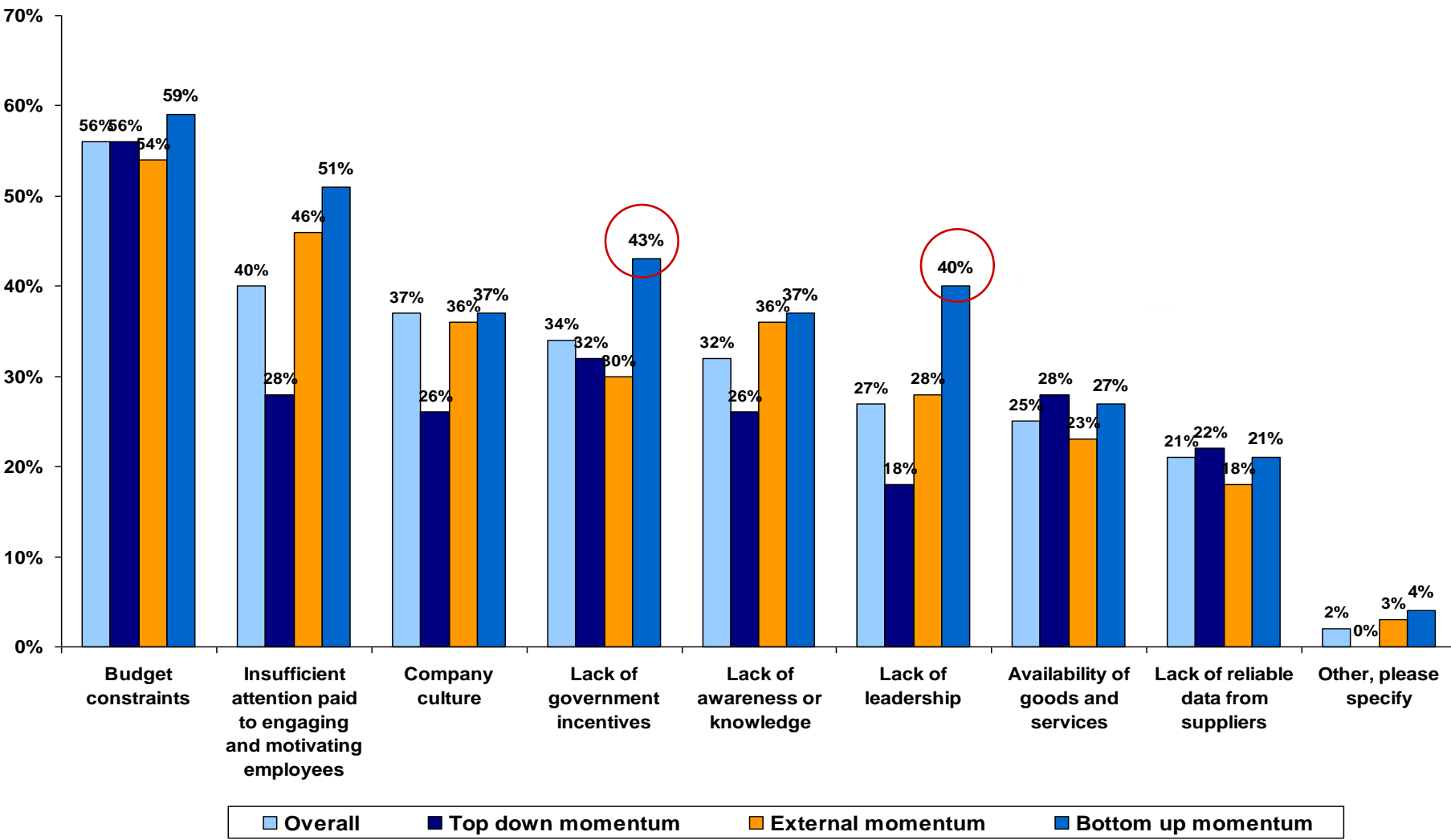


Q14. Which from the following steps or activities would you like to see your company undertake to improve its approach to environmental issues? Please state if: a) measures are in use and considered effective b) Measures are in place but need improvement c) Measures are yet to be introduced

# Environmental Policy



Budget constraints are the top barrier to companies becoming more 'green'

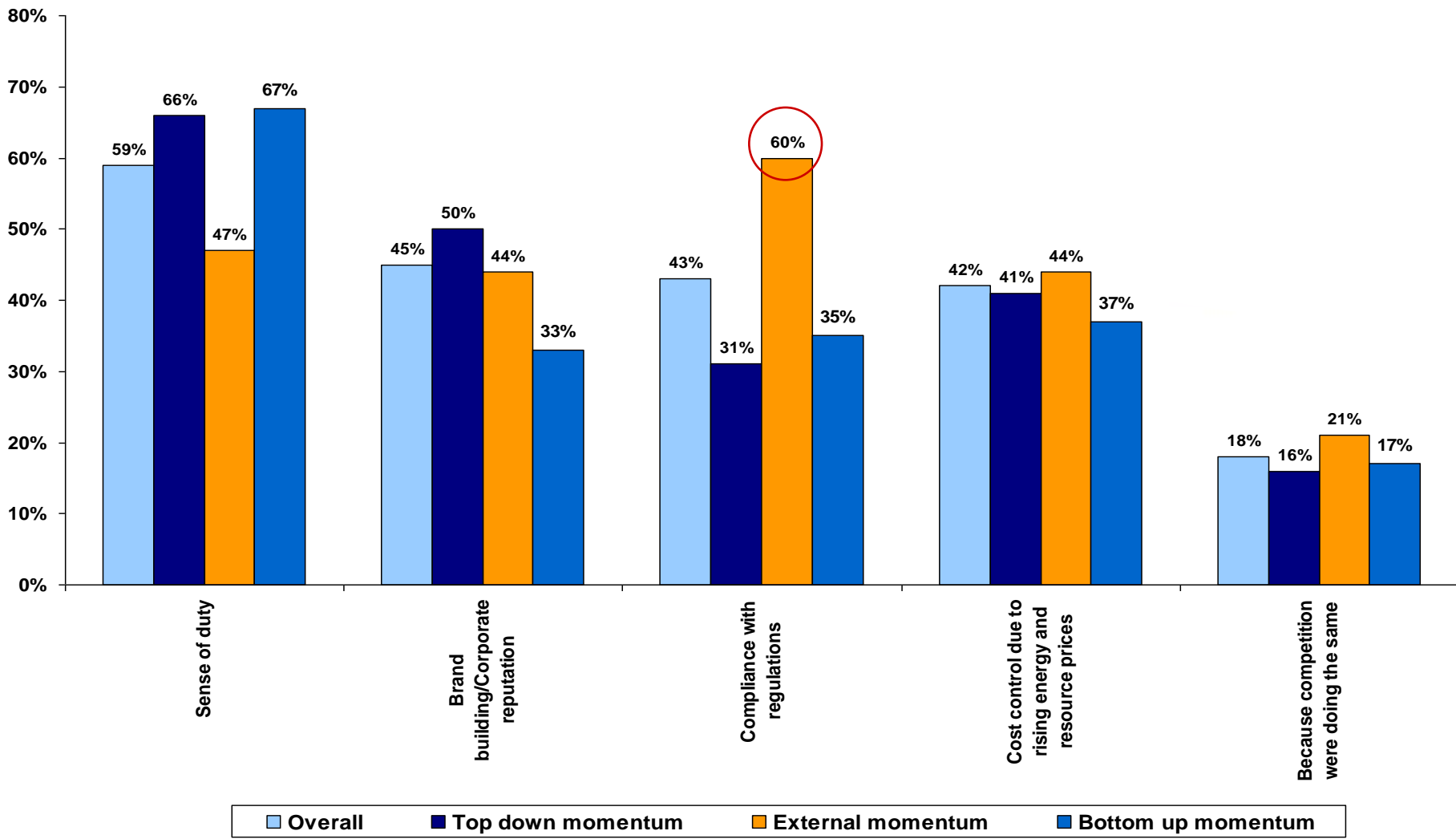


Q15. Which of the following do you feel are barriers to your company becoming more 'green'?

# Environmental Policy



Sense of duty is considered the top motivation behind a company implementing an environmental policy/measures

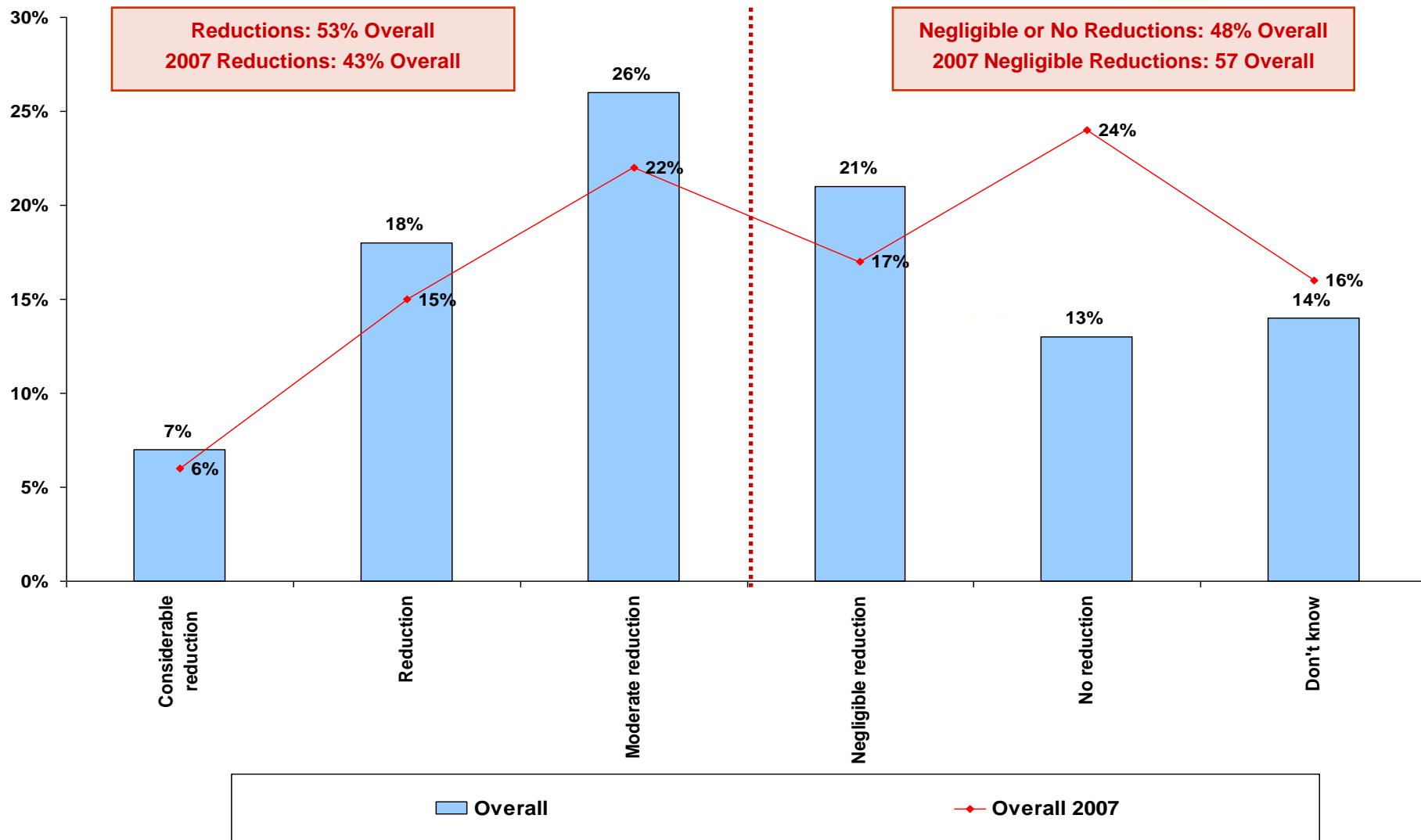


Q16. Which of the following do you think were the motivations behind your company implementing the environmental policy/taking environmental measures?

# Environmental Policy



Most respondents felt there is a reduction in performance of products with a reduced environmental impact



Q18. To what extent do you consider that reduced environmental impact also implies a reduction in overall performance of office products generally?

# Environmental Policy



## Office products linked to a reduction in performance

### Printers



### Light bulbs



### Computers

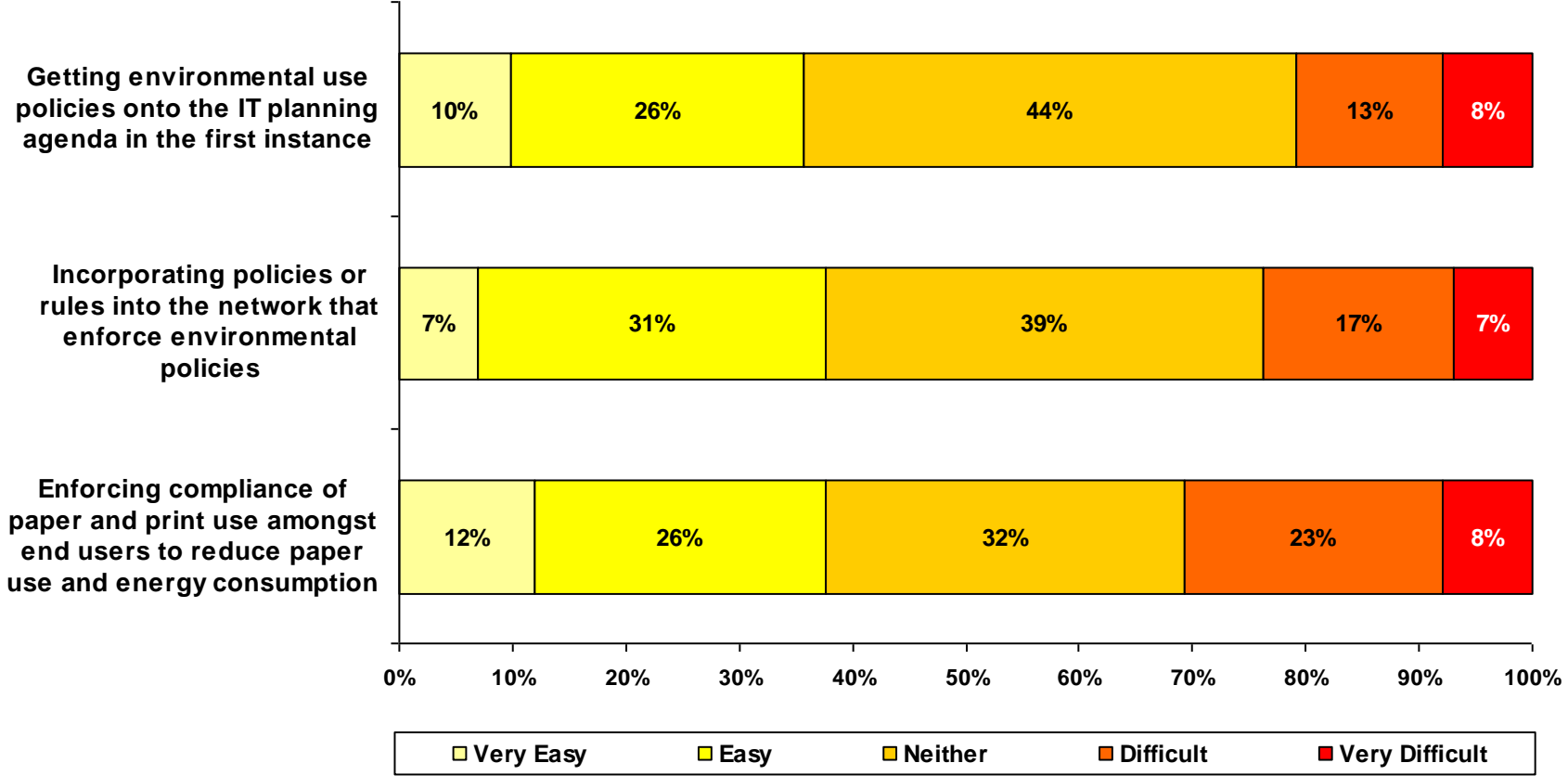


Q18. With what specific office products, if any, do you associate a reduction in overall performance?

# Environmental Policy



Getting environment policies onto IT planning, incorporating policies and enforcing compliance aren't considered difficult to implement

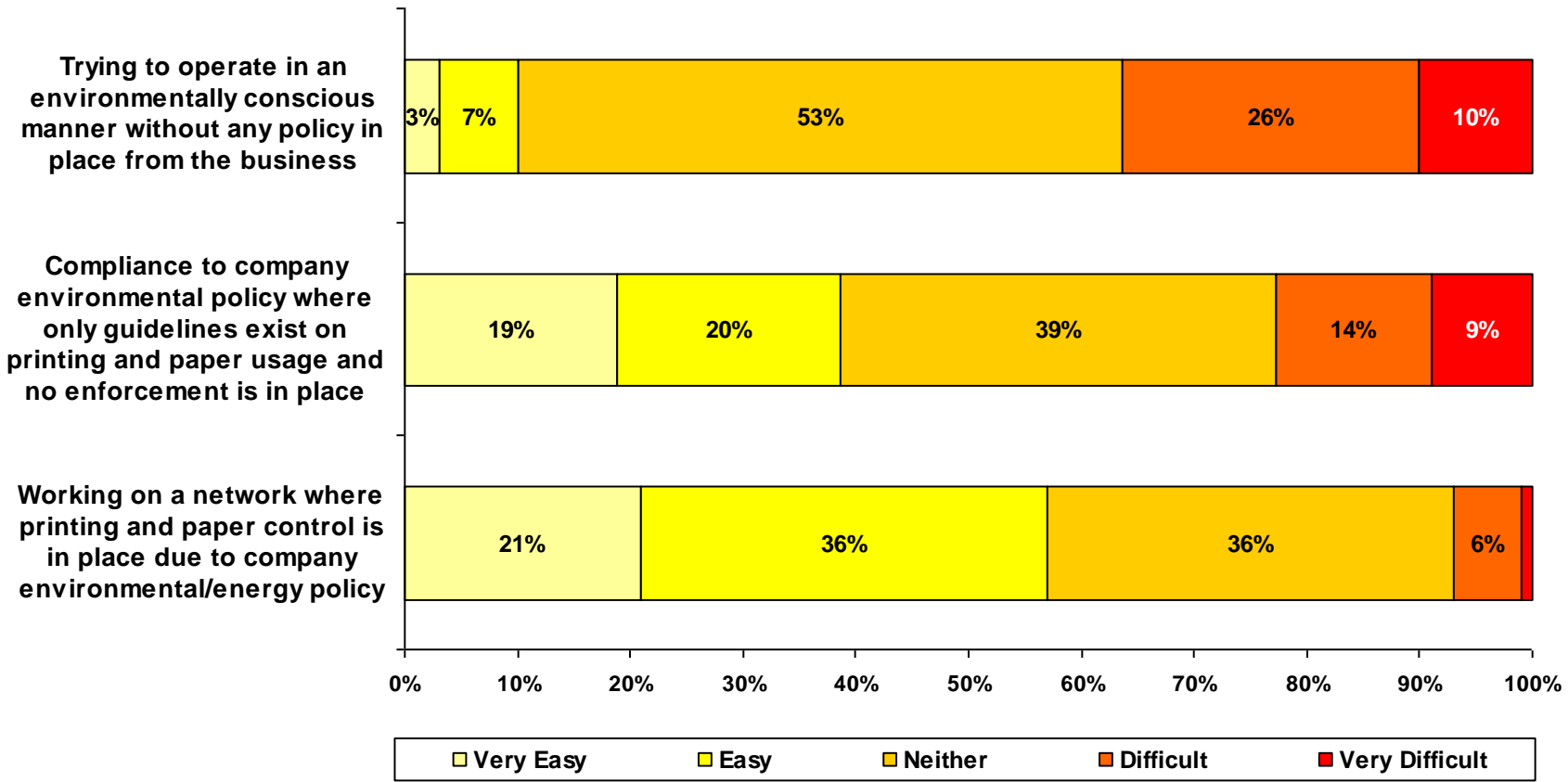


Q19. How difficult would you rate the following tasks on a scale of 1 – 5, where 1 is very easy and 5 is very difficult?

# Environmental Policy



Respondents feel it's difficult to operate in an environmentally conscious way without a policy in place

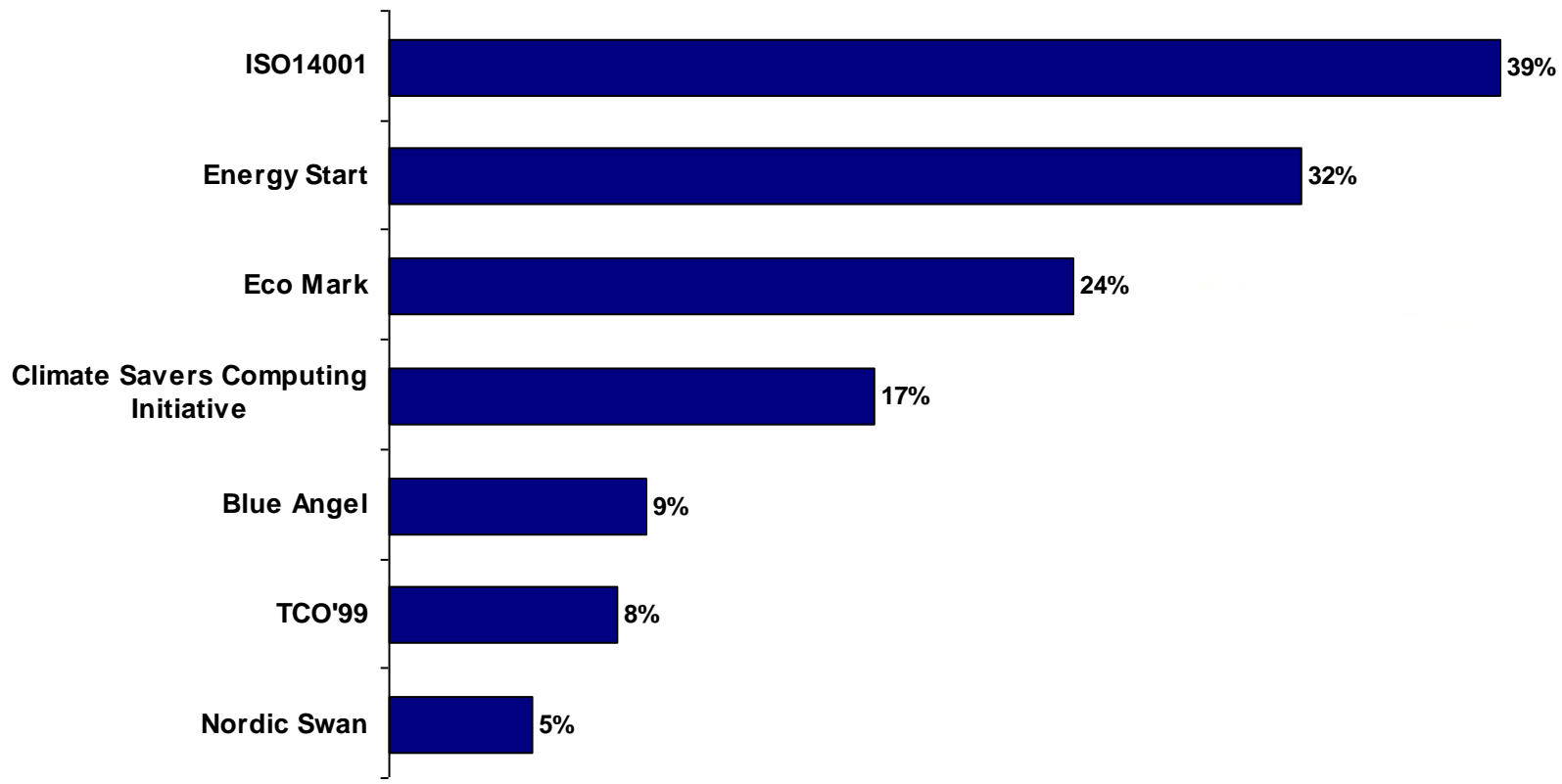


Q19. How would you rate the following tasks on a scale of 1 – 5, where 1 is very easy and 5 is very difficult?

# Environmental Policy



ISO14001 and Energy Start are the most influential standards used when choosing an IT supplier

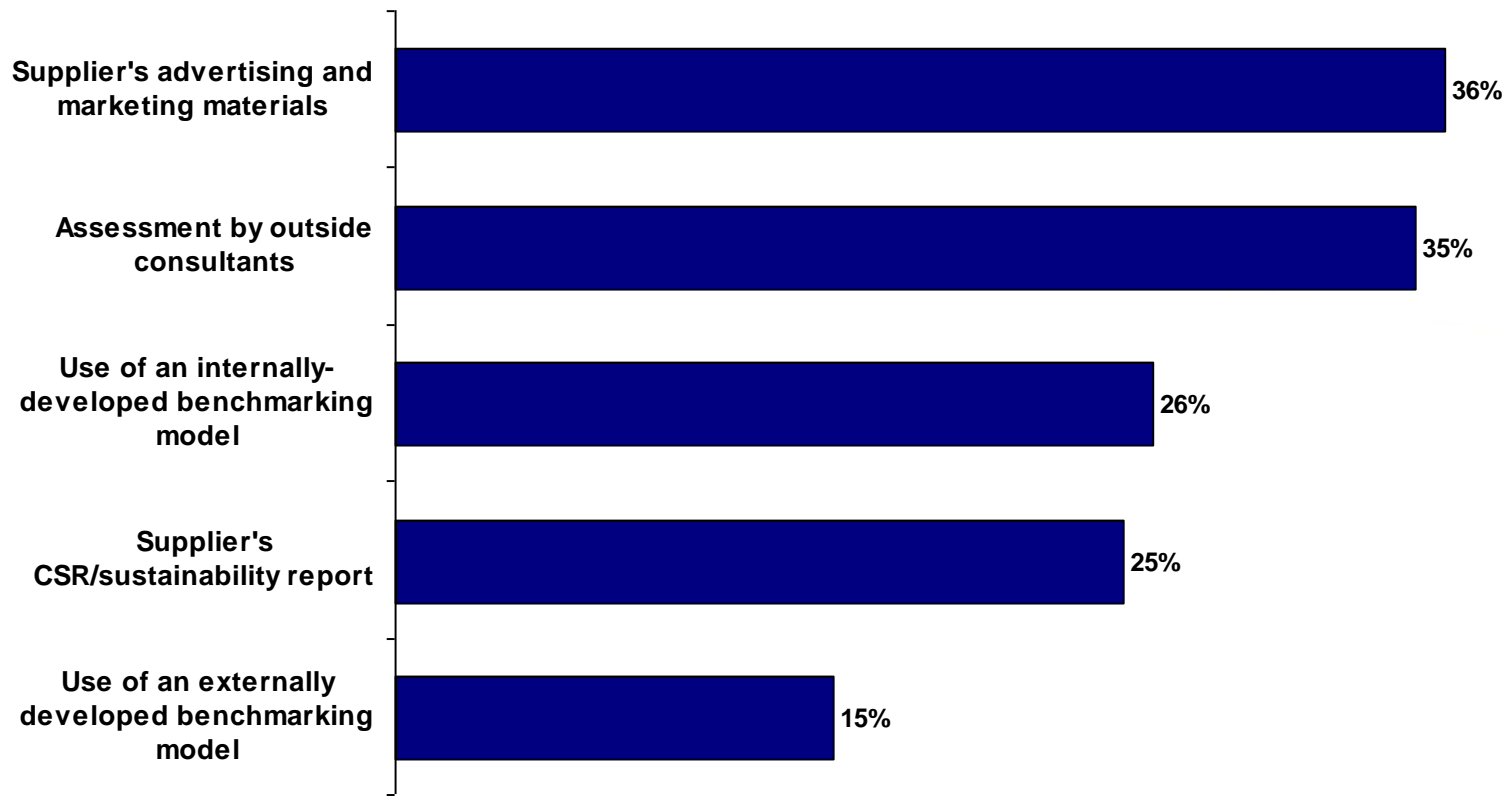


Q22. Which of the following standards and accreditations influence your choice of IT supplier?

# Environmental Policy



Advertising and marketing materials influence choice of IT supplier more than a CSR report or external benchmarking model

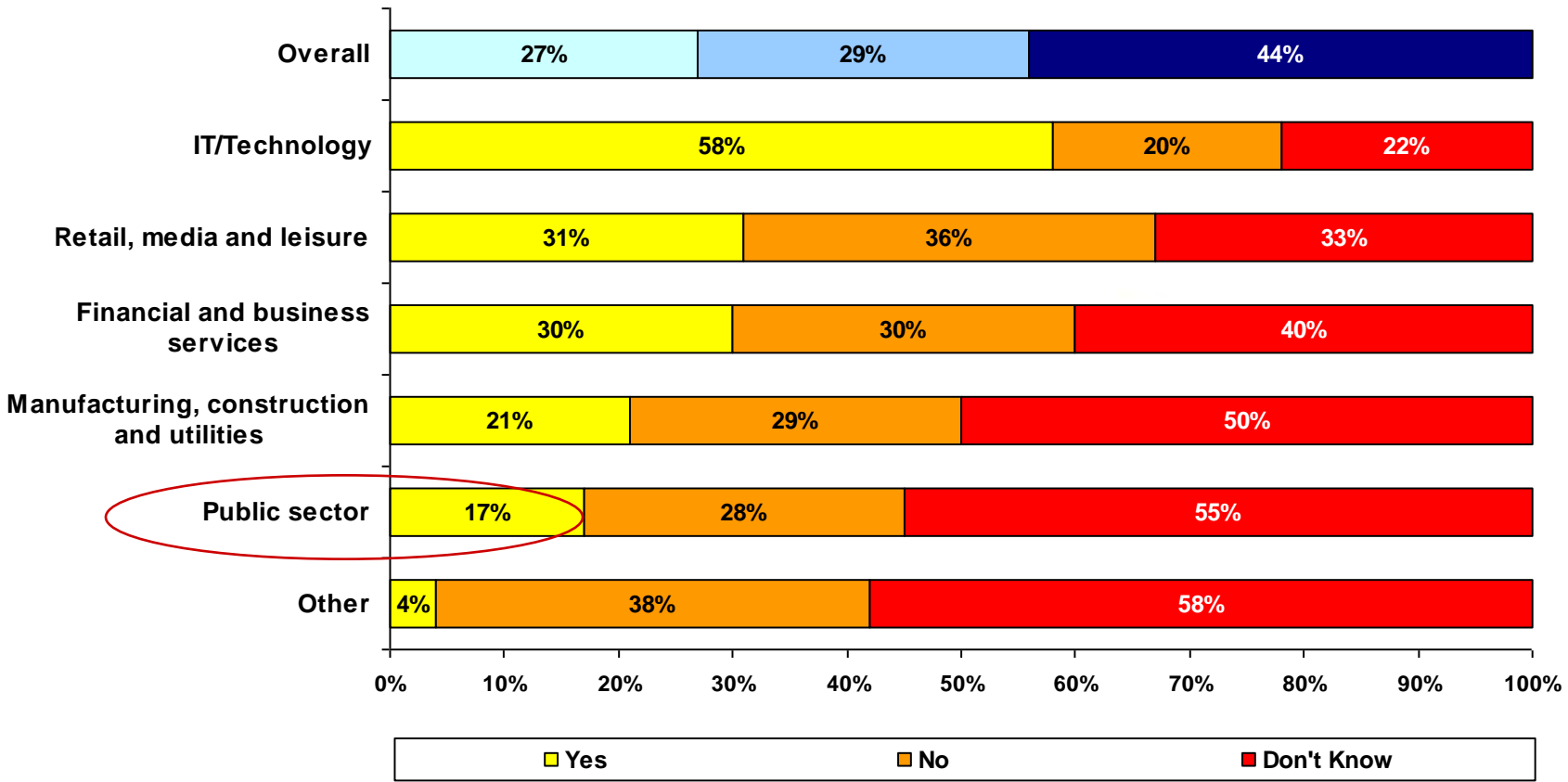


Q23. What methods do you use to scrutinise the environmental credentials of your IT suppliers?

# Environmental Policy



Public sector is least likely to trying to achieve carbon neutral status whilst the IT/technology are the most likely to trying to achieve this

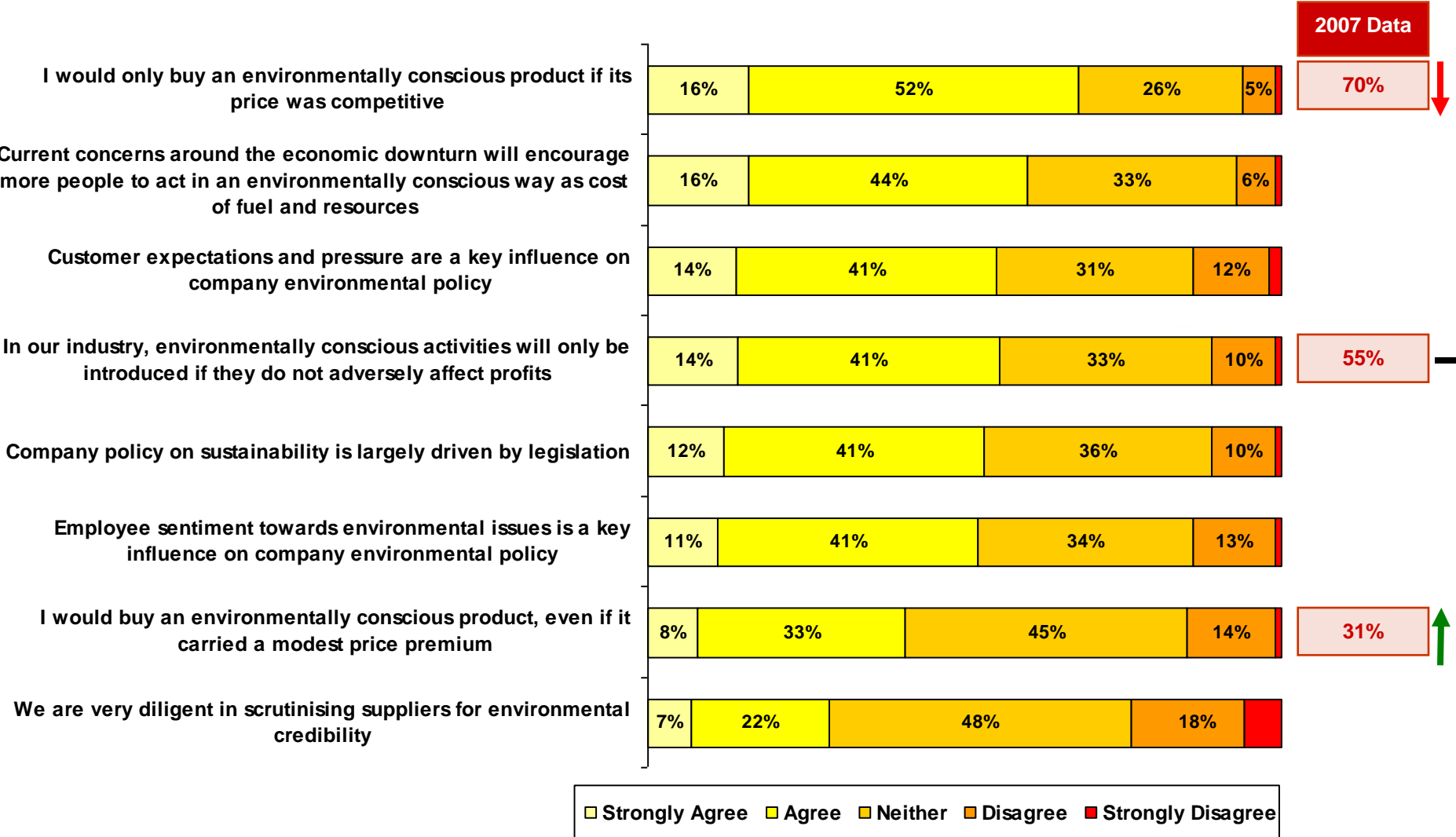


Q24. Is your organisation currently trying to achieve carbon neutral status?

# Environmental Policy



Environmentally conscious products need to be price competitive in order to compete with other products



Q26 – Q32. Please state your level of agreement to the following statements using the scale provided.

