Work to be Done

At the beginning of the year as part of the Verdigris project, we published an online survey. The purpose of this survey was to learn more about the strategic motivators and environmental intentions of printers and their customers. We were looking for insights into sharing best practice, and had hoped to get a better idea of environmental awareness in the printing industry. We wanted to understand more about market drivers for printers and their customers.

The three-part survey was translated into ten languages. We worked on the translations with industry associations and the leading trade magazines in various countries, which also helped to encourage their members and

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readers to participate. We had hoped people would take the chance to share their views and contribute to improving the perception of print's environmental impact.

That the response to the survey was disappointing to us is a massive understatement. Many people looked at the survey, but only a small proportion of them actually completed it. Statistically this is apparently quite typical, particularly with surveys that address a broad audience.

Most of these respondents, who were either management or business owners (68%), completed the English language version, with inputs from the United Kingdom, Canada and the US. For the rest, the uptake was indeed pathetic: for instance, zero for the Spanish and Swedish versions, 13 in the Netherlands, and 11 in Norway. This in turn makes it difficult to detect meaningful national trends.

It is impossible to glean any really meaningful data from such a small sample. However we can conclude that the low response rate, while typical, also reflects a general apathy in the printing industry, a laziness when it comes to collective interests. We can also conclude that there is a hardcore of printers in many countries committed to making their businesses and products more environmentally sustainable. This is encouraging, and in this context the results of the survey are more meaningful.

So what else does it tell us? It tells us that the German representative of bvdm, the country's largest trade association, who warned us that printers were surveyed-out was right. It also tells us that in uncertain economic times, printers are too busy to bother with surveys and that green matters drop down the list of priorities.

Although they may broadly acknowledge that the industry's environmental impact is important, most printers invited to complete the survey probably did not bother because they considered it of no direct relevance. The bulk of the meagre 138 survey respondents are small companies already committed to managing their environmental impact. Most had a turnover of one to five million Euros, and a handful of respondents had turnovers in excess of fifty million Euros.
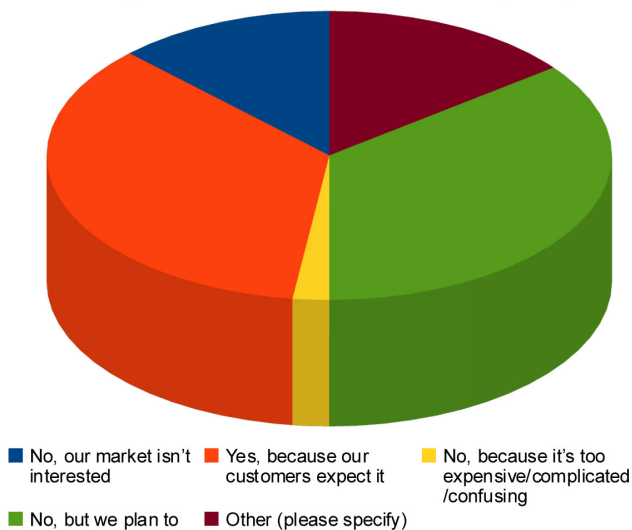
For the most part these companies are sheet-fed and digital printers, with some overlap, producing marketing collateral, books and magazines. However, 26% of respondents were also involved with other activities such as journal printing and stationery. As a general rule, the owners of small companies tend to be in the driving seat when it comes to setting business policies, including environmental practices: they go green because it's what they believe in, and part of their ethic.

For the really large companies working with blue chip clients, environmental accountability is often mandated as part of their terms of business. High on the list of certifications for instance are ISO 14001, the environmental management standard, and the FSC chain of custody certification. ISO 9001 and PEFC accreditation follow and all cross national boundaries. Certifications such as the Blue Angel in Germany, the Nordic Swan in Scandinavia and ImprimVert in

France are local rather than internationally adopted certifications.

We were also interested in the extent to which an environmental policy is important to printers. Over 50% said it is important to the business with a further 34% of companies having instituted a policy in response to customer pressure. An additional 34% say they plan to set

Do you have an environmental policy?

- No, our market isn't interested
- Yes, because our customers expect it
- No, because it's too expensive/complicated /confusing
- No, but we plan to
- Other (please specify)

up such a policy. This is most likely in response to client requirements or their own consciences. It is also possible that many printers didn't complete the survey because they lack any environmental policy, so the survey wasn't relevant for them. This could also explain the relatively high number of printers in this survey who do have an environmental policy.

Most companies with an environmental policy manage it internally (63%) and have appointed an individual to oversee the work and get things done (67%). But 27% of respondents prefer to work with consultants. Such consultants also play an important role in regulatory and standards compliance, another area we wanted to learn about. We wanted to know more about the extent to which printers value international standards to inform the ISO work we are involved in for the carbon footprinting of print media.

Around 30% of respondents consider themselves tightly regulated, but a surprising number don't and follow instead good practice guidelines and their own ideas

about what it means to be environmentally friendly. Less than 2% ignore guidelines, but encouragingly there is a clear correlation between environmental interests and revenues for 53% of the printers who participated in this survey. And 31% said the environmental interests of the biggest revenue providers influenced their business strategy. Fully 29% of printers who are actively engaged in reducing environmental impacts, either for their own or their customers' benefits, regularly measure their carbon footprints.

There seems to be a lot of good intention amongst the respondents when it comes to the business of measuring carbon footprints. In addition to the 29% already doing it, 28% anticipate doing so in the near future. The 29% already active in this area are indeed thorough in their evaluations, with 60% taking everything into account for the measurement: energy, transport, raw materials and waste, and 57% measuring waste to landfill. This is most likely because many countries levy a tax or other charge to dump waste in landfill sites.

A surprising number of this small sample, 17%, even measure the carbon footprints of the products they print in response to customer pressure. It's clear that unless they have to, most printers don't measure the carbon

Do you measure your business's carbon footprint?

- Yes, regularly throughout the year
- Never
- Plan to
- Other (please specify)
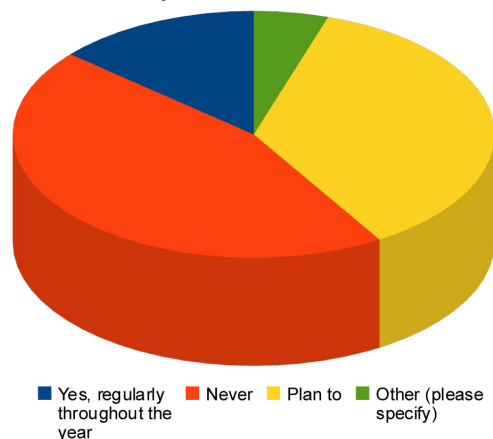
footprint of what they produce, which is generally true for many manufacturers.

This doesn't mean that the environment isn't important to printers, because 90% of respondents have active recycling programmes. Employees can recycle glass,

paper, cans and plastic on site. It makes good business sense to have policies that meet the needs of employees as well as customers; however, this high percentage may also reflect a growing awareness that wasting materials that can be recycled is essentially antisocial.

Of course, handling and disposing of waste can be expensive, so it makes sense to recycle as much of it as

What percentage of your production waste is recycled?

■ 1-25% ■ 26-50% ■ 51-75% ■ 76-99% ■ All
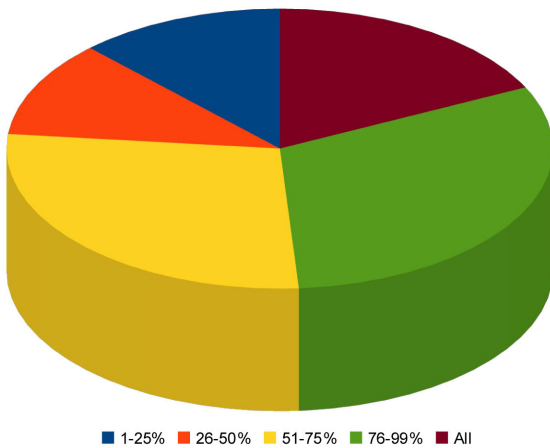
possible. Only a handful of survey respondents recycle all of their waste, but 30% recycle 76-99% of it, with 27% recycling 51-75%. Encouragingly, everyone taking part in this survey recycled at least some of their production waste.

Having a policy to encourage and support recycling and improved waste management is a first step towards becoming completely carbon neutral. A programme of continual improvement takes time and investment but above all commitment. We had expected a low number of companies to be actively engaged with carbon offsetting. Yet 16% are buying carbon offsets to bring their businesses closer to carbon neutrality.

With the environment high on the news agenda in many countries printer buyers want to know more about print's environmental impact and are asking for new services to support reduced impacts. Quality assurance and environmental standards are where most print buyers start. It's therefore unsurprising that the most popular customer requirement amongst respondents is for information and services relating to certifications and

qualifications. 65% of printers' customers are interested in this and recycling and reuse are of interest to 47% of respondents' customers. A further 35% are interested in digital media services, which printers increasingly offer alongside printing services.

Customers' and prospects' interest in a company's environmental credentials are driving the need for compliance to recognised standards in some markets. Of the respondents 27% said that around half of their customers cared about this. However, nearly 30% said that less than ten per cent of their customers were interested in this. We conclude that adoption of international standards is closely linked with customer awareness of their existence, and understanding of their role in making companies more accountable, whether it's for quality management of the business (ISO 9001) or environmental management (ISO 14001).
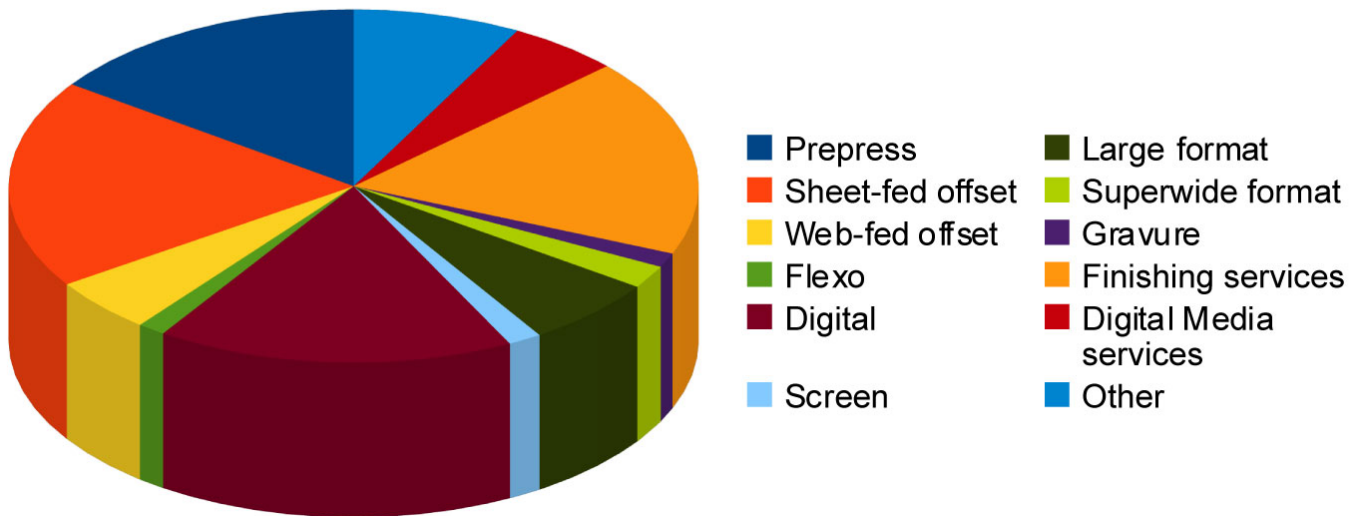
The importance of a green policy for high profile companies providing consumer goods and services is obviously paramount. Allegations of activities that are hostile to the environment can have an immediate

Number of Employees

■ 11-25
■ 26-50
■ 51-100
■ 101-500
■ over 500
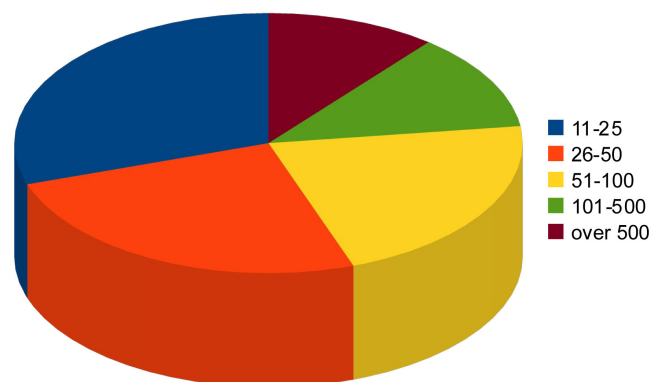
effect on share prices and sales. However it seems to be important for smaller companies as well, both print buyers and printers. In all, 75% of respondents have a green policy because they care personally about global warming and GHG emissions reductions and 53% have a green policy because it is what their customers want. For 48% of respondents a green policy also creates opportunities for new revenue opportunities.

Revenue Sources

Legend:
- Prepress
- Sheet-fed offset
- Web-fed offset
- Flexo
- Digital
- Screen
- Large format
- Superwide format
- Gravure
- Finishing services
- Digital Media services
- Other

Designing such a policy begins with an assessment of the values of the business owners, the employees and the customers the business serves. Various factors shape next steps, such as investment planning, recycling options and so on. However, this can all be covered in a policy document. Of our respondents, 18% allow their green policy to influence major capital investments, and 55% consider it for all aspects of business planning including investment.

Although for many companies a green policy can sometimes be little more than lip service assuaging green anxieties, 46% of survey respondents share their environmental policy with employees and customers. This dialogue encourages constant improvement but it may also be because customers require it, which is the case with a further 22% of respondents.

The purpose of a green policy is ultimately to reduce the business's environmental impact. For companies with a tangential interest in the environment, customer interests are usually the dominant influence to reduce the carbon impact of a business. Of the respondents, 29% said that the split in their customer bases between interest and disinterest was about equal. For 23% of printers, less than ten percent of customers cared one way or the other.

More encouragingly, for 58% of printers around half their customers are showing an interest in green printing as long as it doesn't cost more. Balancing sustainable business growth with continuous improvements to reduce environmental impact is about managing costs in tandem with executing a green policy. According to our survey, less than 3% of respondents have customers that only buy green and are prepared to pay a premium. However, for 65% of printers, customer interest in green printing is rising. This may in part be due to the recession as increasing numbers of customers and printers recognise that cutting costs and reduced environmental impact often work in tandem.

The influence of stakeholders on business strategy is obviously important for a business to thrive. However, we were interested in the importance of sustainability for stakeholders: was it vital, interesting but not required, or simply not important? For 64% of respondents it is vital to their customers, and 63% said it was important to their shareholders. This may reflect the fact that most answers to this survey came from small companies, very likely with a strong commitment to the environment already. Interestingly when we looked more closely at the influence stakeholders have over environmental policies, it is unimportant for an average of a mere

6.25%. So clearly the environment matters, but how much and in what way depends on the context in which it is considered.

For the relatively small sample of contributors who completed the Verdigris Environmental Survey, the environment is certainly an important part of their conversations with customers. Small companies striving to reduce their environmental impact are often doing so in line with the values of their shareholders and employees. In larger companies, customer pressure and the need for environmentally positive supply chains are the primary motivators. For those companies not yet fully engaged with a green agenda, many are planning to improve their impacts, often working with their customers. In print as in other industries, improving the carbon footprint of products depends on determination and cooperation throughout the supply chain.

Laurel Brunner