



AV PROCUREMENT: THE SUSTAINABILITY AUDIT

A deep dive into sustainability trends and investment in Europe

SONY[®]

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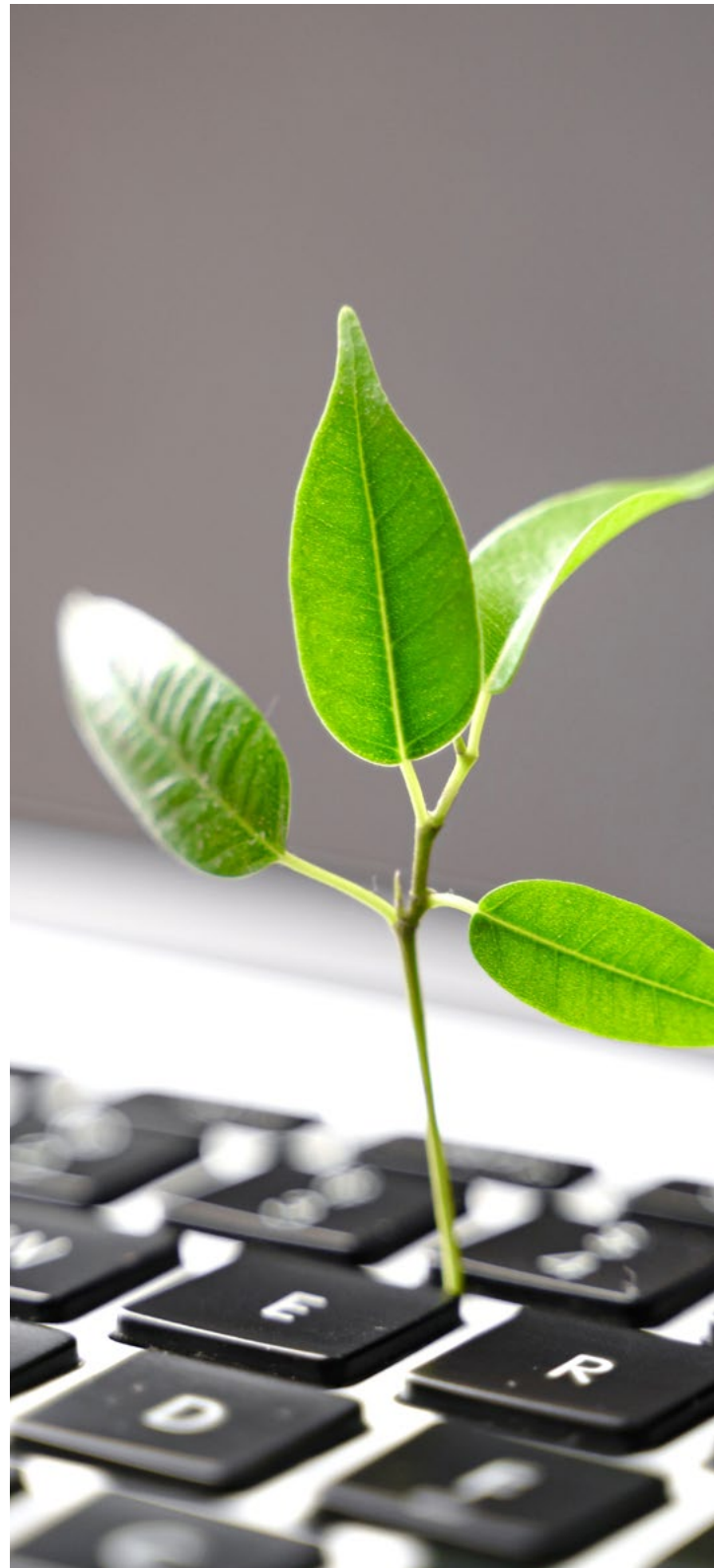
Introduction and executive summary

The corporate world is abuzz with discussions about sustainability. These are driven partly by consumer, employee and investor pressure, as well as by upcoming regulations like the EU's Corporate Sustainability Reporting Directive (CSRD), which will mandate greater accountability in environmental reporting.

In a shifting landscape, Sony Professional Displays and Solutions Europe embarked on a research mission to take the pulse of the corporate audiovisual (AV) sector. Sony wanted to find out how AV professionals across Europe approach sustainability and whether this is important to corporates and if it affects their AV procurement process. In particular, it sought to answer the million-dollar question: **Are companies willing to pay more for sustainable products and solutions?**

According to this research, the answer is a resounding yes. Around **80%** of businesses are willing to pay over **20%** more for AV products that are made more sustainably or are more energy efficient. This research also reveals that sustainability is now a key consideration in corporate real estate and the industry's AV decision-makers. Most (**85%**) say a provider's sustainability practices are important when choosing an AV partner, and **79%** agree that a lack of sustainability practices would put them off buying.

But this is just scratching the surface. The findings reveal nuanced approaches to sustainability, with key differences among industries, countries and the public and private sectors. Read on to learn more about the opportunities and challenges on the path to a greener AV landscape.



Methodology

In tandem with Censuswide, Sony surveyed over **1000** corporate AV professionals across the UK, Germany, Italy, Poland, Spain, Sweden, Denmark and France.

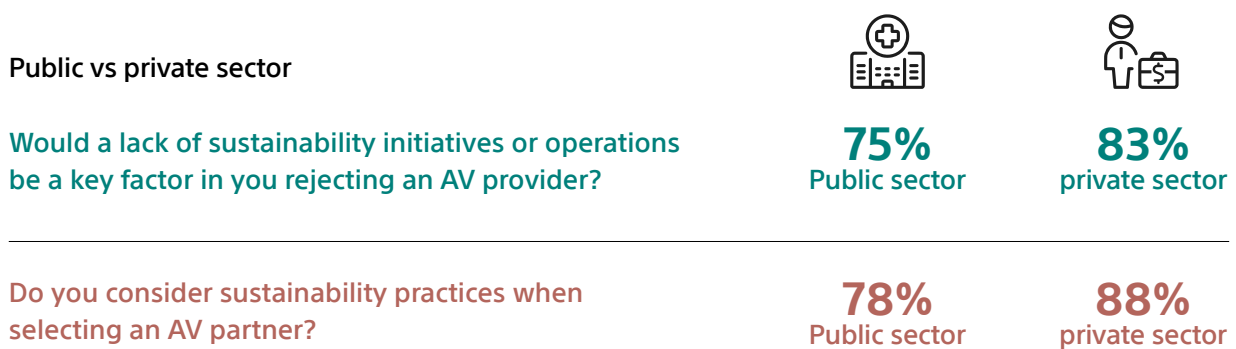
Respondents held decision-maker titles and came from multiple sectors, including aerospace and defence, automotive, banking, financial services and insurance, energy and power, engineering, food and agriculture, law and legal, manufacturing, medical and allied health, mining, pharmaceutical and biotechnology, research and development, technology and telecommunications.



Are AV decision-makers prioritising sustainability?

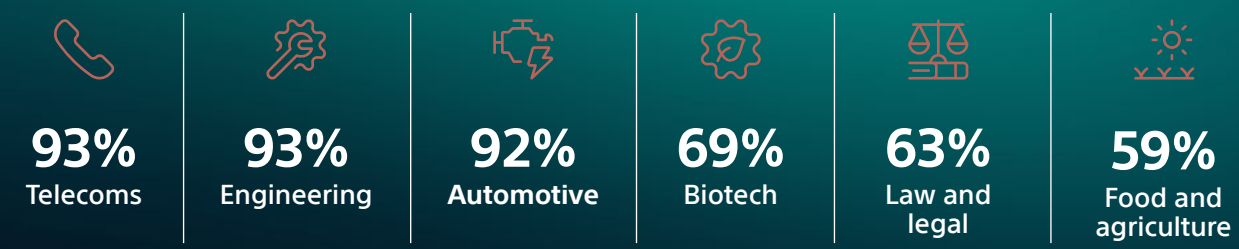
Sony’s research paints a compelling picture of the growing significance of sustainability among corporate AV decision-makers. Most respondents (85%) said a provider’s sustainability practices were important when choosing an AV partner, with 79% saying a lack of prospective provider’s lack of them would put them off. This highlights a considerable shift in industry priorities.

Interestingly, the research reveals a divide between the public and private sectors. Private organisations appear to place a higher premium on sustainability, are more likely to prioritise it during procurement and reject providers found lacking in this area.



A deeper dive into the data uncovers further nuances across different industries. While sectors like telecoms and engineering lead the way in prioritising sustainability, others like law and legal need to catch up, indicating varying degrees of awareness and commitment. Similarly, there are geographical differences in views. UK respondents (74%) are the least likely to consider sustainability important compared to Italy at 93% – although the rate is high across the board.

Industry breakdown: Do you consider prospective AV providers’ sustainability practices during procurement?



Are AV pros willing to pay more for sustainable solutions?

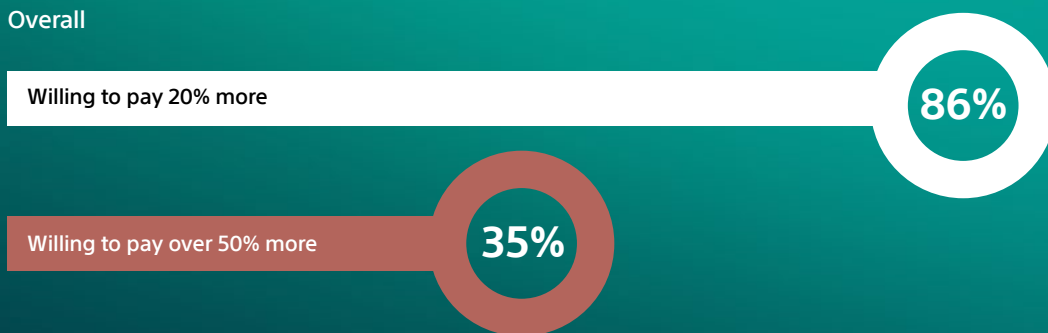
Sony’s research affirms that sustainability is now a tangible factor influencing purchasing decisions in the corporate AV sector. Around 8 in 10 businesses are willing to pay over 20% more for AV products made more sustainably or with greater energy efficiency, with over a third willing to pay over 50% extra. This significant financial commitment underscores a profound mindset shift, where environmental impact is on par with operational efficiency and economic considerations.

Interestingly, the public sector emerges as a frontrunner in this trend, with a higher proportion (93%) of respondents expressing a willingness to pay a premium for sustainability compared to the private sector (80%).

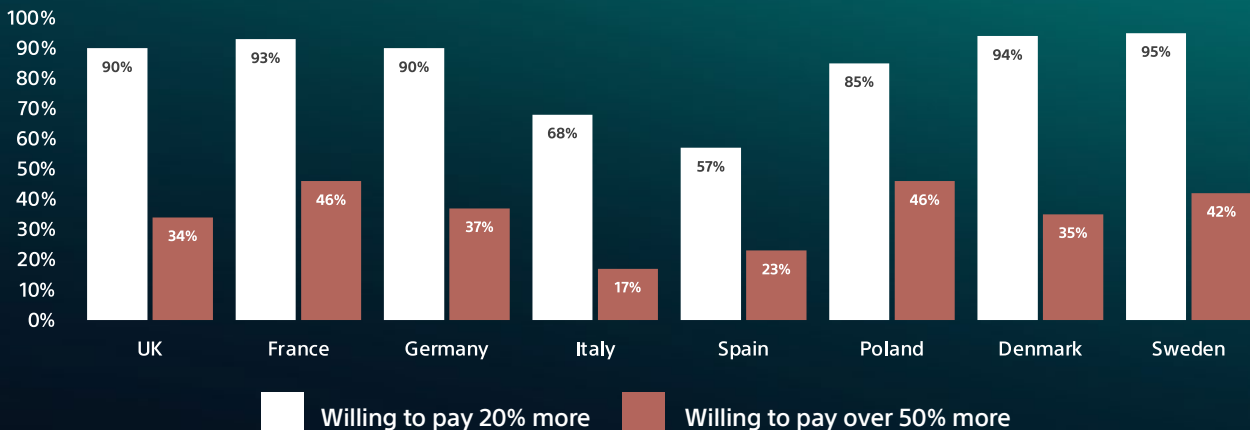
The country-specific breakdown further enriches this narrative, highlighting varying degrees of commitment to sustainability. Notably, Scandinavian countries like Denmark and Sweden are most willing to invest in sustainable solutions, potentially reflecting the region’s strong cultural and political emphasis on environmental protection.

How much more are you willing to pay for a product with better energy efficiency and therefore a lower lifetime total cost of ownership?

Overall



Country split

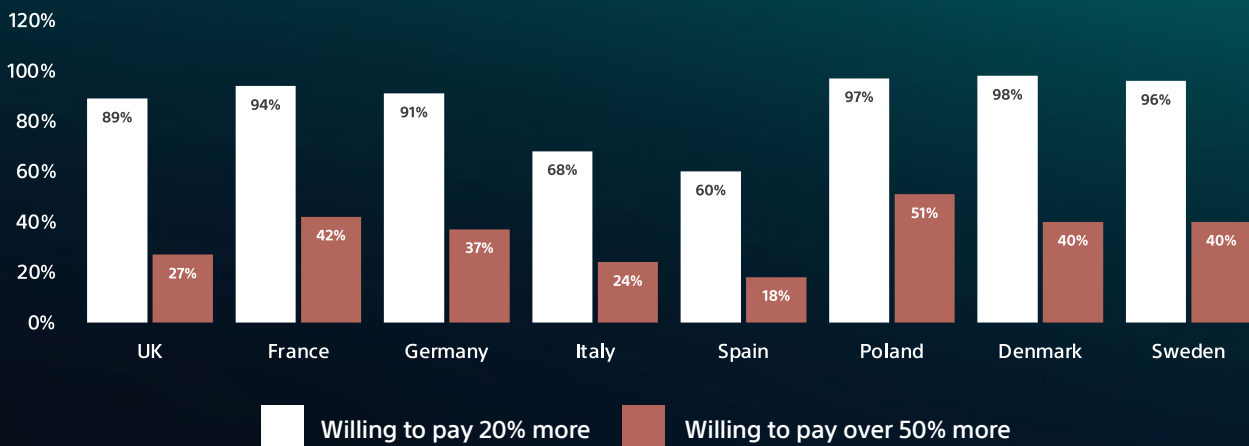


How much more are you willing to pay for a product that has been produced more sustainably?

Overall



Country split



In addition to a willingness to pay more, Sony’s research also reveals that corporate AV decision-makers are now considering sustainability throughout the procurement process. This speaks to a comprehensive and integrated approach to decision-making. Sony’s findings reveal that the pricing and negotiation stage is the most common point for decision-makers to prioritise sustainability. Still, other parts of the procurement process are not far behind:

- Pricing and negotiation | 43%
- Vendor selection | 42%
- Project initiation | 40%
- Equipment specification | 39%
- Post-purchase/implementation | 36%
- At no stage | 0.5%

What impacts respondents' approach to sustainability?

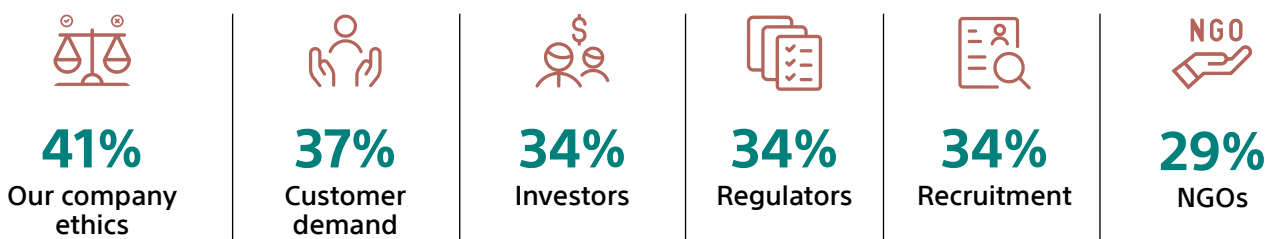
Many factors influence corporate AV decision-makers' decision to prioritise sustainability. However, company ethics emerged as the greatest influence, with 41% of respondents naming this a key driver. Customer demand was ranked second, with 37% of organisations listing it as key. Investors, regulators, and recruitment were all named drivers by 34% of respondents.

The prominence of company ethics underscores a deep-rooted commitment to responsible business practices, reflecting a growing sense of corporate social responsibility among AV professionals. However, the significant influence of external stakeholders like customers and investors also highlights the increasing pressure from market forces and financial interests to embrace sustainability.

The country-specific nuances shed further light, revealing distinct regional priorities and motivations. The UK is the only country to rank investors (42%) as its top driver for implementing sustainable practices, while Germany (41%) and Sweden (38%) both rank recruitment as theirs. Meanwhile, Poland and Denmark rank customer demand as their biggest driver, at 48% and 50%, respectively.

Findings are broadly consistent across industries. Interestingly, the legal sector stands out with a unique perspective, placing NGOs (40%) ahead of company ethics (23%) as their primary sustainability driver. This could reflect a heightened sensitivity to external scrutiny and a proactive approach to aligning with societal expectations.

What are the greatest influences on ensuring your business is operating sustainably?



CSRD

Another noteworthy finding is the predicted impact of the EU’s Corporate Sustainability Reporting Directive (CSRD), which underlines the growing regulatory push towards greater transparency and accountability in corporate sustainability reporting.

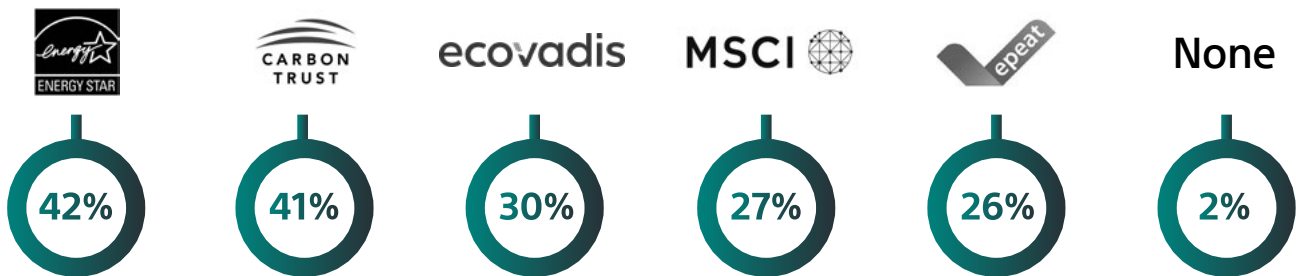
Asked whether CSRD would significantly influence their approach to procurement in the next two years, over a third (34%) of corporate AV professionals agreed, saying they’d prioritise AV providers with robust sustainability practices. A further 35% said it would have a moderate impact.

Denmark is the least likely to see CSRD as critical, with only 19% seeing the regulation as important. Meanwhile, Poland blows other countries out of the water – 55% of respondents said this directive would be critical to their buying decisions.

Eco-labels

Sony also asked whether decision-makers see eco-labels as a valuable tool and badge of trust. While labels like Energy Star and Carbon Trust enjoy relatively high recognition, others are less widely acknowledged, suggesting a need for greater standardisation and clarity in eco-labelling.

What eco labels do you consider most important to you or your business?



Conclusion: AV sustainability – the curtain rises on a greener act

Sony's research underscores a shift in priorities in the corporate AV sector. Sustainability is no longer a peripheral concern but a core driver across the entire AV procurement process.

Organisations' increasing willingness to invest in sustainable AV solutions is promising. This shift is not driven solely by altruism, but by a practical understanding of the long-term value and cost-effectiveness of sustainable technologies. It also underscores the intricate web of factors that influence sustainability adoption, from internal ethical considerations to external market pressures and regulatory frameworks.

However, the research also points out areas that need attention. The disparity in sustainability commitment across industries and countries highlights the need for continuous awareness and education. Moreover, the mixed response to eco-labels underlines the need for more standardisation and clarity.

Looking ahead, impending regulations like the EU's CSRD are poised to further accelerate the drive towards sustainability in the corporate AV sector. As businesses face increased scrutiny and reporting requirements, the demand for sustainable solutions will only grow.

As the industry evolves, a commitment to sustainability may become a defining factor in the success of European AV providers. Those who fail to embrace sustainable practices risk losing out.





Industry perspectives

“Sony’s new research dispels the myth that sustainability is still seen as a ‘nice to have’. New regulation, combined with growing pressure from consumers and employees, has made companies start to think more seriously about sustainability, but these ambitions need to be echoed in purchasing decisions in order to drive real change. These findings should encourage AV providers to improve the sustainability credentials of their products and services and ensure that their impact is being shared. It is only through collaboration and communication that we will start to see the AV industry move towards a more sustainable model, and it is great to see Sony sharing this research to give us all another push in the right direction.”

Rhea Horlock

Head of Corporate Social Responsibility, Kinly

“Sony’s research tells a somewhat surprising story about the corporate industry’s genuine motivation to operate and purchase more sustainably. It’s particularly promising for us as an AV integrator that holds ourselves to high standards when it comes to sustainable practices. For example, as well as being ISO4001 compliant, we also have on-site balers that turn plastic, polystyrene, and cardboard waste from manufacturers into fully recyclable bales.

We can make every effort possible to be more sustainable on our own, but it’s ultimately down to every single link in the chain to hold each other accountable for our approach to sustainability. As we see more end-users looking for transparent and practical sustainability initiatives, it’s encouraging to see that Sony is driving this conversation forward as a manufacturer.

As a partner of Sony’s, and one that has sustainability at our core, it’s easier to work with a manufacturer that is open and transparent about its own sustainability initiatives. While it’s true that we’re seeing sustainability crop up more in conversations during the purchasing cycle, especially with larger tenders, there’s still work to be done. Unsurprisingly, despite best intentions, cost savings still often win out against eco-consciousness. The more we talk about this and manufacturers like Sony put weight behind the discussion, the better.”

Shelley Townend

Marketing Manager, Universal AV

A note from Sony

















Rik Willemse
 Head of Professional Displays
 and Solutions at Sony Europe

We often hear that, while companies have an appetite to be more sustainable, most are unwilling to pay more for sustainable solutions. This research challenges that preconception,” said Rik Willemse, Head of Professional Displays and Solutions at Sony Europe. “It’s heartening to see corporations willing to ‘put their money where their mouth is’ on sustainability. In our view, the onus is now on AV providers to bring more sustainable solutions to market and clearly explain their benefits to prospects – a mission we take very seriously here at Sony with our company wide road to zero initiative and sustainable product solutions such as the SORPLASTM recycled plastic used in our BRAVIA displays. For the last few years we have been beating the drum for sustainability. Sony is making very clear strides towards a more sustainable future in AV technology, and we are on a mission to make this conversation a top priority for end-users, partners and manufacturers alike, including our increasingly strong sustainability focus at major industry events like ISE.”



How is Sony leading the way on Sustainability?

Sony Group drive comprehensive efforts & concrete target setting to improve sustainability throughout all business operations & product lifecycle of Sony products.

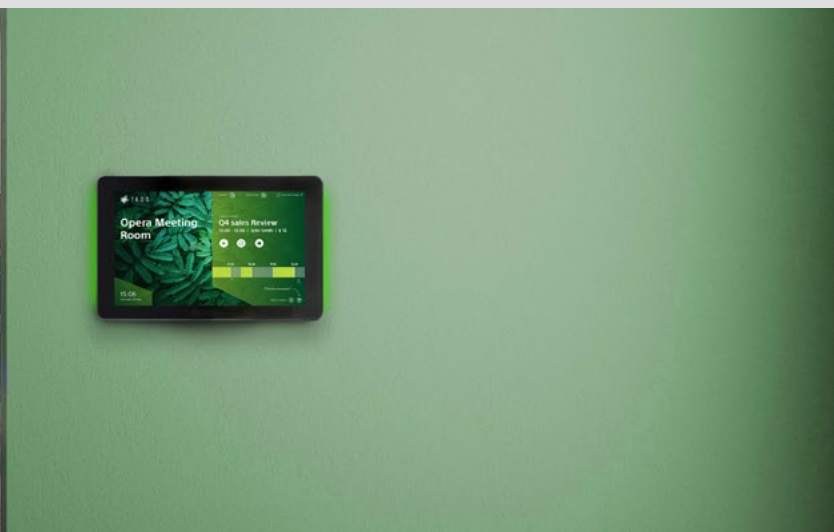
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| <p>SONY Group</p> | <div style="display: flex; justify-content: space-between;"> <div style="width: 30%;">  <p>Sony's plan to reduce our environmental footprint to zero BY 2050</p> </div> <div style="width: 30%; text-align: center;"> <p>INDUSTRY LEADING TARGET SETTING</p> <p>approved by External Initiatives</p>  <div style="display: flex; justify-content: space-around;"> <div style="text-align: center;"> <p>RE100</p> <p>100% Renewable electricity by 2030</p> </div> <div style="text-align: center;"> <p>SCIENCE BASED TARGETS</p> <p>Net Zero GHG Emission by 2040</p> </div> <div style="text-align: center;"> <p>ZERO</p> <p>Zero Virgin materials usage by 2050</p> </div> </div> </div> <div style="width: 30%;"> <p>A LEADER IN SUSTAINABILITY EFFORTS</p> <p>Sony recognized by external auditors & institutions</p> <div style="display: flex; justify-content: space-around;"> <div style="text-align: center;">  <p>6th consecutive year honouree</p> </div> <div style="text-align: center;">  <p>No. 1 LFD manufacturer AAA score- Aligned with Paris Agreement</p> </div> <div style="text-align: center;">  <p>8th year on A-List for climate Change</p> </div> </div> </div> </div> | | |
| <p>SONY Corporation & BRAVIA</p> | <p>MAKING IT</p>  <p>57%</p> <p>Less CO2 emissions*, by reducing use of virgin plastic & using Sony's recycled material SORPLAS™</p> | <p>MOVING IT</p>  <p>15%</p> <p>Less CO2 emissions*, with smaller, lighter packaging + 90% less ink</p> | <p>USING IT</p>  <p>32%</p> <p>Power saving settings in Eco Dashboard, can reduce energy usage by up to 32%*</p> |
| <p>PD&S PRO BRAVIA FY24 & Beyond</p> | <div style="display: flex; justify-content: space-between;"> <div style="width: 30%;"> <p>IMPROVED EPREL RANK</p> <p>Our BZ-L line-up brings an energy rank improvement for 93% of the new BRAVIA models vs their predecessors.</p> <div style="display: flex; justify-content: space-around;"> <div style="text-align: center;"> <p>PREDECESSORS</p> <p>ALL G</p>  </div> <div style="text-align: center;"> <p>BZ-L SERIES</p> <p>E/F</p>  </div> </div> <p>Great BRAVIA Performance, in a more efficient way.</p> </div> <div style="width: 30%;"> <p>AMBIENT LIGHT SENSOR</p>  <p>Adaptive brightness & power based on light conditions (all BZ-L)</p> <p>POWERFUL SOC</p>  <p>No Media player needed. Less devices, less energy used.</p> </div> <div style="width: 30%;"> <p>ECO LABEL ACHIEVEMENTS</p>  <p>EPEAT Bronze- 11 SKU's incl. all BZ35L & BZ40L</p>  <p>Energy Star - 9 SKU's incl. 98" BZ30L</p> </div> </div> | | |

*For full details on sustainability metrics visit Sustainability in BRAVIA displays - Sony Pro **energy saving value varies by model and region

*55BZ30L achieved 'EPREL G' ranking, all other models achieved F or better.

Find out more at [Pro.Sony/Sustainability](https://www.sony.com/pro/sustainability)

Smart Workspaces with Sony Professional



To find out how Sony's increasingly sustainable corporate technology products and solutions could help improve the sustainability of your AV operations, you can visit our website or get in contact with one of the team.

Find out more: pro.sony/sustainability

Contact us: pro.sony/en_GB/corporate/corp-contact-us

