

Rethinking printing

April 2010



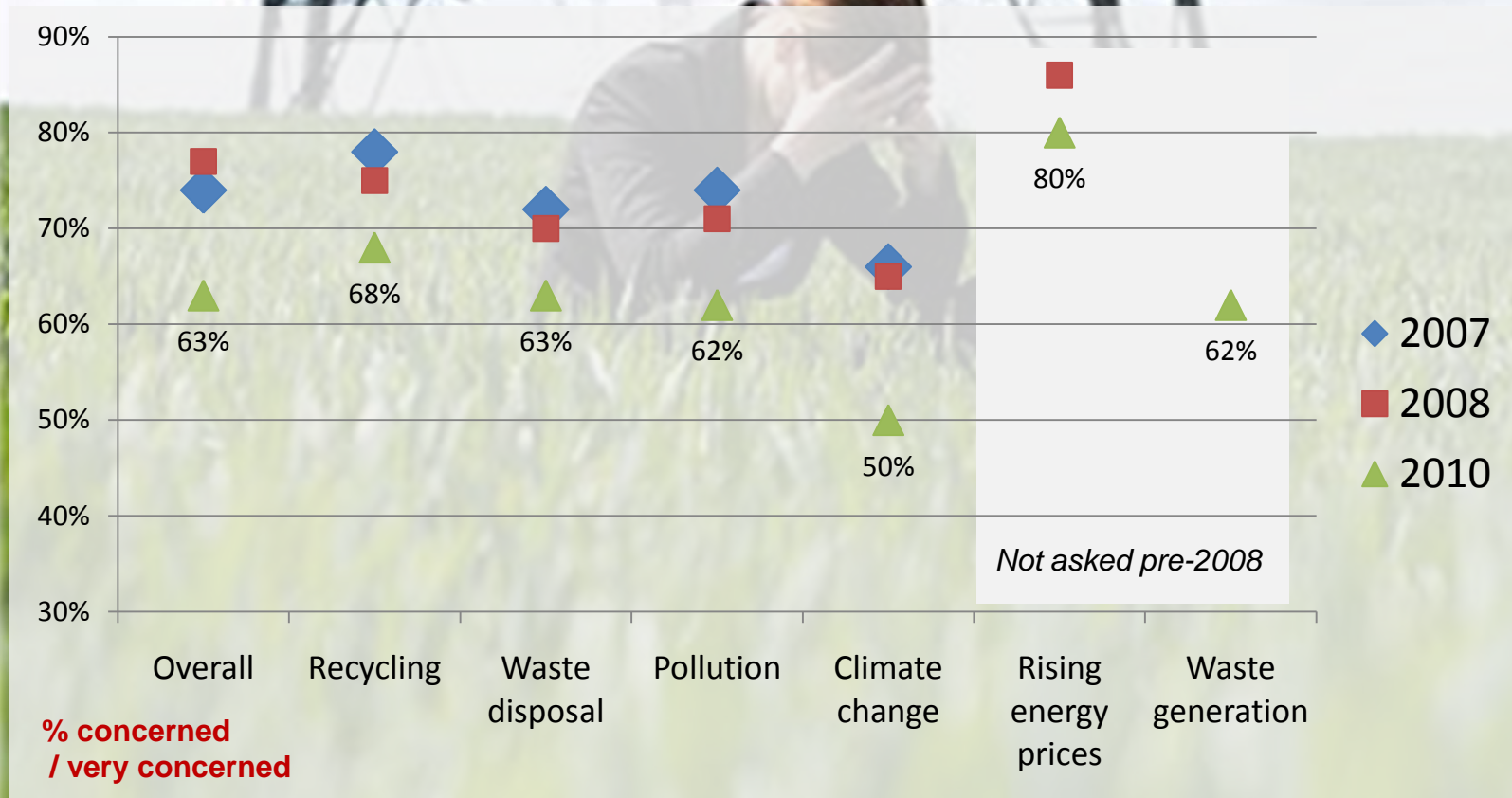
Rethinking printing: Key themes

Signs of **green fatigue** amongst consumers and net **increases in the amount of printing**, mean that the onus has to now shifted to companies to **automate** what they can to improve environmental performance whilst encouraging employees to **think twice** about unnecessary printing.

With IT investments remaining mainly **cost driven**, a desire for **environmentally preferable** solutions and printer management being an evident **burden** on IT departments – MPS is increasingly on IT agendas

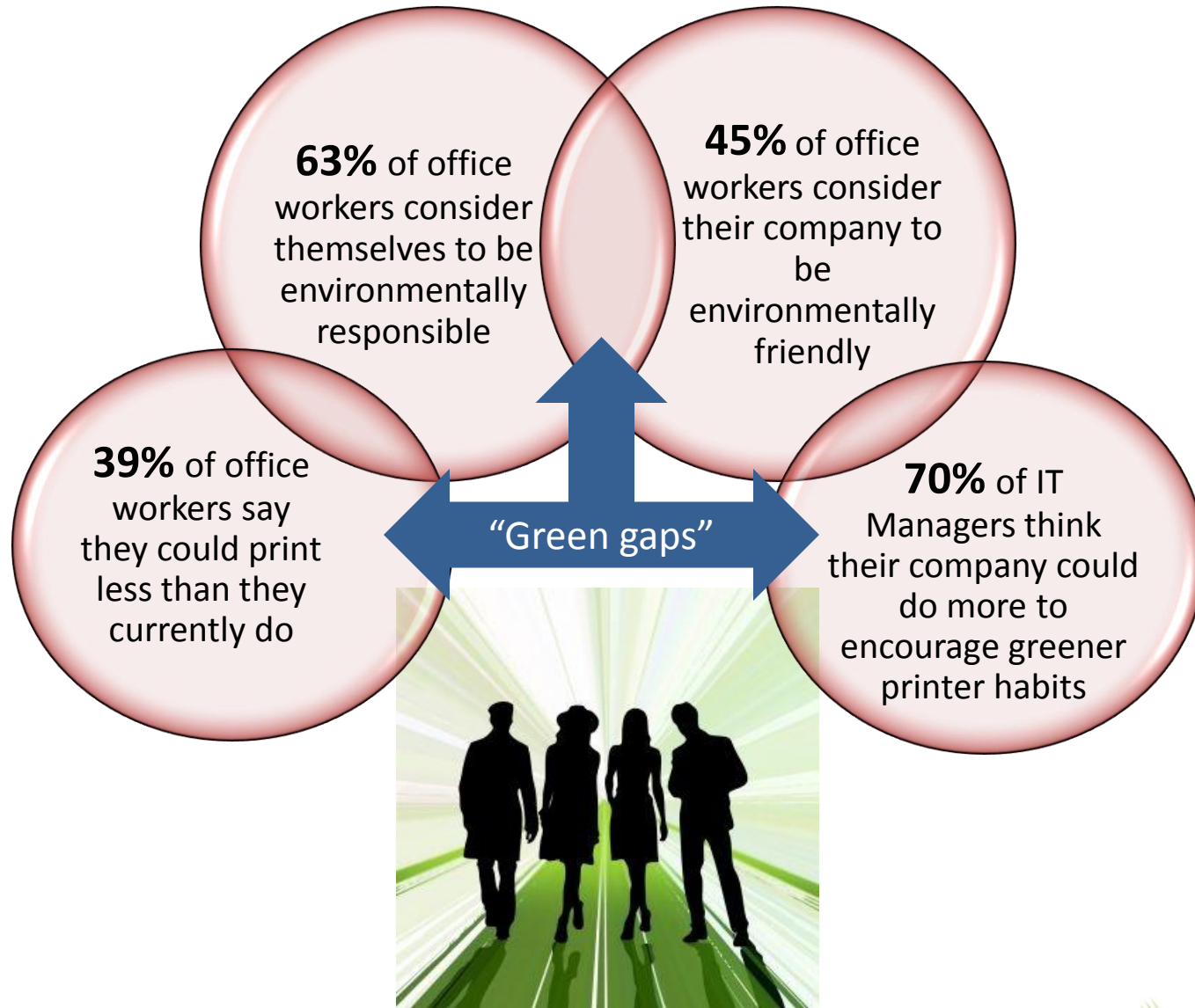


Is green fatigue setting in?



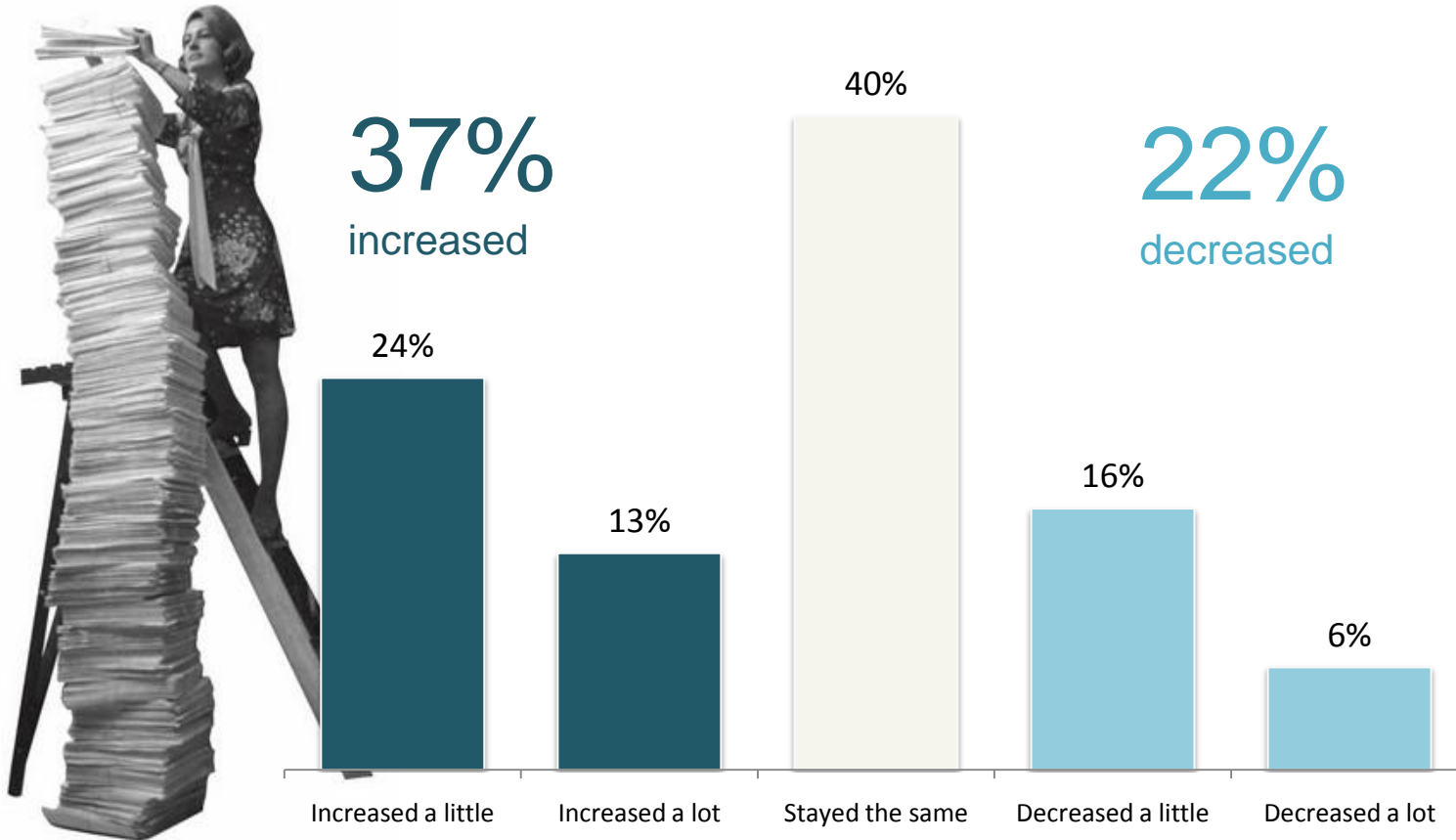
S12 - How concerned are you personally about environmental issues, such as climate change, pollution, household waste disposal and recycling?
Base: Office workers

Evident green gaps in UK businesses



Printing going up, not down...

There has been a **net increase in printing** over the last 12 months with only 1 in 5 office workers having decreased their levels of printing



S4 - Overall, how would you say the amount of printing you do has changed in the last 12 months?
Base: All employees (1000)

Print-onomics

The average UK office worker goes through as many as **10,000** sheets of paper per year (45 sheets per day)



For each office worker **6,800** of these sheets of paper is wasted or unnecessary

2,100 sheets could be printed single-sided

1,600 sheets could be read on screen instead

1,100 are printed for proof-reading


800 sheets are unnecessary duplicates

600 sheets are the wrong documents

600 sheets are left forgotten on the printer


Balancing print priorities

IT managers are looking for:



More efficient printing
More secure printing
Cost savings
Environmentally friendly

Office workers are looking for:



Efficient printing / no queues
Secure printing
Environmentally friendly

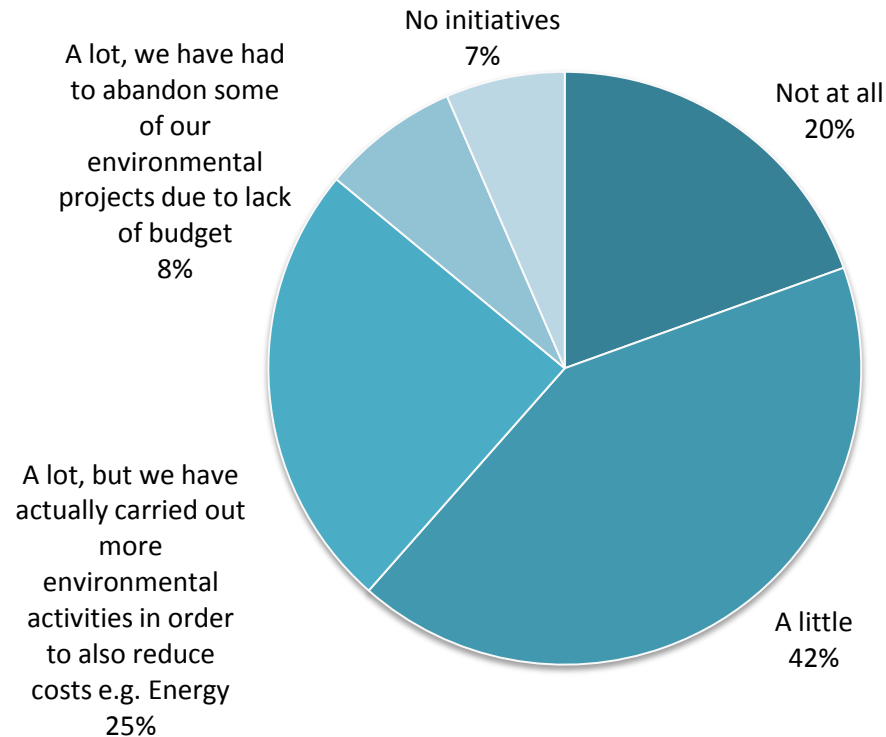
MPS provides a way of reconciling these drivers and a starting point for implementing policies and educating users about best practice printing

Green business **IT Manager findings**



Impact of downturn on environmental programmes

The downturn appears to have had either a neutral or positive effect on the level of environmental activities as companies strive to save costs



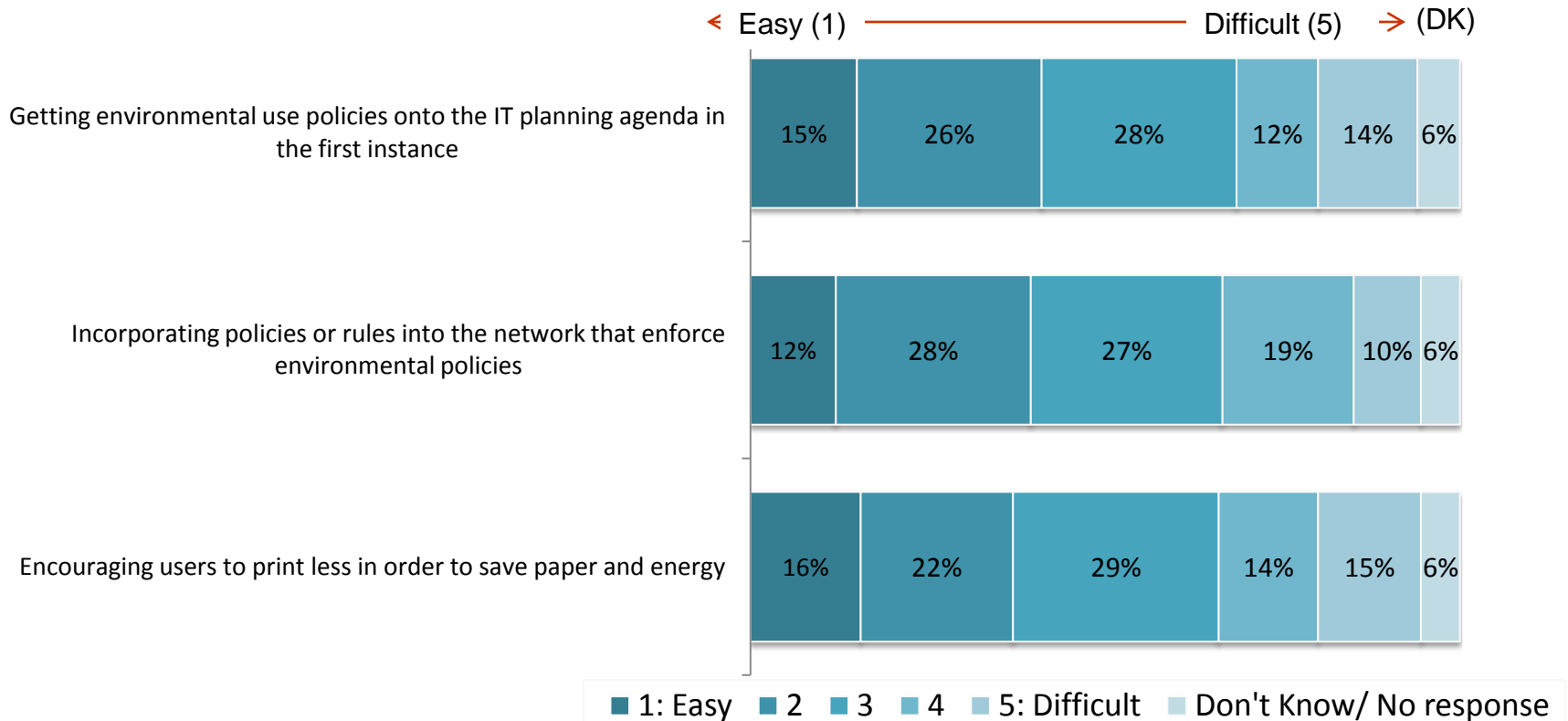
61%
of managers consider their organisation to be environmentally friendly

67%
say they make environmentally conscious decisions at work

Q12 - Which of the following best describes how you feel environmental programmes and initiatives in your company have been affected by challenging economic circumstances?
All IT managers (200)

Difficulties in implementing environmental policy

It is considered easier to get environmental policies onto the IT planning agenda now (41%) than it was in 2008 (36%) although incorporating rules into the network that enforce environmental policies is deemed more difficult now (29%) than in 2008 (24%)

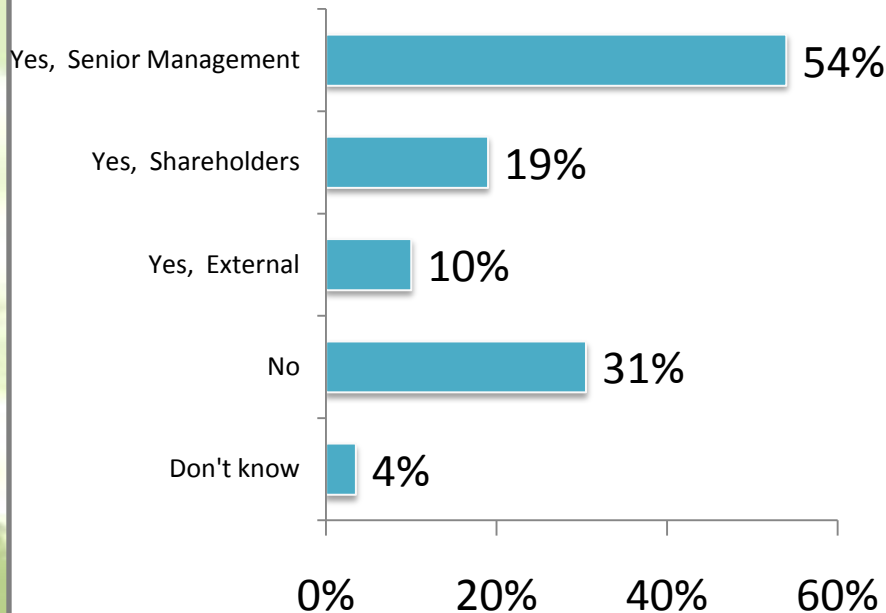


Q3 Within your company, how difficult would you rate the following tasks on a scale of 1 to 5, where 1 is "very easy" and 5 is "very difficult"? Base: All managers (200)

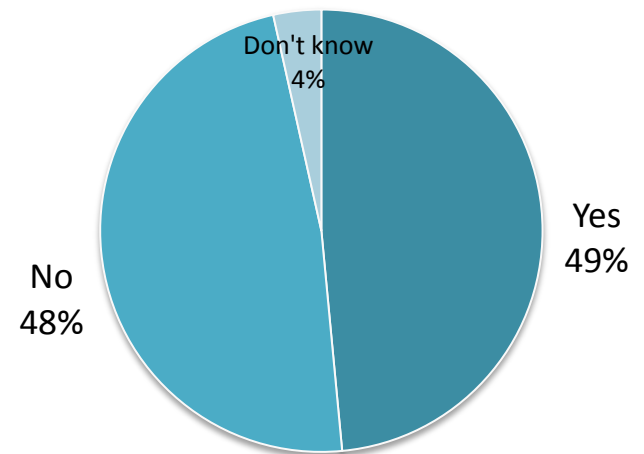
Environmental reporting and audits

65% of IT managers are required to report on IT environmental performance although only 49% have actually conducted an energy audit

Required to report on environmental performance of IT systems



Conducted audit of IT energy use

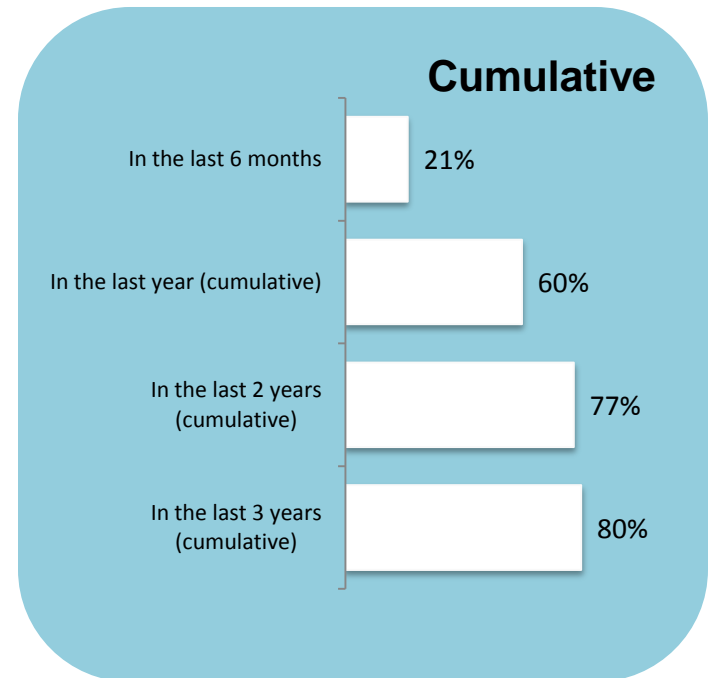
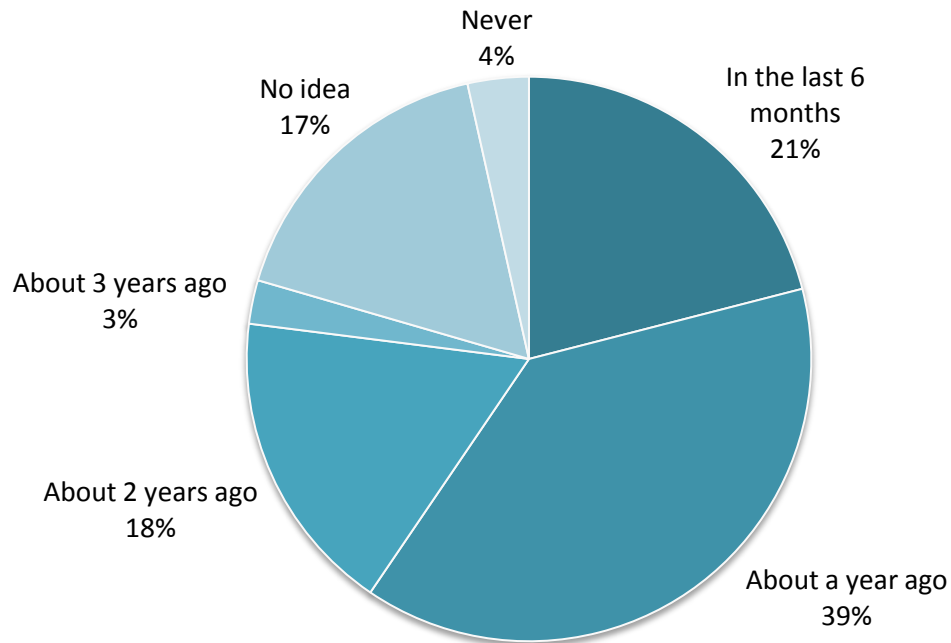


Q5 - Are you required to report on the environmental performance of your IT systems to senior management, shareholders or external bodies? Q4 - Have you ever conducted an audit of IT energy use relating to power consumption and resources?

Base: All managers (200)

Auditing of printing practices

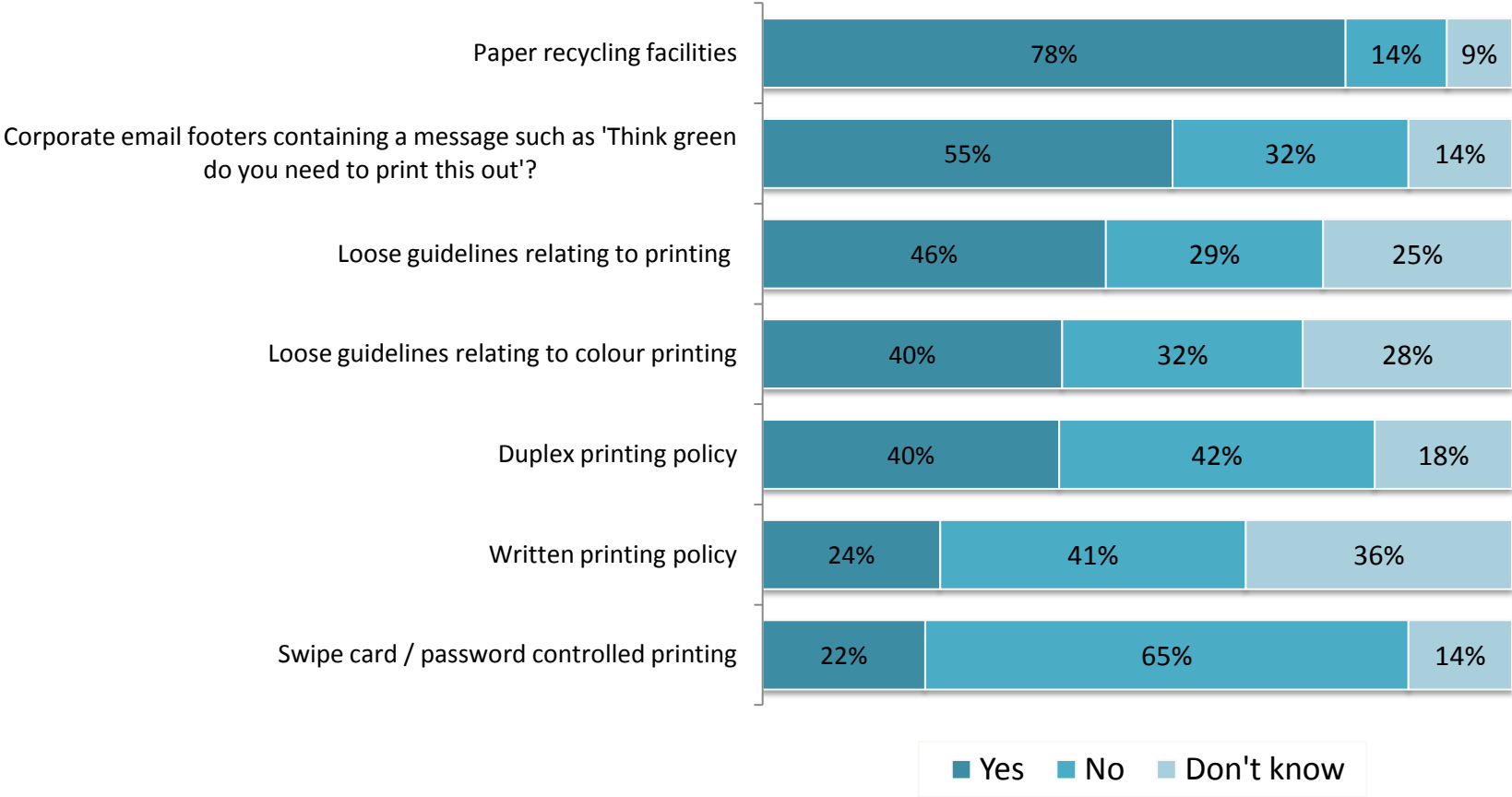
60% of companies have audited their printing practices in the last year



Q13 - When did your company last audit its printing operations / practices, including establishing the cost of printing within your company? All IT managers (200)

Printing guidelines / processes in place

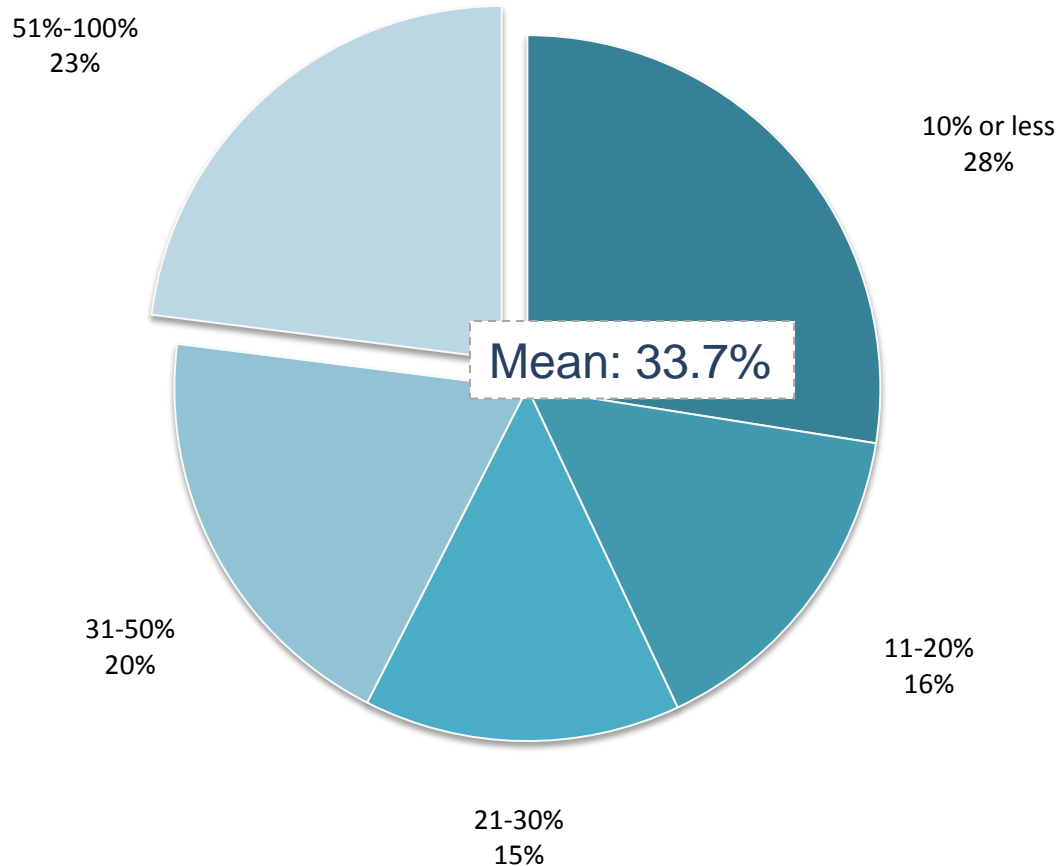
Loose guidelines are more prevalent than strict printing policies – there is no relationship between these processes and reductions in printing over the past 12 months



S7 - To your knowledge, does your organisation have any of the following guidelines or processes in place? Base: All employees (1000)

The printer time trap

On average, IT departments are spending a third of their time on printer-related issues

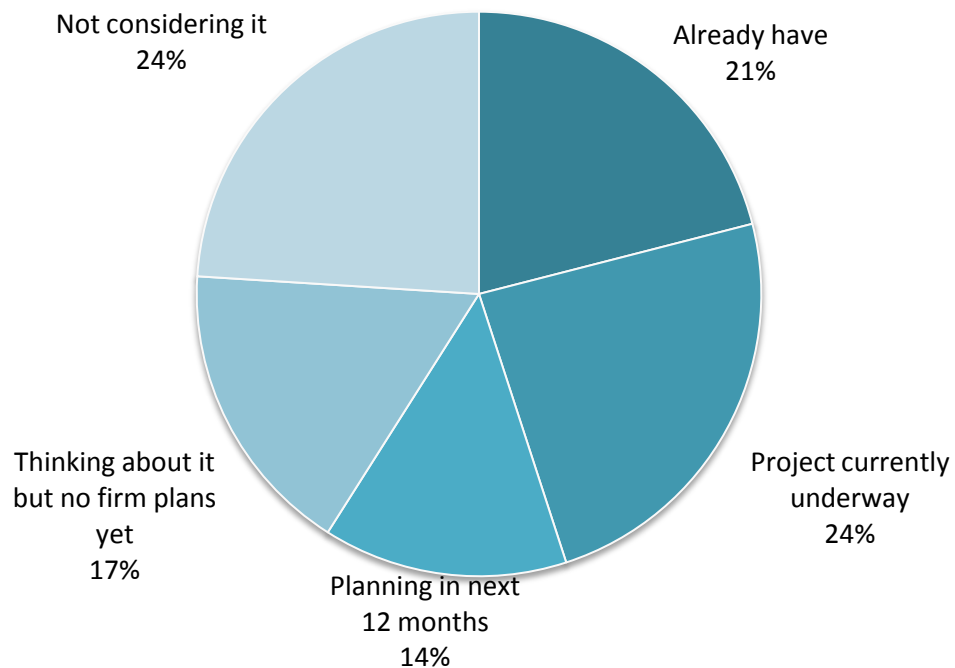


71%
of IT Managers think that
the **efficiency** of their
printing could be improved

Q1 - Approximately what percentage of your IT department's time is devoted to supporting printers and other document systems? Base: All managers (200)

Deployment of MPS / MDS

MPS is important to half of companies, and one fifth already have MPS / MDS services in place



51%

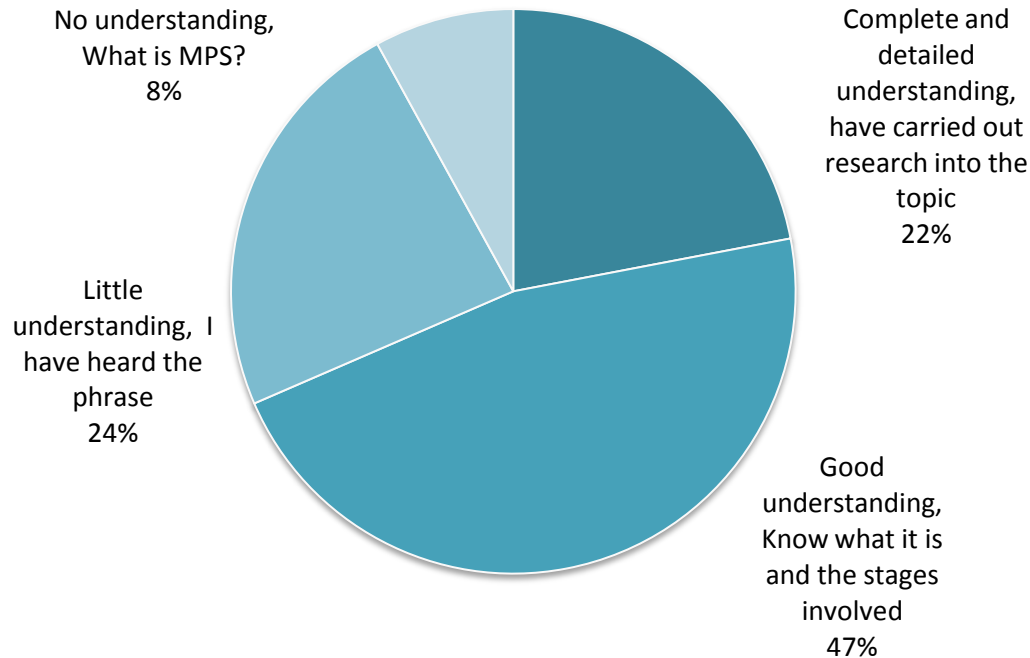
of managers say that MPS services are becoming an increasingly important aspect of IT planning and activity

Q7 - Does your company currently use or is it planning to deploy an outsourced managed print / document service in the next 18 months?
Base: All IT managers (200)

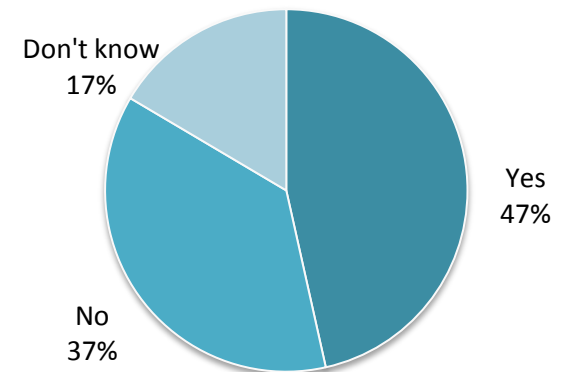
Understanding of MPS

More than two-thirds of IT Managers claim to have a good or complete understanding of MPS

Level of understanding of MPS



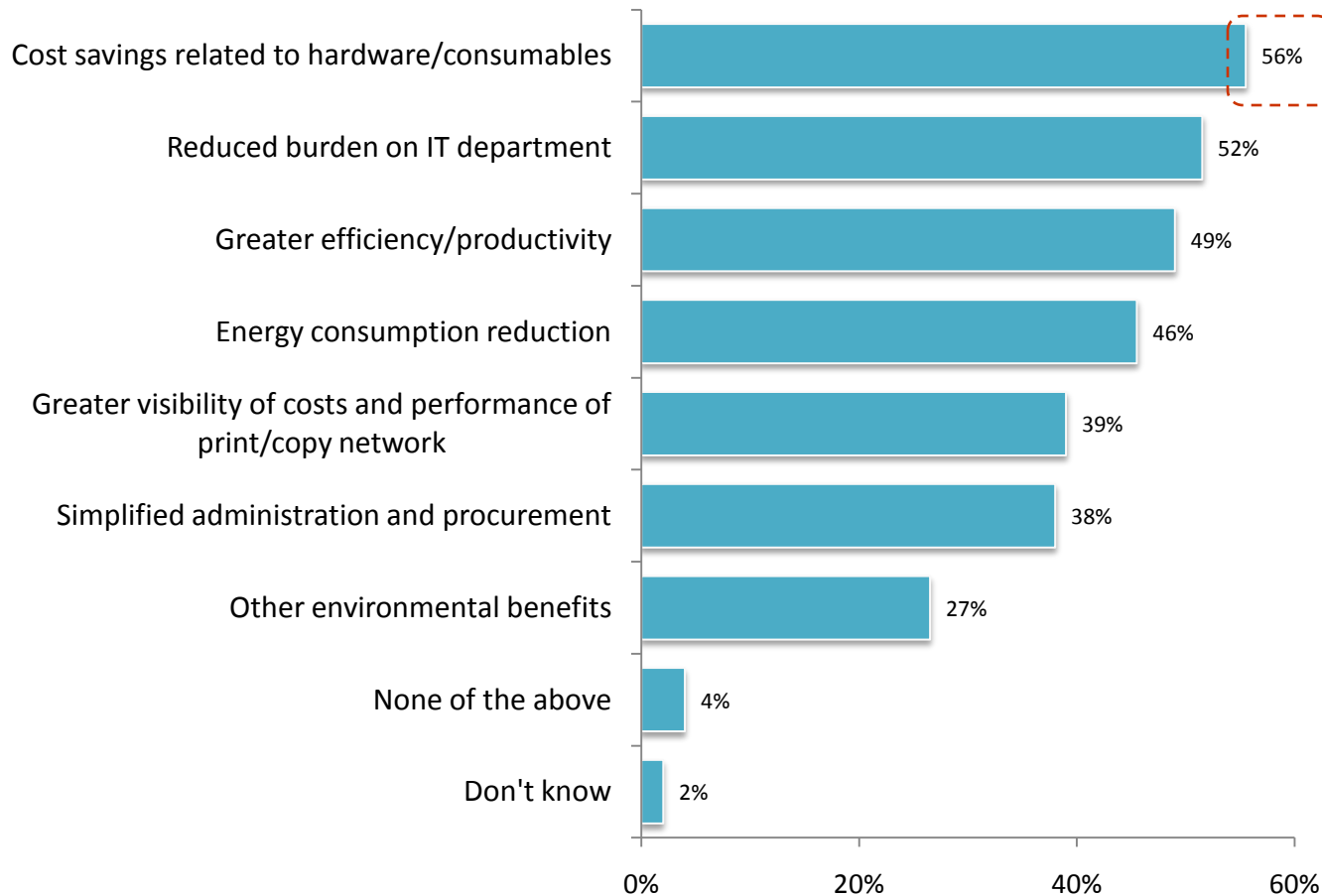
Whether would use independent consultants to assess MPS requirements



Q8 - How knowledgeable would you say you are on the topic of Managed Print Services (MPS)?
Q11 - Do you think you would use an independent consultancy to assess your MPS requirements prior to selecting an MPS supplier? All IT managers (200)

Most compelling benefits of MPS

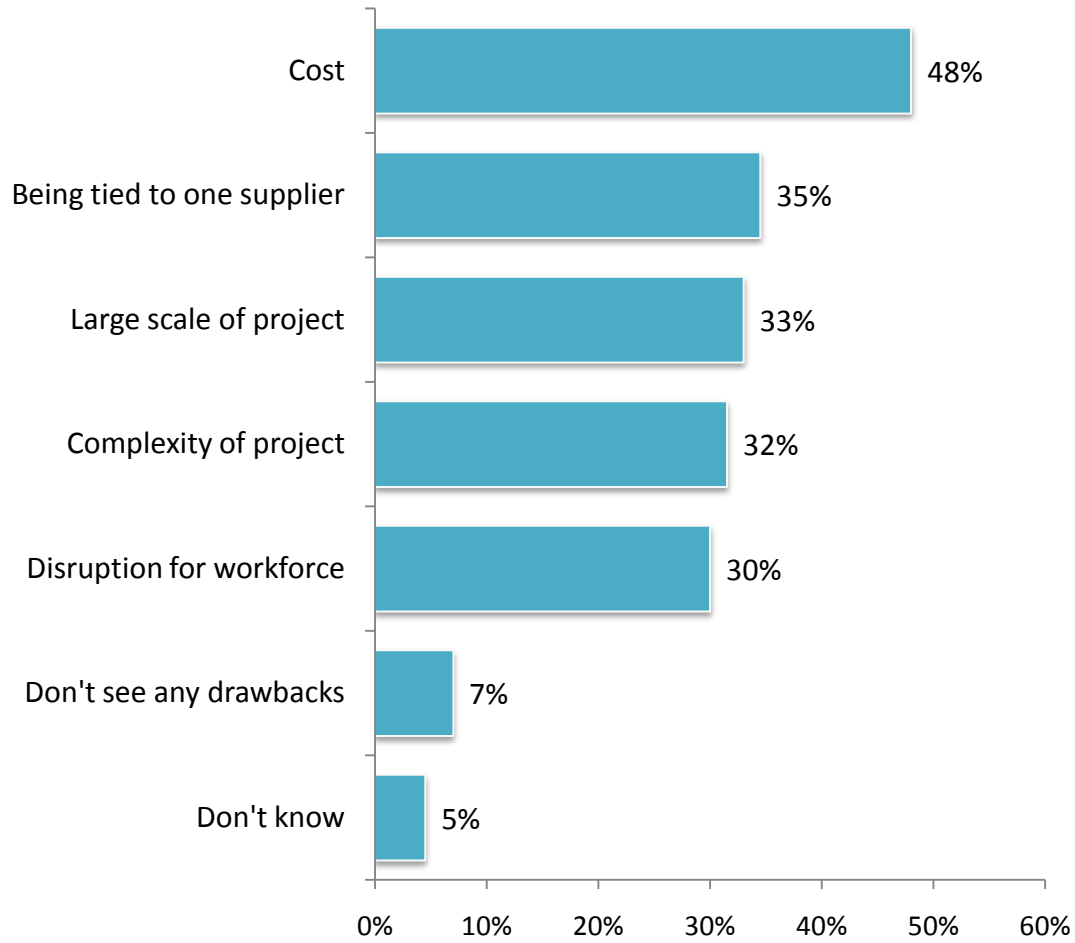
Cost savings are the most compelling benefit, although easing pressure on IT departments is a key concern as is greater efficiency / productivity



Q9 - Which do you see as relevant to your organisation?
All IT managers (200)

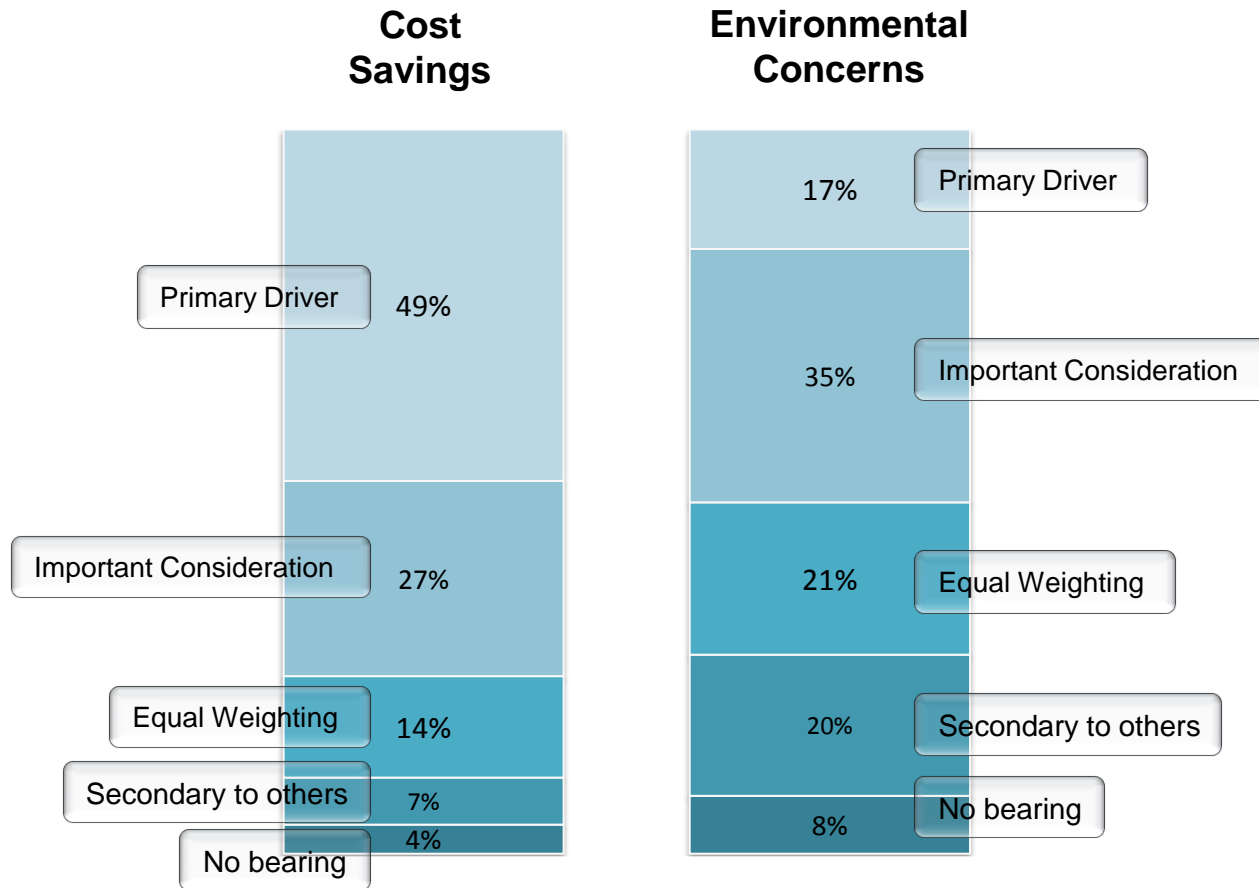
Main barriers to adopting MPS

Despite cost savings being seen as biggest benefit, actual deployment costs are also the main barrier



Drivers of IT investment

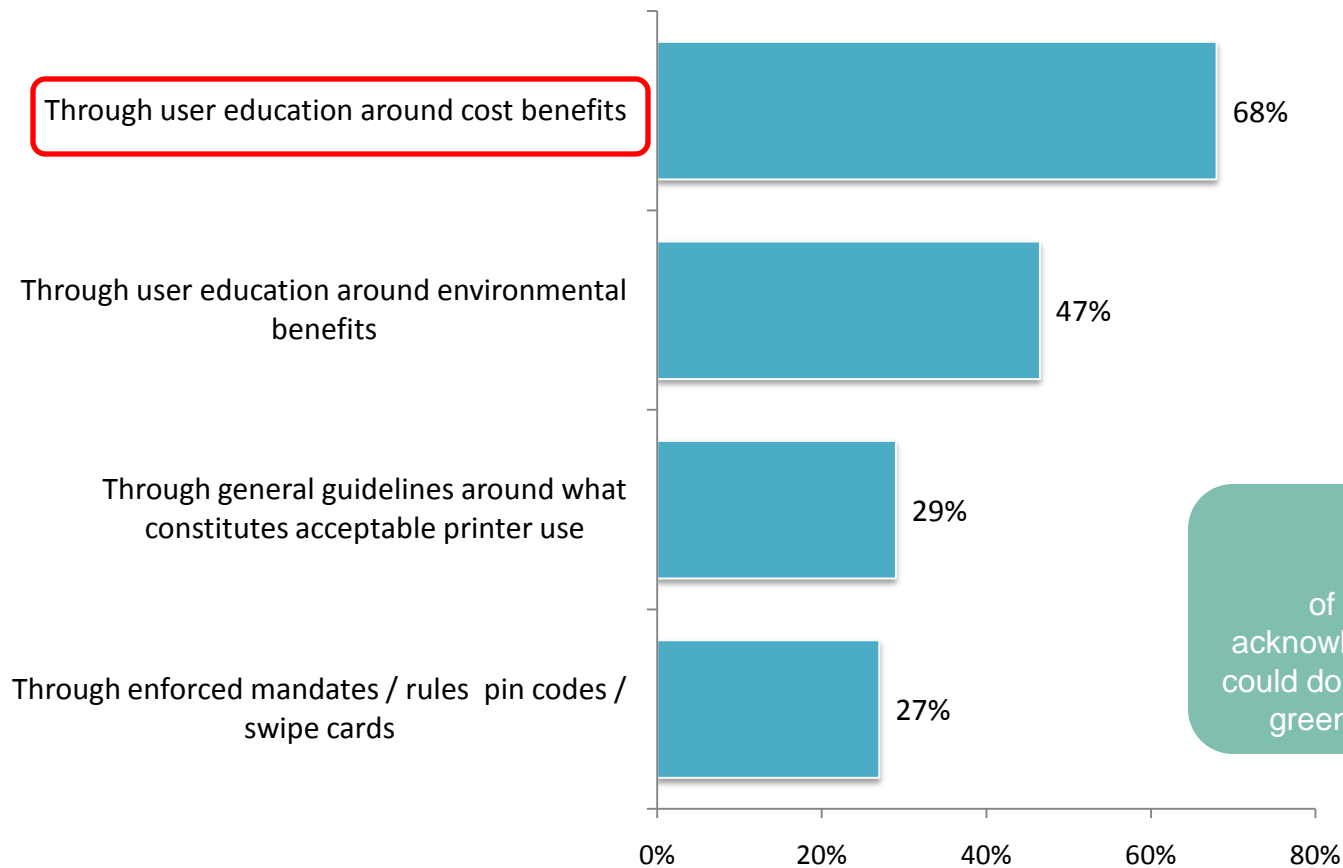
Cost outweighs environmental concerns in driving investment in IT although the environment is an important consideration or given equal weighting to cost in 56% of companies



Q6 - a) To what extent are environmental concerns driving investment in IT in your organisation?
Q6 - b) To what extent are cost savings driving investment in IT in your organisation?
Base: All managers (200)

Encouraging best practice printing

IT managers feel that user education around cost benefits would best encourage good printing habits, ahead of education around the environmental benefits



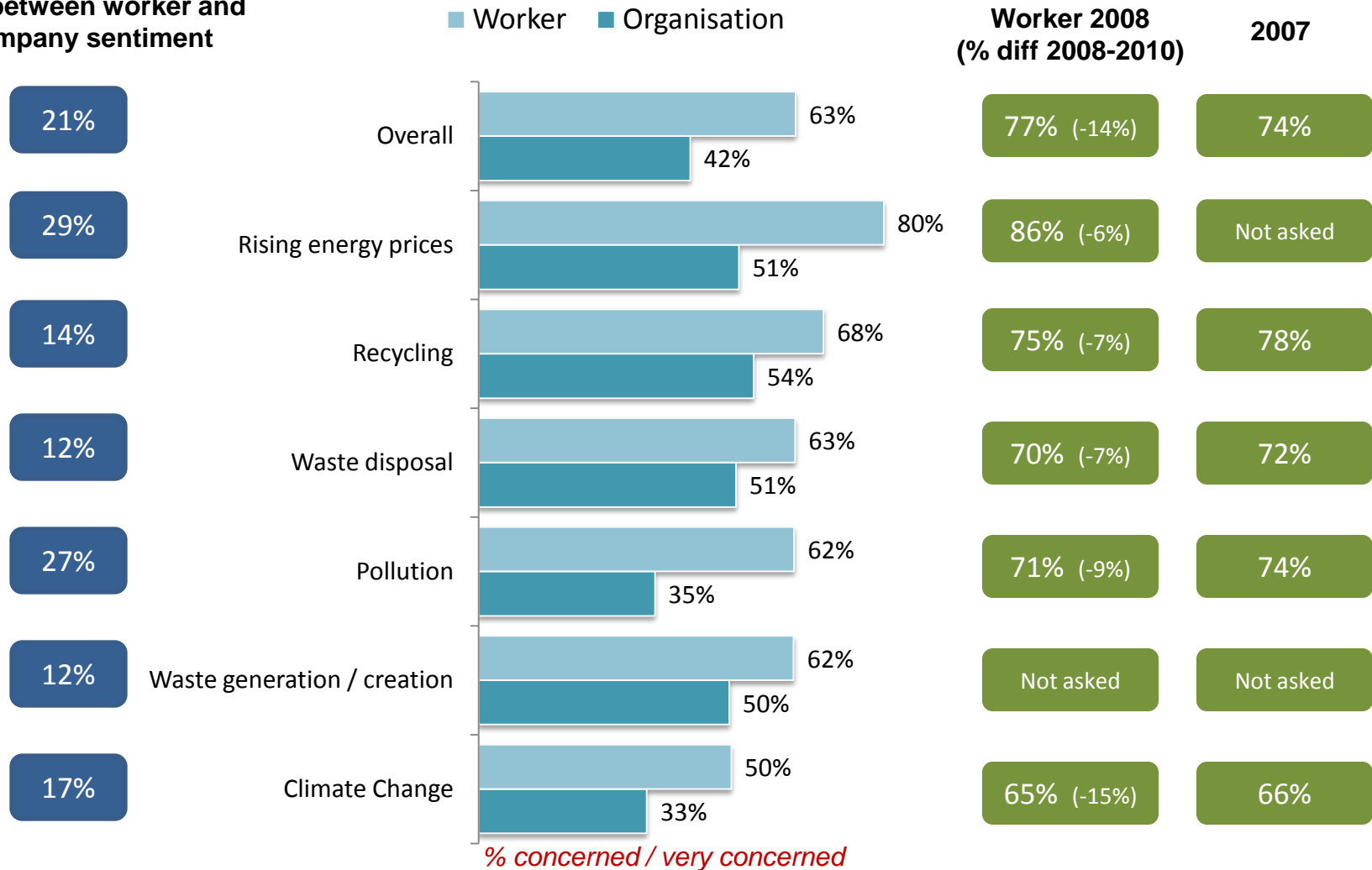
70%
of IT managers
acknowledge their company
could do more to encourage
greener printer habits

Perspectives on printing:
Office worker



Mind the gap: environmental disconnects


Gap between worker and company sentiment



S12 - How concerned are you personally about environmental issues, such as climate change, pollution, household waste disposal and recycling? S13 - How concerned do you think your organisation is about environmental issues, such as climate change, pollution and recycling? Base: All employees (1000)

Causes of print wastage

Two thirds of printed material is currently wasted, mainly due to individual and company “default settings” to single side printing and personal paper preferences. This is unchanged in 2 years.



% wasted every week	2010	2008
Printing documents single sided rather than double sided	21%	20%
Preferring to read on paper rather than on screen	16%	13%
Printing for proof-reading rather than on screen	11%	10%
Printing too many copies of a document	8%	9%
Printing the wrong document	6%	9%
Forgetting to collect printouts from the printer	6%	7%
TOTAL WASTAGE	68%	67%

40% of employees consider themselves to be a ‘paper person’

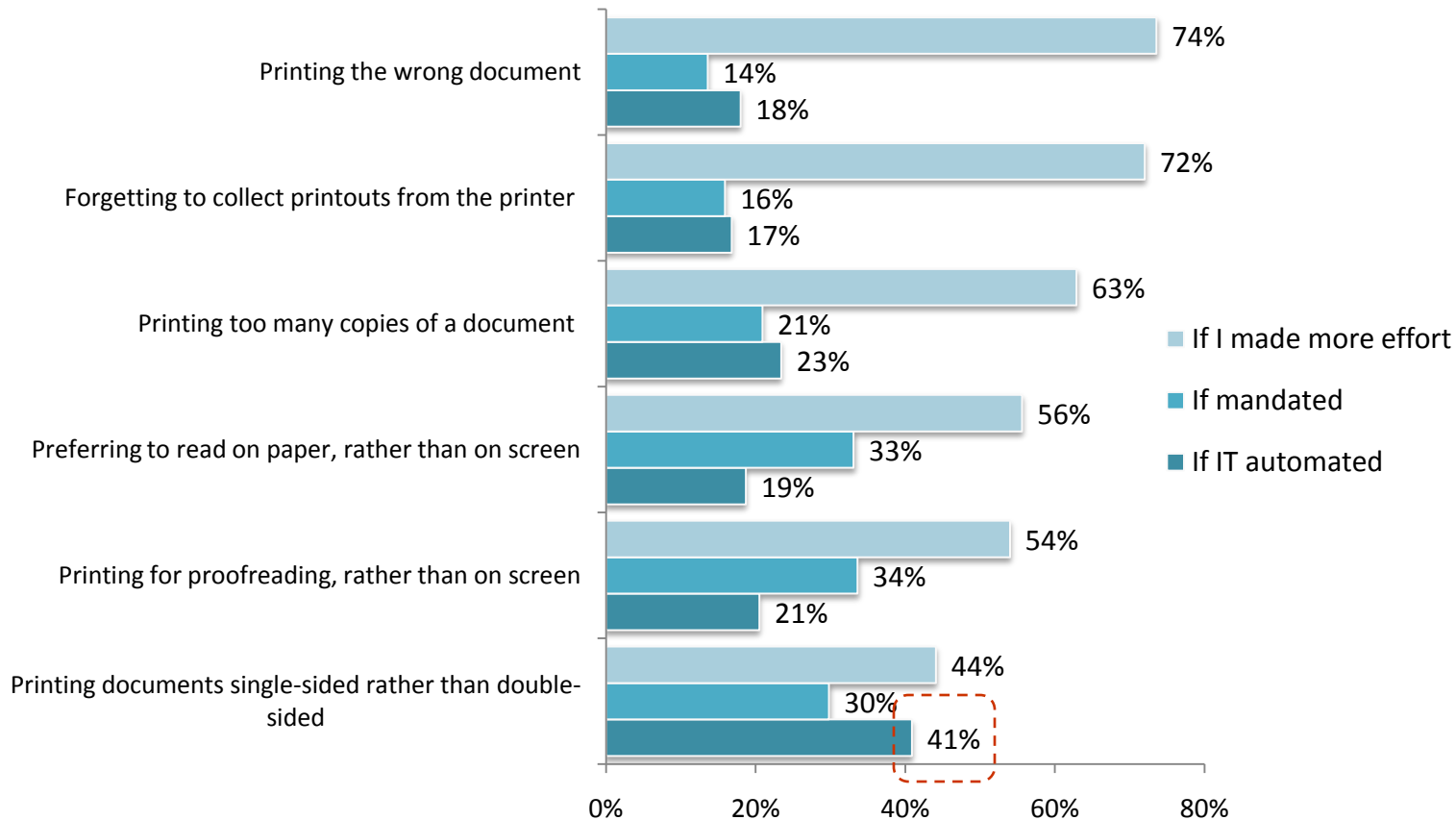
39% of employees say they could print less than they currently do

S5 - In your day-to-day use of printing, what percentage of the material you print out each week/paper is ‘wasted’, by ...

Base: All employees (1000)

Tackling print wastage

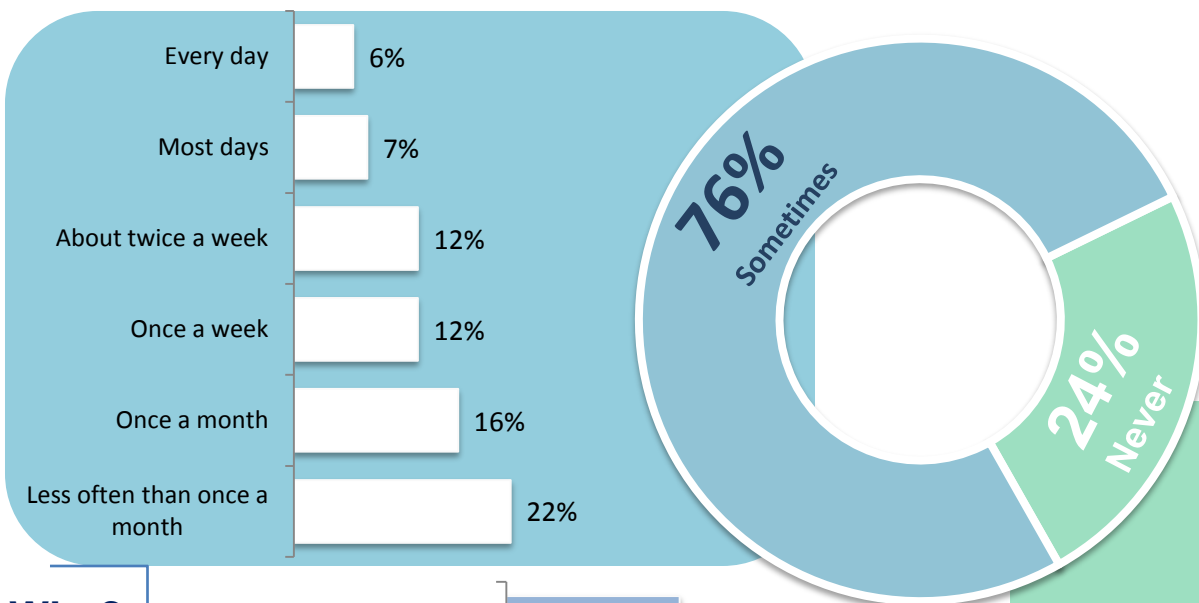
A combination of **individual and company action** is needed to address print wastage – individuals need to take more responsibility for “printing errors” whilst companies can automate double sided printing (the key cause of wastage) and encourage people to think twice about printing



Personal printing at work

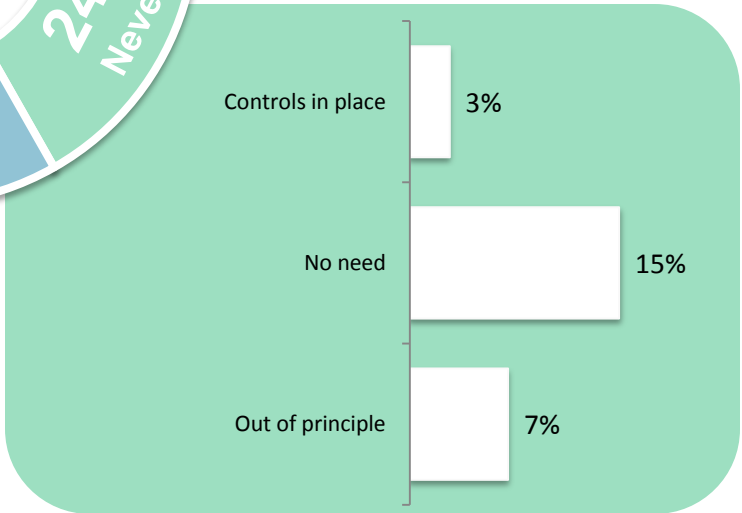
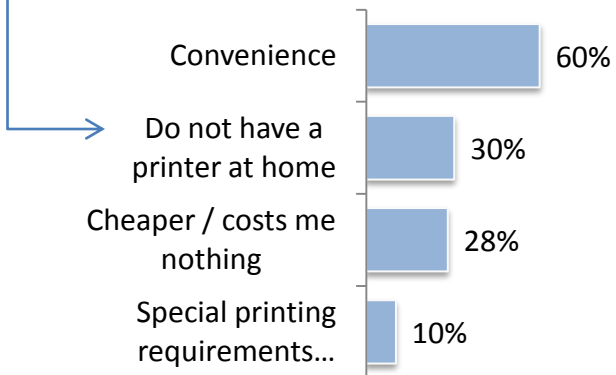
Three quarters of office workers sometimes print personal documents on office printers. This is likely to be symptomatic of a wider trend of blurred boundaries between home and work.

Convenience is the main driver



18%
of employees think they should be free to print in a way they see fit

Why?



S9 - Typically, how often do you print out personal / non-work related documents on your office printer?

S10. Why do you print out personal / non-work related documents on your office printer?

Base: All employees (1000)

Changing print behaviour

78% feel that ultimate responsibility resides with the **individual**, compared to just **22%** who say the company should be responsible. The first group prints on average 38 sheets a day, compared to 65 by those who feel the company should be responsible.

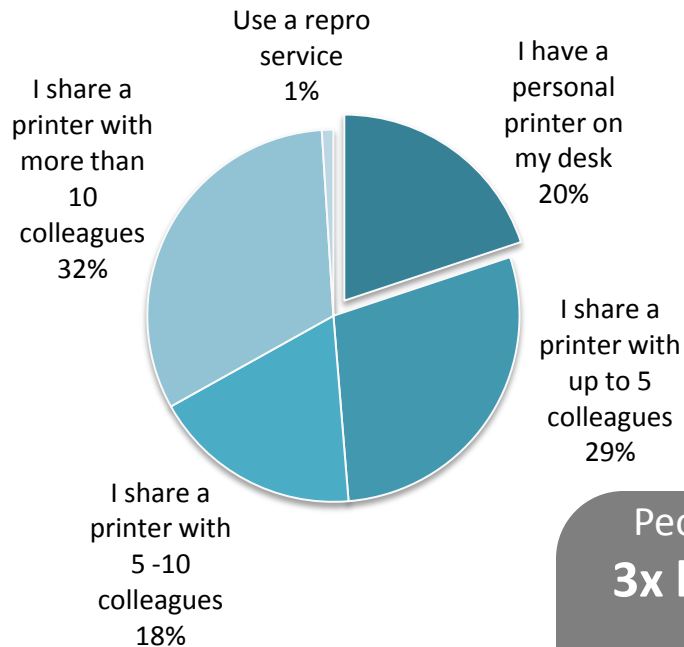
56% feel that their company could do more to encourage greener printer habits (compared to **70%** of IT managers) and **39%** of office workers acknowledge that they could print less than they do.

Only **18%** think that employees should be free to print in a way that they see fit, whilst **34%** of IT Managers take this view.



It's good to share....

Although only 1 in 5 people have a personal printer at work, those who share printers are printing less in absolute terms and changing their printer habits over time. Clearly, in some cases personal printers are deployed to those with greater print requirements but may also engender an over-reliance on printing

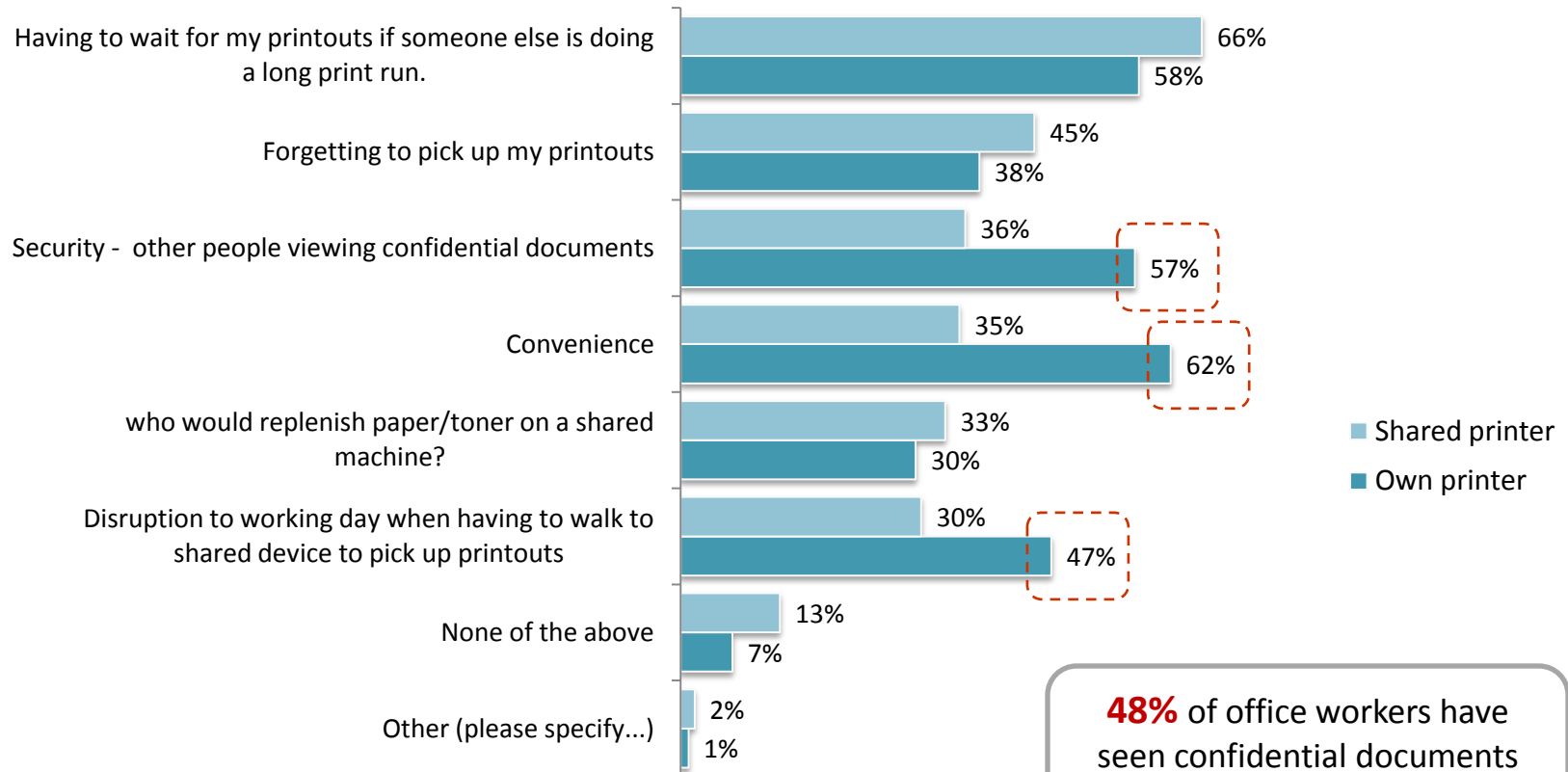


People who share a printer with 10 or more others print **3x less** than those who have their own printer (27 sheets per day compared to 79 sheets)

20% of those who share a printer with 10 or more others have increased their printing in the last 12 months, compared to **48%** of those with their own printer

Employee concerns about printer sharing

Those who currently have their own printer express more concerns about sharing – most notably revolve around **convenience** and **security**



48% of office workers have seen confidential documents left on printers in the past year

S2.a - Which of the following would be concerns for you if you had to share a printer?

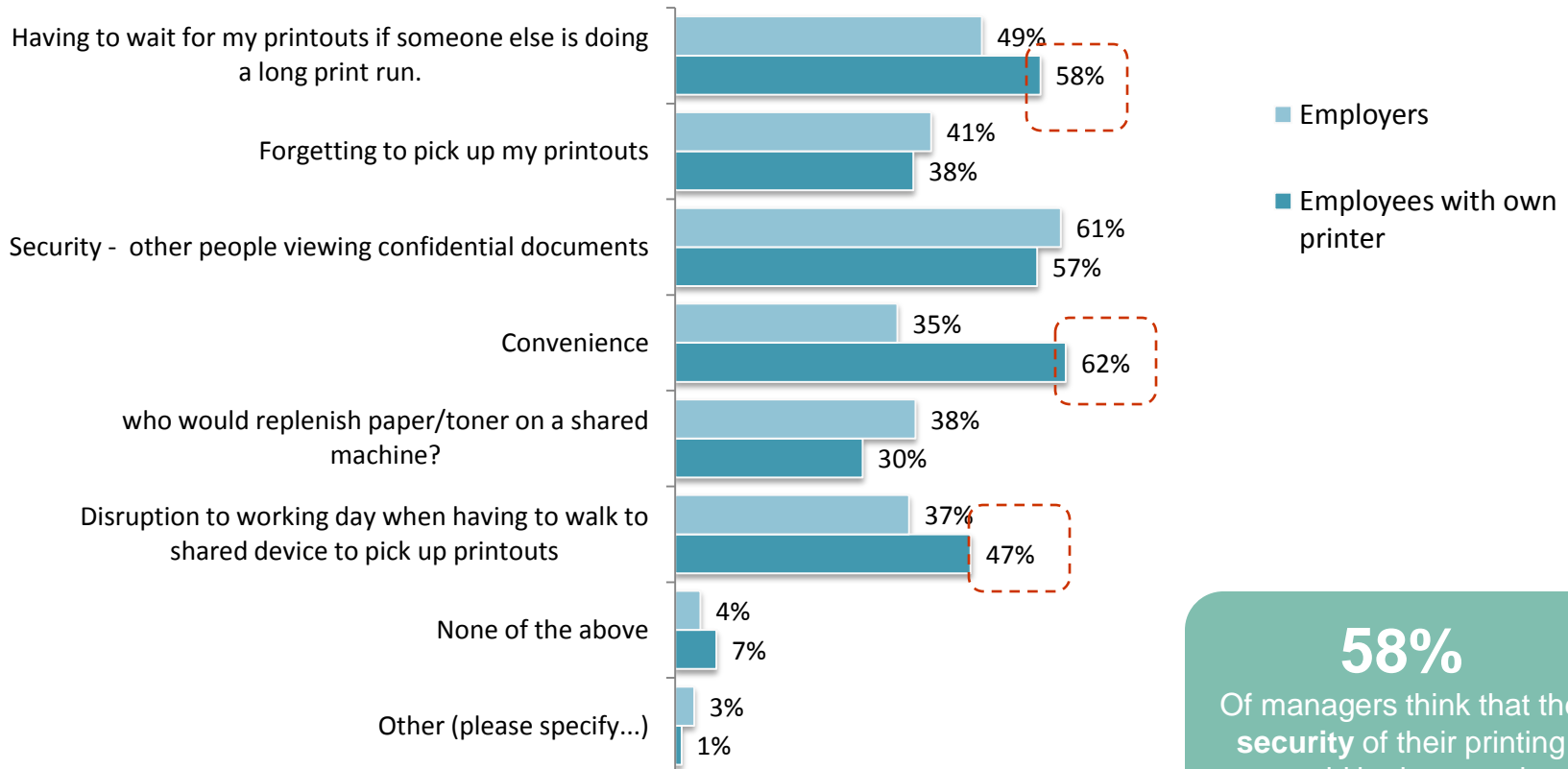
Base: All who do not currently share a printer (199)

S3.a - Which of the following have you found to be difficulties with sharing a printer with others?

Base: All who share an office printer (791)

Shared printer concerns: employer vs employee

Employers are out of step with employees when it comes to the convenience issues associated with sharing a printer

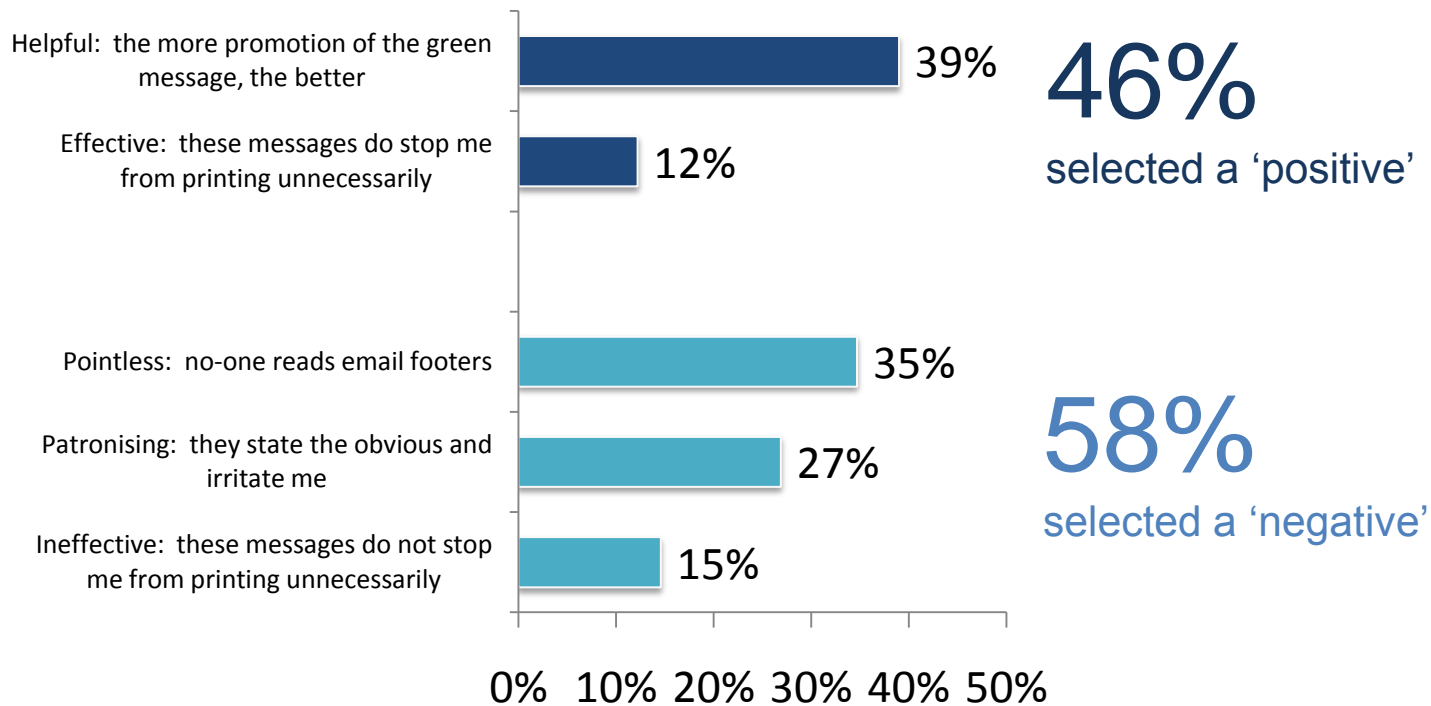


58%
Of managers think that the security of their printing could be improved

S2.a - Which of the following would be concerns for you if you had to share a printer?
Base: All EMPLOYEES who do not currently share a printer (199)
Q2 - What do you feel might be their main objection to this?
Base: All EMPLOYERS (200)

“Think Green” Messaging

58% of respondents have something negative to say about “Think Green” messaging, with 35% believing them to be ‘pointless’. However, 46% had positive comments. 39% describe them as ‘helpful’



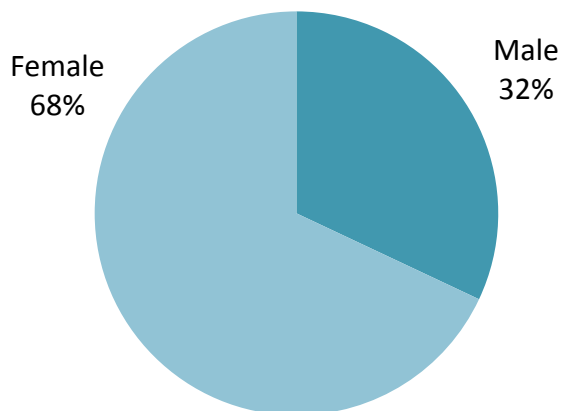
S15 - Which of the following sum up your attitude to emails containing messages such as “Think green – do you really need to print this out”? (Select all that apply)

Base: All employees (1000)

Appendix

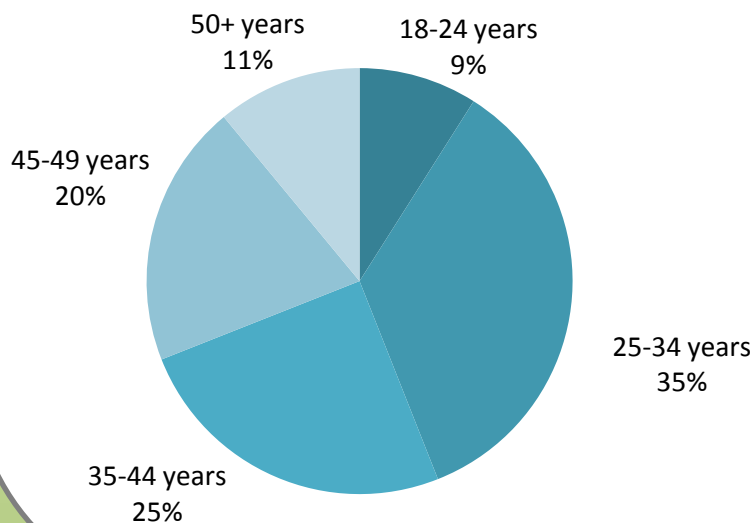
Research approach / sample profile – Office workers

Gender

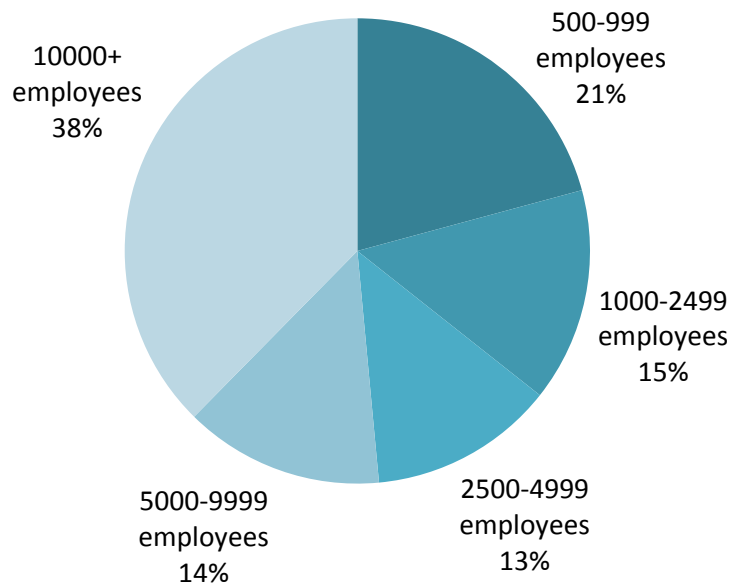


1000 interviews were conducted online with UK office workers within UK companies with 500+ employees during April 2010

Age



Company size

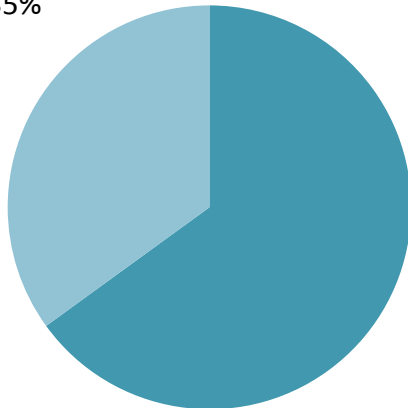


Research approach / sample profile – IT Managers

200 interviews were conducted online with UK IT Managers within UK companies with 500+ employees during April 2010

Gender

Female
35%



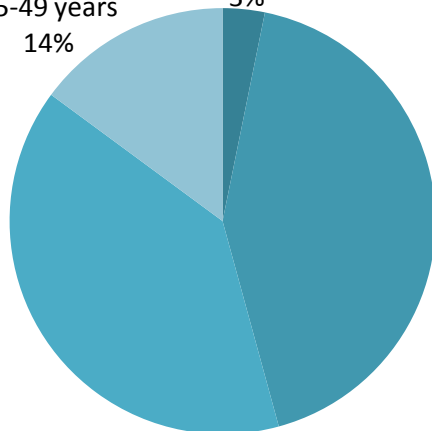
Male
65%

Age

18-24 years
3%

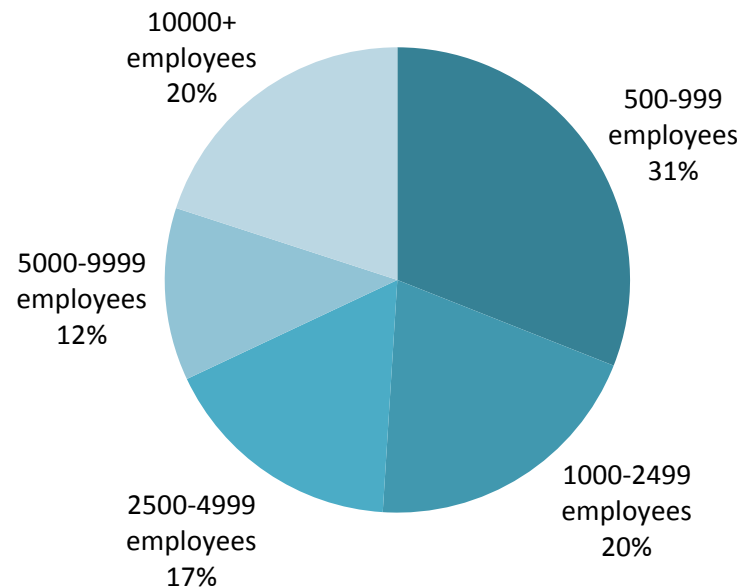
45-49 years
14%

35-44 years
37%



25-34 years
40%

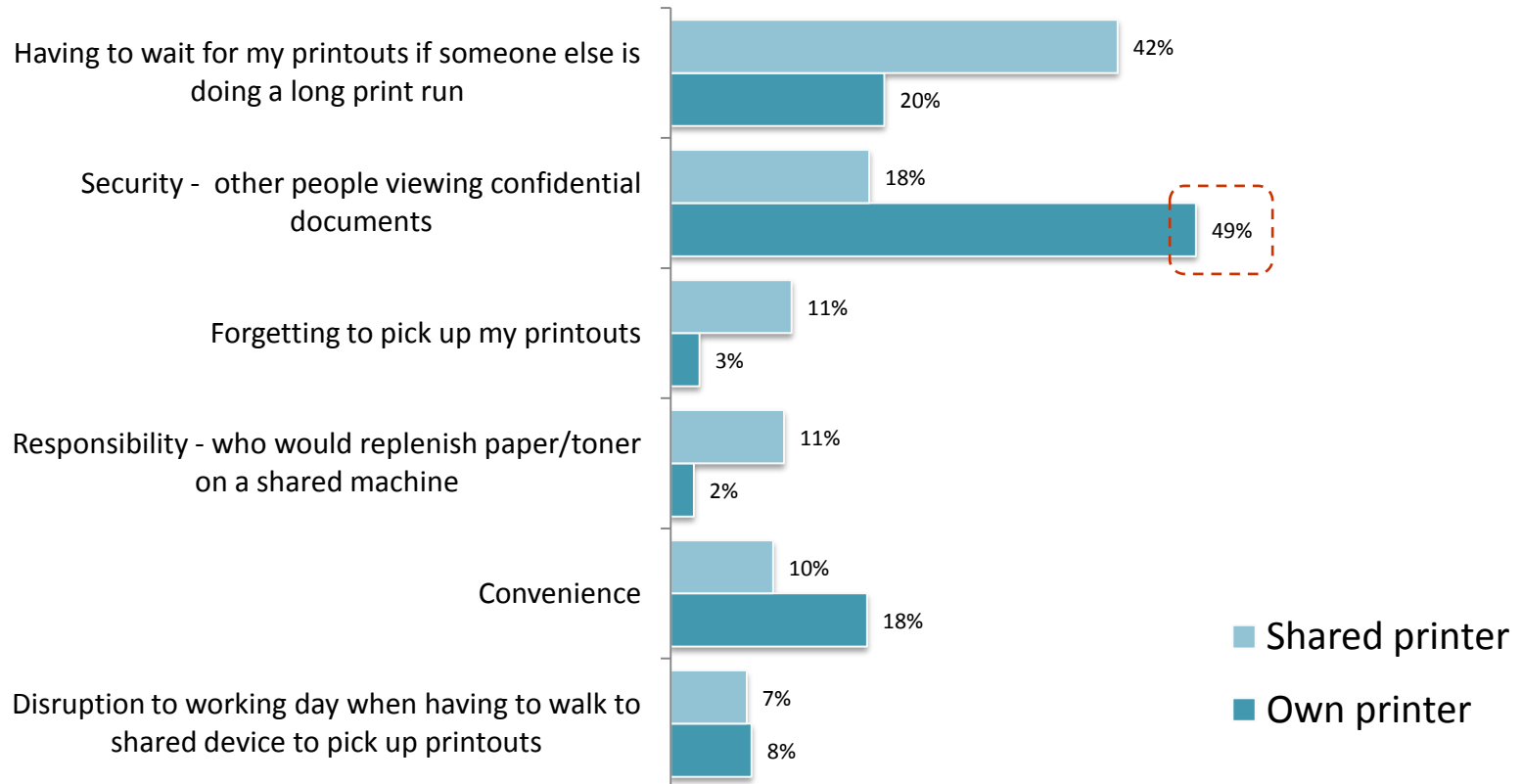
Company size



Appendix:

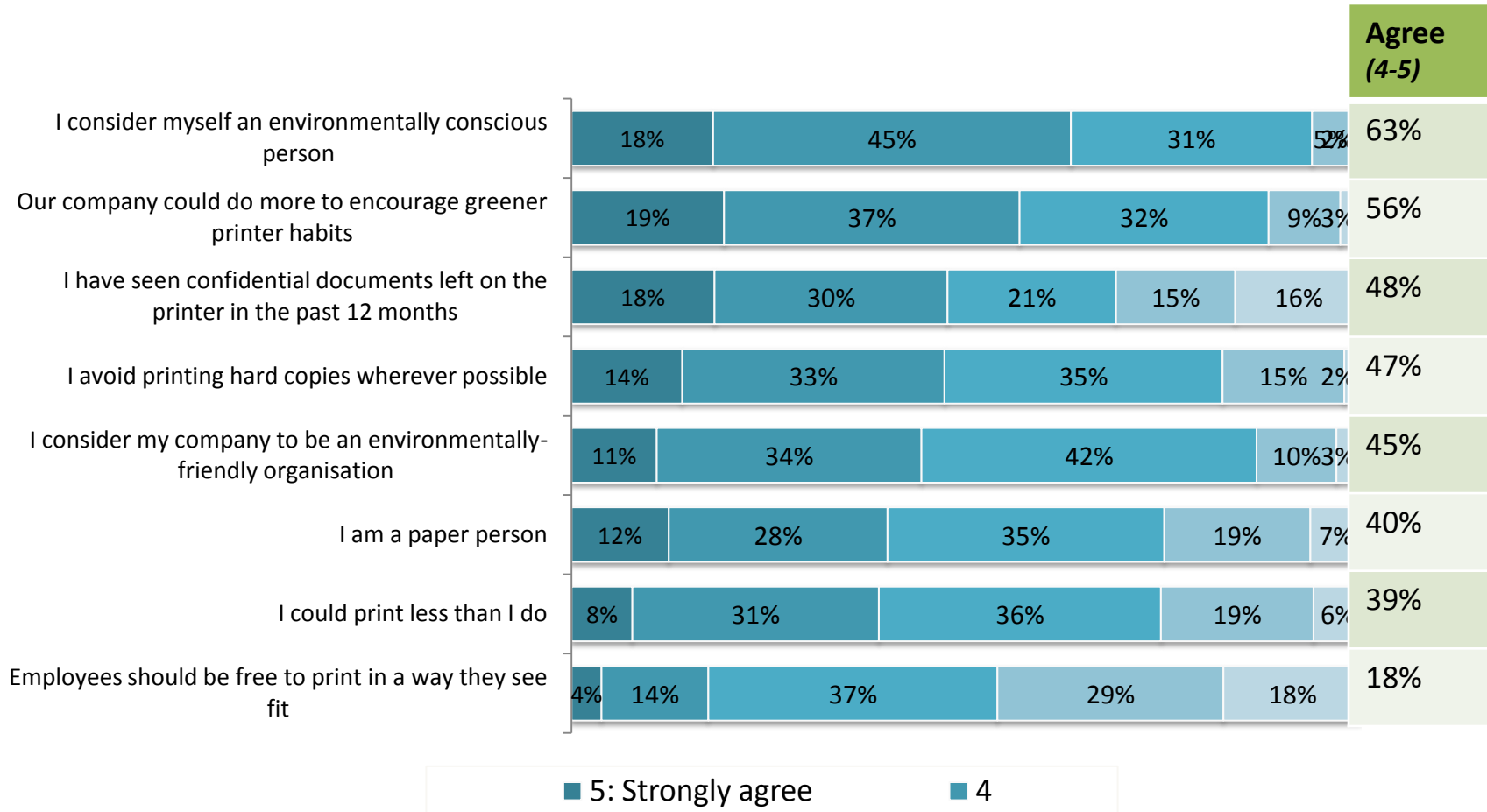
Main employee concerns about printer sharing (2)

Those who currently share are most frustrated about having to **wait for printouts**, whilst those who do not currently share would be more concerned about **security**

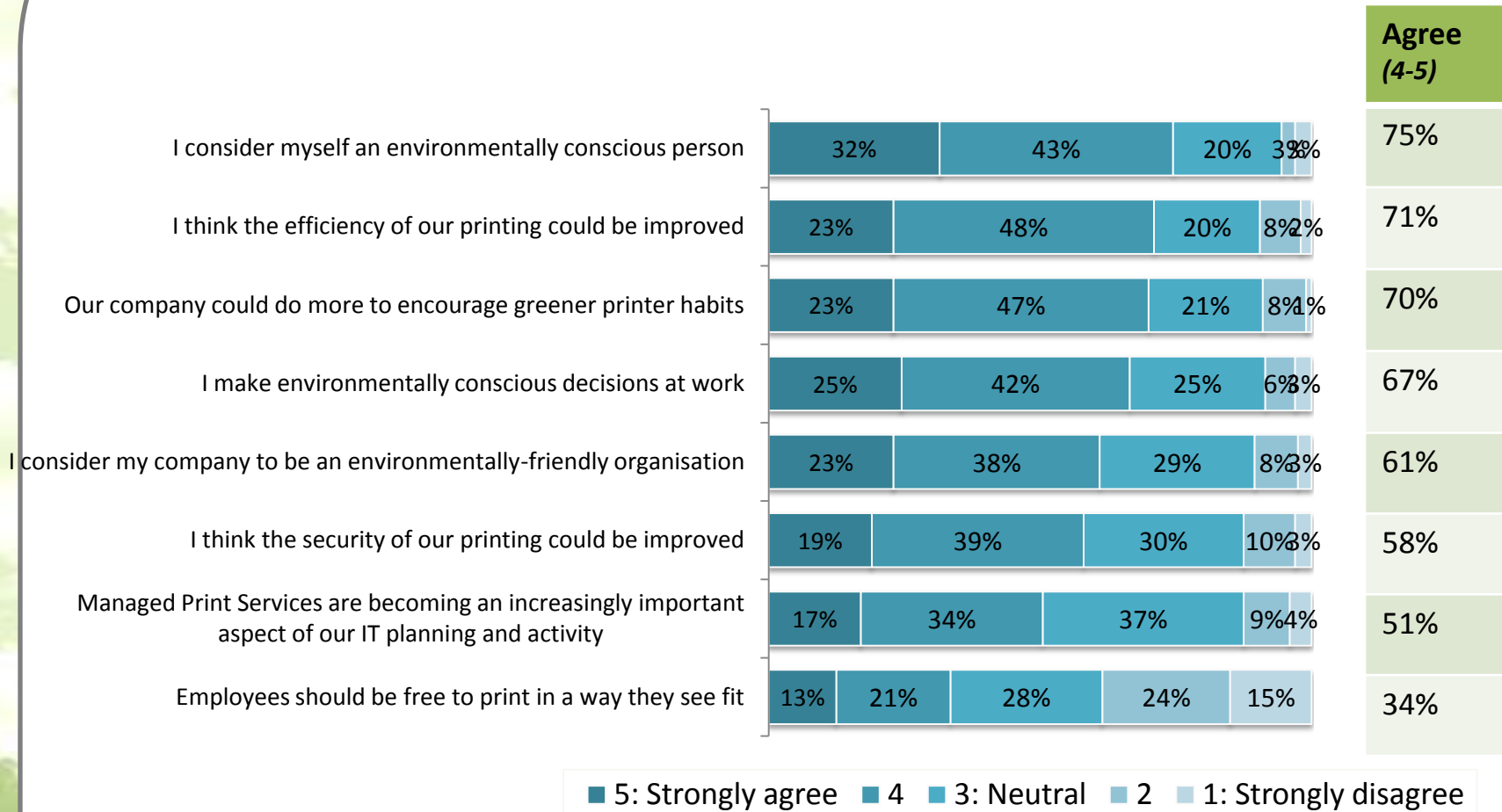


S2b - And which would be your biggest concern?
Base: All who do not currently share a printer (199)
S3b - And which would say has been the biggest difficulty?
Base: All who share an office printer (791)

Appendix: Employee attitude statements



Attitude statements: IT Managers



Q15 - To what extent do you agree or disagree with the following statements?
All IT managers (200)

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