



## Rethinking printing

Kyocera Environmental survey  
2011



# Summary and Highlights



# Paper waste is still a problem


Overall print volumes are in decline, but...

The average worker goes through as many as 6,000 sheets a year, 3720 of them wasted

Default settings – such as printing single-sided – cause much of the waste



# Green Policy, but Few Green Convictions



71% of procurement managers claim their company has a green procurement policy

Only **1 in 5** companies would rule out a supplier based on poor green credentials

Only **18%** of procurement managers regularly hold environmental audits of suppliers

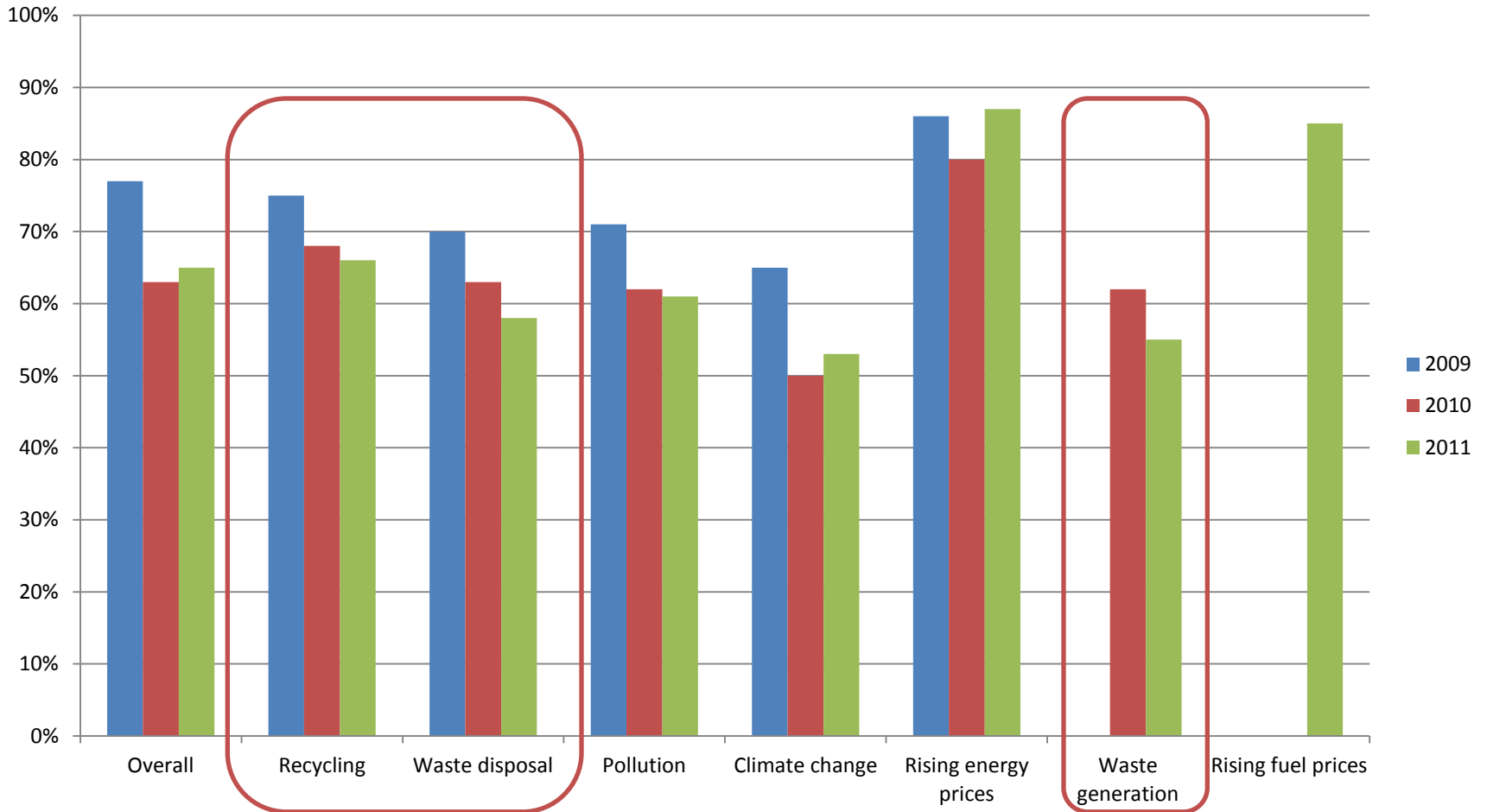
66% of IT managers are required to report on IT environmental performance although only **58%** have actually conducted an energy audit

80% of IT managers and 89% of procurement managers report that costs are a main IT purchase driver...only 45% and 52% report similar green concerns

## Perspectives on printing: Office workers



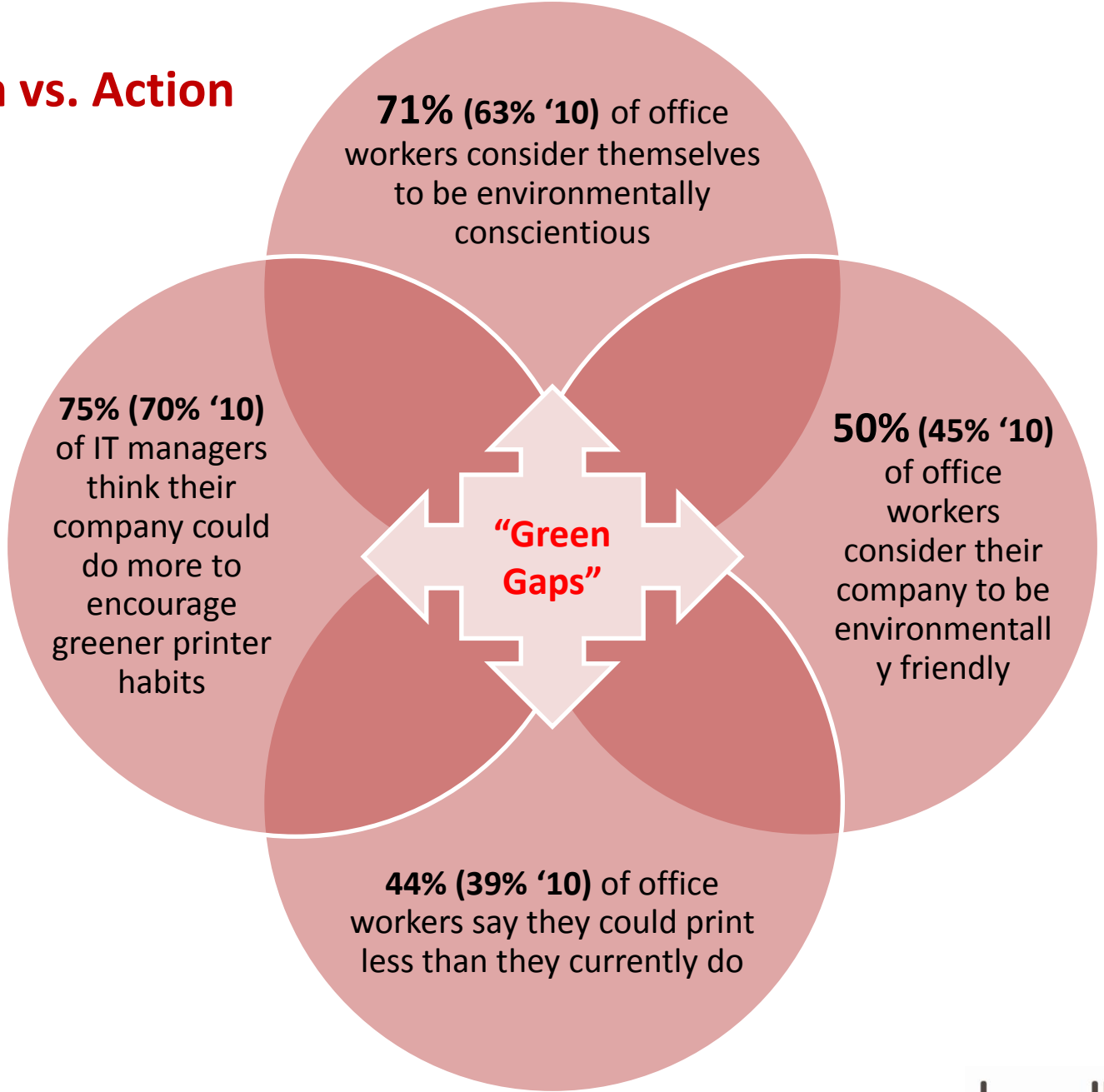
# Recycling and waste management becoming less of a concern



% concerned / very concerned

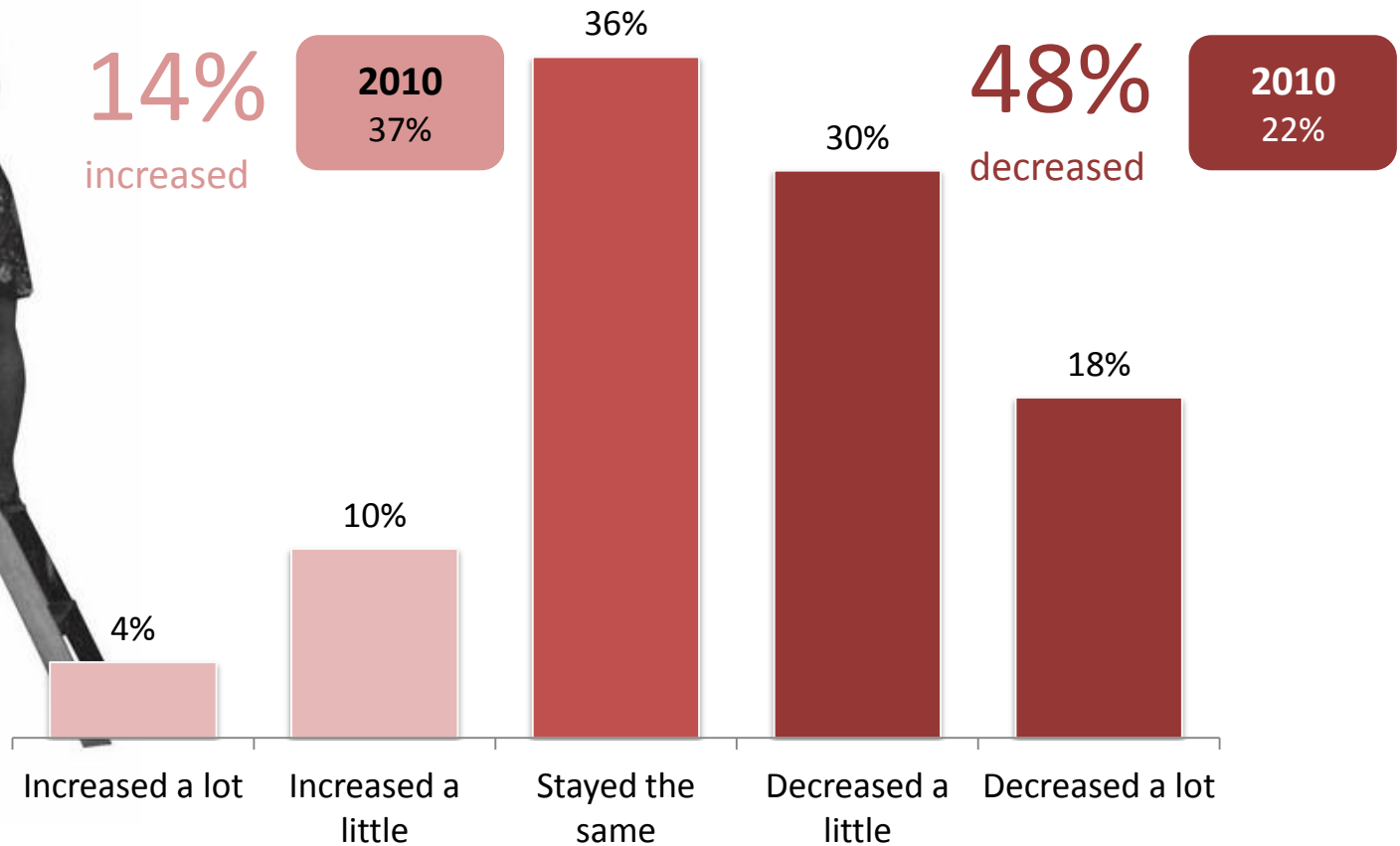
Q1 - How concerned are you personally about environmental issues, such as climate change, pollution, household waste disposal and recycling?  
Base: Office workers (1000)

# Perception vs. Action



# Printing on the way down

There has been a **net decrease in printing** over the last 12 months nearly half of office workers having decreased their levels of printing



Q10 - Overall, how would you say the amount of printing you do has changed in the last 12 months?  
Base: Office workers (1000)

# Print-onomics

The average UK office worker goes through as many as **6,000** sheets of paper per year (10,000 sheet '10)  
**25** sheets per day (45 sheets '10)



For each office worker **3720** of these sheets of paper is wasted or unnecessary

1140 sheets could be printed double-sided

660 are printed for proof-reading

300 sheets are the wrong documents

900 sheets could be read on screen instead

420 sheets are unnecessary duplicates

300 sheets are left forgotten on the printer

Q9. In a typical working day, approximately how many pages do you print out in total?  
Base: 1000 Office workers

# 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

1,100 are printed for proof-reading

600 sheets are the wrong documents

1,600 sheets could be read on screen instead

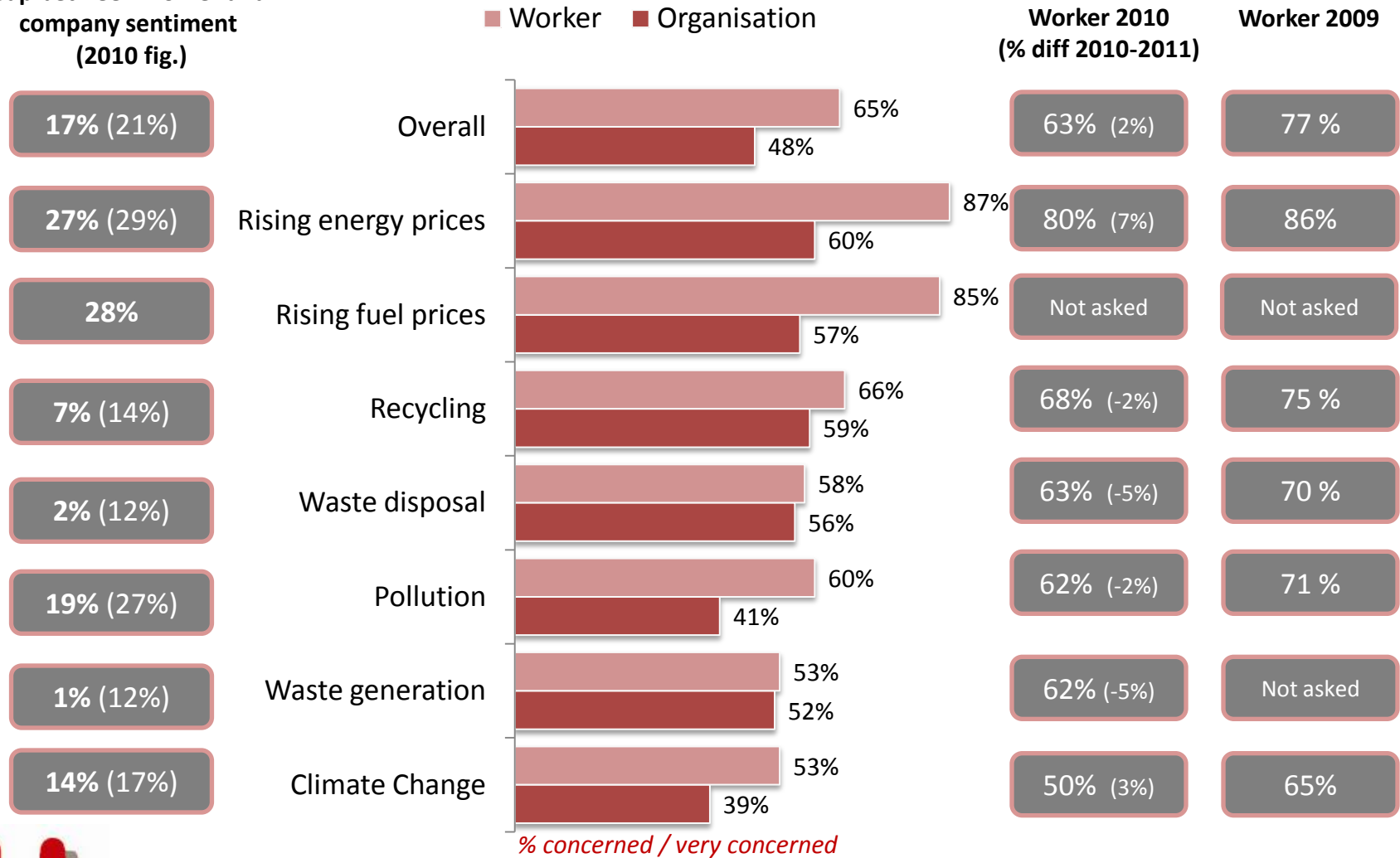
800 sheets are unnecessary duplicates

600 sheets are left forgotten on the printer

Q14. In a typical working day, approximately how many pages do you print out in total?  
Base: All employees (1000)

# Rising costs the greatest concern for employees at a personal and organisational level


Gap between worker and company sentiment (2010 fig.)



Q1 - How concerned are you personally about environmental issues, such as climate change, pollution, household waste disposal and recycling? Q2 - How concerned do you think your organisation is about environmental issues, such as climate change, pollution and recycling? Base: Office workers (1000)

# Causes of print wastage

Just under **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 3 years.



% wasted every week	2011	2010	2009
Printing documents single sided rather than double sided	19%	21%	20%
Preferring to read on paper rather than on screen	15%	16%	13%
Printing for proof-reading rather than on screen	11%	11%	10%
Printing too many copies of a document	7%	8%	9%
Printing the wrong document	5%	6%	9%
Forgetting to collect printouts from the printer	5%	6%	7%
<b>TOTAL WASTAGE</b>	<b>62%</b>	<b>68%</b>	<b>67%</b>

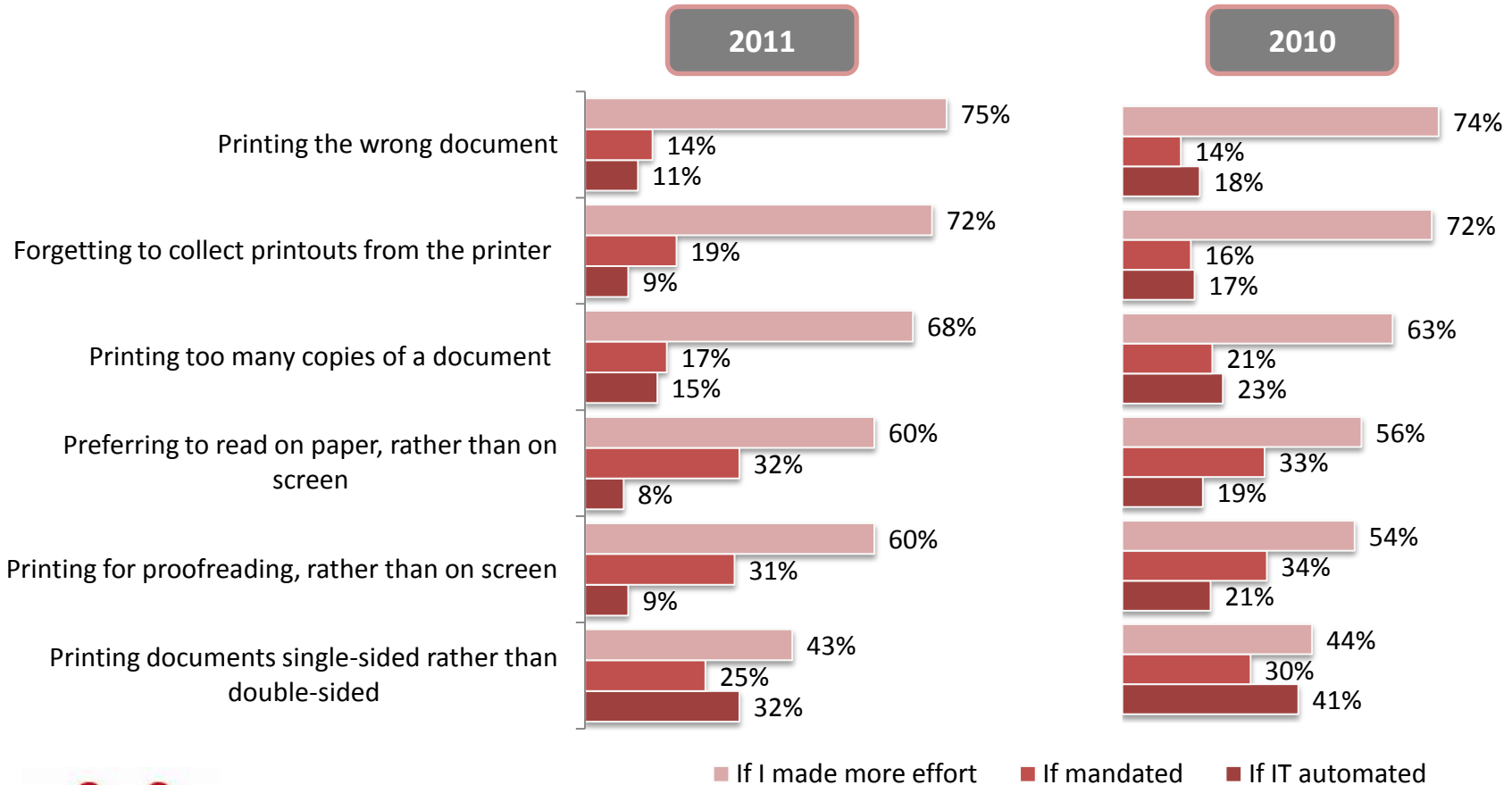
**35%** (40% '10) of employees consider themselves to be a **'paper person'**

**44%** (39% '10) of employees say they **could print less** than they currently do

Q11 - In your day-to-day use of printing, what percentage of the material you print out each week/paper is 'wasted', by ...  
Base: Office workers(1000)

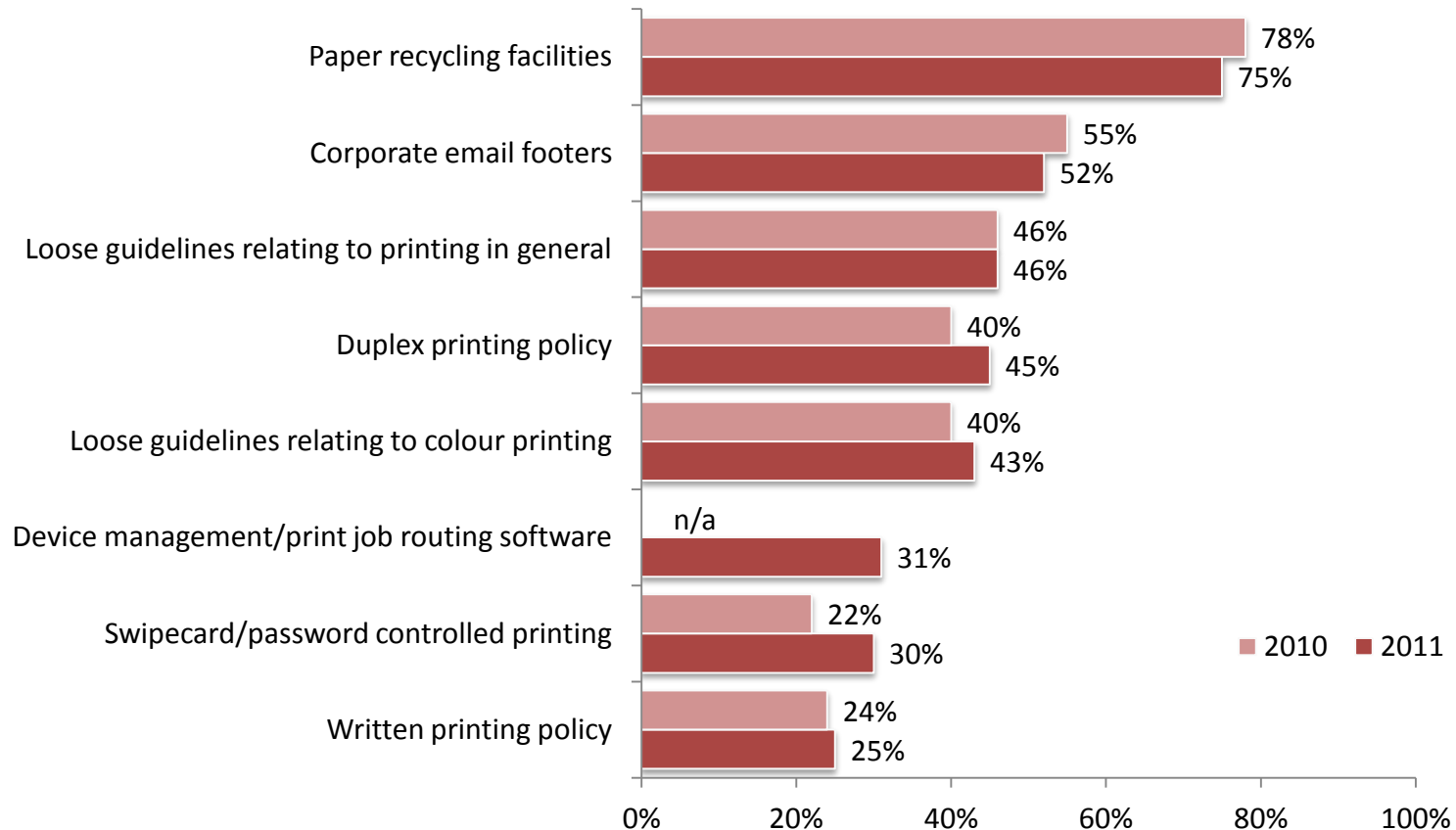
# Tackling print wastage

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



Q12 - Do you think this percentage could be reduced if...  
Base: Office workers (1000)

# Three-quarters of offices have paper recycling facilities

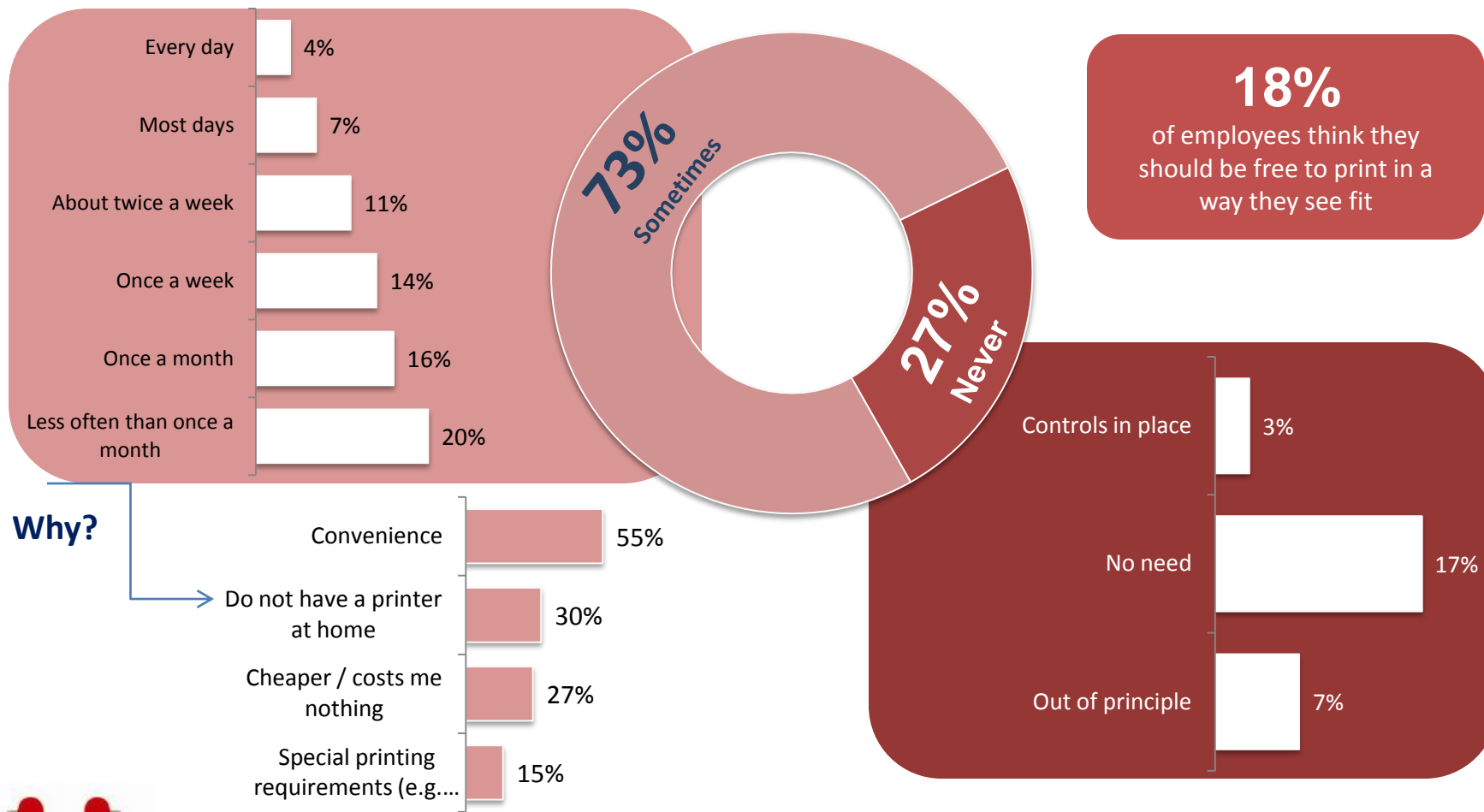


Q13. To your knowledge, does your organisation have any of the following guidelines or processes in place?  
Base: Office workers (1000)

# 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

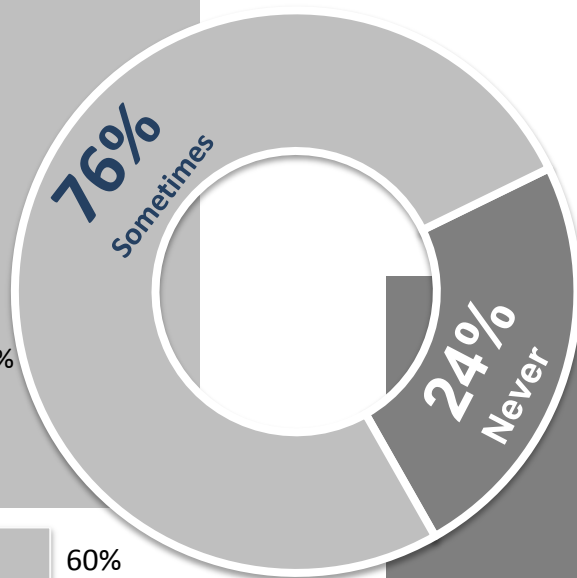
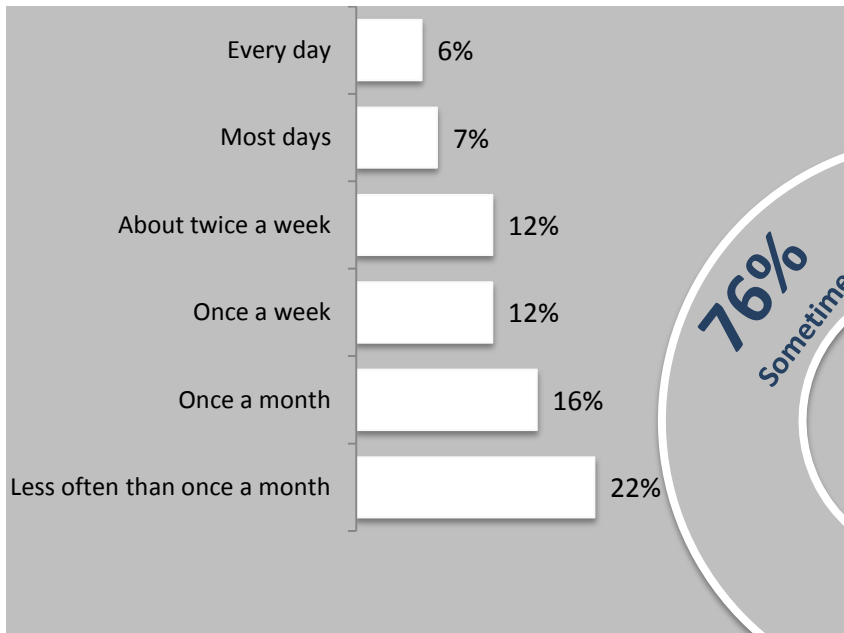


Q15 - Typically, how often do you print out personal / non-work related documents on your office printer?

Q16 - Why do you print out personal / non-work related documents on your office printer?

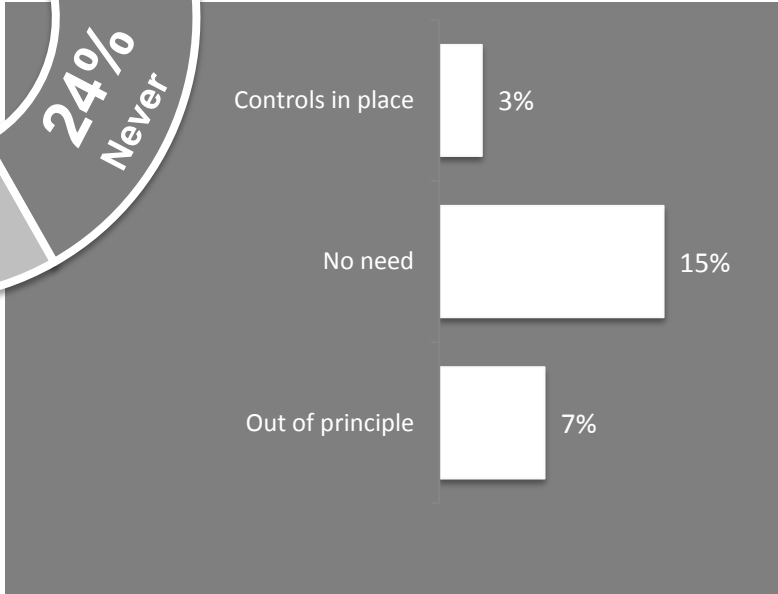
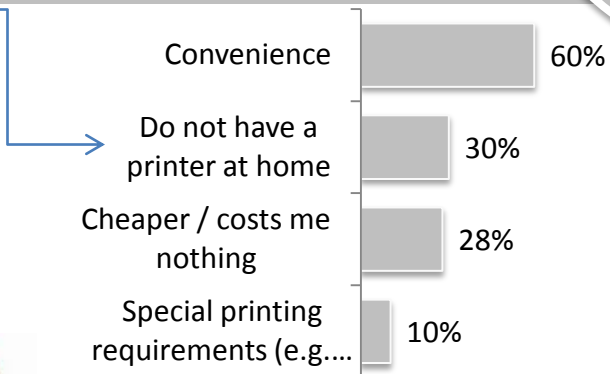
Base: Office workers (1000)

# Personal printing at work: 2010



**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

**72%** (78% '10) feel that ultimate responsibility resides with the **individual**, compared to just **28%** (22% '10) who say the company should be responsible. The first group prints on average 6000 sheets a day, of which 3720 are wasted.

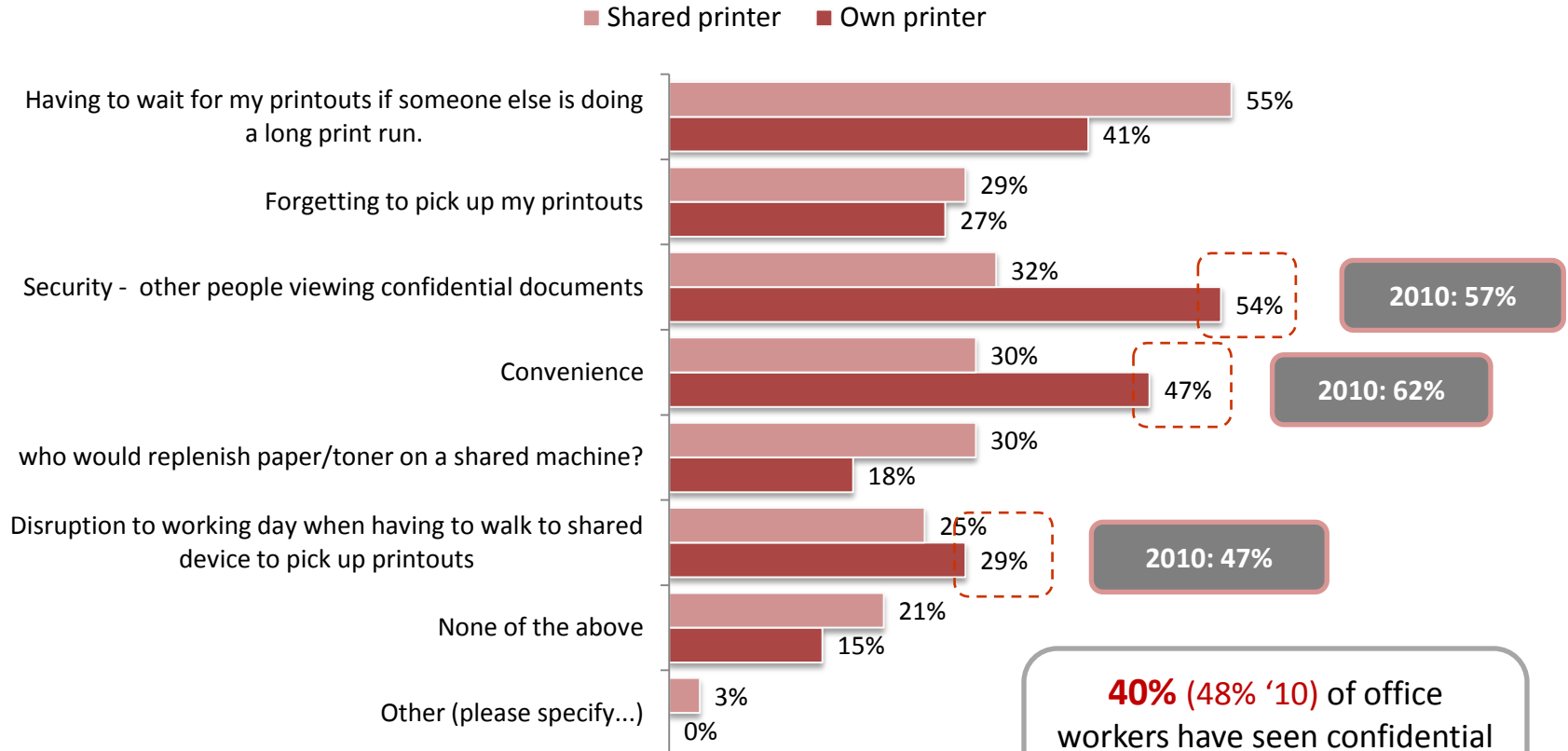
**61%** (56% '10) feel that their company could do more to encourage greener printer habits (compared to **75%** (70% '10) of IT managers/**56%** procurement managers) and **44%** (39% '10) of office workers acknowledge that they could print less than they do.

Only **18%** (18% '10) think that employees should be free to print in a way that they see fit, whilst **34%** (34% in '10) of IT Managers/**36%** of procurement professionals take this view.

Q14. Who do you feel is ultimately responsible for ensuring employees print in a responsible fashion?  
Base: Office workers (1000)

# Employee concerns about printer sharing

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



**40% (48% '10)** of office workers have seen confidential documents left on printers in the past year

Q7a - 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 (136)

Q8a - Which of the following have you found to be difficulties with sharing a printer with others?

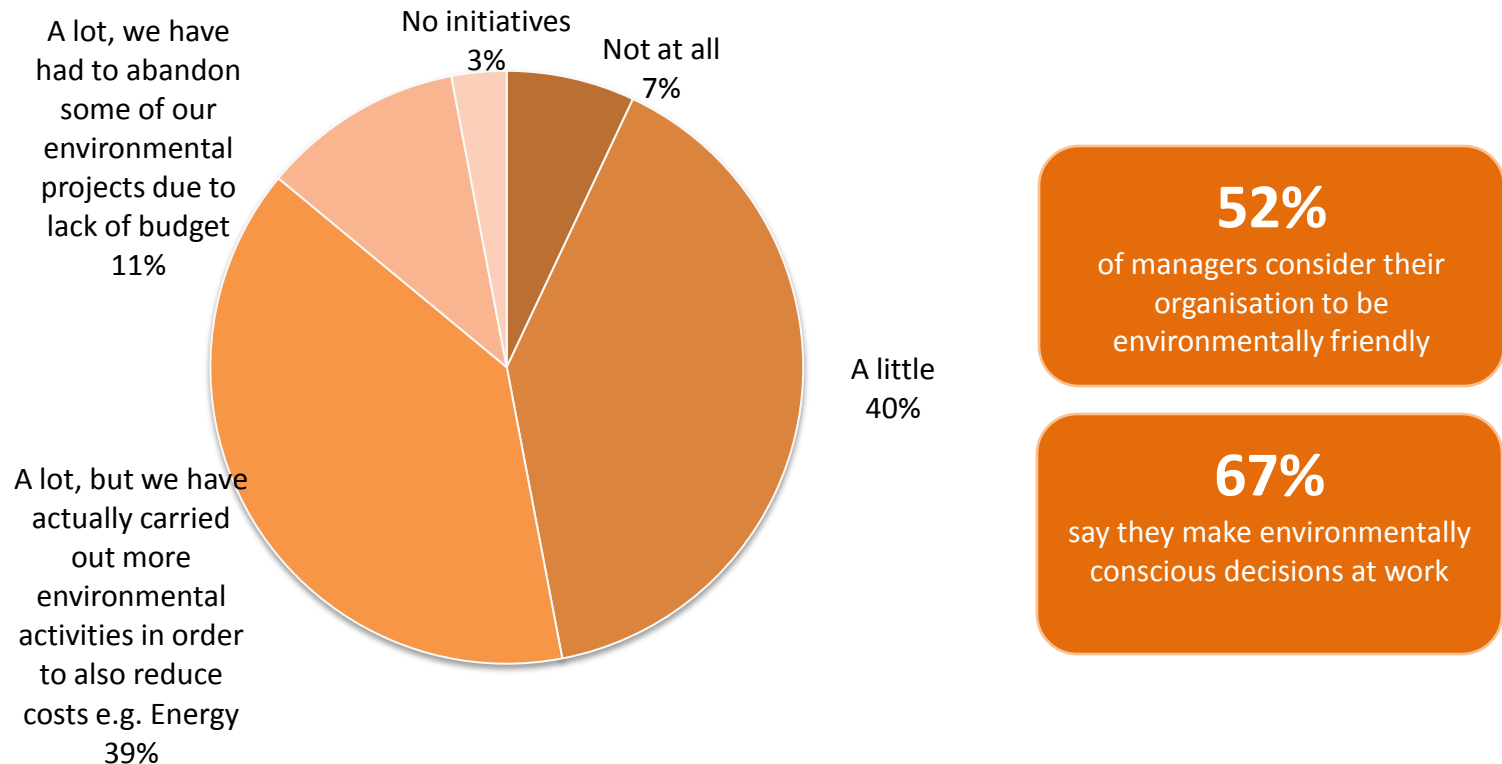
Base: All who share an office printer (842)

## Green business IT Managers



# Impact of downturn on environmental programmes

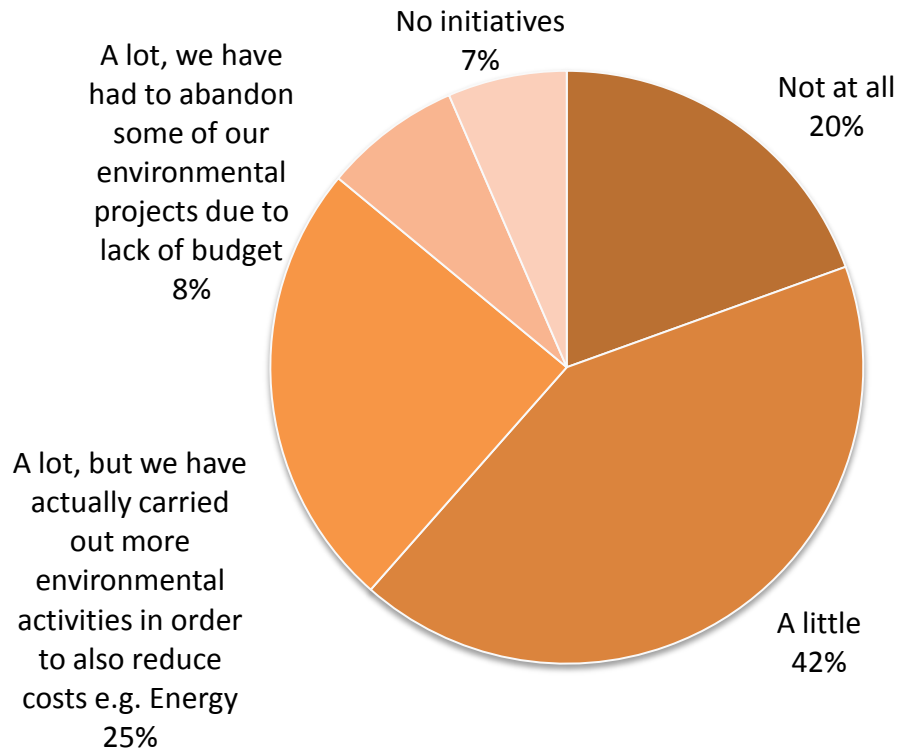
The downturn appears to have had either a neutral or positive effect on the level of environmental activities as companies strive to save costs



Q6 - 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 professionals (200)

# 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

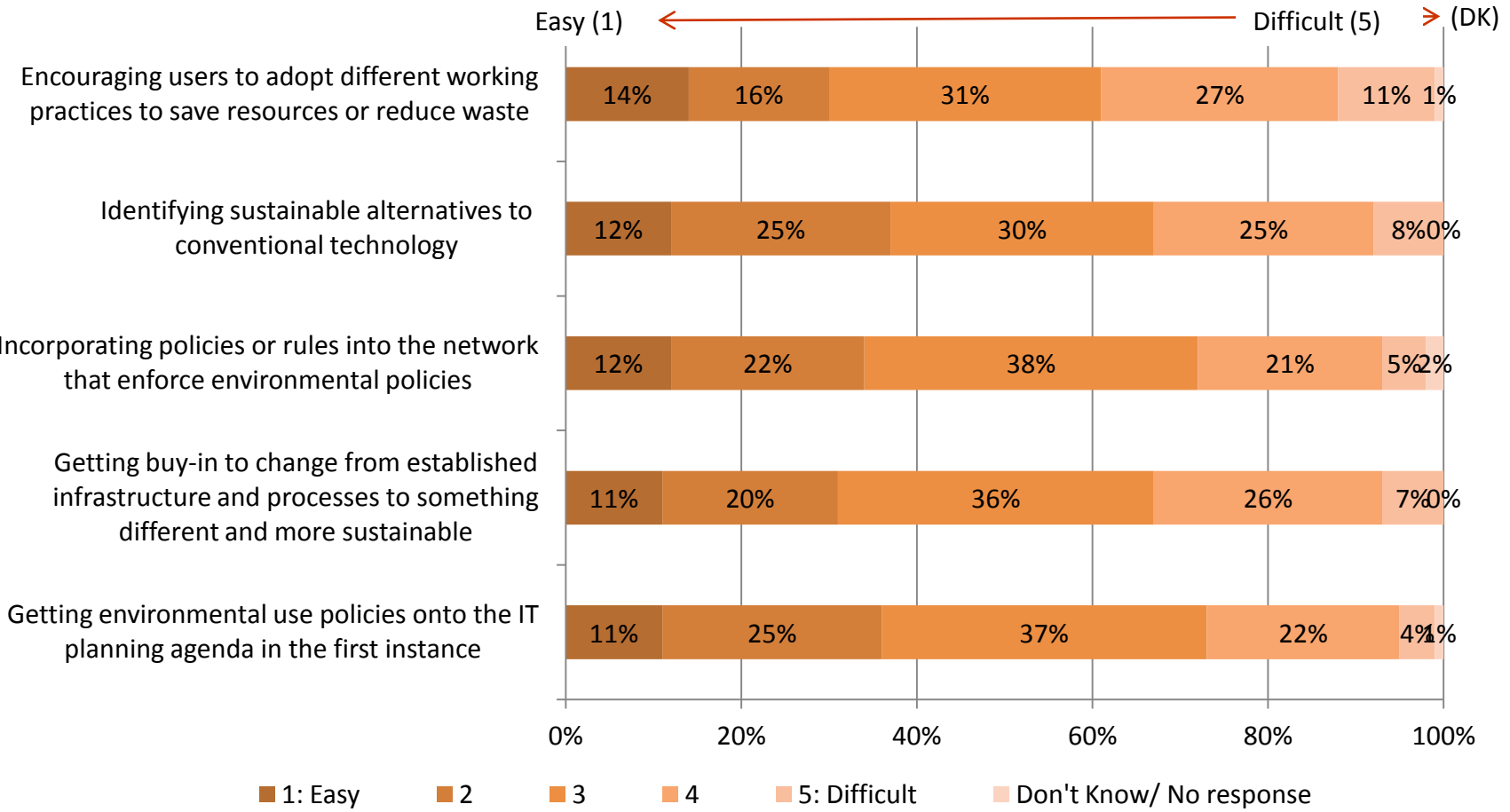
Q12 - Which of the following best describes how you feel environmental programmes and initiatives in your company have been affected by challenging economic circumstances?  
All IT managers (200)

# Difficulties in implementing environmental policy

Top 2 box\* '10

40%

41%

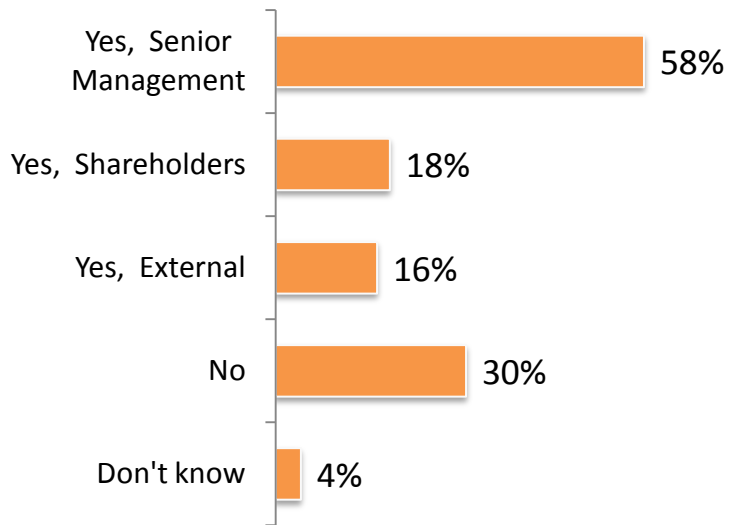


Q2 Within your company, how difficult would you rate the following tasks on a scale of 1 to 5, where 1 is "very easy" and 5 is "very difficult"? Base: IT professionals (200)  
 \*Those Who select either 1 ('Easy') or 2

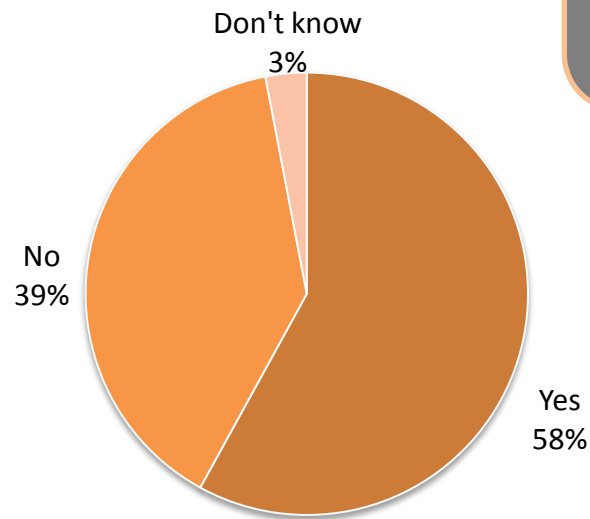
# Environmental reporting and audits

66% of IT managers are required to report on IT environmental performance although only 58% have actually conducted an energy audit

Required to report on environmental performance of IT systems



Conducted audit of IT energy use



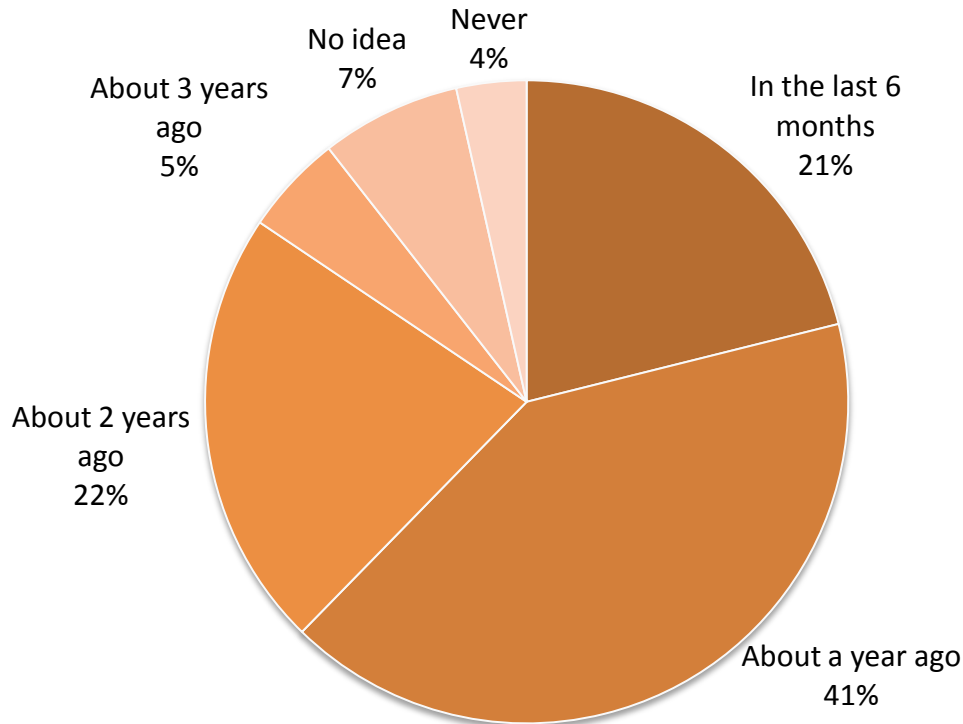
**2010**  
65% of managers are required to report on performance, but only 49% have conducted an audit

Q4 - Are you required to report on the environmental performance of your IT systems to senior management, shareholders or external bodies? Q3 - Have you ever conducted an audit of IT energy use relating to power consumption and resources?

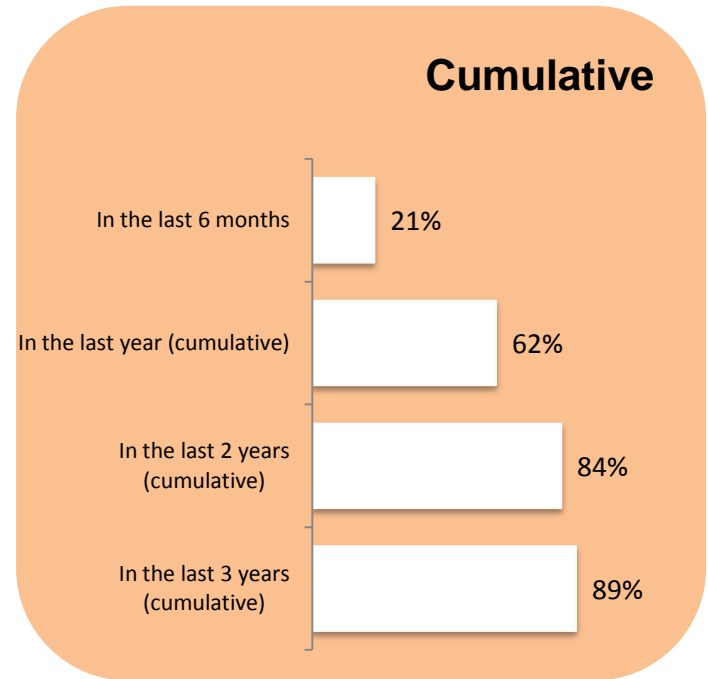
Base: IT professionals (200)

# Auditing of printing practices

62% of companies have audited their printing practices in the last year



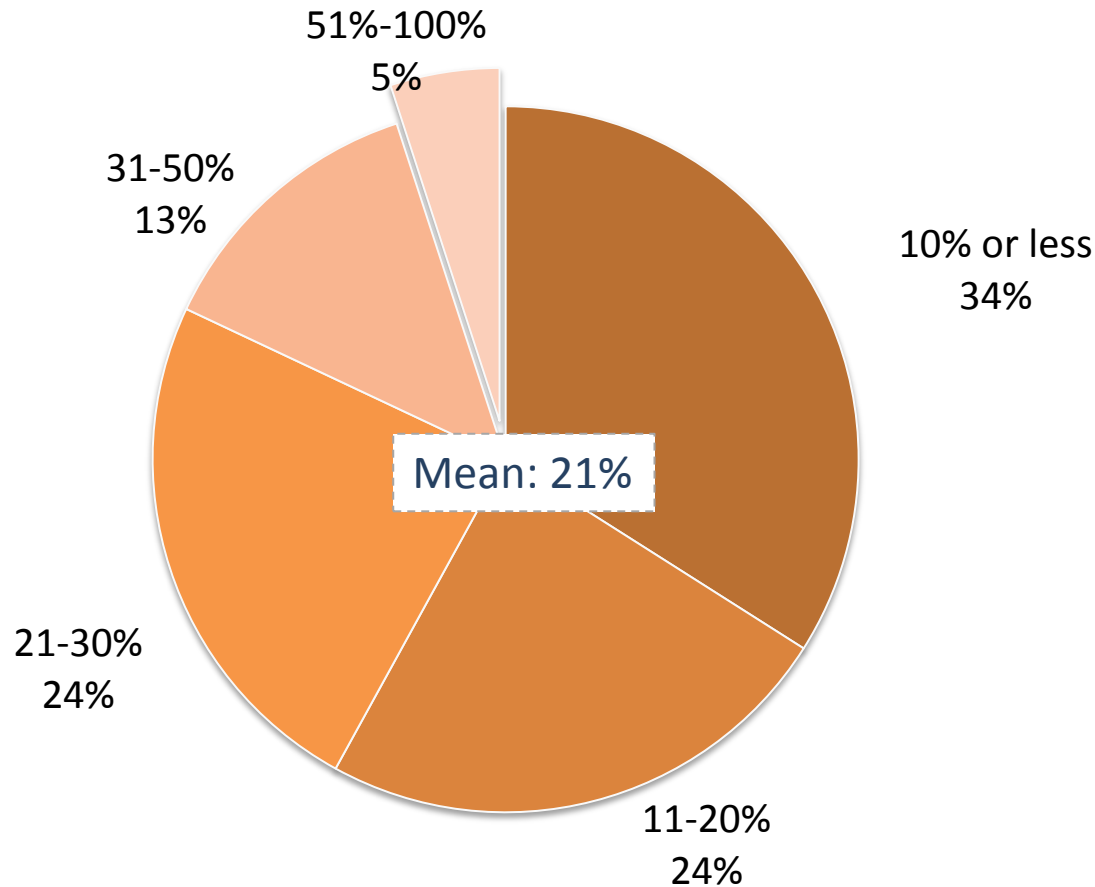
**2010**  
60% of companies have audited their printing practices in the last year



Q7 - When did your company last audit its printing operations / practices, including establishing the cost of printing within your company? All IT Professionals (200)

# The printer time trap

Time devoted to supporting printers and other document systems is on the way **down**, but a fifth of IT departments' time is still devoted to supporting printers



**2010**  
Mean: 34%

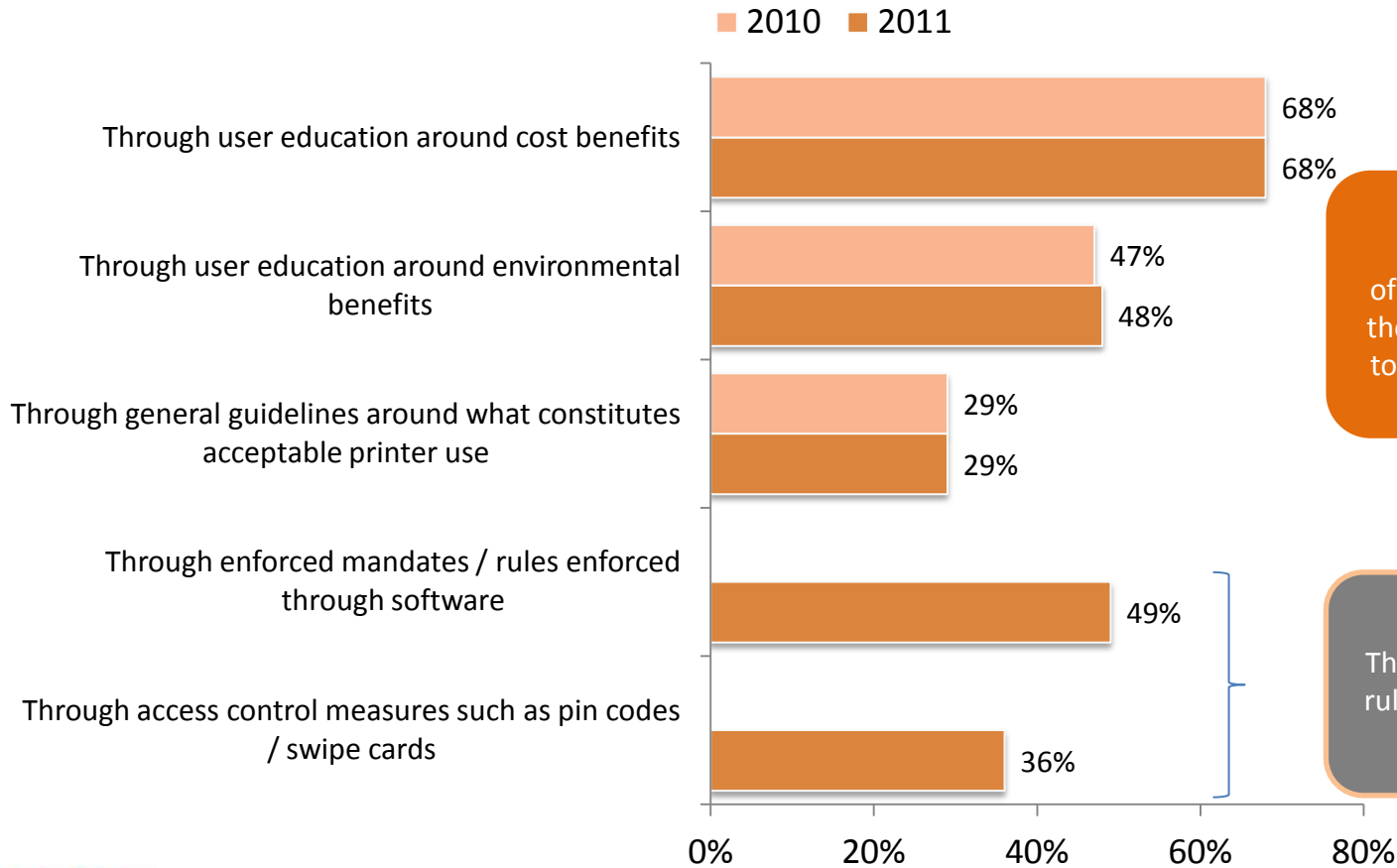
**80%** (71% '10)  
of IT Managers think that the **efficiency** of their printing could be improved



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



**76%** (70% '10)  
of IT managers acknowledge their company could do more to encourage greener printer habits

**2010**  
Through enforced mandates / rules pin codes / swipe cards:  
**27%**



Q8 - How do you think best practice printing can be encouraged in your company?  
All IT professionals (200)

## 2011 findings

Procurement Managers



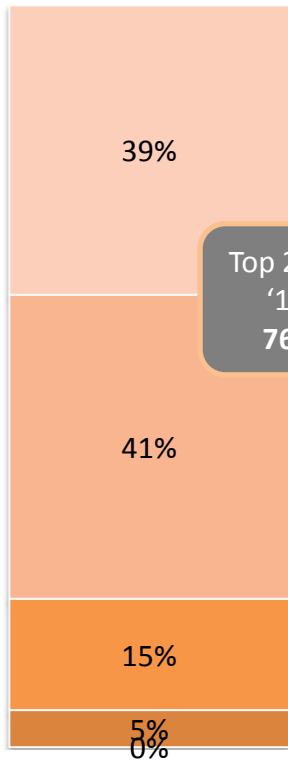
# Procurement Managers



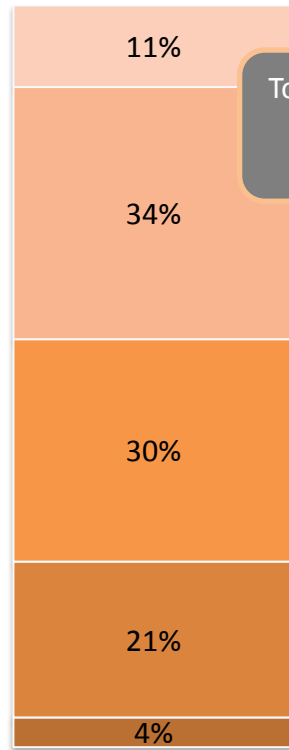
# Drivers of IT investment

## IT Managers

### Cost Savings

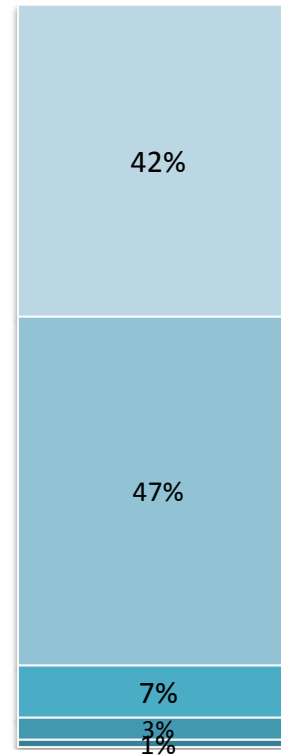


### Environmental Concerns

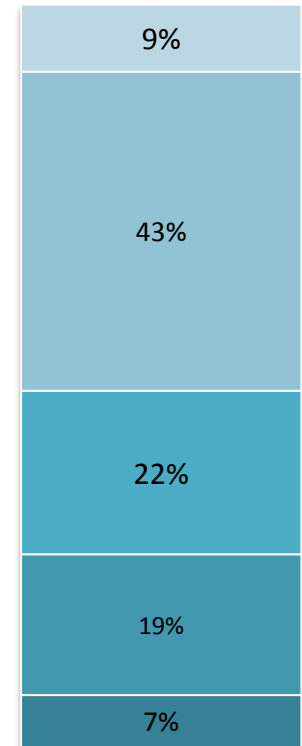


## Procurement Managers

### Cost Savings



### Environmental Concerns



- No Bearing
- Equal weighting
- Primary driver

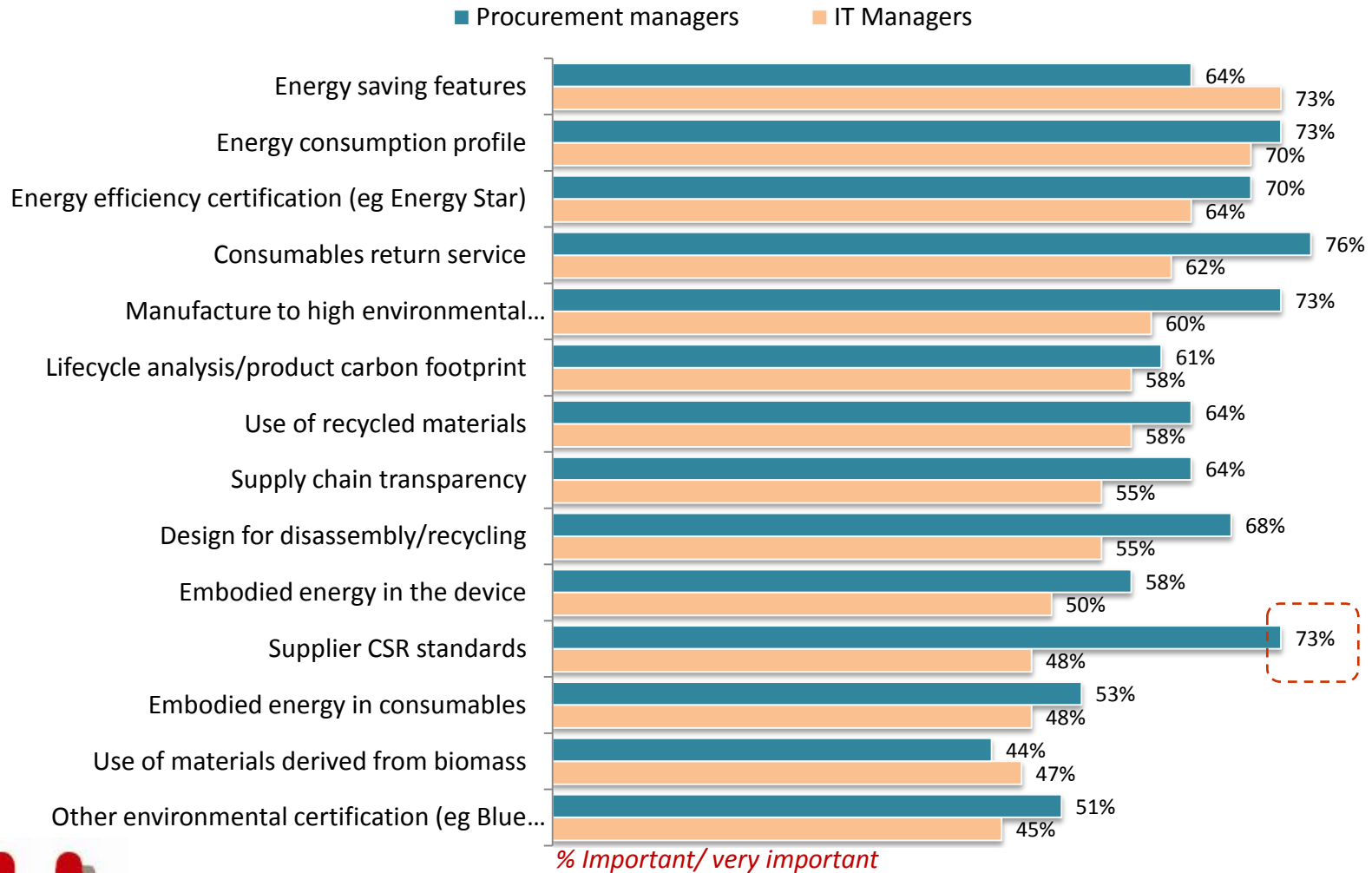
- Secondary to others
- Important consideration

- No bearing
- Equal weighting
- Primary driver

- Secondary to other
- Important consideration

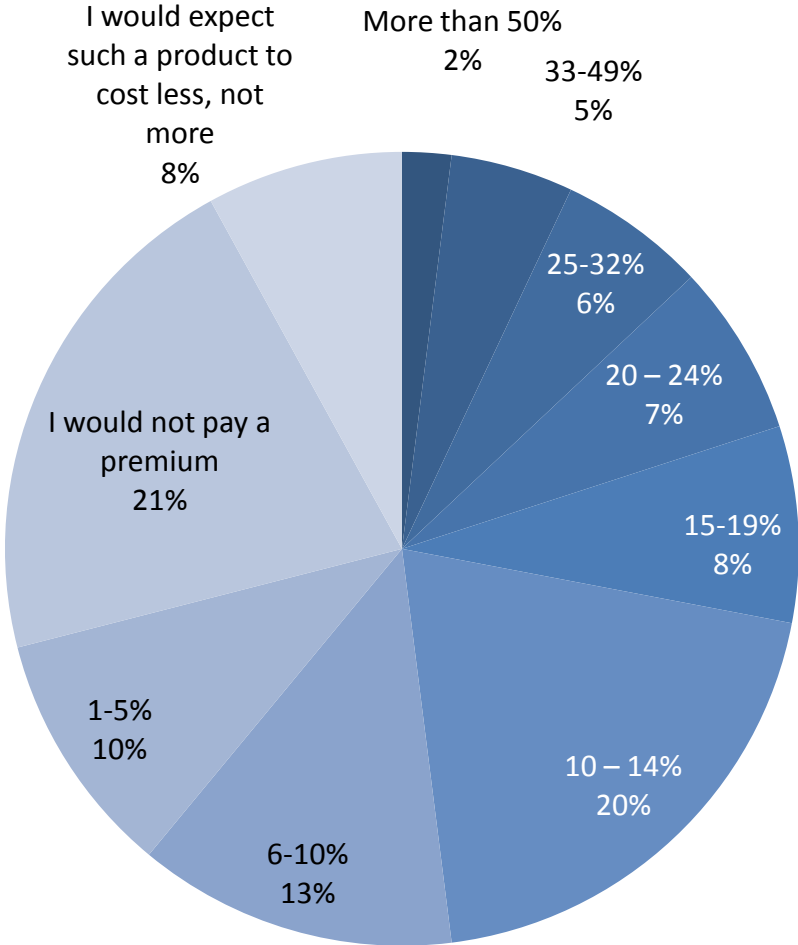
Q5a. To what extent are environmental concerns driving investment in IT in your organisation?  
 Q5b. To what extent are cost savings driving investment in IT in your organisation?  
 Base: All IT professionals/Procurement professionals (200)

# Supplier CSR standards are more of an important consideration for procurement managers



Q9/Q20. How important are each of these topics when selection printers/copiers for your organisation?  
All IT managers (200)/Procurement professionals (200)

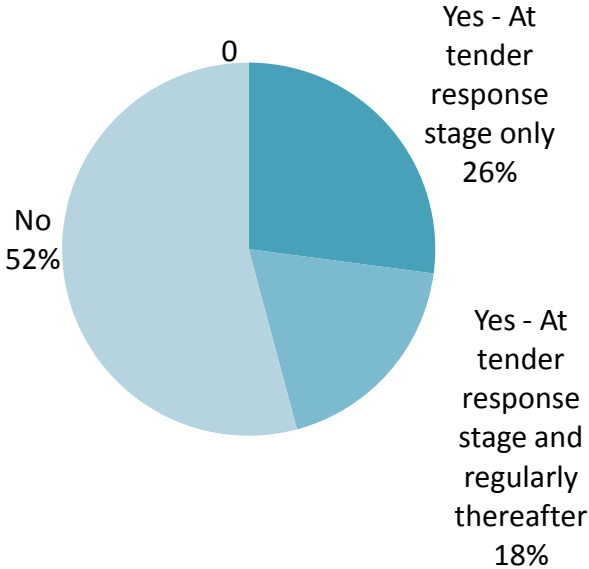
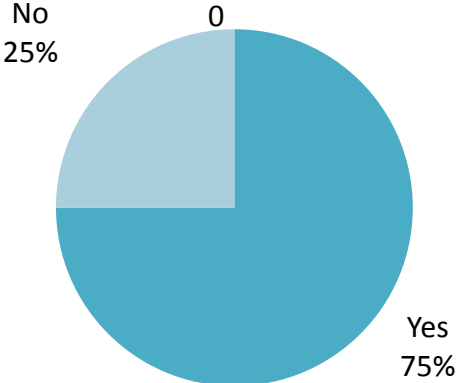
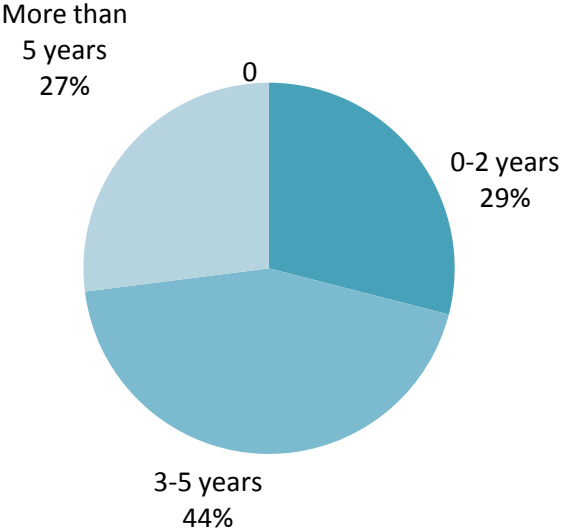
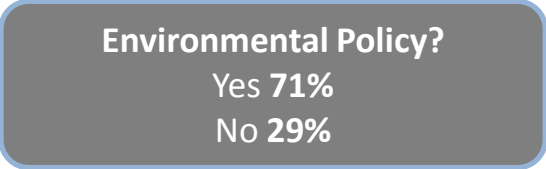
# 1 in 5 procurement managers are not prepared to pay a premium based on green criteria



Q21. To what extent are you prepared to pay a premium for a product that performs well on the criteria you consider important?  
Procurement Professionals (200)



# Only 18% audit suppliers' green performance regularly after tenders are accepted



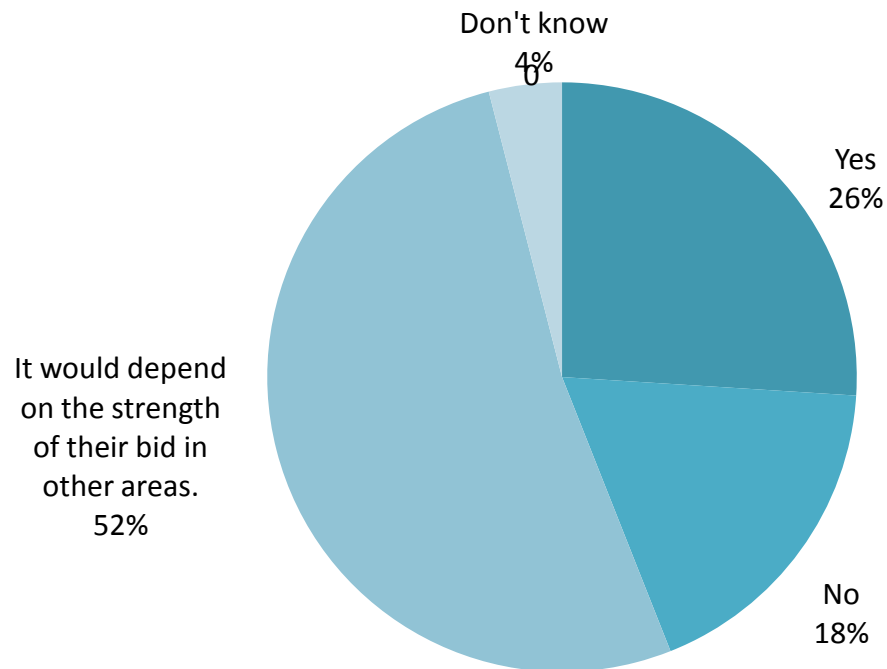
Length of policy

Green questions at tender stage

Audit on performance?

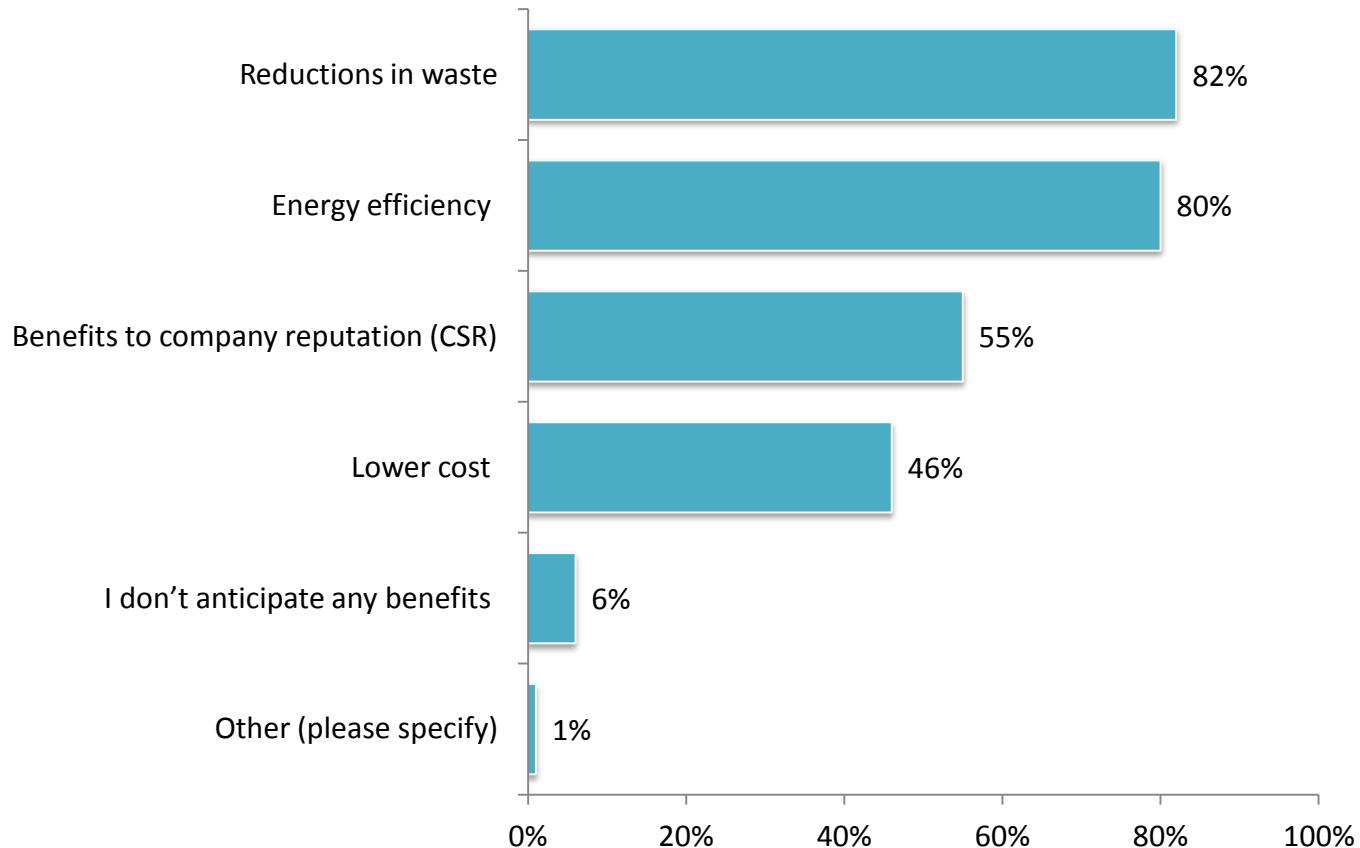
Q12. Does your organisation have an environmental supply chain/procurement policy? Base: Procurement Professionals (200)  
 Q13. How long has this policy been in place? Base: 'Yes' (141)  
 Q14. Do you include questions about suppliers' environmental performance in tenders? Base: Procurement Professionals (200)  
 Q15. Do you audit your suppliers' environmental performance? Base: Procurement Professionals (200)

# 1 in 4 companies would discount a supplier if they failed to meet environmental expectations



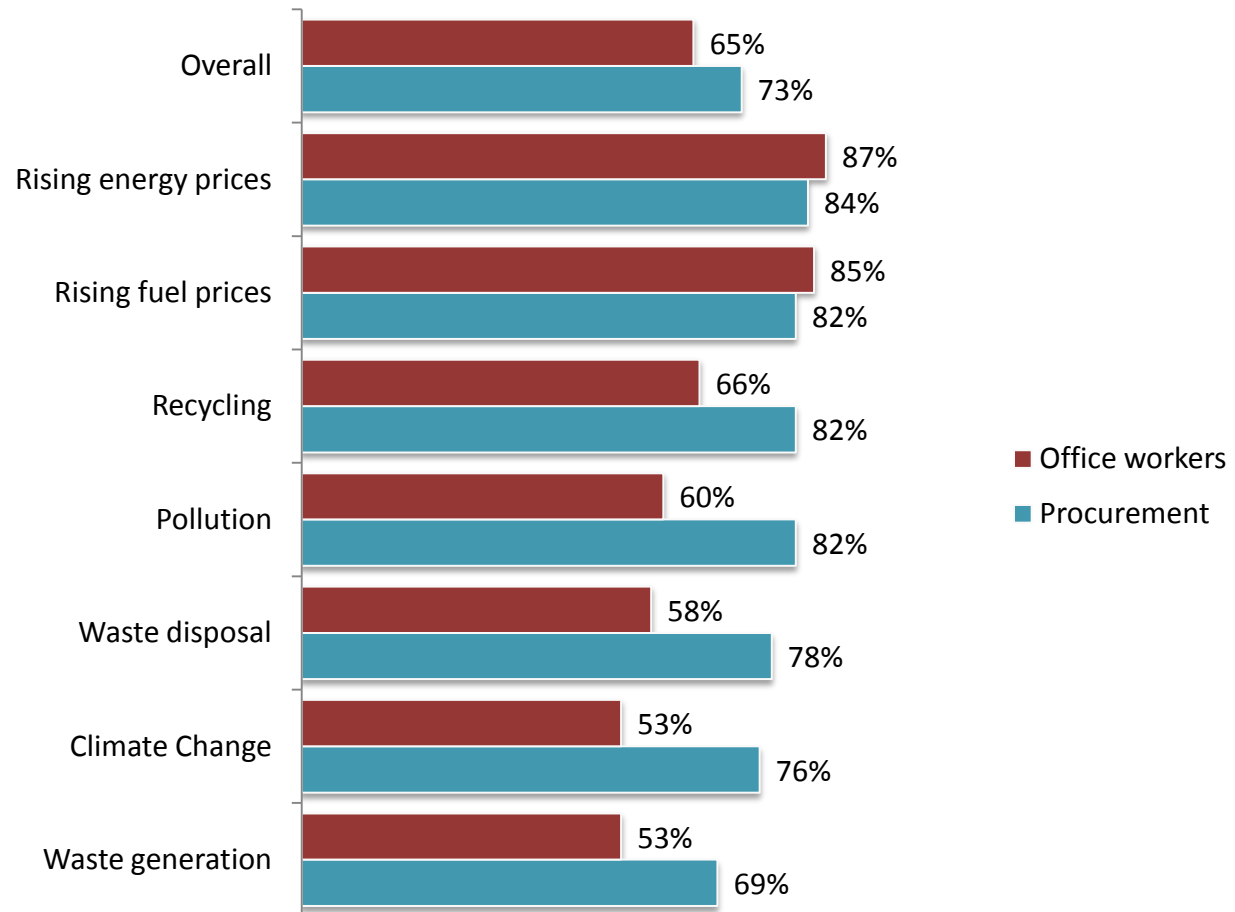
Q16. Would you discount a supplier if it failed to meet your minimum environmental standards?  
Procurement Professionals (200)

# Reductions in waste and energy efficiency are considered the more important environmental issues



Q17. What benefits do you associate with taking environmental issues into account when specifying goods and services?  
Procurement Professionals (200)

# Rising energy and fuel prices are the greatest personal concerns



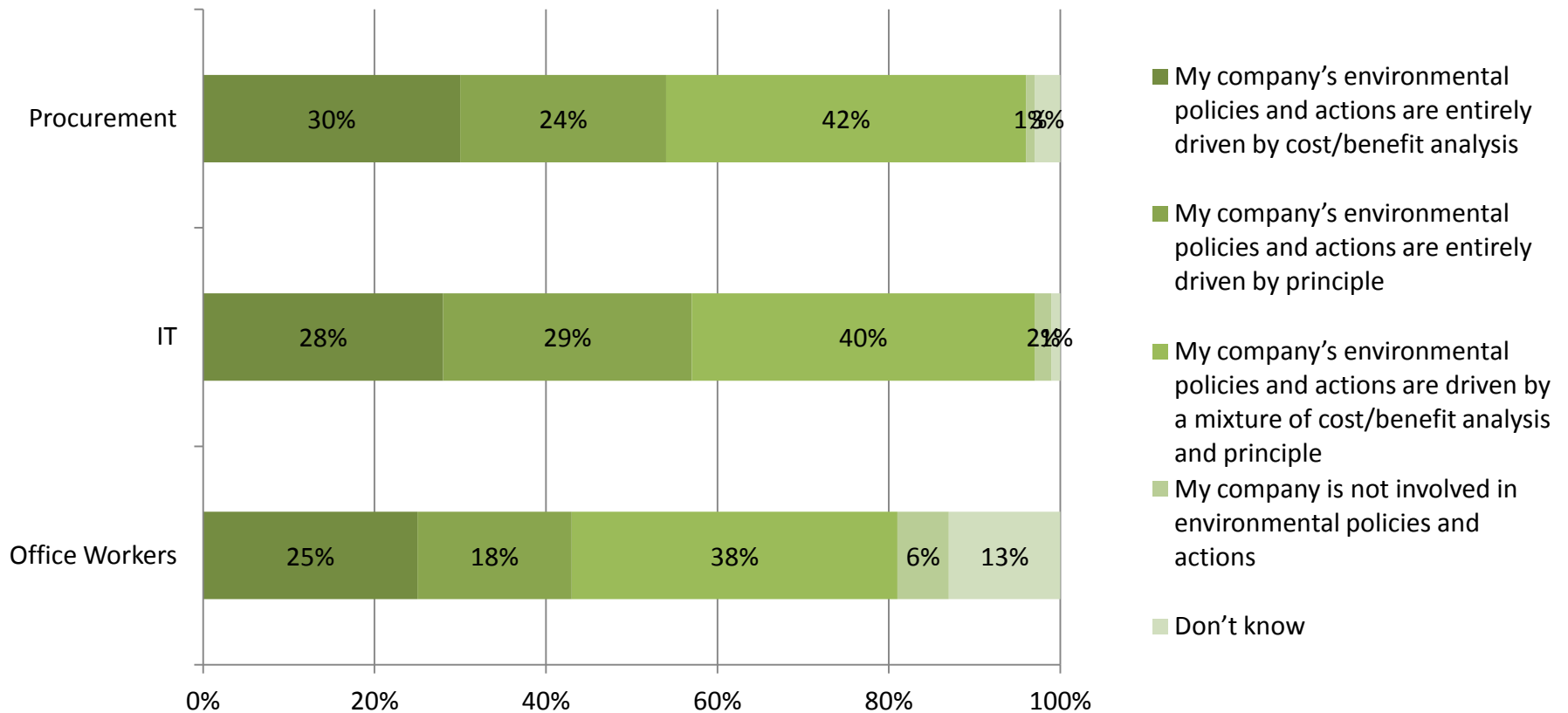
Q19. How concerned are you personally about environmental issues, such as climate change, pollution, household waste disposal and recycling?  
Procurement Professionals (200)



# Procurement, IT & Office workers



# Environmental policies are usually driven by some form of cost



Q3. Which of the following best describes your opinion?  
Base: Office workers(1000)

# Most firms have some sort of offsets, at least on a team/department level



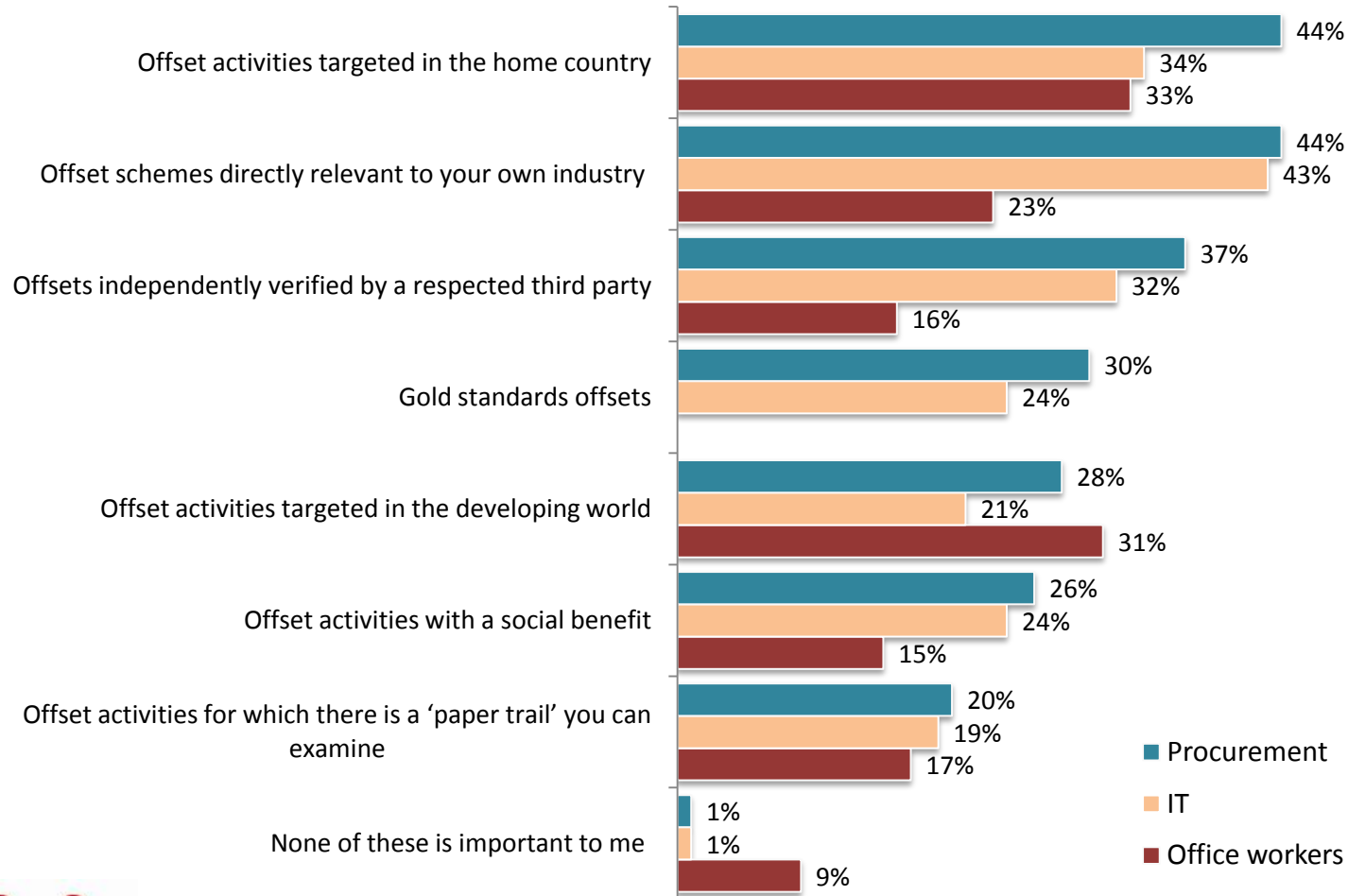
We arrange carbon offsets for...

- All activities on a company-wide basis
- Some activities (e.g. plane flights) on a company-wide basis
- Some activities, on a team or department level
- A few activities, on the initiative of individual employees or managers
- We don't arrange carbon offsets for any activities, to my knowledge
- I don't know

...But they are not effectively communicated to their staff – **nearly half** (48%) of workers claim to have no knowledge of carbon offsets

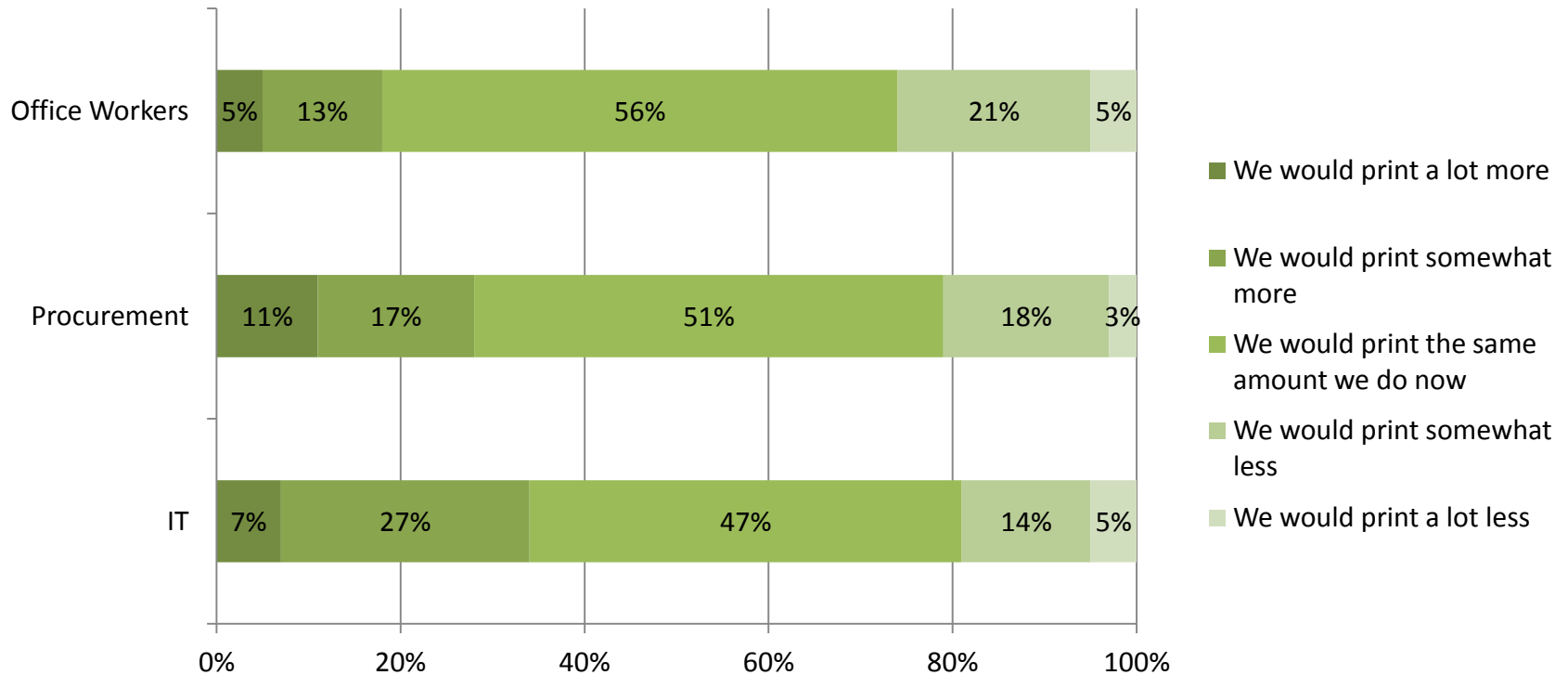
Q18/Q23. Which of the following best describes your company's current activities? Base: Office workers (1000), IT(200), Procurement (200)

# Local schemes and industry-focused schemes are preferred, especially by Procurement



Q19/Q24. Which of the following are criteria that you personally would prefer to see in an offset scheme?  
Base : Office workers (238), IT(129), Procurement (142)

# A quarter of office workers claim carbon neutral printers would decrease their printing volumes



However, the **majority** of firms feel volumes will remain the same

Q20/Q22. In your opinion, how might having carbon neutral printers change your team's printing volumes?  
Base: Office workers (1000), IT(200), Procurement (200)



# Rethinking printing

July 2011

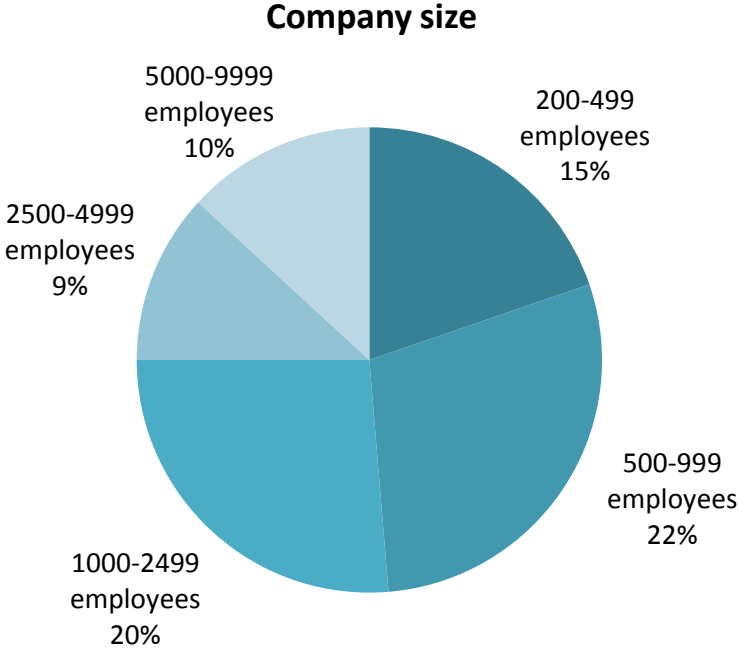
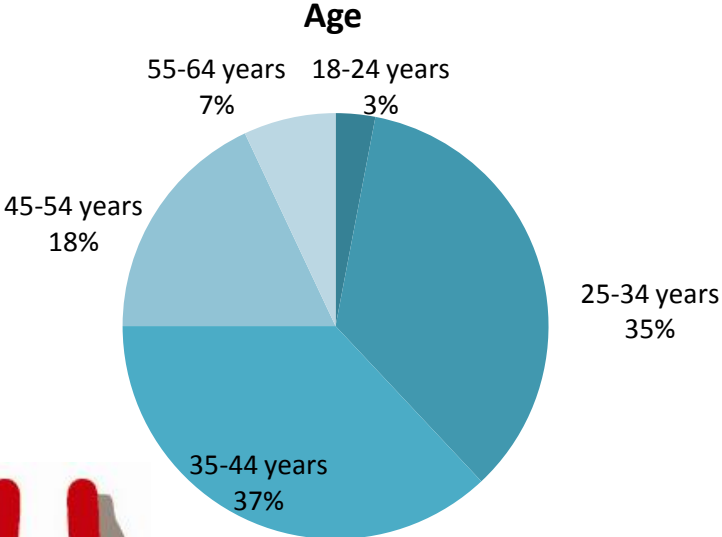
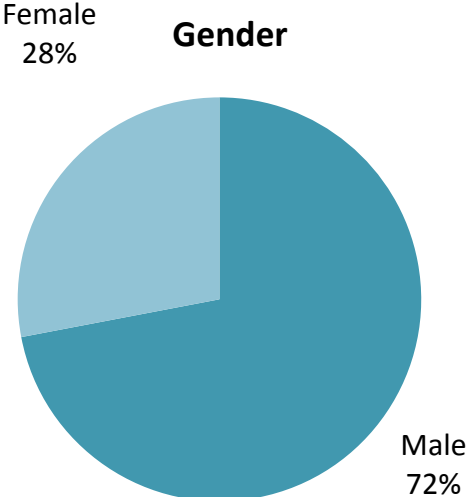


# Appendix



# Research approach / sample profile – IT professionals

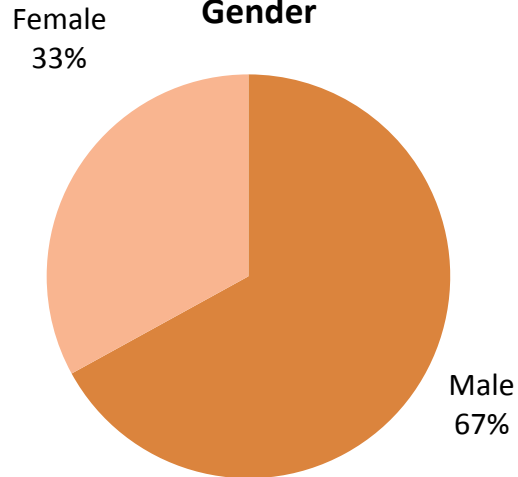
200 interviews were conducted online with UK IT Managers within UK companies with 200+ employees during April 2010



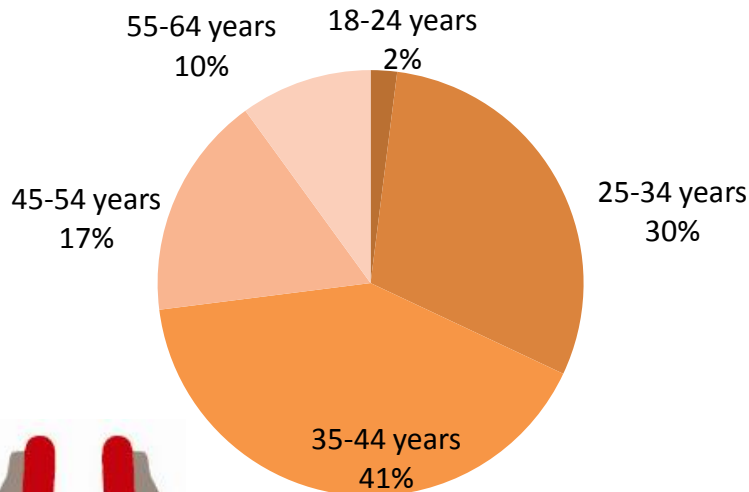
# Research approach / sample profile – Procurement professionals

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

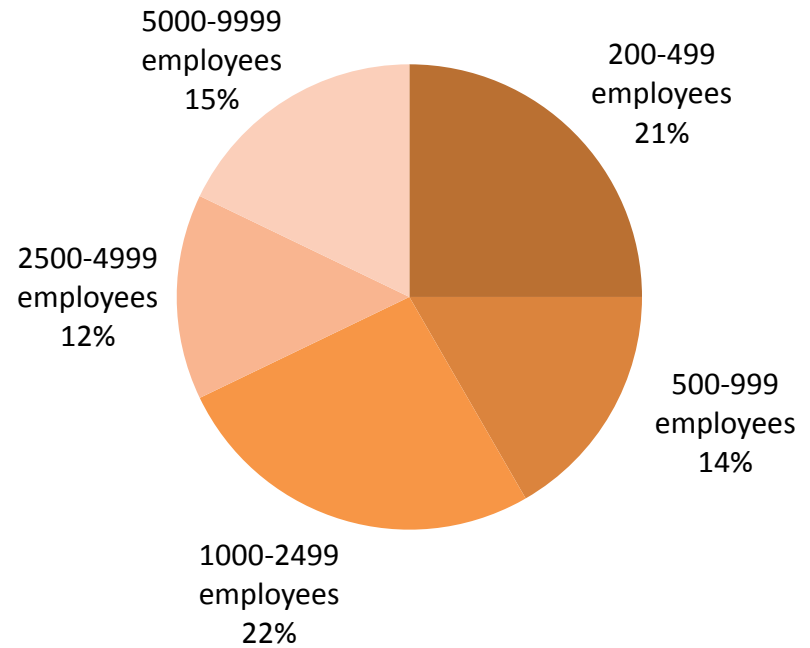
**Gender**



**Age**



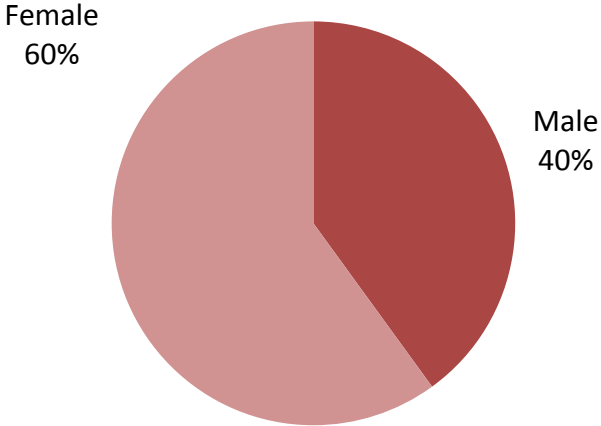
**Company size**



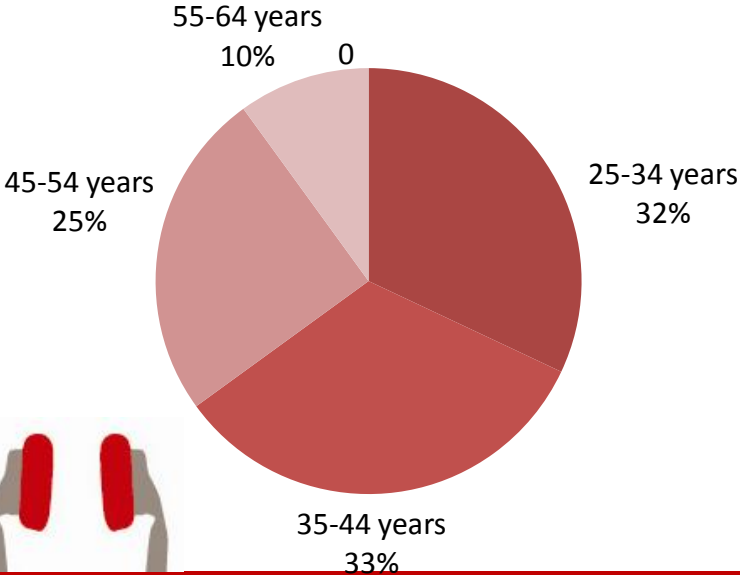
# Research approach / sample profile – Office workers

1000 interviews were conducted online with UK office workers within UK companies with 200+ employees during July 2011

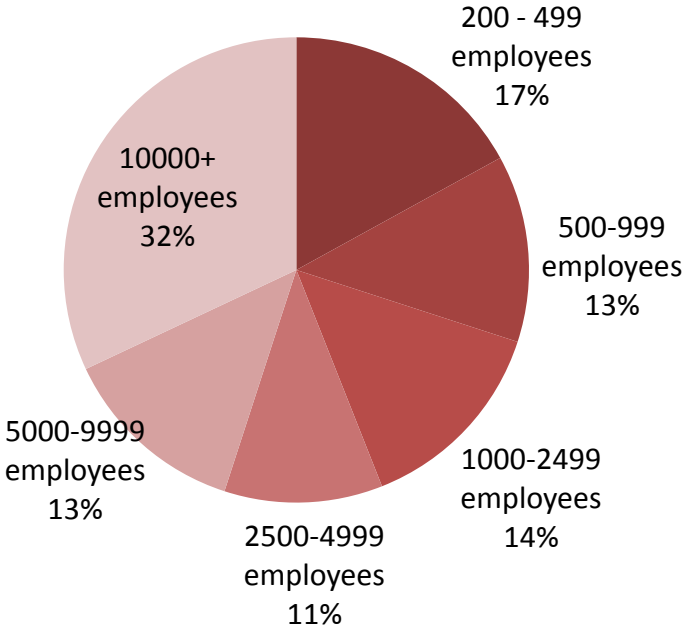
### Gender



### Age

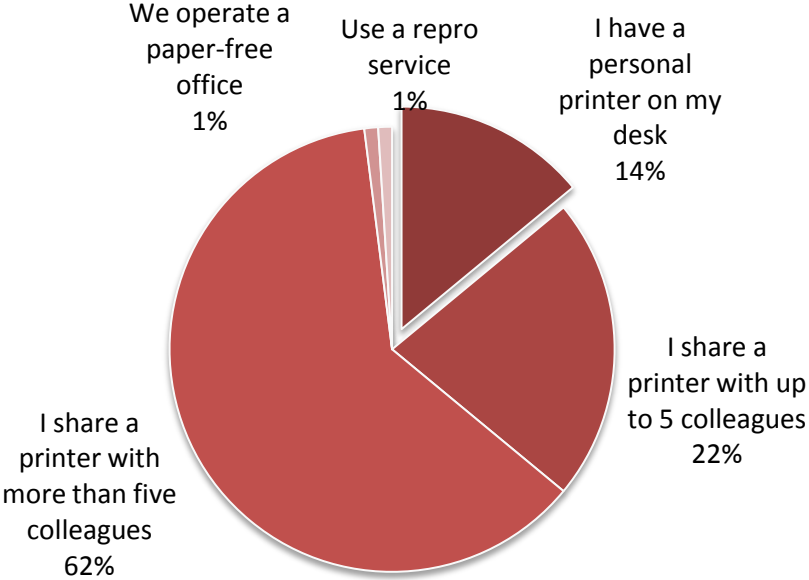


### Company size

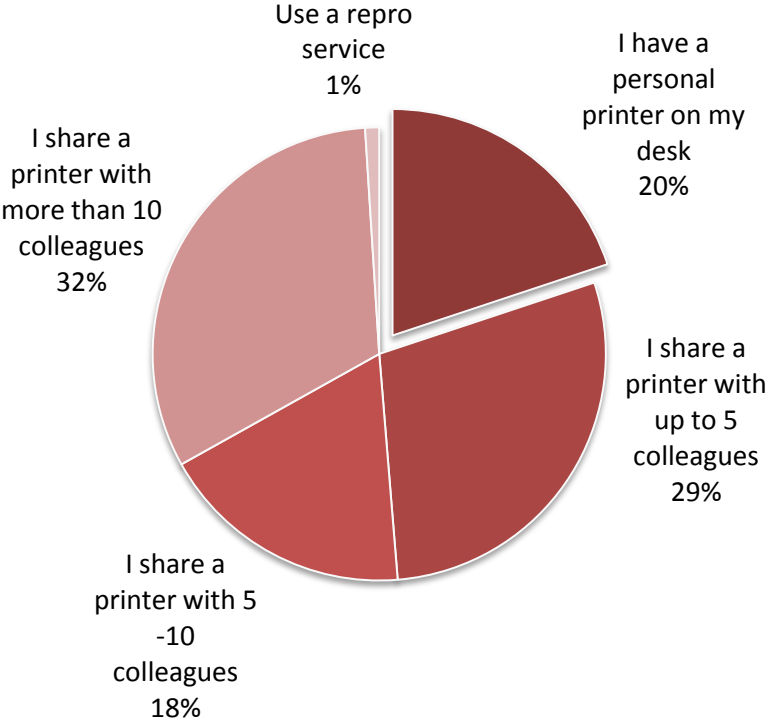


# Sharing a printer with the wider office (5 or more colleagues) has risen over the last year

2011



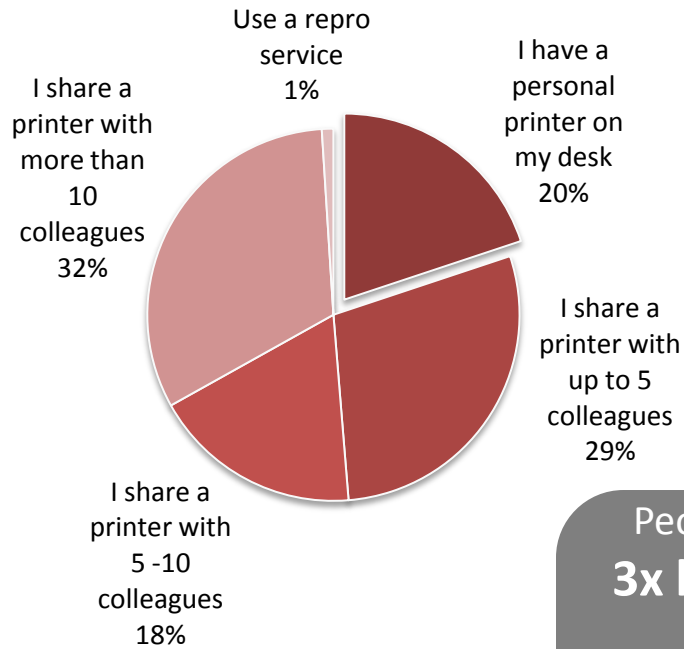
2010



Q6 - Which of the following best describes your office printing facilities?  
Base: Office workers (1000)

## 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



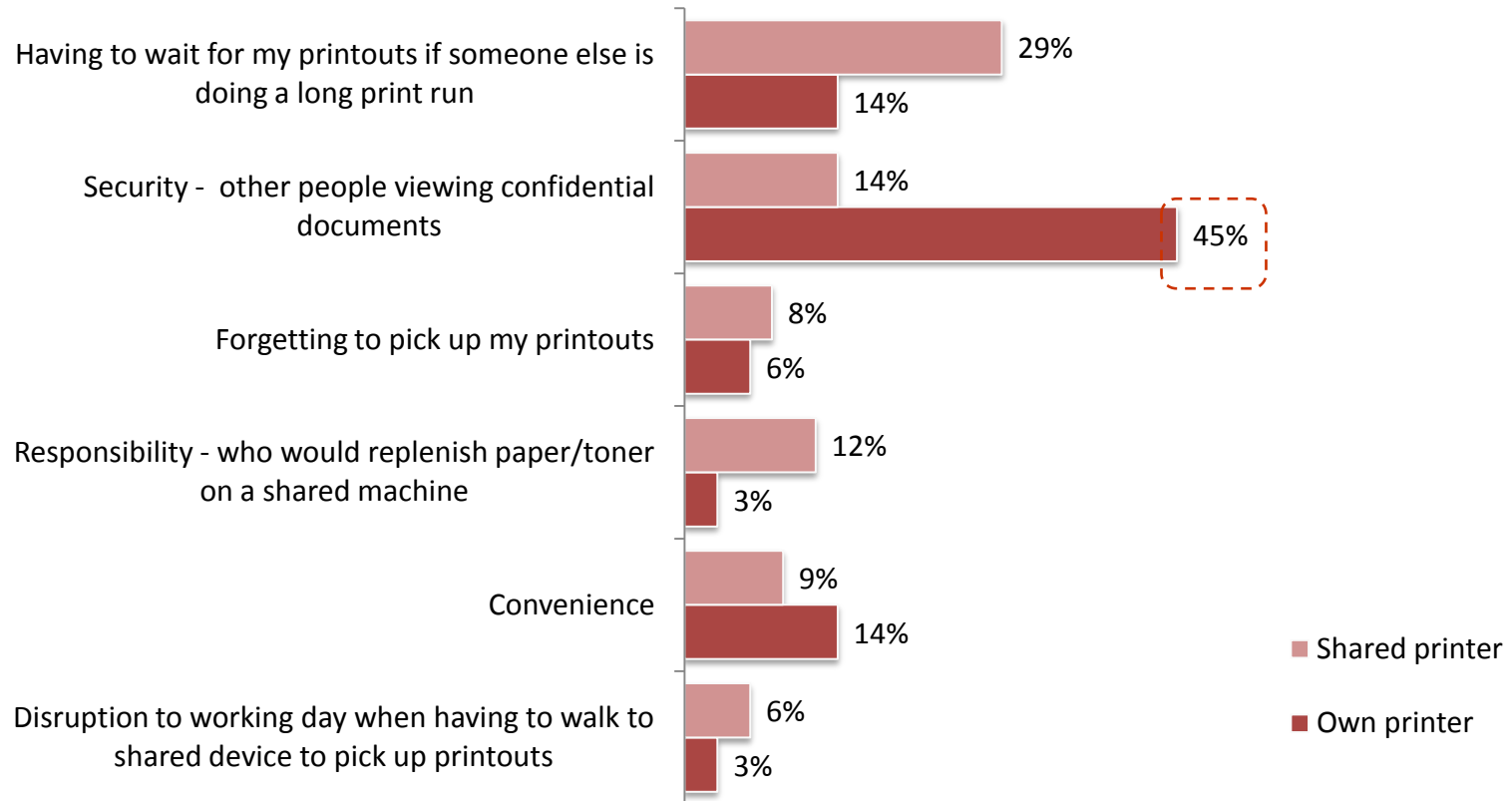
People who share a printer with 10 or more others print **3x less** than those who have their own printer (27 sheets per day compared to 79 sheets)

**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

# 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**



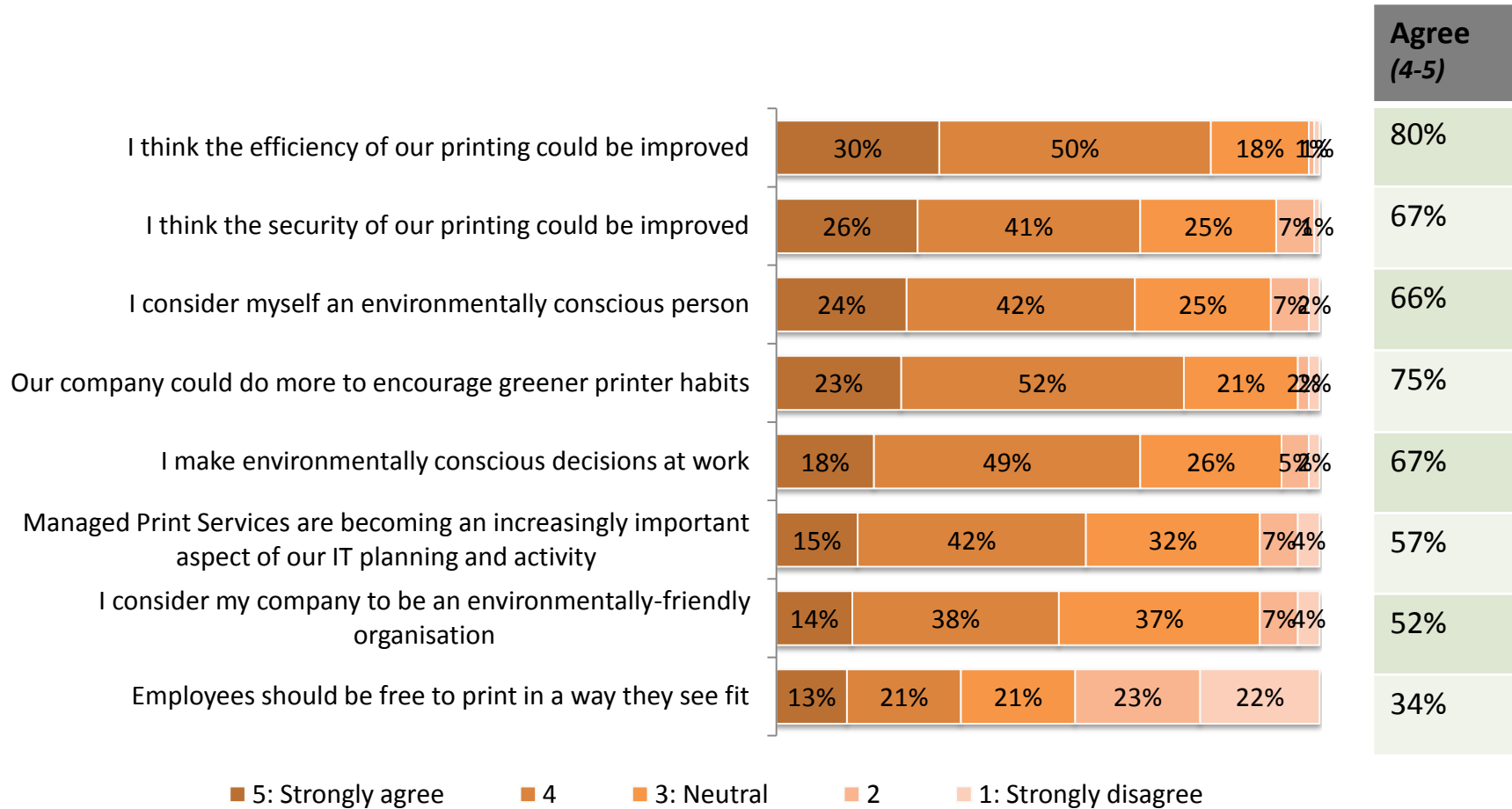
Q7b - And which would be your biggest concern?

Base: All who do not currently share a printer (136)

Q8b - And which would say has been the biggest difficulty?

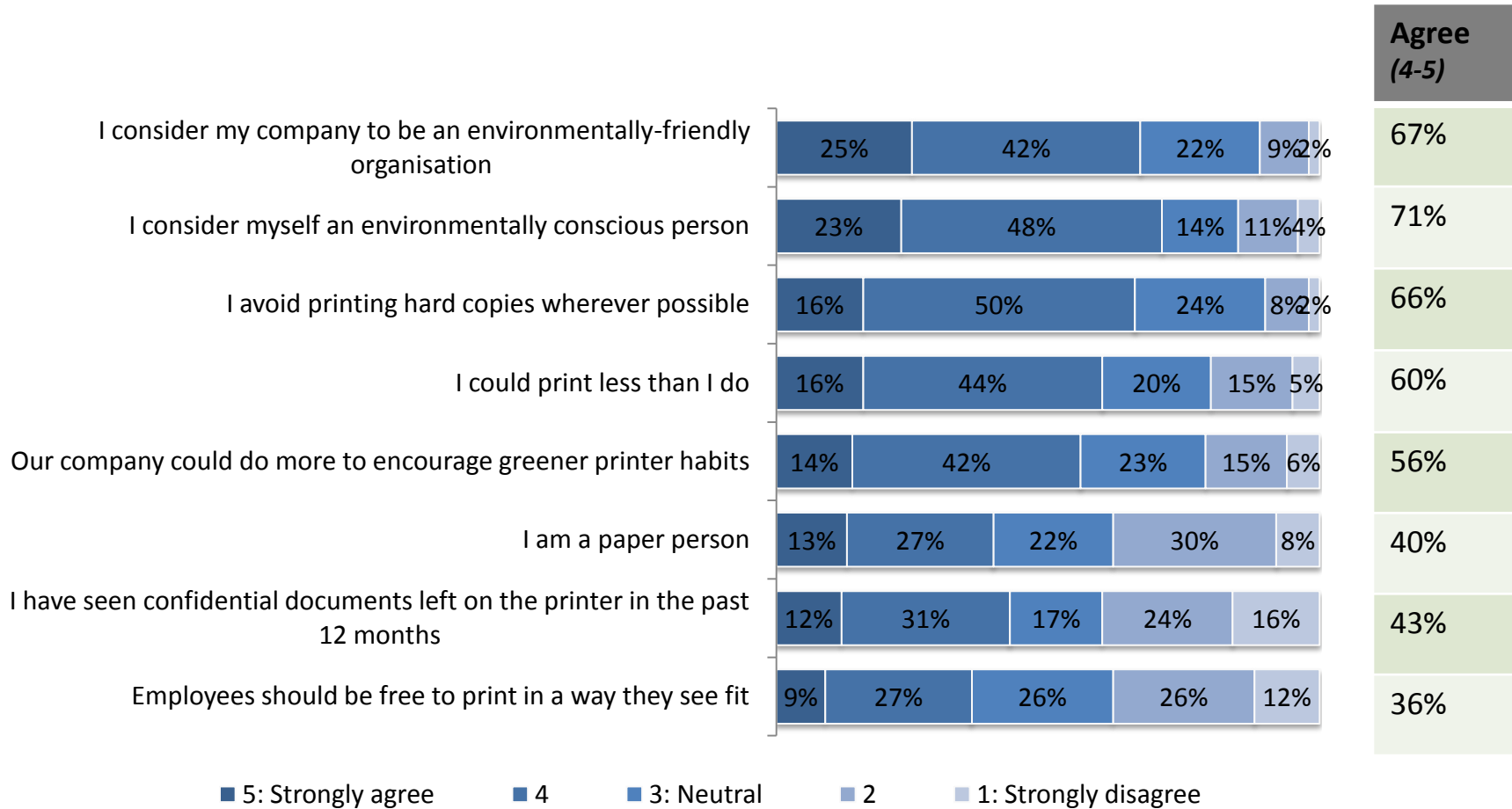
Base: All who share an office printer (842)

# Attitude statements: IT Professionals



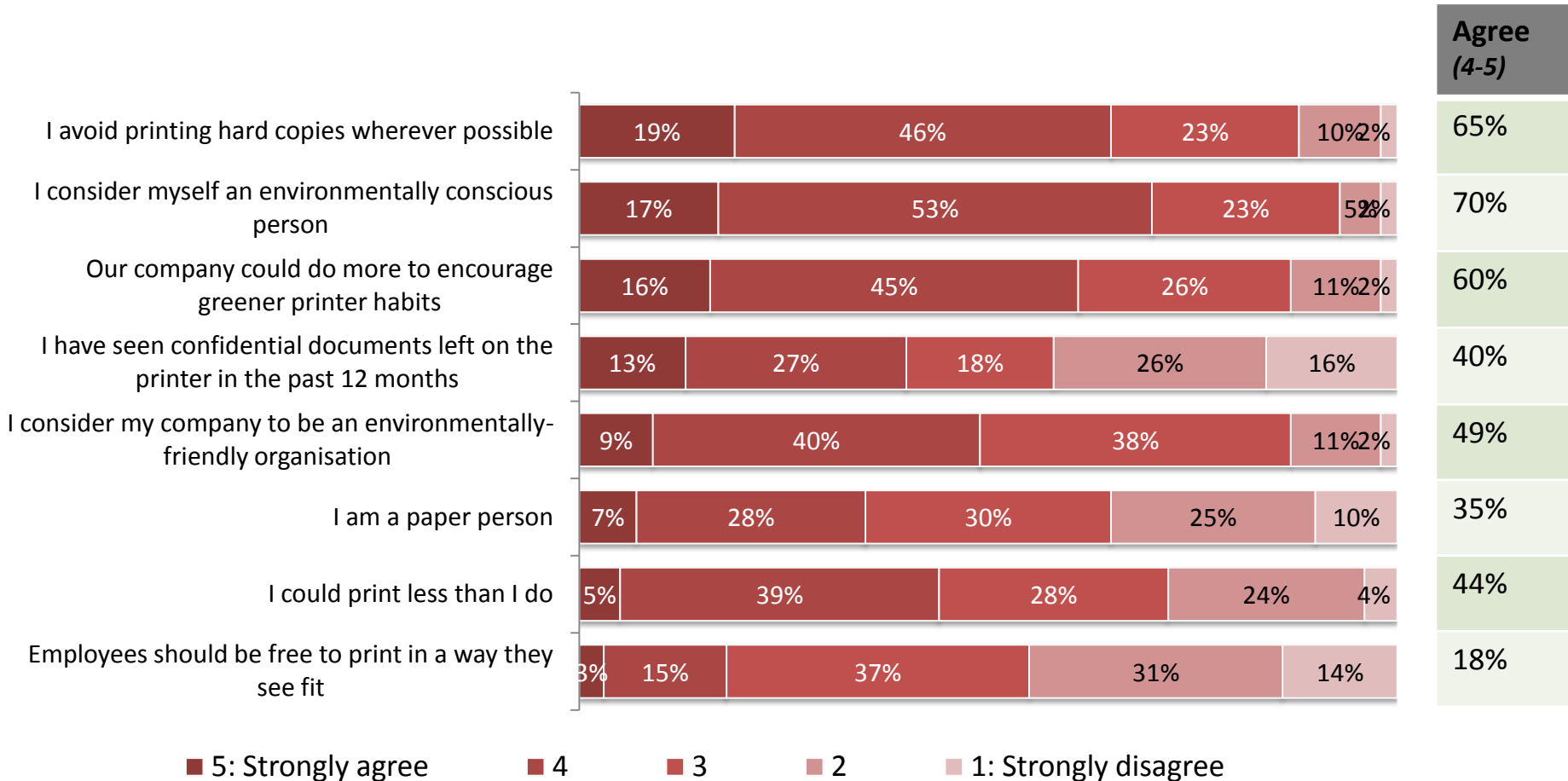
Q10 - To what extent do you agree or disagree with the following statements?  
All IT managers (200)

# Attitude statements: Procurement professionals



Q18 - To what extent do you agree or disagree with the following statements?  
Procurement professionals (200)

# Attitude statements: Office workers



Q5 - To what extent do you agree or disagree with the following statements?  
Base: Office Workers (1000)



# Rethinking printing

July 2011

