

December 23, 2009

Abstract

The Future of the Office Document: 2009 Survey Results

Report Fast Facts

Published: December 2009

Pages: 74

Tables & Figures: 74

Price: \$3,995

Order Information

To place your order today, contact Robyn Wuori at 781.616.2100 or via e-mail at robyn_wuori@infotrends.com

About InfoTrends

InfoTrends, a Questex Company, is the leading worldwide market research and strategic consulting firm for the digital imaging and document solutions industries. We provide research, analysis, and advice to help clients understand market trends, identify opportunities, and develop strategies to grow their businesses. To learn more about our company, visit www.infotrends.com.

© 2009 InfoTrends, Inc.
www.infotrends.com

Abstract

This document analyzes the findings from InfoTrends' *2009 Future of the Office Document Survey*, which was fielded during September 2009. It explores the changing role of office documents; customer requirements; and usage patterns in relation to printing, copying, scanning, and page volumes in the office environment. As appropriate, this report also compares the results from this year's survey to the results of our 2007 survey to help establish key market trends.

For More Information

If you would like to order extra copies of this report, receive permission to use any part of the report, or be informed of upcoming market updates, reports, and related projects, please e-mail us at info@infotrends.com.

Headquarters:
97 Libbey Industrial Parkway
Suite 300
Weymouth, MA 02189
United States
+1 781 616 2100
info@infotrends.com

Europe:
3rd Floor, Sceptre House
7-9 Castle Street
Luton, Bedfordshire
United Kingdom, LU1 3AJ
+44 1582 400120
euro.info@infotrends.com

Asia:
Hiroo Office Building
1-3-18 Hiroo, Shibuya-ku
Tokyo 150-0012
Japan
+81 3 5475 2663
info@infotrends.co.jp

Table of Contents

Executive Summary	6
Introduction	7
Methodology	7
Definitions	8
A3 vs. A4	8
CAGR	8
Company Size	8
Mean vs. Median	8
Single-Function Devices vs. Multifunctional Peripherals (MFPs).....	8
Key Market Trends	9
Single-Function to Multifunctional.....	9
Black & White to Color.....	11
A3 to A4.....	13
Survey Findings	15
Respondent Profile	15
<i>Company Size</i>	15
<i>Location Size</i>	16
<i>Company and Location Size: 2007 vs. 2009</i>	17
<i>Primary Business</i>	18
<i>Annual Revenues</i>	19
<i>Job Title</i>	20
<i>Department</i>	21
Equipment Owned	22
<i>Black & White A3 Devices</i>	22
<i>Black & White A4 Devices</i>	24
<i>Color A3 Devices</i>	26
<i>Color A4 Devices</i>	28
<i>Other Office Equipment</i>	31
Inkjet-Based Devices.....	33
<i>Primary Use</i>	33
<i>Percentage of Network-Connected Inkjet Devices</i>	34
Printing and Copying: Black & White vs. Color	35
<i>Primary Applications for Monochrome Printing/Copying</i>	35
<i>Primary Applications for Color Printing/Copying</i>	36
<i>Percentage of Output Produced in Color</i>	37
<i>Satisfaction with Color Image Quality</i>	38
Outsourcing Practices	39
<i>Outsourcing for Production</i>	39
<i>Reasons for Outsourcing</i>	40
<i>Change in Outsourcing in Past Year</i>	41
<i>Anticipated Change in Outsourcing in Coming Year</i>	41
Paper Consumption.....	42
<i>Number of Paper Sheets Used Per Month</i>	42
<i>Change in Print/Copy Volume in Past Year</i>	43
<i>Anticipated Change in Print/Copy Volume in Coming Year</i>	44
<i>Use of Software to Monitor/Control Paper Volumes</i>	45
<i>Percentage of Devices that Use Various Paper Sizes</i>	46
<i>Percentage of Color Output Produced on Various Paper Weights</i>	47
<i>Output Produced on Color MFPs</i>	48
<i>Anticipated Change in Use of Specialty Papers</i>	49

Anticipated Change in Use of Recycled Papers 50
Office Devices Equipped with Paper Handling Features 51
Questions about Specific Office Devices 52
Functions Performed on MFPs 52
Documents Scanned on Workgroup Copiers and Multifunctional Printers 54
Scanning Applications 55
Anticipated Change in Use of Various Functions 57
Use of Color 58
Company’s Attitude about Color 58
Strongest Barrier to Widespread Color Use 59
Future Purchasing Intentions 60
Black & White or Color? 60
Maximum Page Size 63
Importance of Various Criteria 64
Importance of Various Features for Next MFP 65
Anticipated Purchasing Location 66
Software Applications 67
Usefulness of Document Management Software 67
Importance of Various Abilities 68
Environmental Features 70
Brand Awareness 71
Black & White Office Equipment 71
Color Laser Office Equipment 72
Color Inkjet Office Equipment 73
Conclusion **74**

List of Figures

Figure 1: Total U.S. Copier Vendor Placements of Single-Function and Multifunctional Copier Devices – 2008-2013 (Thousands)	9
Figure 2: Total U.S. Printer Vendor Placements of Single-Function and Multifunctional Devices – 2008-2013 (Thousands)	10
Figure 3: Total U.S. Copier Vendor Placements of Monochrome and Color MFP Placements – 2008-2013 (Thousands)	11
Figure 4: Total U.S. Monochrome and Color Printer-Based MFP Placements – 2008-2013 (Thousands)	12
Figure 5: Total U.S. Office Monochrome A3 and A4 Placements – 2008-2013 (Thousands)	13
Figure 6: Total U.S. Office Color A3 and A4 Placements – 2008-2013 (Thousands).....	14
Figure 7: Approximately how many employees work at your company?	15
Table 1: Breakdown by Company Size Category.....	15
Figure 8: Approximately how many employees work at your specific location?	16
Figure 9: Mean Number of Employees by Company and Location – 2007 vs. 2009.....	17
Figure 10: Which of the following best describes your company’s primary business?	18
Figure 11: What are your company’s average annual revenues?.....	19
Figure 12: Mean Annual Revenues by Company Size.....	19
Figure 13: Which of the following best describes your position or job title?.....	20
Figure 14: Which of the following best describes your department?.....	21
Figure 15: Approximately how many of the following types of black & white A3 devices are in use at your location?	22
Figure 16: Mean Number of Black & White A3 Devices by Company Size	23
Figure 17: Approximately how many of the following types of black & white A4 devices are in use at your location?	24
Figure 18: Mean Number of Black & White A4 Devices by Company Size	25
Figure 19: Approximately how many of the following types of color A3 devices are in use at your location?	26
Figure 20: Mean Number of Color A3 Devices by Company Size	27
Figure 21: Approximately how many of the following types of color laser A4 devices are in use at your location?	28
Figure 22: Approximately how many of the following types of color solid ink A4 devices are in use at your location?	29
Figure 23: Approximately how many of the following types of color liquid inkjet A4 devices are in use at your location?.....	29
Table 2: Mean Number of Color A4 Devices by Company Size	30
Figure 24: Approximately how many of the following types of other devices are in use at your location?	31
Figure 25: Mean Number of Other Devices by Company Size	32
Figure 26: Which of the following best describes your company’s use of inkjet-based products? (Segmented by Company Size).....	33
Figure 27: Percentage of Network-Connected Inkjet-Based Devices by Company Size.....	34
Figure 28: What are your primary applications for black & white printing/copying?.....	35
Figure 29: What are your primary applications for color printing/copying?	36
Figure 30: What percentage of your printing/copying jobs on the following devices are produced in color?	37
Table 3: Mean Percentage of Printing/Copying Produced in Color.....	37
Figure 31: Are you satisfied with the image quality of your color devices? (Segmented by Company Size)	38
Figure 32: Does your department/company send any print/copy jobs to an outside organization for production?.....	39
Figure 33: Why does your department/company send print/copy jobs to an outside organization?....	40
Figure 34: How have your outsourcing levels changed in the past 12 months?.....	41
Figure 35: How do you expect your outsourcing levels to change in the next 12 months?	41

Figure 36: On average, how many sheets of paper do you use in each of the following types of devices per month? 42

Figure 37: How have your printing/copying volumes changed over the past year?..... 43

Figure 38: How do you expect your company’s printing/copying volumes to change in the coming year? 44

Figure 39: Does your company use software to track print/copy volumes? (Segmented by Company Size) 45

Figure 40: Does your company use software to control/restrict print/copy volumes? (Segmented by Company Size) 45

Figure 41: What percentage of your printing/copying jobs use the following paper sizes? 46

Figure 42: Roughly what percentage of the output on your office’s primary color device is produced on the following paper weights? (Segmented by Company Size)..... 47

Figure 43: What percentage of the output produced on your color MFP corresponds to the following categories? (Segmented by Company Size)..... 48

Figure 44: How do you expect your use of specialty paper to change over the next three years? (Segmented by Company Size)..... 49

Figure 45: How do you expect your use of recycled paper to change over the next 3 years? 50

Figure 46: What percentage of your office devices are equipped with optional paper handling features?..... 51

Figure 47: Approximately what percentage of the jobs produced on your black & white MFPs use the following functions? 52

Figure 48: Approximately what percentage of the jobs produced on your color MFPs use the following functions? 53

Figure 49: Approximately what percentage of the jobs produced on your fax-based MFPs use the following functions? 53

Figure 50: Of the documents that you scan on your workgroup copiers and multifunctional printers, what percentage are e-mailed, archived, edited, or faxed? 54

Figure 51: How important are the following scanning applications to you? 55

Figure 52: What percentage of each of the following scanning applications are produced in color? 56

Figure 53: How do you expect your company’s usage of the following functions to change over the next three years? 57

Figure 54: Which of the following best describes your company’s current attitude about color? (Segmented by Company Size)..... 58

Figure 55: Which of the following do you consider to be the strongest barrier to widespread use of color printers and copiers in your office? (Segmented by Company Size) 59

Figure 56: For your next office equipment purchase, will you most likely consider a black & white or color device? (Segmented by Company Size)..... 60

Figure 57: Which of the following types of black & white devices are you most likely to purchase? ... 61

Figure 58: Which of the following types of color devices are you most likely to purchase?..... 62

Figure 59: What will be the maximum page size of your next office equipment device?..... 63

Figure 60: When you purchase your next office imaging device, how important will each of the following criteria be?..... 64

Figure 61: When you purchase your next MFP, how important will you consider each of the following features? (Means) 65

Figure 62: From which location will you most likely purchase the following types of devices?..... 66

Figure 63: How useful would document management software be to your organization? (Segmented by Company Size)..... 67

Figure 64: How important would it be for your company to have software applications that offer the following capabilities?..... 68

Figure 65: Mean Importance of Various Abilities for Software Applications by Company Size 69

Figure 66: How important are each of the following environmental features when deciding to purchase printing products for your business?..... 70

Figure 67: How familiar are you with the following black & white brands? (Tier 1)..... 71

Figure 68: How familiar are you with the following black & white brands? (Tier 2)..... 71

Figure 69: How familiar are you with the following color laser brands? (Tier 1) 72
Figure 70: How familiar are you with the following color laser brands? (Tier 2) 72
Figure 71: How familiar are you with the following color inkjet brands?..... 73

This material is prepared specifically for clients of InfoTrends, Inc. The opinions expressed represent our interpretation and analysis of information generally available to the public or released by responsible individuals in the subject companies. We believe that the sources of information on which our material is based are reliable and we have applied our best professional judgment to the data obtained.