

IT peripherals are no longer peripheral

Uncovering the enormous impact
of every-day technology and the
challenges of getting it right



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Foreword

There are about 94.35 million printers sold globally every year¹, not to mention scanners, projectors and other IT peripherals. The sheer scale of the market is overwhelming. We nearly all have access to at least one of these at home, work or in an educational setting.

And while we call these pieces of technology “peripheral,” they’re far from it. They allow information to flow, support collaboration, enable learning, aid care provision and help administration of our public services.

They’ve become part of the fabric of our lives, but there are factors bringing

them to our attention like never before. Energy costs are spiralling, the need for sustainability is growing, regulations are tightening, and expectations are increasing from workers, learners, patients and citizens.

In this context, the way a single printer works might not make much difference on its own, but multiply it by 94.35 million and it can make a huge difference. Chosen carefully and used well, peripherals can help cut costs, reduce energy consumption and CO₂ emissions, and improve outcomes in many ways – from improving sustainability and workflow, to reducing data breaches and lost hours of work.

This report aims to explore the challenges, opportunities and priorities for managing IT peripherals. It does so by considering key data points and trends as surfaced by research we’ve run within key industries and countries in Europe, the Middle East and Africa.

I hope you find it useful.

Yoshiro Nagafusa,
President of Epson Europe

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President of Epson Europe

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Executive summary



Energy

63% of respondents want to reduce energy costs and many (54%) say ink jet printers will help them meet their cost reduction goals but just a fifth (19%) of all printers in commercial settings are inkjet². This is a missed opportunity – energy costs are high and **an inkjet printer can reduce its use by up to 90% compared to laser³.**



Scanning

Three quarters of respondents (76%) say digitalisation will, in general, be a priority in the next three years with 74% saying it's causing a greater need for new scanning technology.



Projectors

The projector is the mainstay of meeting rooms and classrooms throughout the world. **Over four fifths (85%) expect to invest in the same number or more projectors in the next 12 months compared to the last.** They're indispensable, not peripheral.



Training

71% of respondents have between 1 and 10 printers, but need greater training on how to use their technology to the benefit of their organisation. We need to use the ubiquitous technology we have better.



Education

93% of education workers say it's essential that teachers have access to a printer, **yet (76%) admit they use their home printer for teaching needs.**



Health

Over half (55%) of healthcare respondents admit flaws in their processes have led to data and or document misplacement or loss during the last 12 months.

They personally lose nearly a day (7 hours) each month to poor IT that prevents them from doing their job.



Public Sector

Nearly two thirds (65%) say the ability to scan and digitise records is recognised as the best solution for securing data within the organisation. However, just a third (33%) say they will increase scanning to reduce data and records loss or misplacement. Respondents know what they need to do but aren't committing to doing it.

The research was commissioned by Epson and conducted online by Coleman Parkes among 5,650 IT decision-makers, users and influencers in IT and technology peripherals between April and June 2022. It had a focus on education, healthcare and the public sector. All figures quoted come from this research unless stated otherwise.

1. Energy costs put peripherals centre stage

The price of energy is climbing at an astronomical rate. At the start of 2022 annual energy inflation hit 27%⁴ and it's continued to rise. In fact, the World Bank says energy prices are now expected to increase by 50% on average in 2022⁵. Most regions are now living through a cost-of-living crisis with many in energy poverty⁶.

In this context, one of the biggest challenges faced by respondents who took part in our research is the need to reduce energy expenditure, cited by nearly two thirds (63%). Specifically, about the same number (62%) say they're concerned about the energy use of printers given the increases in energy costs.

Importantly, interviewees can see some solutions on the horizon. Over half (54%) say inkjet printers will help them meet their cost reduction goals. And over two thirds (68%) say they want a better understanding of energy savings that could be made by changing the type of printers in use.

It's therefore surprising that just a fifth (19%) of all printers in commercial settings are inkjet⁷, despite them offering a potentially huge energy saving opportunity. This has been proven by research from the University of Cambridge showing that inkjet technology can be up to 90% more energy efficient than laser technology depending on the type of printer used⁸.

Organisations need to move faster in adopting energy-efficient technology. A single printer might not save much energy, money or CO₂ alone, but a whole fleet of business printers could deliver significantly with a shift from laser printing to inkjet.



Questions leaders need to consider:

- **Where am I using most energy and how can I cut it?**
- **Where are the biggest potential reductions in energy usage?**
- **What simple changes can I make to create a larger overall reduction in energy?**

62%



say they're concerned about the energy use of printers given the increases in energy costs

2. Digitalisation starts with a humble scanner

Pandemic restrictions lifted in many countries throughout early 2022⁹, but they've left a lasting technology legacy. According to the European Investment Bank, nearly half (46%) of EU firms became more digital during the COVID-19 crisis¹⁰. In the Middle East, the UAE stands out as a digitally evolving nation, but it doesn't compare to the US, Singapore or Hong Kong. And some African nations lag badly¹¹.

To keep up with the leading economies, digitalisation needs to be a main concern. With this in mind,

it's reassuring that three quarters of our respondents (76%) say it will, in general, be a priority over the next three years. Overall, 90% say it's important to increase the level of digitalisation within their organisation.

But where do they start? "Being more digital" can be nebulous – meaning many things to many people. In fact, achieving more digitalisation is a challenge for nearly three fifths of respondents (57%). A good place to start is with scanning paper documents. Once scanned, they can be stored digitally, or entered into digital workflows.

Scanning is the doorway to digitalisation, as recognised by three quarters of interviewees (74%) who believe digitalisation is causing a greater need for new scanning technology. A further 68% agree that they need to invest in more scanning technology to meet their digitalisation goals.

This raises the question of how it's paid for, because fewer than half (43%) of respondents in education have accessed the funding and grants open to them for digitalisation. Over a quarter (27%) had no idea they existed.

It seems many agree that digitalisation and scanning will be vital but those in important sectors such as education are not taking advantage of what's on offer to help drive it forward. It's a huge, missed opportunity.



Questions leaders need to consider:

- What does digitalisation mean to my organisation?
- Is scanning the first step towards digitalisation?
- Do sources of funding exist to help us invest in scanners and other technologies to digitalise?

46% 

of EU firms became more digital during the COVID-19 crisis

3. We've ignored peripherals to our detriment

We're all guilty of taking every-day technology for granted. According to respondents, seven in 10 (71%) have up to 10 printers in their organisation. Yet there are probably few of us who could say, that we make use of all the features. When was the last time you printed from your phone or benefitted from OCR capabilities when scanning?

Our research shows we're not making the most of the tech at our fingertips. Nearly three quarters (73%) of respondents say there is a desire in their organisation to have a greater understanding of how to benefit more from technology they already have.

73%

say there is a desire in their organisation to have a greater understanding of how to benefit more from technology

Supporting this, a further 71% say they need greater training on how to use the technology to the benefit of the organisation. And it seems many think the grass is greener on the other side, with nearly two thirds (63%) agreeing that their sector is playing catch-up in technology use compared to others.

Considering we're surrounded by the likes of printers, scanners, projectors, it seems a wasted opportunity that we give them so little thought and don't learn to use them to their full advantage. If we did, they could work wonders.



Questions leaders need to consider:

- What technology do I have within my organisation?
- How is it being used?
- How are other organisations and sectors using their technology?
- How can we maximise productivity and efficiency through technology training?

63%



Believe that their sector is playing catch-up



4. Projecting the future

Projectors are familiar to most people. The concept has been around since pre-history when the first cave dwellers made shapes in the light shining on the walls of their homes. Shadow puppets and camera obscuras came next. By the 1990s they were seen in workplaces, education and entertainment.

And their primacy is not waning. According to respondents, over half (55%) expect to see an increase in the use of projectors in the next 12 months. Compared to whiteboards and flat panel displays, interviewees say there are many benefits. These include quality of image (67%), ability for a wider audience to see things clearly (57%) and they remove the concern that some people may not be able to see content (51%) fully.

Perhaps as a result, 85% expect to invest in the same number or more projectors in the next 12 months compared to the last. And people are increasingly keen to allay their own misconceptions about projectors with nearly two thirds of respondents (64%) saying there is a desire in their organisation to understand how to use them better.



Questions leaders need to consider:

- **Where are the biggest issues with visibility of content or ability to collaborate through screens?**
- **How can I address these shortcomings with new projectors?**
- **How can I help use projectors to their full?**

55%

expect to see an increase in the use of projectors in the next 12 months

64%

say there is a desire in their organisation to understand how to use them better.



5. Education must offer teachers the technology they need

Education is the basic building block of every society. It's the single best investment countries can make to build prosperous, healthy and equitable societies. Yet it seems the sector isn't doing enough to provide teachers with the technology they're asking for.

Ninety three per cent of education workers we questioned said it's essential that teachers have access to a printer, yet fewer than half (47%) of teachers use printers in the classroom. Many are driven to using their own with 76% admitting they have a printer at home they use for teaching needs.

More widely, pressure is mounting for better technology provision in schools. Nearly three quarters of respondents (73%) say students expect higher levels of technology use now compared to before, and the majority of educators (71%) are looking at greater ways to collaborate and generate student engagement.

But improving solutions comes at a cost and over half (52%) state that gaining funding for the necessary technology is a key challenge, with nearly two thirds (64%) saying that lack of funding is limiting the ability to increase engagement and learning with students.

For those that do have the ability to invest, 58% say not enough training is given to teachers on how to use the

technology provided effectively, while six in 10 (60%) are concerned that not enough consideration is given to how the technology will improve provision of teaching/training ahead of purchase – possibly leading to poor investment choices.


Considering those questioned say over two fifths (43%) of the average school day is spent using digital technology, it's worrying that there seems to be such challenges.

The sector needs to look at how it can best support students and teachers in the wake of hybrid and digital learning. And at a basic level, provide easy and official access to tools such as printers – particularly as 46% expect an increase in print volumes over the next 12 months.



Questions leaders need to consider:

- How can I keep up with ever-increasing technology demands, especially in relation to hybrid lessons?
- How can I ensure teachers have the training to use the technology provided?
- How can I ensure there are no obvious shortfalls, such as a lack of printers?
- What are the sources of funding that will help us invest in technology?

93% 
said it's essential that teachers have access to a printer



6. Healthcare struggles with data loss and down-time

Healthcare systems around the world are under huge pressure. The pandemic has caused enormous care backlogs¹². While they deal with this, they can't lose sight of basics such as data privacy and efficiency.

Yet over half of healthcare respondents (55%) admit flaws in their processes have led to data and or document misplacement or loss during the last 12 months. While there are many factors that can cause a data loss, nearly half of healthcare respondents (48%) state that moving to scanned, digitalised records will reduce the risk. Many also believe it will reduce costs (64%) and improve efficiency (53%).

But data loss isn't the only issue. On average, healthcare respondents personally lose nearly a day (seven hours) each month to poor IT that prevents them from doing their job. There are approximately 6,154,000 health and social care workers in Germany, according to latest data from the Organisation for Economic Co-operation and Development

(OECD)¹³. Their average salary is about €36,093 or €18.50 an hour based on a 37.5-hour week¹⁴. Even using such a basic calculation as this, poor technology costs Germany's health and social care system in the region of €9,563,316,000 a year¹⁵.

Just 17% of healthcare respondents say that a lack of funding is holding them back from meeting their core objectives. It's reassuring then that funding issues should not hold back purchases that could cut data breaches and loss of time.



Questions leaders need to consider:

- Where are the flaws in processes leading to data losses?
- How can I digitalise records and information to reduce issues?
- What technology is not fit for purpose?
- How much time is being lost in my organisation and why?
- Why isn't this being addressed considering the funding is available?

48% 

of healthcare respondents say that moving to scanned, digitalised records will reduce risk



7. The public sector knows peripherals can help solve issues, but isn't acting

Within government departments and the public sector, there is nearly always a need to deliver excellent services, while minimising costs and maximising efficiencies. Political scrutiny often worsens the situation.

Yet in a similar story to healthcare, over half of public sector respondents (55%) admit flaws in their processes have led to data and or document misplacement or loss during the last 12 months.

This is a serious challenge considering it may be happening within organisations with responsibility for enforcing data privacy.


In addressing this, nearly two thirds (65%) say the ability to scan and digitise records is recognised as the best solution for securing data within the organisation. However, just a third (33%) say they will increase scanning to reduce data and records loss or misplacement. Respondents know what they need to do, but aren't committing to doing it.

Also mirroring healthcare, the public sector has an issue with time lost to tech that's not fit for purpose. Respondents personally lose an average eight hours each month to poor IT that prevents them from doing their job. Considering efficiency and productivity are always concerns in the public sector, investing in better technology could be a quick win.



Questions leaders need to consider:

- Where are the flaws in processes leading to data losses?
- How can I digitalise records and information to reduce issues?
- Why isn't funding being maximised to boost scanning and digitalisation?
- How much time is being lost in my organisation and why?

Only
33% 
 say they will increase scanning to reduce data and records loss or misplacement

Recommendations

It's clear from this research that peripherals have a huge role to play. Selected and used well they can reduce energy use, CO2 emissions, cost and stop people from wasting hours in unproductive ways.

It's time we all looked at the technology around us and considered just how central it might be to the way we live and work.

Leaders need to remember that small changes across an entire organisation can make huge differences. In this context, peripherals are no longer peripheral. They're central to solving some of the biggest challenges we face as a society.

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15. $€18.50 \times 7 \text{ hours} = €129.5 \text{ a month.}$
 $€129.50 \times 12 \text{ months} = €1,554 \text{ a year}$
wasted per worker. $€1,554 \times 6154000$
workers = $€9,563,316,000$ a year wasted

