The Print Security Landscape, 2022

Securing the remote and hybrid workforce

Print security trends in the US and Europe - Excerpt

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QUOCIRCA

Executive summary

Quocirca's Global Print Security Landscape 2022 report reveals that many organisations are struggling to keep up with print security demands in today's hybrid work environment. Home printing is creating new security concerns, exacerbated by shadow purchasing of devices. SMBs and mid-size organisations are finding it harder to keep up with print security challenges leading to a higher incidence of print-related data loss. This is leading to a lower confidence, particularly among SMBs, in the security of their print infrastructure. However, in Quocirca's Print Security Maturity Index, those organisations classed as leaders that have implemented a range of technology and policy measures are seeing lower levels of data loss and have higher confidence in the security of their print infrastructure. Print manufacturers and channel partners must strengthen their security propositions for organisations of all sizes to help customers mitigate risk in the new era of hybrid work.

The study is based on the views of 531 IT Decision Makers (ITDMs) in the US and Europe. 23% of the respondents were from SMBs (250 to 499 employees), 29% from mid-size organisations (500 to 999 employees) and 47% from large enterprises (1,000+ employees).

The following vendors participated in this study:

Manufacturers: Brother, Canon, Epson, HP, Kyocera, Konica Minolta, Lexmark, Ricoh, Xerox
ISVs: EveryonePrint, Kofax, MPS Monitor, MyQ, PaperCut, Ringdale

Key findings

- **Remote working is here to stay and is creating an expanded threat landscape.** Pre-pandemic approaches to securing the print environment focused around a primarily static, office-based workforce now need to move to supporting workers who spend some time in the office, and some in the home environment. On average, 44% of employees are expected to work remotely as offices fully reopen. Hybrid work creates significant security challenges for IT teams to manage as the exploitable attack surface increases. The proliferation of shadow IT and unsecured home networks means that organisations need to rethink their security posture around the print environment.
- **IT security remains the top investment priority over the next 12 months.** 53% of respondents say it is one of their highest three priorities. MPS (managed print services) are second in importance (41%) followed by managed IT services (38%) and cloud services (35%). 70% of organisations expect to increase their print security spend over the next 12 months, with only 11% expecting a decrease.
- **A reliance on printing creates a need for effective print security.** Despite rapid digitisation over the course of the pandemic, many organisations remain reliant on printing. Printing will remain critical or very important for 64% of organisations in the next 12 months. 44% anticipate that office print volumes will increase, and 41% that home print volumes will do likewise. Printers and networked MFPs pose a security risk not only in terms of printed documents being accessed by unauthorised users, but also as an ingress point to the network if left unprotected.
- **Just a quarter (26%) feel completely confident that their print infrastructure will be secure when offices fully reopen.** Organisations are struggling to keep up with print security demands: more than half (53%) say it has become considerably or somewhat harder to do so. 67% of respondents are concerned about the security risks of home printing, compared to 57% who are concerned about office print security.
- **Print security is lower on the security agenda than other elements of the IT infrastructure.** Top security risks are considered to be cloud or hybrid application platforms, email, public networks and traditional endpoints. Employee-owned home printers come in as the 5th top security risk (24%) ahead of the office print environment (21%). This suggests both a lack of awareness and complacency in not

fully appreciating the security vulnerabilities around printing, which remains an integral endpoint in the IT environment.

- **There are marked differences between MPS users and non-MPS users.** Organisations that use an MPS provider foresee much greater growth in print volumes and are most confident in the security of their print environment – despite having a higher awareness of the risks. They are also twice as likely to state that keeping up with print security challenges has become somewhat or a lot easier. The visibility and control provided by an MPS appears to ease the security burden for users, increase assurance that they can ramp up print volumes if needed, and reduce complacency, therefore lowering the likelihood of being blindsided by a security incident.

- **In the past 12 months, over two thirds (68%) of organisations have experienced data losses due to unsecure printing practices.** This has led to a mean cost per data breach of £631,915. Such quantified financial losses are bad enough for organisations to manage, but they also state many other negative impacts, such as a loss of business continuity and ongoing business disruption after the breach. Customer loss is reported to be the biggest impact for SMBs. Large organisations are less likely to have suffered a print-related data loss, with 36% reporting no breaches compared to 24% of SMBs. The public sector is the most affected vertical. Vulnerabilities around home printers were cited as the top reasons for data loss – such as home workers not disposing of confidential information securely, and interception of documents stored in the home printer environment.

- **Quocirca's Print Security Maturity Index reveals that only 18% of the organisations can be classed as Print Security Leaders**, meaning they have implemented six or more security measures. The number of leaders rises to 22% in the US and falls to 12% in France, which also has the highest number of laggards (37%). Print Security Leaders are likely to spend a higher amount on print security, experience fewer data losses, and report higher levels of confidence in the security of their print environment. When compared by vertical, finance has the largest percentage of leaders (23%).

- **Less than a third (28%) of ITDMs are very satisfied with their print supplier's security capabilities.** This drops to 20% in the public sector. US organisations are most satisfied, with those in Germany least happy. ITDMs who use an MPS have far higher satisfaction levels (42% are very satisfied) than those who don't (20%).

- **Most ITDMs turn to managed security service providers (MSSPs) for print security advice.** MSSPs are the primary source of security guidance for 35% of organisations overall, rising to 40% in the US. Just 18% of ITDMs overall would turn to an MPS provider for print security guidance, while 21% would consult a print manufacturer. This points to an opportunity for MPS providers and channel partners to collaborate more closely with MSSPs.

- **CIOs and CISOs differ in their views on the future of print, and their handling of security challenges relating to the hybrid print environment.** CISOs are more bullish, with 53% and 58% respectively expecting a rise in office and home print volumes, compared to 42% and 40% of CIOs. Notably, CIOs (32%) and CISOs (33%) show the most concern around home printing compared to other IT respondents, ranking it as their second top security risk. CIOs also seem to be finding it harder than CISOs to keep up with print security challenges – 61% stated that they were finding it considerably or somewhat harder, compared to only 44% of CISOs, where 29% also stated that they were finding it somewhat or a lot easier.

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About Quocirca

Quocirca is a global market insight and research firm specialising in analysing the convergence of print and digital technologies in the future workplace.

Since 2006, Quocirca has played an influential role in advising clients on major shifts in the market. Our consulting and research is at the forefront of the rapidly evolving print services and solutions market, trusted by clients who are seeking new strategies to address disruptive technologies.

Quocirca has pioneered research in many emerging market areas. More than 10 years ago we were the first to analyse the competitive global market landscape for managed print services (MPS), followed by the first global competitive review of the print security market. More recently Quocirca reinforced its leading and unique approach in the market, publishing the first study looking at the smart, connected future of print in the digital workplace. The Global Print 2025 study provides unparalleled insight into the impact of digital disruption, from both an industry executive and end-user perspective.

For more information, visit www.quocirca.com.

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