

CAN YOU FEEL THE HEAT YET



THERE'S AN URBAN MYTH WHICH SAYS THAT

“ If a frog is placed in a saucepan of boiling water, it will jump out, but if it is placed in cold water that is slowly heated, it will not perceive the danger and will stay in the saucepan, where it will eventually be cooked to death* ”

* According to contemporary biologists the premise of this story is not actually true, but it's best not to try it...

The moral of the story – known as the 'boiling frog syndrome' – is that human beings are sometimes unable to detect gradual change until it is too late.

What does this have to do with the office products (OP) industry? A clue to part of the answer lies in a few key moments in recent history:

FACT #1: While the fax machine was originally invented in 1843, it was not until the 1980s that faxes came into widespread use, as manufacturers produced more compact and affordable machines.

RESULT #1: Office workers who turned 18 when the fax machine proliferated in the mid-1980s will be 45 years old in 2012. Fax is an 'old' office technology that these workers are very comfortable with.

FACT #2: The internet was effectively born in 1982 when the internet Protocol Suite (TCP/IP) was standardised, and the concept of a worldwide network of fully interconnected TCP/IP networks was introduced.

RESULT #2: Office workers who were born in 1982 – the same year as the internet – will be 30 years old in 2012. For them, the internet has been ever-present in their lives.

FACT #3: The internet was first commercialised in 1995 when the last restrictions on the use of the internet to carry commercial traffic were removed.

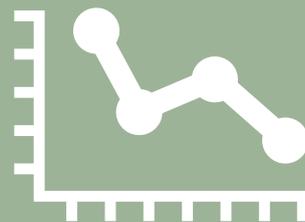
RESULT #3: Office workers who turned 18 when the internet was commercialised in 1995 will be 35 in 2012. For them, the internet has been a commercial reality for all of their working lives.

FACT #4: The earliest smartphone was the IBM Simon, designed in 1992 and released to the public in 1993. Besides being a mobile phone, it also contained a calendar, address book, world clock, calculator, notepad, email client, games and the ability to send and receive faxes.

RESULT #4: Office workers who turned 16 when the IBM Simon became available in 1993 would be 35 today. Smartphones are central to their lives.



The decline in demand for traditional office products experienced worldwide since 2008 has not just been due to the global recession. Beneath the financial uncertainties a demographic and technological trend has been developing that, in time, could so heat up the OP industry 'saucepan' that the frog – that is, demand for conventional OP items – will die.



The indications are that office workers aged under 35, raised in and at home with the digital age, behave very differently to their senior colleagues; they are more likely to work on screen only, rarely print out documents and take notes during meetings on a tablet or smartphone. In short, their use of traditional OP items is likely to be minimal.

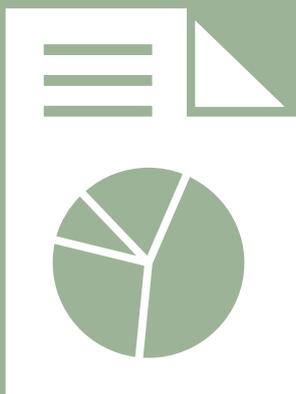
And their influence on the OP industry is, of course, only going to increase. Currently, under 35s account for only 36% of the labour force in the US and the UK – 31-32% in Germany and Italy. In ten years' time this cohort will account for more than half of the working population and their needs and behaviour will become the 'norm'.

Furthermore, this is a worldwide phenomenon because it is being driven by technology that is available – and being adopted – worldwide, overriding traditional local cultures and working practices.



The implications of this for the global OP industry could be monumental, and it is vital that manufacturers and distributors alike are made aware of how these younger office workers act and think.

Martin Wilde Associates (MWA), specialist researchers to the global OP market, and OPI, the leading media firm for the global OP industry, are proud to announce the publication of 'Boiling The Frog: The OP Industry's Guide To Younger Office Workers'.



This unique market research study – based on in-depth telephone interviews with hundreds of office workers, two thirds of whom are under 35 and one third over 35 – focuses on the behaviour, needs, attitudes and requirements of these younger office workers, compared to their older colleagues.





Published in July 2012, the report investigates key questions that will have a major impact on the future of the OP industry, including:



- Which OP items are regularly being used in the workplace and for work at home?



- Which OP items are regarded as needing to be changed?



- To what extent are documents printed out? Under what circumstances?



- Is product quality or branding important?
- Where are hot drinks and water sourced at work?



- To what extent – and how – are documents filed?



- What written and verbal communication methods are preferred?
- What social networking sites are used for work?
- Are iPads/tablets and smartphones used for work? Who provides them?



- How will the use of OP change in the next five years?

MWA and OPI compare and contrast the answers to these key issues across worker age categories, ensuring that the collected data yields the information that manufacturers, wholesalers and resellers will need to determine future strategy, product ranges, communications and investment decisions.

To order your copy, complete the form overleaf, or order online at www.opi.net/frog.

BOILING THE FROG: THE OP INDUSTRY'S GUIDE TO YOUNGER OFFICE WORKERS

To order your copy of the report, complete the order form below and send it to:
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