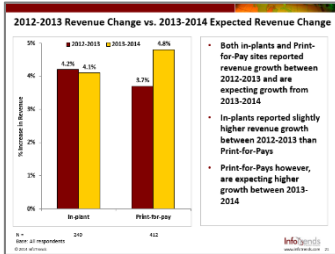


◆ The Production Printing Industry in North America ◆

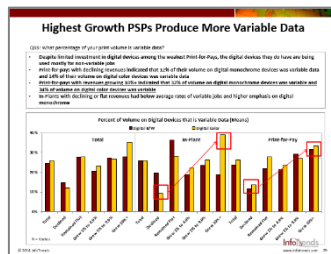
北米 印刷サービスプロバイダー調査

完成のご案内



印刷サービスプロバイダー(PSP)は、事業発展のために、新しいスキルを習得し、事業領域を「従来の印刷」から拡張していかなければなりません。それは、単なる印刷サービス業者から、「付加価値を創り出す包括的なサービス・プロバイダー」へと変化する必要性を意味しています。

多くの印刷業者(PSP)がス・プロバイダーに変貌し企業もあります。ビジネス産性へのフォーカスが続き、「in-plant」と「print



新サービスを開始したり、マーケティング・サービスしている中で、ニッチ機会での利益に集中しているへアプローチは異なれど、業界は効率化、高生いています。当社では 2011 年に実施した調査に「for pay」において、様々なインダストリーセグメン

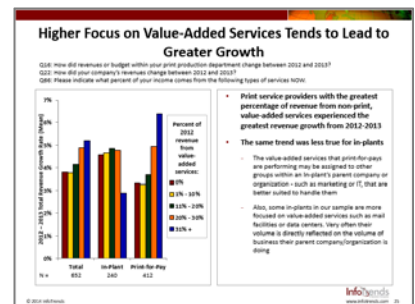
ト、ビジネスモデル、事業サイズの観点で分析を行います。

■ 調査の目的

| | |
|----------|--|
| ビジネスモデル | <ul style="list-style-type: none"> 現在(そして計画)中の事業・サービス内容と、その収益に関する期待について確認 デジタル印刷のハードウェア・ソフトウェアの影響を計測(例:VDP,ワークフロー等) ECプラットフォームやプリントマネジメントの影響を確認 |
| アプリケーション | <ul style="list-style-type: none"> 主要なプリントアプリケーションを特定 プリントボリュームの傾向を調査し、アプリケーションの成長・抑制の要因を確認 |
| 投資 | <ul style="list-style-type: none"> テクノロジー(プリンターなど)への投資計画および投資と成長戦略との相関を確認 業界における整理統合、M&A、再編に関する進行速度、およびインパクトの計測 Eコマース投資の目的、成功、失敗の確認 |

■ 調査方法:

1. 定量調査: PSP への Web 調査 (652 件)
 - 調査内容: 本資料 p.3 以降にてご確認ください
 - 調査対象:
 - Print-for-pay 412 件 (商業印刷、デジタルプリンティングスペシャリスト、クイックプリンター、ダイレクトメーラー等)
 - インプラント 240 件 (インプラントプリントショップ、インプラントデータセンター)
2. 定性調査: 20 社への電話インタビュー
 - (print-for-pay/インプラント)



■ 調査レポートの構成

- Introduction & Demographic Overview
- Executive Summary
- Recommendations
- Critical Success Factors
- Software Usage & Investment Plans
- Equipment Usage & Investment Plans
- Finishing Capabilities
- Digital Color Applications

■ 成果物

- 調査レポート 一式
- 各質問への回答（表形式データ）、および回答目次

■ スケジュール

- 調査レポート完成 2014年9月

■ 調査対象地域:

- 北米

■ 調査レポートの入価格

- 基本価格: \$15,995
- オプション: プレゼンテーション \$1,500 + 交通費



株式会社 インフォトレンドズ: <http://www.infotrends.co.jp/corporate-profile/>

米国のボストンに本社を置くInfoTrends社の日本法人。デジタルイメージング市場、ドキュメントソリューション市場に特化した調査活動で高い評価を得ており、市場動向の分析レポートの企画販売、コンサルティングサービスを行っています。

(担当: 清水、水村): TEL:03-5475-2663 Email: mail@infotrends.co.jp



Production Print Services in North America Understanding Industry Transformation

調査レポート目次 : TOC of main report

1. Production Print Services in North America: Understanding Industry Transformation
2. Study Contents
3. Understanding a Changing Market
4. **Study Objectives**
5. Identifying Business Model, Application & Investment Trends
6. Primary Research Demographic Overview
7. Executive Summary
8. Summary Conclusions – Market Drivers, Inhibitors, & Evolution
9. Summary Conclusions – Print-for-Pay & In-Plants
10. Industry Segments
11. **Recommendations**
12. Recommendations – Print Service Providers (1)
13. Recommendations – Print Service Providers (2)
14. Recommendations – Print Service Providers (3)
15. Recommendations – Print Service Providers (4)
16. Recommendations – Equipment & Software Vendors (1)
17. Recommendations – Equipment & Software Vendors (2)
18. **Critical Success Factors**
19. Surviving, Thriving, and Dying Overview: Print-for-Pay
20. Surviving, Thriving, and Dying Overview: In-Plants
21. 2012-2013 Revenue Change vs. 2013-2014 Expected Revenue Change
22. Biggest Print Service Providers are Doing the Best
23. Thriving PSPs Allocate More Resources to Top Line
24. Growing PSPs Rely Less on Print Revenue
25. Higher Focus on Value-Added Services Tends to Lead to Greater Growth
26. Declining PSPs Say They Need Better Devices
27. Print Service Providers Page Volume and Run Length Trends
28. Highest Growth PSPs Have Higher Ratio of Digital Devices
29. Highest Growth PSPs Produce More Variable Data
30. Growth PSPs Offer More Finishing Services
31. Growth PSPs Operate More and Have Higher Utilization
32. In-Plant Consolidation Will Continue Where Possible
33. The Pace of Commercial PSP Consolidation Will Intensify
34. Percent of Print Revenue from Web-to-Print or e-Commerce
35. Print Service Provider Software Investment
36. Tracking and Monitoring Waste
37. Managing Print Sourcing is a Growth Driver for In-Plants
38. **Software Usage & Investment Plans**
39. Print Workflow Software Used: Total
40. Print Production Software Usage Comparative of This Survey Data vs. Previous InfoTrends Research
41. Print Production Software Usage Comparison by Environment
42. Software Investment Plans
43. **Equipment Usage & Investment Plans**
44. Types of Printing Equipment Used
45. Sites With Revenue Growth Tend to Have More Devices
46. Revenue Growth Sites Operate More Hours
47. Revenue Growth Sites Have Higher Equipment Utilization

48. Digital B&W Equipment Investment Plans
49. Digital Color Equipment Investment Plans
50. Offset Equipment Investment Plans
51. Finishing Equipment Investment Plans
52. **Finishing Capabilities**
53. Number of Finishing Services Offered
54. Off-Line Finishing Services Offered
55. In-Line Finishing Services Offered
56. On-Site Finishing Services Offered: Total
57. On-Site Finishing Services Offered: In-Plant vs. Print-for-Pay
58. Finishing Decision-Makers
59. Finishing Bottlenecks
60. Consideration of Moving Off-Line Finishing In-Line
61. **Digital Color Applications**
62. Color Cut Sheet Volume by Application (Means)
63. HSIJ Volume by Application (Means)

PPT チャート資料目次: TOC of PPT charts

Blue 2011年版にも類似項目があるもの (similar survey was done in 2011 version)

Orange 2014年のみに追加された項目 (new topic added in 2014 version)

回答者プロフィール

1. PPS-NA
2. Type of Printing Operation
3. Level of Responsibility
4. Company's Primary Business
5. In-Plant Job Title
6. Print-for-Pay Job Title
7. Management of In-Plant Facility
8. Number of Additional In-Plant Locations
9. In-Plant Revenue Structure
10. Number of Employees in United States
11. Number of Employees at Location
12. Number of In-Plant Employees at Location
13. Percent of Employees by Job Category: Currently (Means)
14. Percent of Employees by Job Category: In 2-3 Years (Means)

PSP 事業概要

15. Change in In-Plant Budget from 2012 to 2013
16. Expected Change in In-Plant Budget from 2013 to 2014
17. Integration of In-Plant Printing With Another Department
18. Department In-Plant Reports To
19. Number of Locations
20. Revenue from Printing & Related Services
21. Revenue Change from 2012 to 2013
22. Expected Revenue Change from 2013 to 2014
23. 2012-2013 Revenue Change vs. 2013-2014 Expected Revenue Change
24. Acquisition between 2012 and 2013
25. Most Likely Future of Business
26. Sources of Revenue: Region (Means)
27. Sources of Revenue: Customer Size (Means)
28. Top Three Vertical Industries of Customers
29. Who Sales Representatives Call On
30. Ways of Promoting Services

ワークフロー・ソフトウェア

31. Print Production Workflow Software Definitions
32. Software Usage: Total
33. Software Usage: In-Plant
34. Software Usage: Print-for-pay
35. Software Licensing Models Used: Total
36. Software Licensing Models Used: In-Plant
37. Software Licensing Models Used: Print-for-pay
38. Average Run Length of Web-to-Print or e-Commerce Jobs
39. Average Run Length of Web-to-Print or e-Commerce Jobs (Mean)
40. Percent of Revenue from Web-to-Print or e-Commerce Jobs
41. Does Web-to-Print System Provide Connectivity to Print MIS
42. Are Paper Job Tickets Used?
43. Are Jobs Scheduled Manually?

44. Are Jobs Imposed Manually?
45. Percent of Jobs Received not Print-Ready
46. Percent of Jobs Received not Print-Ready (Mean)

ハードウェア・フィニッシング

47. Types of Printing Equipment
48. Number of Offset Devices by Category
49. Number of Offset Devices by Category (Means)
50. Number of Digital Color Devices by Category
51. Number of Digital Color Devices by Category (Means)
52. Number of Color HSIJ Devices by Category
53. Number of HSIJ Devices by Category (Means)
54. Number of Digital B/W Devices by Category
55. Number of Digital B/W Devices by Category (Means)
56. Number of Wide Format Devices by Category
57. Number of Wide-Format Devices by Category (Means)
58. Off-Line Finishers Used With Output Devices
59. In-Line Finishers Used With Output Devices
60. Output Devices Used With In-Line Finishing: Total
61. Output Devices Used With In-Line Finishing: In-Plant
62. Output Devices Used With In-Line Finishing: Print-for-pay
63. Outsourced Finishing Processes
64. Type of Mechanical Binding Applied
65. Reasons for Choosing Mechanical Binding Type
66. Decision-Maker for Finishing Used
67. Off-Line Finishing Bottlenecks
68. In-Line Finishing Bottlenecks
69. Consideration of Moving Off-Line Processes In-Line
70. Top Reason for Considering Moving Off-Line Process In-Line
71. Considerations of Moving Off-Line Process In-Line
72. Type of Finishing Required: Color Jobs (Means)
73. Type of Finishing Required: B/W Jobs (Means)

サービス内容 (収益への期待)

74. Services Currently Offered
75. Additional Services Expected to Add in Next Two Years
76. Expected Revenue Growth by Service
77. Expected Revenue Growth by Service (Means): Total
78. Expected Revenue Growth by Service (Means): In-Plant
79. Expected Revenue Growth by Service (Means): Print-for-pay
80. Top Three Revenue Generating Services
81. Percent of Print Volume That is Variable: Currently
82. Percent of Print Volume That is Variable: Current (Means)
83. Percent of Print Volume That is Variable: In 2 Years
84. Percent of Print Volume That is Variable: In 2 Years (Means)
85. Most Used File Format
86. Percent of Volume on Color Devices that is B/W (Means)
87. Percent of Volume on Color Devices that is B/W (Means)
88. Days Operated
89. Hours Operated per Day (Means)
90. Hours Per Day of Device Usage (Means)

アプリケーション

- 91. Color Cut Sheet Volume by Application (Means): Total
- 92. Color Cut Sheet Volume by Application (Means): In-Plant
- 93. Color Cut Sheet Volume by Application (Means): Print-for-pay
- 94. HSIJ Volume by Application (Means): Total
- 95. HSIJ Volume by Application (Means): In-plant
- 96. HSIJ Volume by Application (Means): Print-for-pay
- 97. B/W Cut Sheet Volume by Application (Means)

投資への意識・計画

- 98. Percent of Income by Source: Currently (Means)
- 99. Percent of Income by Source: Currently (Means)
- 100. Percent of Income by Source: In Two Years (Means)
- 101. Digital B/W Device Investment Plan: Total
- 102. Digital B/W Device Investment Plan: In-plant
- 103. Digital B/W Device Investment Plan: Print-for-pay
- 104. Primary Driver to Purchase New B/W Device
- 105. Digital Color Device Investment Plan: Total
- 106. Digital Color Device Investment Plan: In-Plant
- 107. Digital Color Device Investment Plan: Print-for-pay
- 108. Primary Driver to Purchase New Color Device
- 109. Digital Color Capabilities Investment Plan: Total
- 110. Digital Color Capabilities Investment Plan: In-Plant
- 111. Digital Color Capabilities Investment Plan: Print-for-pay
- 112. Finishing Devices Investment Plan
- 113. Finishing Devices Investment Plan: Total
- 114. Finishing Devices Investment Plan: In-Plant
- 115. Finishing Devices Investment Plan: Print-for-pay

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- 116. Job Trends: Total
- 117. Job Trends: In-Plant
- 118. Job Trends: Print-for-pay
- 119. Business Conditions Trends: Total
- 120. Business Conditions Trends: In-Plant
- 121. Business Conditions Trends: Print-for-pay

ゴミ・無駄

- 122. Tracking of Waste
- 123. Waste Elements Tracked
- 124. Waste Factors: Total
- 125. Waste Factors: In-Plant
- 126. Waste Factors: Print-for-pay
- 127. Workflow Process with Most Waste

アウトソーシング

- 128. Role in Print Procurement
- 129. Print Procurement Right of First Refusal
- 130. In-Plant Insourcing
- 131. Percent of Revenue from Insourcing

**2011 年版には存在するが、2014 年版で除外された設問内容
(survey questions which were included in 2011, however excluded in 2014)**

Q14: Are you planning on integrating your print production operation with another printing, mailing, or data center operation?

Q29: Of the files received for print jobs, what percentage are received in the following formats? (Native Office Applications, Native Graphics Applications, PDF, PostScript, Variable Data Output File, Other)

Q31: Which of the following types of prepress equipment do you have at your site? (Computer-to-plate System, Color scanner, B&W scanner, Film imagesetter)

Q33: For each of the following types of equipment, is it 1-color, 2-color, 4 color, or 5+ color?

Q42: What two-dimensional barcode format have you used in your mobile 2D barcode campaigns? (Quick Response (QR) Code, Universal Product Code (UPC), Microsoft Tag, BeeTagg, DataMatrix, JAGTAG, ScanBuy EZcode, Other, Don't know)

Q43: What types of print applications have you used for 2D mobile barcode campaigns? (Direct Mail, Brochures, Business Cards, Catalogs, Posters/ Banners/ Signage, Inserts/Coupons, Bills/ Statements/ Invoices, Packaging, Magazines, Books, Newspapers Other. Don't know)

Q50: Please indicate the growth/decline of your OFFSET printing volumes in 2010. (Increased, Remained flat, Decreased)

Q52: What is the primary reason that Offset volume has moved to digital? (Shorter print-runs, digital is more cost effective, Converted to a print-on-demand model to remove obsolescence, Needed to incorporate variable data, Converted from a print and distribute model to a distributed print model, Other)

Q61: When acquiring the following types of equipment, would you prefer to purchase it used or new? – (Used, New, N/A)

Q63: How do you plan on financing the following types of digital black & white devices? – (Lease, Purchase/Cash, Purchase/Finance with Vendor, Purchase/Finance with Bank, Other)

Q66: What is your investment plan for the following OFFSET devices? – (Budgeted for 2011, Considering in 2012, Considering in 2013 or later, None)

Q67: How do you plan on financing the following offset devices? – (Lease, Purchase/Cash, Purchase/Finance with Vendor, Purchase/Finance with Bank, Other)

Q69: How do you plan on financing the following finishing devices? – (Lease, Purchase/Cash, Purchase/Finance with Vendor, Purchase/Finance with Bank, Other)

Q77: What is the most common size you run on your digital device? – (Smaller than 8.5 x 11, 8.5" x 11", 8.5" x 14", 11" x 17", 12" x 18", 14" x 20", Larger than 14' x 20')

Q78: What percentage of the volume on your digital devices is 11"x17" or greater?

- B&W Cut Sheet Printer/Press
- B&W Cut Sheet MFP/Copier
- Full Color Cut-Sheet Digital Printer/Press
- Full Color Cut-Sheet Digital MFP/Copier

Q79: What percentage of jobs requires the stocks listed below for your B&W Cut-Sheet Printer?

- Uncoated Text

- Uncoated Cover
- Coated Text
- Coated Cover
- Unusual/Specialty Stocks

Q80: What percentage of jobs requires the stocks listed below for your Color Copier/MFP?

- Uncoated Text
- Uncoated Cover
- Coated Text
- Coated Cover
- Unusual/Specialty Stocks

Q81: What percentage of jobs requires the stocks listed below for your Color Cut-Sheet Printer/Press?

- Uncoated Text
- Uncoated Cover
- Coated Text
- Coated Cover
- Unusual/Specialty Stocks