

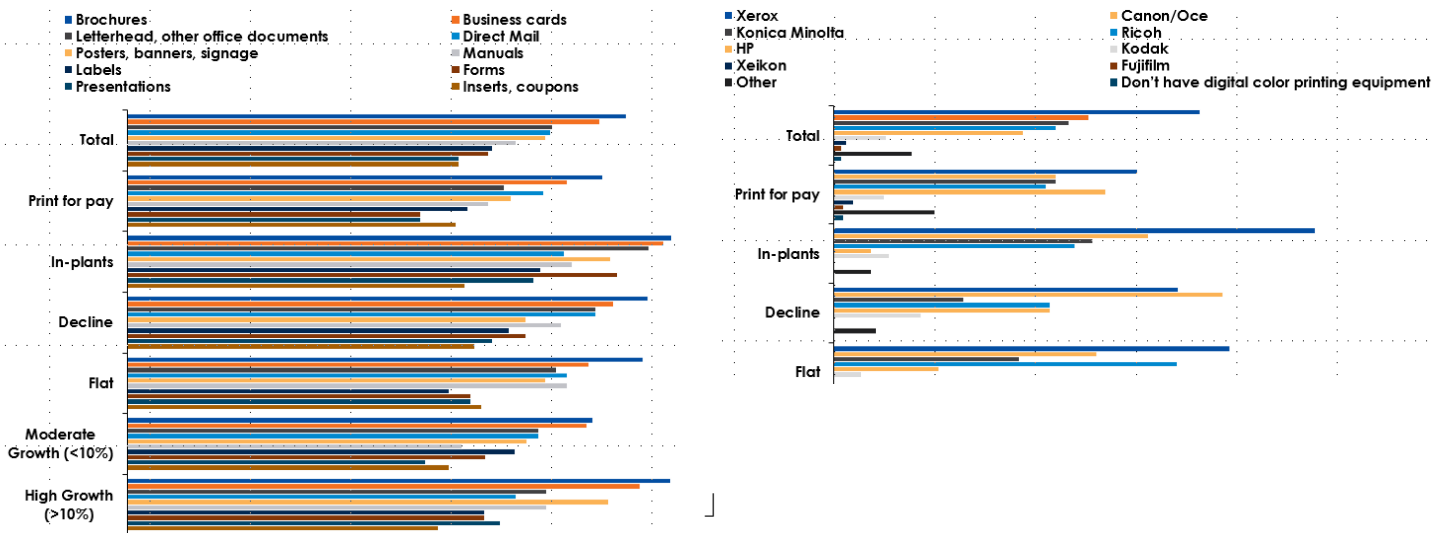


## Winning in an Evolving Print Services Market

2018 Multi Client Study (US market)

2018年、当社では米国の印刷事業社(PSP)226件を対象としたウェブ調査を実施いたしました。また10件のPSP電話インタビューも含め市場分析を行った調査レポートです。

(149 Commercial/Print-for-Pay & 77 In-plant)



### 調査目的：

The study's overall goal is to uncover the key actions that high-growth print for pay and in-plant printing operations are taking to grow, develop, improve, and market their businesses/operations. In addition, the study will report on current business/market conditions, emerging customer requirements, as well as staffing and training requirements. It will provide valuable insight relative to what printers and in-plants are trying to do strategically, where they have challenges, and the key support that is needed to be successful.

### 調査レポート (Data Charts) 目次

- Printing Operation
- Influence Level
- Respondent Department
- Respondent Title
- Equipment Used
- Software Products Used
- Future Equipment Investments
- Devices Owned (Means)
- Print for Pay Ownership Type
- In-plant Ownership



- In-plant Operation Type
- In-plant Reporting
- Primary Industry Served
- Additional Staffed Printing Locations in NA
- Number of Employees
- In-plant Annual Revenue/Budget
- Print for Pay Annual Revenue/Budget
- Print for Pay – Number of Employees
- In-plant – Number of Employees
- Print for Pay – Change in Revenue 2016 to 2017
- Print for Pay – Change in Revenue 2017 to 2018
- In-plant – Change in Revenue 2016 to 2017
- In-plant – Change in Revenue 2017 to 2018
- Applications Currently Printed (1)
- Applications Currently Printed (2)
- Applications Currently Printed (3)
- Future Applications (1)
- Future Applications (2)
- Future Applications (3)
- Job Categories
- First Refusal Right
- Insourcing
- Insourcing Revenue
- Digital Color Print Equipment Primary Vendor
- Digital Color Print Equipment Brands
- Vertical Market Focus
- Top 5 Vertical Industries
- Horizontal Market Focus
- Top 5 Horizontal Audiences
- Days of Operation
- Hours of Operation per Day
- Devices Usage Times (Means)
- Current Revenue from Services (Means)
- Anticipated Revenue from Services (Means)
- Print-related Value-Added Services Offered
- Print-related Value-Added Services Used for Marketing
- Marketing Services Offered
- Marketing Services Used for Marketing
- Digital Services Offered
- Digital Media Services Used for Marketing
- Print-Related Value-Added Services Profit Margin
- Marketing Services Profit Margin
- Digital Media Services Profit Margin
- Revenue Increase from Print-Related Value-Added Services
- Revenue Increase from Marketing-Related Services
- Revenue Increase from Digital Media-Related Services
- Print-Related Value-Added Services Challenges
- Digital Color Printing Volume: 4+ Colors



- Digital Color Printing Volume in 2 Years: 4+ Colors
- Print Volume: Variable Data
- Print Volume in 2 Years: Variable Data
- Variable Data Pricing Approaches
- Personalization in Print Volume (Means)
- Competitive Strategy
- Business/Market Conditions Level of Influence
- Future Investments
- Capital Investment Opinions
- Workflow Areas for Improvement (1)
- Workflow Areas for Improvement (2)
- Plans to Automate Processes
- Job Tickets
- Job Scheduling
- Job Imposition
- Files that Require Addition Set-up Work
- Web-to-Print Volume
- Web-to-Print Volume in 2 Years
- Reasons for Offering Web-to-Print Services
- Web-to-Print Pricing Method
- Waste Measurement
- Waste Elements Measured
- Annual Budget for Employee Training
- Print for Pay – Training Method
- In-plant – Training Method
- Annual Employee Training Budget
- External Training Services
- Preferred Training/Education Models(3)
- Hours of Training Per Year
- Expected Change in Employee Training Budget
- Marketing Activities
- Most Effective Marketing Activities
- Top Sources of Information
- Information on Vendors' Websites

## 調査レポート（Analysis Report）目次

- 2 Table of Content
- 3 Study Introduction
- 4 Project Objectives
- 5 Study Methodology
- 6 Respondent Profile**
- 7 Respondent Profile Summary
- 8 Printing Operation & Decision Making Status
- 9 Respondent Department & Title
- 10 Executive Summary**
- 11 Understanding this Document



- 12 U.S. Printing and related services revenue are in a gradual decline
- 13 Despite a growing US economy, the number of printing industry establishments is steadily declining
- 14 Key Highlights (1)
- 15 Key Highlights (2)
- 16 PSP survey sample reported overall growth, with those reporting growth significantly outweighing those that experienced a decline
- 17 Key Growth Factors
- 18 PSPs with flat or declining revenues are lacking in many areas, but are trying to improve their situation
- 19 In-plants have adapted to market conditions and remain competitive
- 20 Recommendations**
- 21 Technology Vendor Recommendations (1)
- 22 Technology Vendor Recommendations (2)
- 23 Commercial PSP Recommendations (1)
- 24 Commercial PSP Recommendations (2)
- 25 In-Plant Recommendations
- 26 Key Findings**
- 27 Growth PSPs have more digital color printing and mail processing equipment, and less offset printing equipment in their environments
- 28 Growth commercial printing companies are less likely to be family owned than declining ones
- 29 Operating model does not dictate In-Plant growth
- 30 High growth PSPs had a smaller proportion of staffing in production and a larger proportion in IT, sales, and marketing vs. declining PSPs
- 31 Growth Commercial PSPs tend to have a vertical market focus
- 32 High growth PSPs have a higher tendency to have horizontal focus
- 33 Utilization across all respondents was relatively healthy, especially on digital color printing equipment
- 34 High-growth PSPs have a greater percentage of revenue coming from wide format printing, digital B&W printing, and non-print value-added services
- 35 Future growth will depend on a greater focus on digital color printing, wide format printing, and non-print value-added services
- 36 Growing in-plants are more likely to have right of first refusal. They are also more likely to insource!
- 37 High growth PSPs have higher adoption of most types of software
- 38 Commercial PSPs continue to have greater usage of workflow software than in-plants
- 39 The top types of software that PSPs will invest in the most are web-to-print, digital workflow mgmt. and project mgmt.
- 40 There is significant variation on the types of software investments between growth and declining PSPs
- 41 While traditional services are most common today, PSPs are looking to web-to-print and print enhancements for future expansion
- 42 High growth PSPs are more likely to offer cross-media/social/etc., content creation, and digital asset management
- 43 Overall, digital value-added services are not common among PSPs
- 44 High growth PSPs have higher profit margins on all types of value-added services
- 45 High growth PSPs have the highest revenue growth of value-added services
- 46 High growth PSPs have the highest revenue growth of value-added services
- 47 Growth PSPs have a higher percentage of their print volume that contains a 5<sup>th</sup> color or other enhancement
- 48 Growth PSPs produce more color variable data than other PSPs
- 49 Pricing per piece is the most common pricing method for variable data printing
- 50 Growth PSPs produce more high complexity variable data jobs than other PSPs

- 51 Growth PSPs have a higher % of volume through their web-to-print platform
- 52 The 3 most common reasons for offering web-to-print are automation, labor cost reduction, and becoming more embedded with customers
- 53 Reasons for Offering Web-to-Print by Company Growth
- 54 High growth PSPs are more focused on adding value via web-to-print than other PSPs
- 55 Tracking waste is not a regular practice throughout the industry
- 56 The majority of PSPs do not typically have an annual training budget
- 57 Among those with a training budget, high growth PSPs spend the most per employee and are more likely to increase budget
- 58 Growth PSPs place more emphasis on color management and sales process/strategies
- 59 High Growth PSPs place more emphasis on SEO/SEM than other PSPs
- 60 In-plants trail behind commercial/print-for-pay PSPs on all types of marketing aside from producing print samples
- 61 Direct mail campaigns and print sample sets are typically the most effective marketing activities
- 62 Trade publications, trade events, and one-on-one meetings are the top 3 preferred methods for PSPs to gather market information
- 63 Merger and acquisition activity is relatively high in today's market
- 64 Growth PSPs are more focused on differentiation while others are more focused on a combination of cost leadership and differentiation
- 65 Hiring sales staff, price competition, and hiring new production staff are the top 3 most significant business conditions
- 66 It is common for equipment and software bids to be awarded on cost and best fit
- 67 Overall, there was low incidence of PSPs reporting areas with major bottlenecks
- 68 Billing, RIPing, & archiving are the top areas to be automated for PSPs reporting problems
- 69 Growth PSPs have greater use of electronic job ticketing
- 70 High growth PSPs had greater use of electronic job scheduling
- 71 High growth PSPs had the highest usage of standalone imposition software
- 72 There is still a significant amount of jobs (42%) that are not print-ready and require additional set-up work

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株式会社キーポイント インテリジェンス：（担当： 清水、水村）

TEL:03-5475-2663

Email: info@keypointintelligence.jp