CANON SOLUTIONS AMERICA

PROPELLING YOUR BUSINESS
FORWARD IN AN EVER-CHANGING
COMPETITIVE ENVIRONMENT

ENHANCING THE IN-PLANT PRODUCT AND SERVICE OFFERING

Enhancing the In-Plant Product and Service Offering

In-house printing operations report making moves to better serve parent organizations, address competitive challenges, pursue new opportunities, and expand services.

As the effects of the COVID-19 pandemic wane and parent organizations are getting back to business, in-plants are facing heightened competition for filling press capacity, hiring staff, and keeping work in-house. Given these market conditions, there's a great need to enhance existing services and add new ones.
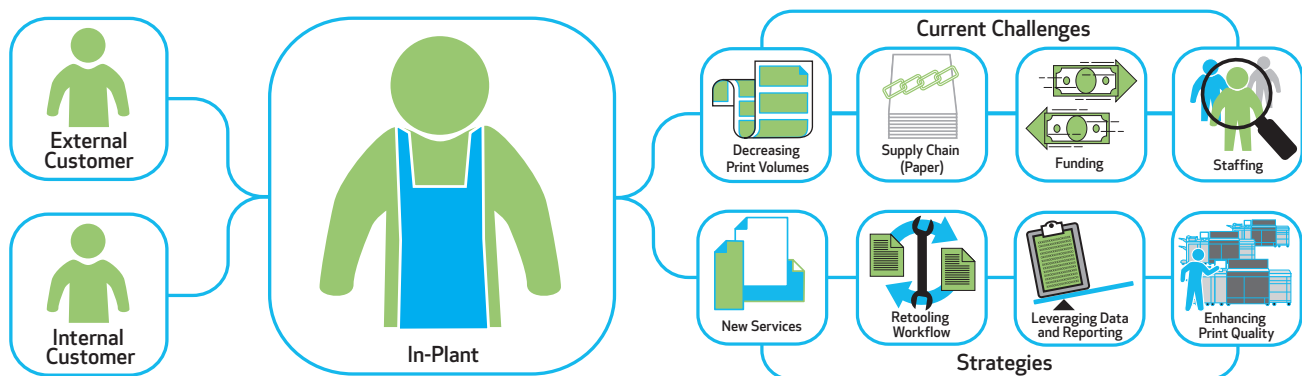
This report offers insights into how in-plants are adapting to changing operating conditions, ways they're enhancing value to parent organizations with products and services, and methods they're using to help strengthen customer relationships.

Canon U.S.A. has been sponsoring annual market research studies by NAPCO Research[1] to help print providers better understand customer needs and the operational investments and capabilities that can help support customers' changing requirements.

The current series, *Propelling Your Business Forward in an Ever-Changing Competitive Environment,* is based on surveys of commercial printers, in-plants, and communication buyers or influencers. This second report (and the two to follow) will take a deeper dive into the most recent survey data.

The survey questions sought answers about how in-plants are keeping their operations healthy along with what parent organizations expect. The responses from in-plant printing operations and communication buyers from organizations with in-plants offer insights that can help support strategies for enhancing services and meeting parent organization needs.

Enhancing the In-Plant Offerings and Value

External Customer

Internal Customer

In-Plant

Current Challenges

Decreasing Print Volumes

Supply Chain (Paper)

Funding

Staffing

New Services

Retooling Workflow

Leveraging Data and Reporting

Enhancing Print Quality

Strategies

2

PROPELLING YOUR BUSINESS FORWARD IN AN EVER-CHANGING COMPETITIVE ENVIRONMENT —
Enhancing the In-Plant Product and Service Offering

Here's a summary of key research findings:

Parent Organization Trends

• Communication buyer respondents with in-plants selected their top factor in choosing to use print as the value of the product or service associated with a communication effort. Other reasons include its "green" benefits, its tangible nature, and its perception as a better tool for customer acquisition as compared to alternatives.

• Top reasons buyers with in-plants reported selecting external print providers are quality, services offered, reliability, turnaround time, and online ordering capabilities.

• Reasons organizations with in-plants reported why they would end a relationship with a print provider are price increases, sub-par quality or sustainability, a desire to reduce suppliers, and poor customer service and responsiveness.

In-Plant Strategies and Challenges

• Of in-plant respondents, 85% reported that they were retooling operations to increase automation and productivity while 79% reported funding investments in growth, technology, and people.

• In-plants reported that they were leveraging job data to improve decision-making and gain operational insights into press productivity and utilization.

• Over one-third (39%) of respondents reported adding high-speed production inkjet printing technology while another 39% expected to add packaging to their product mix.

• A little over 40% of in-plant respondents reported having the right of first refusal for print work.

• Over half of respondents (54%) reported that they can insource work.

• The top challenge reported by respondents was finding new print work to replace decreasing volumes.

• Over one-third of in-plant survey respondents reported that a key challenge is keeping their operation fully staffed.

In-Plant Services

• A little over one-third of in-plant respondents reported printing work on offset presses while 22% outsource offset work and 35% no longer offer offset print. This finding highlights the ongoing migration of print work from offset to digital presses.

• Nearly all in-plant respondents reported that they offer bindery services and digital toner printing.

• Over 80% reported offering wide-format inkjet printing and variable-data printing.

• Over two-thirds of in-plant respondents reported offering prepress services (80%), graphic design services (79%), and online ordering (71%).

• A majority of in-plant respondents reported offering mailing (69%) and print procurement services (68%) while over half reported offering warehousing fulfillment services (51%).
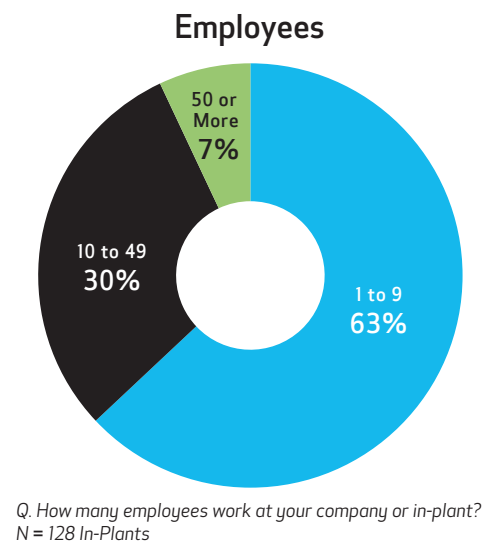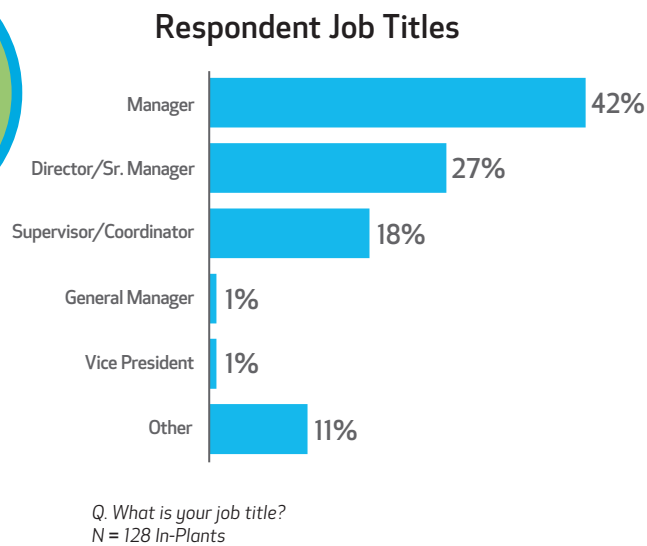
PROPELLING YOUR BUSINESS FORWARD IN AN EVER-CHANGING COMPETITIVE ENVIRONMENT —
Enhancing the In-Plant Product and Service Offering

3

In-Plant Workflow Trends

• Over half of in-plants reported having automated the following process tasks: job submission, prepress makeready, estimating, job reporting, press makeready, color management, and preflighting.

• Software access is expected to move to the cloud. While the majority of in-plants reported that job submission, workflow, file storage, and color management software mostly reside onsite, they expect a growth in the migration of this software to the cloud over the next two years.

Respondent Profiles

Figures 1 and 2 show the job titles of in-plants and communication buyers with in-plants participating in the survey along with the size of their operations/organizations.

Figure 1
In-Plant Respondent Profiles

Respondent Job Titles

Job Title	Percentage
Manager	42%
Director/Sr. Manager	27%
Supervisor/Coordinator	18%
General Manager	1%
Vice President	1%
Other	11%

Q. What is your job title?
N = 128 In-Plants

Employees

- 50 or More: 7%
- 10 to 49: 30%
- 1 to 9: 63%

Q. How many employees work at your company or in-plant?
N = 128 In-Plants

Source: Propelling Your Business Forward in an Ever-Changing Competitive Environment, NAPCO Research 2022

Figure 2
Communication Buyer Respondent Profiles

Respondent Job Titles

- CEO/President/Owner/Director — 28%
- Management Executive — 25%
- Manager — 19%
- Marketing Executive — 11%
- Product Manager — 6%
- Brand Manager — 6%
- Purchasing — 4%
- Other — 1%
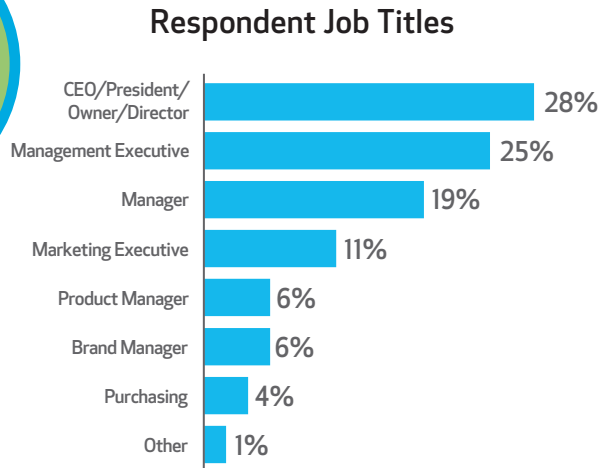
Q. Which of the following describes your role in your organization?
N = 53 Communication Buyers and Influencers with In-Plants

Employees

- Fewer Than 10 — 8%
- 10 to 99 — 17%
- 100 to 499 — 32%
- 500 to 999 — 24%
- 1,000 or More — 19%

Q. In total, how many people does your organization employ?
N = 53 Communication Buyers and Influencers with In-Plants
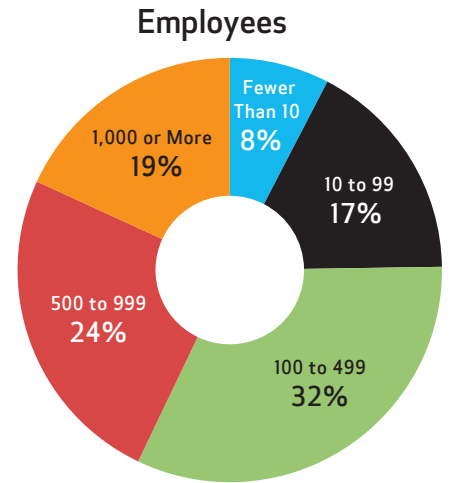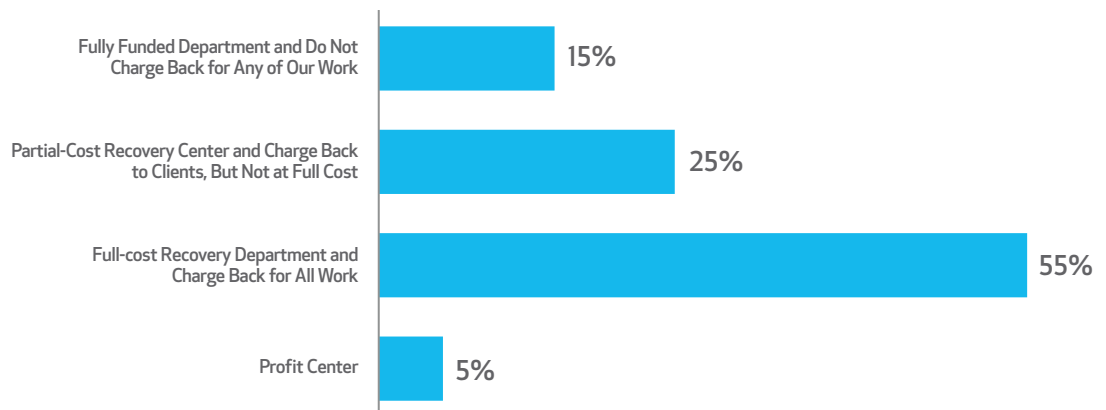
Source: Propelling Your Business Forward in an Ever-Changing Competitive Environment, NAPCO Research 2022

In-Plant Respondents' Operating Models

Successful in-plants strive to operate similar to "for-profit" businesses. In many instances, they charge back for their work, market their services, compare their costs with competitors, and consult with customers in an effort to ensure their service offerings stay in line with customers' needs. The majority of respondents (85%) report charging back for work produced for their parent organization (Figure 3).

Over half of in-plant respondents (55%) report operating as full-cost recovery departments that charge back for all work; 25% report operating as a partial-recovery center and charge back clients and not at full cost; 15% report that they're fully funded and don't charge back for work; and, 5% report that they're profit centers.

Figure 3
In-Plant Operating Models

- Fully Funded Department and Do Not Charge Back for Any of Our Work — 15%
- Partial-Cost Recovery Center and Charge Back to Clients, But Not at Full Cost — 25%
- Full-cost Recovery Department and Charge Back for All Work — 55%
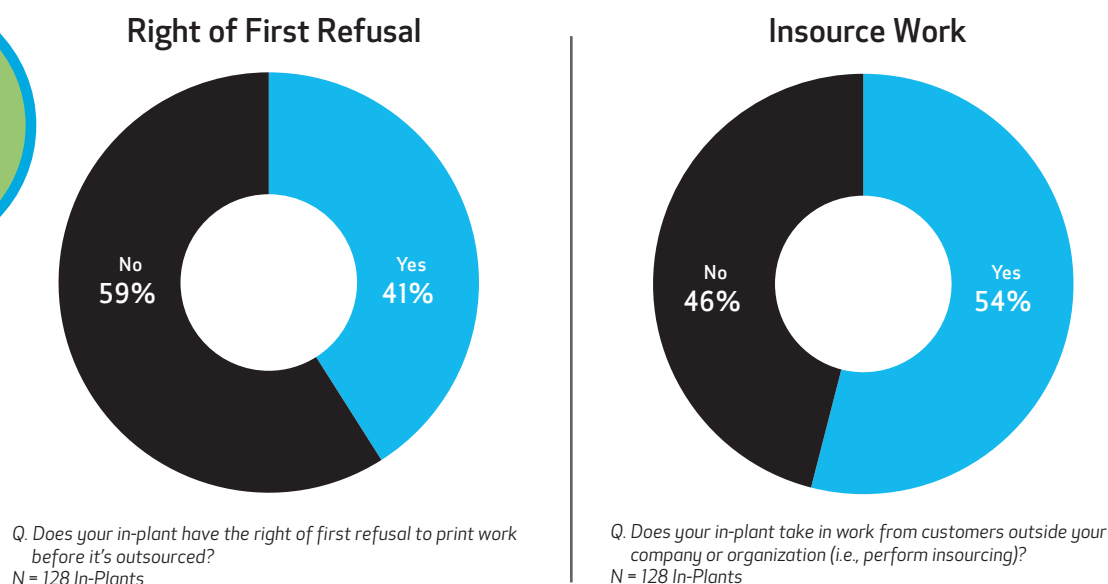- Profit Center — 5%

Q. Which of the following best describes your in-plant operation?
N = 128 In-Plants

Source: Propelling Your Business Forward in an Ever-Changing Competitive Environment, NAPCO Research 2022

PROPELLING YOUR BUSINESS FORWARD IN AN EVER-CHANGING COMPETITIVE ENVIRONMENT —
Enhancing the In-Plant Product and Service Offering

5

In-Plant Respondents' Decision Options

While it's rare for parent organizations to mandate that all departments send their printing to the in-plant, 41% of in-plant respondents report enjoying the right of first refusal for printing before it's outsourced (Figure 4). Most in-plants must compete with outside printers by demonstrating better service, price, and quality.

Figure 4
Outsourcing and Insourcing Work

Right of First Refusal

No 59%

Yes 41%

Q. Does your in-plant have the right of first refusal to print work before it's outsourced?
N = 128 In-Plants

Insource Work

No 46%

Yes 54%

Q. Does your in-plant take in work from customers outside your company or organization (i.e., perform insourcing)?
N = 128 In-Plants

Source: Propelling Your Business Forward in Ever-Changing Competitive Environment, NAPCO Research 2022

One way in-plants can bring in new revenue to support their operations is by insourcing, or accepting work from outside the parent organization, and 54% report doing this. Benefits of insourcing include increased equipment utilization and enabling the in-plant to return revenue to its parent organization.

Typically, in-plants get this work from a variety of sources. University and school district in-plants may take in jobs from other educational institutions while state government in-plants often produce work for local municipalities. In addition, nonprofits are a rich source of insourcing work for many in-plants.

PROPELLING YOUR BUSINESS FORWARD IN AN EVER-CHANGING COMPETITIVE ENVIRONMENT —
Enhancing the In-Plant Product and Service Offering

Reasons Parent Organizations Use Print

To meet their parent organizations' needs effectively, in-plants must understand how these organizations can benefit from print. Figure 5 shows some of the primary factors communication buyer and influencer respondents with in-house printing operations consider when choosing to use print. This survey question allowed for up to five responses. The top considerations chosen for using print are (1) the value of the product associated with the communication effort, (2) the recyclability of printed communications ("green" benefit), (3) the tangible nature of print, (4) print's customer acquisition advantages, and (5) budgetary considerations. Of note, respondents deemed print's effectiveness more important than budget.

Figure 5
Top Reasons
Organizations
Use Print

High Value of the Product or Service Associated with the Communication	51%
"Green" Benefit: Recyclability of Printed Communications	43%
Tangible/Permanent Nature of the Printed Piece vs. Digital/Electronic Messaging	43%
Better Tool for Customer Acquisition	40%
Budget	38%
Target Audience Preference	34%
Historically Use Print, Customers Expect It	34%
Importance of the Communication	32%
Compliance with Regulations	25%
Management Request	23%
Agency Recommends	23%

Select Up to Five

Q. What are the primary factors that determine your organization's use of printed communications?
N = 53 Communication Buyers and Influencers with In-Plants

Source: Propelling Your Business Forward in an Ever-Changing Competitive Environment, NAPCO Research 2022

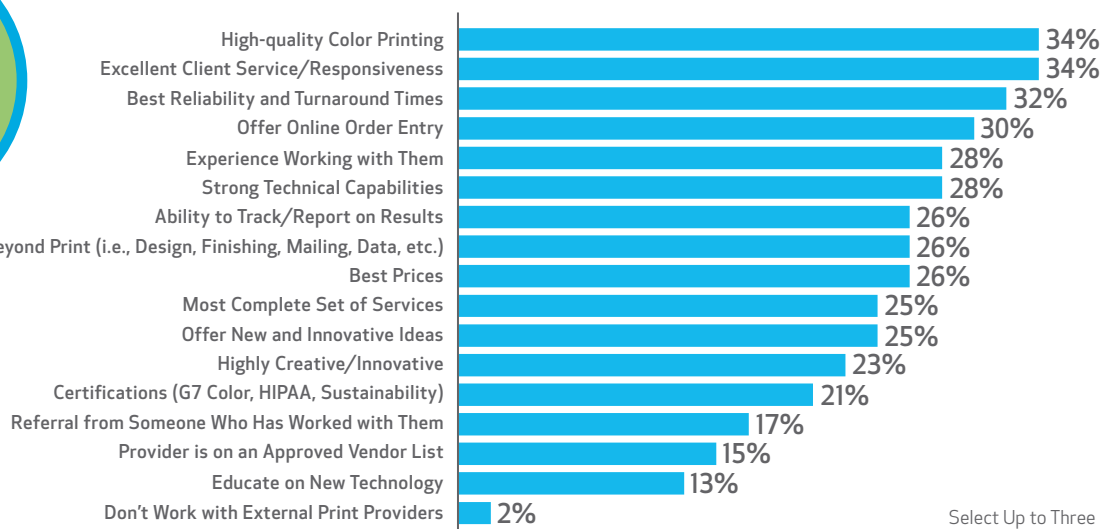PROPELLING YOUR BUSINESS FORWARD IN AN EVER-CHANGING COMPETITIVE ENVIRONMENT —
Enhancing the In-Plant Product and Service Offering

7

Criteria for Selecting External Print Providers

Communication buyers and influencers with in-house printing operations select external or outside print providers for a variety of reasons (Figure 6). Respondents did not identify a dominant set of criteria, suggesting in-plants' efforts to thwart outside competitors to be wide-ranging. This survey finding indicates that keeping parent organizations' work in-house requires a combination of print quality, customer service, production efficiency, innovative services, and building relationships.

Figure 6
Criteria for Selecting External Providers

Criteria	Percentage
High-quality Color Printing	34%
Excellent Client Service/Responsiveness	34%
Best Reliability and Turnaround Times	32%
Offer Online Order Entry	30%
Experience Working with Them	28%
Strong Technical Capabilities	28%
Ability to Track/Report on Results	26%
Offer Services Beyond Print (i.e., Design, Finishing, Mailing, Data, etc.)	26%
Best Prices	26%
Most Complete Set of Services	25%
Offer New and Innovative Ideas	25%
Highly Creative/Innovative	23%
Certifications (G7 Color, HIPAA, Sustainability)	21%
Referral from Someone Who Has Worked with Them	17%
Provider is on an Approved Vendor List	15%
Educate on New Technology	13%
Don't Work with External Print Providers	2%

Select Up to Three

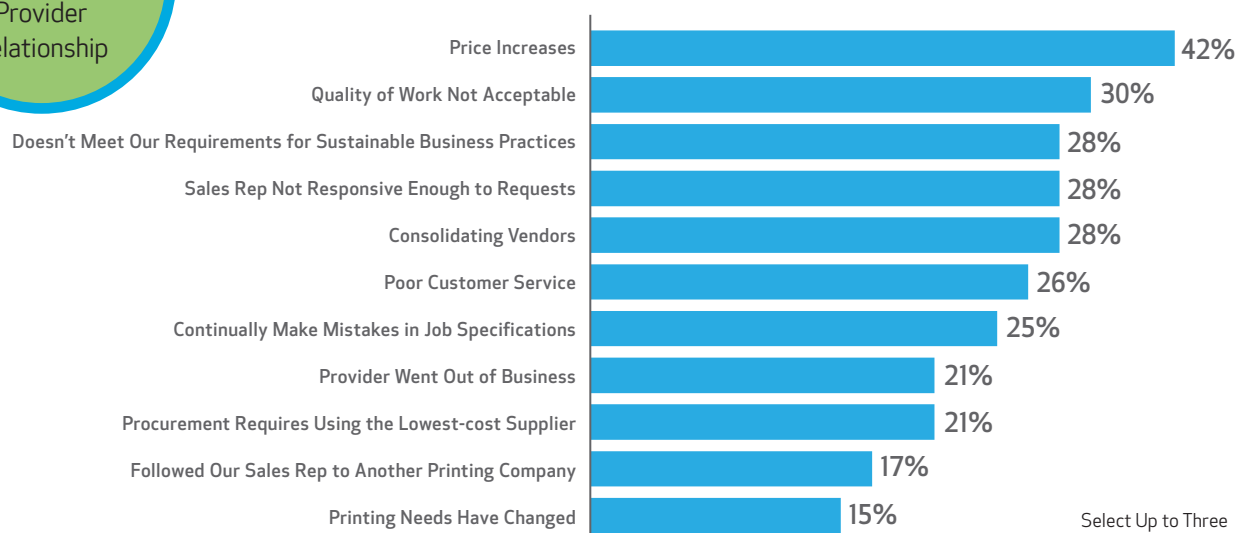*Q. What are your organization's TOP CRITERIA when selecting an external service provider for printing?*
N = 53 Communication Buyers and Influencers with In-Plants

Source: Propelling Your Business Forward in an Ever-Changing Competitive Environment, NAPCO Research 2022

PROPELLING YOUR BUSINESS FORWARD IN AN EVER-CHANGING COMPETITIVE ENVIRONMENT —
Enhancing the In-Plant Product and Service Offering

Reasons Buyers End a Print Provider Relationship

The survey asked communication buyers and influencers to select the top three reasons they would end a relationship with a print provider (Figure 7). Survey respondents with in-house printing operations report the top reasons to be price increases (42%), unacceptable work quality (30%), not meeting sustainability requirements (28%), lack of response to requests (28%), and reducing their number of suppliers (28%). This survey finding can serve as a guide for developing strategies to help keep parent organizations' work in-house.

Figure 7
Top Reasons for Ending a Provider Relationship

Reason	Percentage
Price Increases	42%
Quality of Work Not Acceptable	30%
Doesn't Meet Our Requirements for Sustainable Business Practices	28%
Sales Rep Not Responsive Enough to Requests	28%
Consolidating Vendors	28%
Poor Customer Service	26%
Continually Make Mistakes in Job Specifications	25%
Provider Went Out of Business	21%
Procurement Requires Using the Lowest-cost Supplier	21%
Followed Our Sales Rep to Another Printing Company	17%
Printing Needs Have Changed	15%

Select Up to Three

Q. What are the top THREE reasons your organization would end a relationship with a print provider?
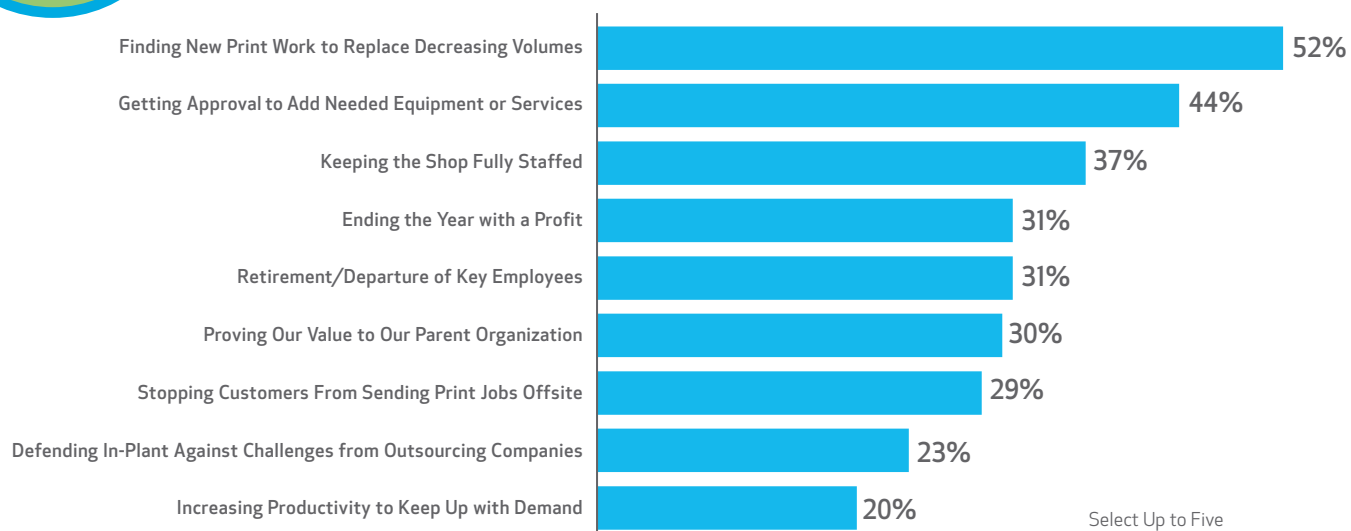*N = 53 Communication Buyers and Influencers with In-Plants*

Source: Propelling Your Business Forward in an Ever-Changing Competitive Environment, NAPCO Research 2022

PROPELLING YOUR BUSINESS FORWARD IN AN EVER-CHANGING COMPETITIVE ENVIRONMENT —
Enhancing the In-Plant Product and Service Offering

9

In-Plants' Top Challenges

In-plant respondents identified their greatest challenges (Figure 8) as finding new print work to replace decreasing volumes (52%), getting approval from parent organizations to add new equipment or services (44%), keeping operations fully staffed (37%), meeting profit goals (31%), and employee retirement or departure (31%).

Some key sources of decreasing print volumes are competition from alternative media, commercial printers, and outsourcing organizations. An ongoing challenge for in-plants is proving their value to their parent organization while also convincing other departments to utilize the in-plant rather than outside printers.

Figure 8
Biggest Challenges

Challenge	Percentage
Finding New Print Work to Replace Decreasing Volumes	52%
Getting Approval to Add Needed Equipment or Services	44%
Keeping the Shop Fully Staffed	37%
Ending the Year with a Profit	31%
Retirement/Departure of Key Employees	31%
Proving Our Value to Our Parent Organization	30%
Stopping Customers From Sending Print Jobs Offsite	29%
Defending In-Plant Against Challenges from Outsourcing Companies	23%
Increasing Productivity to Keep Up with Demand	20%

Select Up to Five

Q. What do you expect will be the biggest challenges to your in-plant over the next year?
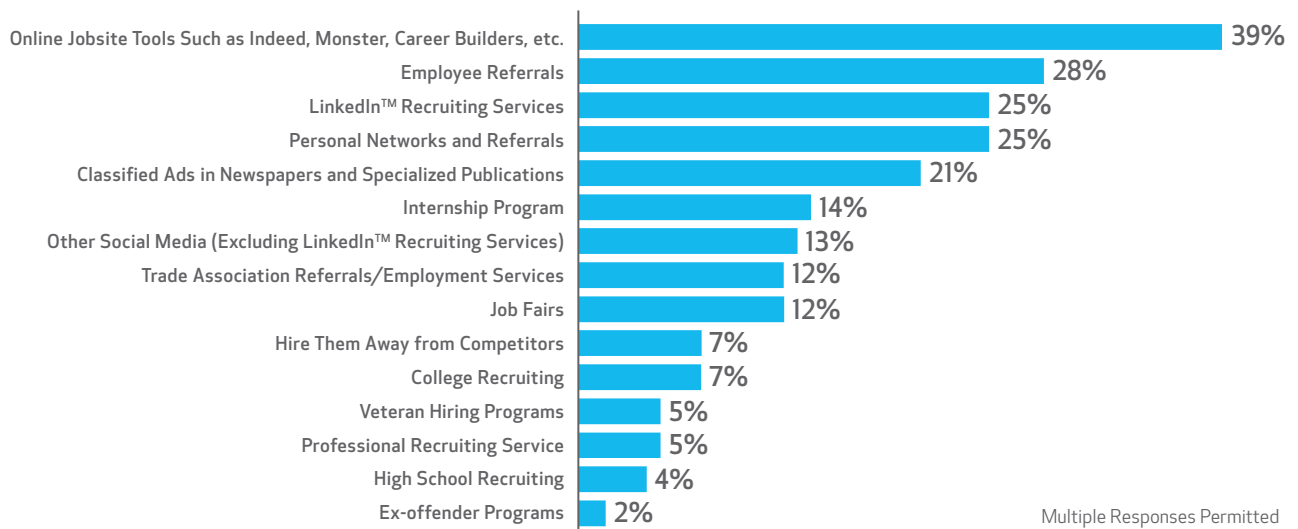*N = 128 In-Plants*

Source: Propelling Your Business Forward in an Ever-Changing Competitive Environment, NAPCO Research 2022

Because in-plants' parent organizations may not be well versed in the printing industry, in-plants often experience difficulty in convincing upper management of the benefits that equipment upgrades or service expansion can bring to the organization.

How In-Plants are Addressing Staffing Challenges

A constant industry challenge is finding qualified workers to staff operations. In-plant respondents report using a variety of methods to find and hire staff, including online job sites, referrals, LinkedIn™ recruiting services, and classified ads (Figure 9).

Figure 9
Methods for Staff Recruiting

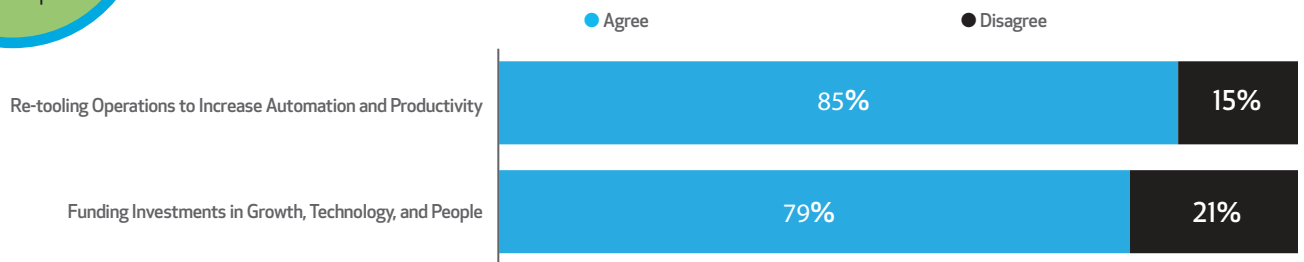| Method	Percentage
Online Jobsite Tools Such as Indeed, Monster, Career Builders, etc.	39%
Employee Referrals	28%
LinkedIn™ Recruiting Services	25%
Personal Networks and Referrals	25%
Classified Ads in Newspapers and Specialized Publications	21%
Internship Program	14%
Other Social Media (Excluding LinkedIn™ Recruiting Services)	13%
Trade Association Referrals/Employment Services	12%
Job Fairs	12%
Hire Them Away from Competitors	7%
College Recruiting	7%
Veteran Hiring Programs	5%
Professional Recruiting Service	5%
High School Recruiting	4%
Ex-offender Programs	2%

Multiple Responses Permitted

Q. Which of the following methods is your organization using to recruit and hire production staff?
N = 71 In-Plants Actively Recruiting and Hiring Production Staff

Source: Propelling Your Business Forward in an Ever-Changing Competitive Environment, NAPCO Research 2022

PROPELLING YOUR BUSINESS FORWARD IN AN EVER-CHANGING COMPETITIVE ENVIRONMENT —
Enhancing the In-Plant Product and Service Offering

11

In-Plant Investment Plans

In-plants report taking action to expand their products and services to better serve customers and enhance their relevance within their parent organizations by re-tooling operations to help increase automation and productivity (Figure 10). Actions to that end include investing in growth, technology, and people.

Figure 10
Investing in Operations, Growth, and People

● Agree   ● Disagree

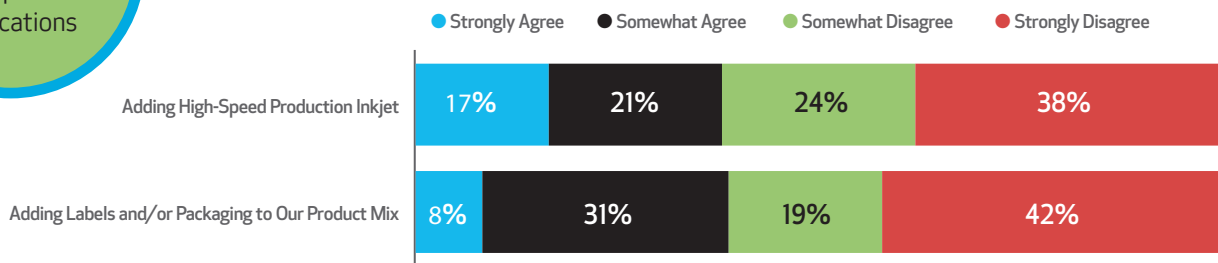|	Agree	Disagree
Re-tooling Operations to Increase Automation and Productivity	85%	15%
Funding Investments in Growth, Technology, and People	79%	21%

Q. For the following statements, please indicate your level agreement. Our operation is ...
N = 125 In-Plants

Source: Propelling Your Business Forward in an Ever-Changing Competitive Environment, NAPCO Research 2022

PROPELLING YOUR BUSINESS FORWARD IN AN EVER-CHANGING COMPETITIVE ENVIRONMENT —
Enhancing the In-Plant Product and Service Offering

Two areas in which in-plants report investing are equipment and application expansion. Thirty-eight percent of respondents report that they expected to add high-speed production inkjet printing technology to their operations (Figure 11).

Figure 11
Investing in New Equipment and Applications

● Strongly Agree ● Somewhat Agree ● Somewhat Disagree ● Strongly Disagree

	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree
Adding High-Speed Production Inkjet	17%	21%	24%	38%
Adding Labels and/or Packaging to Our Product Mix	8%	31%	19%	42%

Q. For the following statements, please indicate your level agreement. Our operation is …
N = 125 In-Plants

Source: Propelling Your Business Forward in an Ever-Changing Competitive Environment, NAPCO Research 2022

Production inkjet printing can offer in-plants the opportunity to bring in new business, generate additional revenue, and produce more work. Key benefits include:

• Cost-effectively printing monochrome and color jobs on one press

• Transitioning black-and-white applications to higher-value/higher-margin color products

• Extending the cross-over point for digital print versus offset, helping more pages migrate to digital print

• The ability to use variable data to enhance personalized materials, which can be particularly helpful for increasing communication response rates
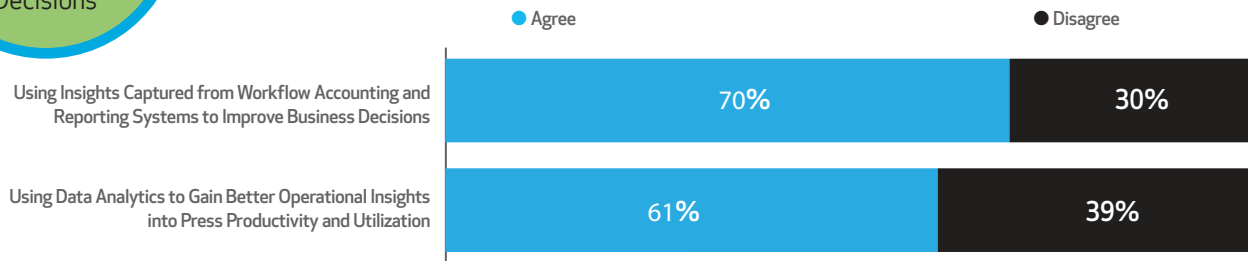
In addition, 39% of respondents plan to add labels or packaging to their product mix. Packaging is an application that's often in high demand and cannot be easily replaced by digital media. Many factors contribute to removing entry barriers and accelerating print providers' migration into packaging. Ongoing progress in technology innovation, digital printing, early adopter successes, process simplification, customer demands, and fierce competition are all forces enticing and enabling in-plants to offer labels and other types of packaging to parent organizations.

PROPELLING YOUR BUSINESS FORWARD IN AN EVER-CHANGING COMPETITIVE ENVIRONMENT —
Enhancing the In-Plant Product and Service Offering

13

Leveraging Operational Data in Decision-Making

In-plant respondents report collecting and analyzing accounting and press productivity and utilization data to gain better operational insights (Figure 12). For example, 70% of in-plant respondents use insights captured from workflow accounting and reporting systems to help improve business decisions.

In-plants recognize that collecting and analyzing data are valuable in providing a full picture of their operations and uncovering trends and bottlenecks. By leveraging key data consistently, in-plants can help optimize their operations and make data-driven investment decisions.

Figure 12
Using Data and Analytics to Make Decisions

● Agree   ● Disagree

	Agree	Disagree
Using Insights Captured from Workflow Accounting and Reporting Systems to Improve Business Decisions	70%	30%
Using Data Analytics to Gain Better Operational Insights into Press Productivity and Utilization	61%	39%

Q. For the following statements, please indicate your level agreement. Our operation is ...
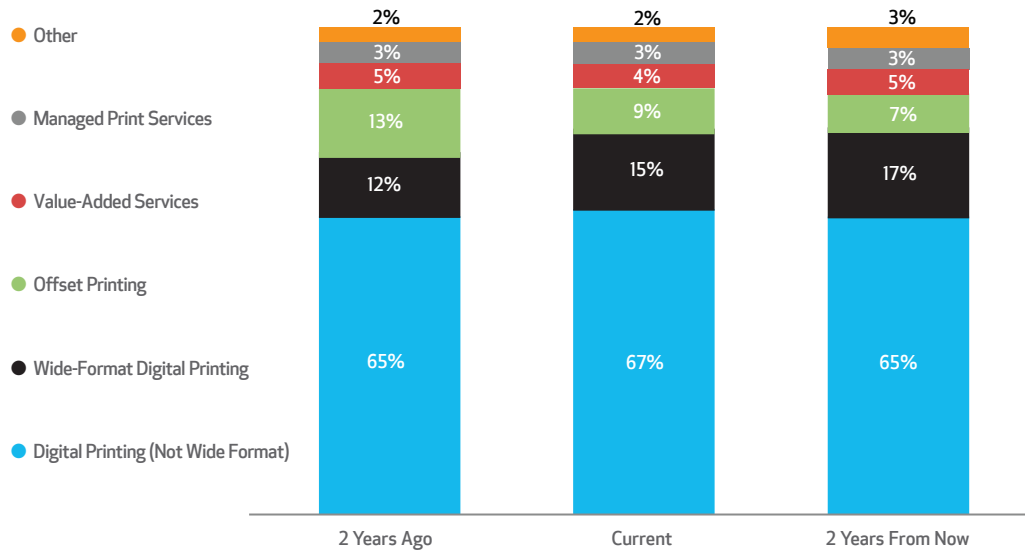*N = 125 In-Plants*

Source: Propelling Your Business Forward in an Ever-Changing Competitive Environment, NAPCO Research 2022

Distribution of In-Plants' Services

Figure 13 shows the past, present, and expected future distribution of in-plant respondents' services. Respondents report that digital printing represented the largest share of work by a wide margin. In the early 1990s, in-plants led the printing industry's transition to digital printing and have continued to build on the digital opportunity.

Offset printing's share of work produced has declined, and as work shifts to wide-format printing and value-added services, this is expected to continue.

Figure 13
Distribution of In-plants' Services

Legend:
- Other
- Managed Print Services
- Value-Added Services
- Offset Printing
- Wide-Format Digital Printing
- Digital Printing (Not Wide Format)

Category	2 Years Ago	Current	2 Years From Now
Other	2%	2%	3%
Managed Print Services	3%	3%	3%
Value-Added Services	5%	4%	5%
Offset Printing	13%	9%	7%
Wide-Format Digital Printing	12%	15%	17%
Digital Printing (Not Wide Format)	65%	67%	65%

Q. What percentage of your organization's work falls/fell into the following types of services 2 years ago, today, and 2 years from now? N = 128 In-Plants
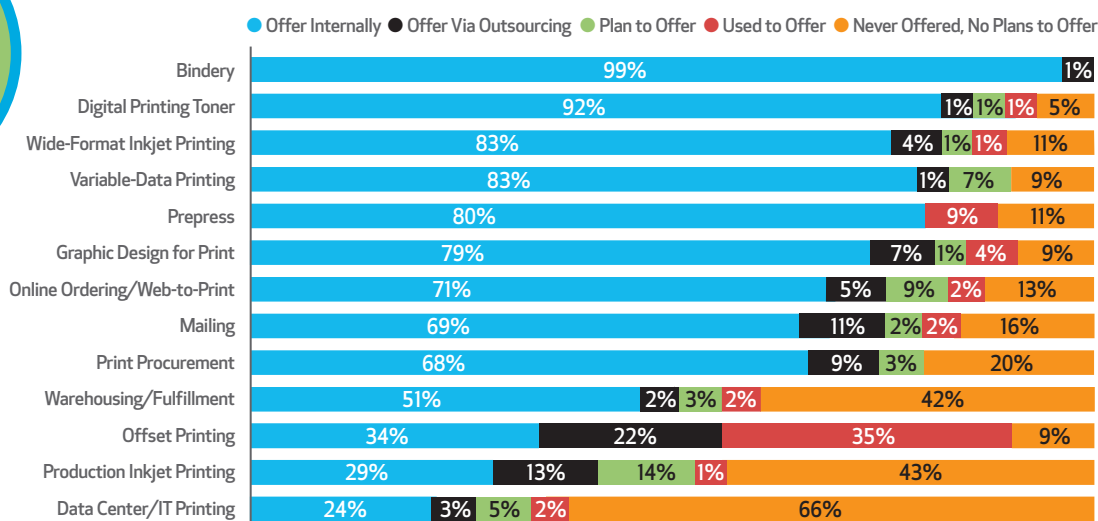
Source: Propelling Your Business Forward in an Ever-Changing Competitive Environment, NAPCO Research 2022

PROPELLING YOUR BUSINESS FORWARD IN AN EVER-CHANGING COMPETITIVE ENVIRONMENT — Enhancing the In-Plant Product and Service Offering

15

Pursuing Services Beyond Print

There are many reasons for in-plants to expand their products and/or services. Providing services that complement and enhance print can create stronger bonds with the departments that in-plants serve, potentially making them less likely to outsource work over a minimal cost difference. Additionally, these services can create opportunities for new and recurring service streams.

Figure 14 highlights in-plant respondents' product and service offerings. Nearly all respondents report offering bindery services and digital toner printing, and over 80% report offering wide-format inkjet and variable-data printing.

Figure 14
In-Plants' Product and Service Offerings

Legend: ● Offer Internally ● Offer Via Outsourcing ● Plan to Offer ● Used to Offer ● Never Offered, No Plans to Offer

Service	Offer Internally	Offer Via Outsourcing	Plan to Offer	Used to Offer	Never Offered, No Plans to Offer
Bindery	99%				1%
Digital Printing Toner	92%	1%	1%	1%	5%
Wide-Format Inkjet Printing	83%	4%	1%	1%	11%
Variable-Data Printing	83%	1%	7%		9%
Prepress	80%			9%	11%
Graphic Design for Print	79%	7%	1%	4%	9%
Online Ordering/Web-to-Print	71%	5%	9%	2%	13%
Mailing	69%	11%	2%	2%	16%
Print Procurement	68%	9%	3%		20%
Warehousing/Fulfillment	51%	2%	3%	2%	42%
Offset Printing	34%	22%		35%	9%
Production Inkjet Printing	29%	13%	14%	1%	43%
Data Center/IT Printing	24%	3%	5%	2%	66%

Q. Which of these services does your in-plant offer?
N = 128 In-Plants

Source: Propelling Your Business Forward in an Ever-Changing Competitive Environment, NAPCO Research 2022

Over two-thirds of in-plant respondents report offering prepress services (80%), graphic design services (79%), and online ordering (71%). A majority report offering mailing (69%) and print procurement services (68%) while over half offer warehousing fulfillment (51%).
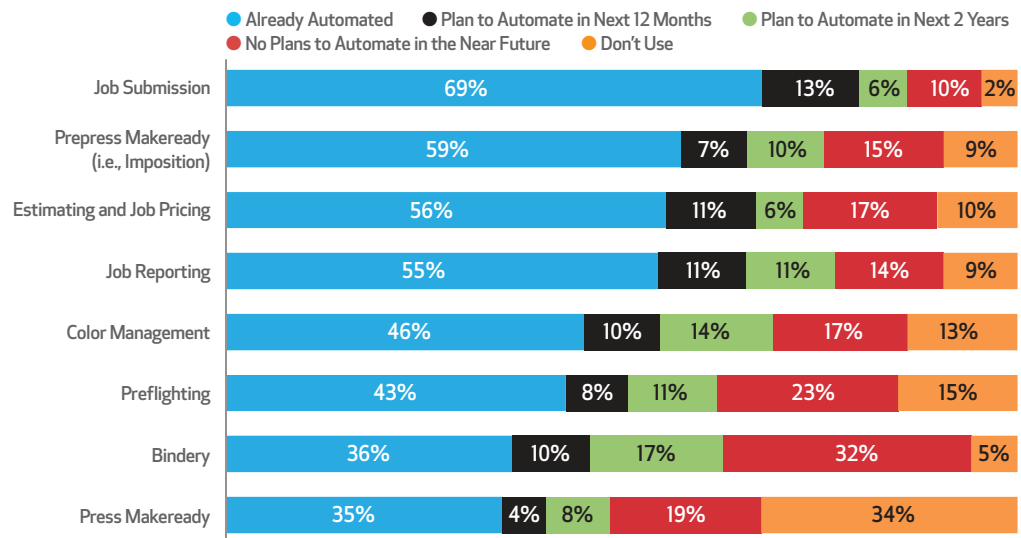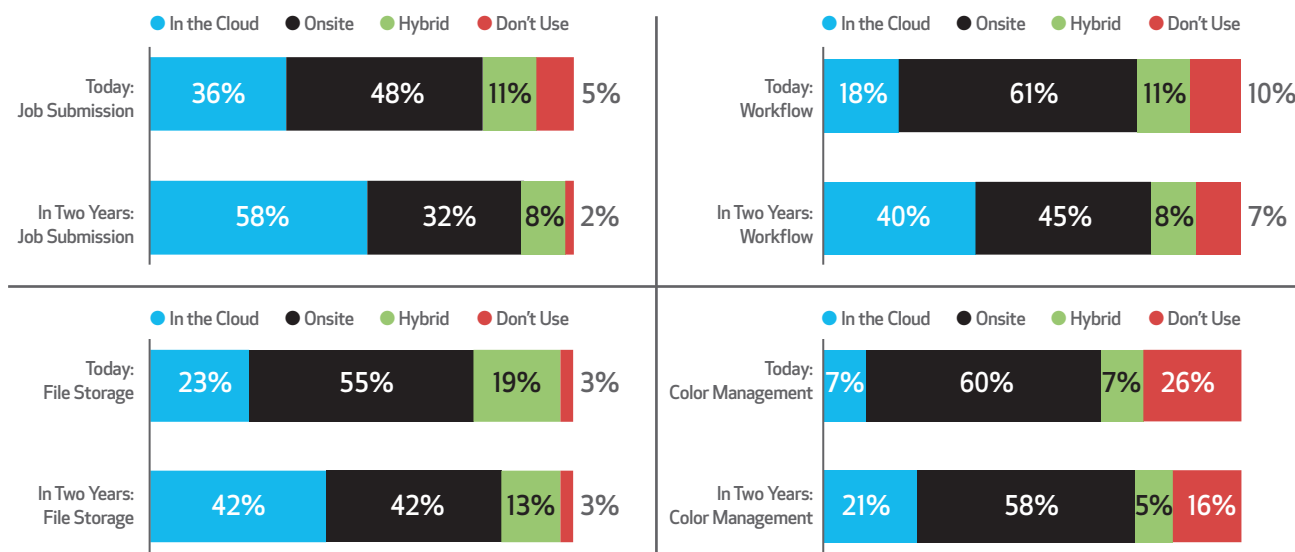
At many in-plants, printing and mailing services go hand in hand. Their parent organizations have recognized the value of merging the two operations under one manager and cross-training staff. Printed work can flow seamlessly into the mail workflow and out the door, and adding mailing services to in-house printing operations could see the benefits of increased print volumes.

Another interesting finding from this question is that a little over 33% of in-plant respondents print work on offset presses, 22% outsource offset work, and 35% no longer offer offset print work, an indication of the ongoing migration of print work from offset to digital presses.

Investing in Workflow Automation

Balancing customer requirements with efficiency can help in-plants' success. It's no secret that automating processes can aid in efficiency. In-plant respondents report that their operations have some level of automation across workflow activities (Figure 15), but that there's room to expand. The most frequently automated activities include job submission (70%), prepress makeready (65%), estimating (62%), and job reporting (60%); the least automated area is the bindery.

Figure 15
Workflow Automation Actions

Legend:
- Already Automated
- Plan to Automate in Next 12 Months
- Plan to Automate in Next 2 Years
- No Plans to Automate in the Near Future
- Don't Use

Activity	Already Automated	Plan to Automate in Next 12 Months	Plan to Automate in Next 2 Years	No Plans to Automate in the Near Future	Don't Use
Job Submission	69%	13%	6%	10%	2%
Prepress Makeready (i.e., Imposition)	59%	7%	10%	15%	9%
Estimating and Job Pricing	56%	11%	6%	17%	10%
Job Reporting	55%	11%	11%	14%	9%
Color Management	46%	10%	14%	17%	13%
Preflighting	43%	8%	11%	23%	15%
Bindery	36%	10%	17%	32%	5%
Press Makeready	35%	4%	8%	19%	34%

Q. What best describes your plans and priorities for automating the following workflow activities?
N = 128 In-Plants

Source: Propelling Your Business Forward in an Ever-Changing Competitive Environment, NAPCO Research 2022

PROPELLING YOUR BUSINESS FORWARD IN AN EVER-CHANGING COMPETITIVE ENVIRONMENT —
Enhancing the In-Plant Product and Service Offering

17

Software Migrating to the Cloud

Software is transitioning more and more to cloud-based platforms. While the majority of in-plants report that job submission, workflow, file storage, and color management software mostly reside onsite, they expect growth in the migration of this software to the cloud within two years (Figure 16).

Using cloud-based software or workflows can often reduce costs. In-plants can reap advantages without some of the headaches and expenses of maintaining, upgrading, and staffing the infrastructure that may be associated with onsite solutions.

Figure 16
Software Moving to the Cloud

● In the Cloud ● Onsite ● Hybrid ● Don't Use

	In the Cloud	Onsite	Hybrid	Don't Use
Today: Job Submission	36%	48%	11%	5%
In Two Years: Job Submission	58%	32%	8%	2%

	In the Cloud	Onsite	Hybrid	Don't Use
Today: Workflow	18%	61%	11%	10%
In Two Years: Workflow	40%	45%	8%	7%

	In the Cloud	Onsite	Hybrid	Don't Use
Today: File Storage	23%	55%	19%	3%
In Two Years: File Storage	42%	42%	13%	3%

	In the Cloud	Onsite	Hybrid	Don't Use
Today: Color Management	7%	60%	7%	26%
In Two Years: Color Management	21%	58%	5%	16%

Q. What best describes how the following software used in your operation is hosted?
N = 125 In-Plants

Source: Propelling Your Business Forward in an Ever-Changing Competitive Environment, NAPCO Research 2022

Conclusion

In-plants are seeking ways to add value and better serve their parent organizations. Because of their close relationships with their internal customers, in-plants routinely hear about new services their customers need, thereby enabling them to add capabilities to offer these services in-house.

Respondents reported investing in operations on all fronts: equipment, technology, workflow, and people; operational data and analytics are guiding those decisions.

In-plant respondents reported providing parent organizations with a range of products and services, with the most common offerings being digital printing, bindery services, variable-data, and wide-format printing. They also reported plans to expand digital print capabilities with production inkjet and application offerings with labels and packaging.

Despite today's competitive forces, in-plants remain dedicated to their parent organizations' success and are committed to pursuing the strategies and services needed to help accomplish their goals.

PROPELLING YOUR BUSINESS FORWARD IN AN EVER-CHANGING COMPETITIVE ENVIRONMENT — Enhancing the In-Plant Product and Service Offering

19

About The Research and Report Series

Propelling Your Business Forward in an Ever-changing Competitive Environment is a series of thought-leadership content pieces based on a NAPCO Research survey of communication buyers, commercial printers, and in-plants, sponsored by Canon U.S.A., Inc.

Reports in the series include:

1. Print 2022 and Beyond
2. Enhancing the In-plant Product and Service Offering
3. Pinpointing and Pursuing High-Growth Print Applications
4. Positioning Your Commercial Printing Business for Success

For more information,
call 1.877.623.4969
or visit csa.canon.com

Canon
CANON SOLUTIONS AMERICA