



**Production Digital
Printing 2024:**
Pathways to Success
in the Year Ahead

Canon



Production Digital Printing 2024: Pathways to Success in the Year Ahead

The year ahead offers print service providers many opportunities and challenges to operational success and profitability. Success in 2024 will require print providers to invest in tools, staff, equipment technologies, and methods to enhance productivity, address labor shortages, and meet changing customer demands.

This special report identifies 11 trends that will influence the printing industry's competitive landscape, recommendations for overcoming challenges, key application opportunities to pursue, and the role production digital printing can play in achieving success in 2024.

1. COMPETITIVE LABOR MARKETS REQUIRE EMPLOYEE INVESTMENT

In the year ahead, print service providers will need to have a strong focus on employee enrichment to retain and attract staff. In a 2023 NAPCO Research survey of commercial printers, 65% report that hiring production staff and 62% indicate that hiring sales staff are critical/moderate challenges.

More competitive labor markets demand print service providers to find ways to heighten their attractiveness to job candidates as well as current employees. Developing a program that invests in staff and offers more organized career paths can support employee retention and recruitment.

Since many printing companies are faced with hiring people with little or no experience, training will be essential.

Recruiting and retaining staff will also be important, and keeping workers requires offering them a career path.

Top Trends 2024

1. Competitive Labor Markets Require Employee Investment
2. Smart Print Production: AI Benefits in Manufacturing and Sales
3. Customized Online Ordering Portals Paving Pathways to Profit
4. Factors Rewriting Opportunities in Book Manufacturing
5. Commercial Printers: Making the Transition to Inkjet
6. Innovations That Are Optimizing Direct Mail Results
7. The Rise of Sheetfed Inkjet in Transactional Document Printing
8. In-House Printing Operations Adding Inkjet
9. Photo Products: A Profitable Inkjet Application
10. Harnessing Automation to Gain a Competitive Advantage
11. Sustainability Is More Than Marketing

According to Adriane Harrison, VP of human relations consulting at PRINTING United Alliance, “Employees need to feel vested, feel a sense of loyalty, and a sense of proficiency, which is a good feeling.” She says this approach helps with retention, recruitment, production, and quality. Harrison recommends print providers consider creating a personalized career development program for every team member. She recommends organizations do the following:

- Identify the skills needed for each position.
- Perform a skills assessment of each team member — skills they use in their job, and skills they have that an employer may not be aware of.
- Meet with each team member to learn what they would like to do within the company, and the job growth they hope to achieve there.
- Identify skills the team member needs to learn (or improve) to achieve their goals.
- Provide training opportunities to hone those skills, and cross-training to learn other skills.

Creating a structured mentorship program is valuable as well. It provides a win-win situation: Younger workers have mentors who can provide guidance, feedback, and reinforcement that they have a voice; and veteran employees feel valued for sharing all the skills and wisdom they’ve amassed.

As for recruiting, print service providers that go beyond common practices of staffing agencies, professional recruiters, and online job posting sites are yielding better results. Attracting talent into printing companies requires outreach and education to organizations like academic institutions (high schools, technical schools, community colleges, and universities), which offer a diverse pool of future job candidates. Offering internship programs are important, too.

2. SMART PRINT PRODUCTION: AI BENEFITS IN MANUFACTURING AND SALES

Artificial intelligence (AI) is the capability of computer systems or algorithms to imitate intelligent human behavior by using a range of technologies, including machine learning, deep learning, and natural language processing (NLP).

AI is not new but is experiencing a resurgence and expansion in capabilities because of faster computer speeds, cloud services, opensource technologies, big data, and a widespread awareness in the general population. These factors are all fueling investment in AI and its ability to tackle more ambitious tasks.

In the printing industry, AI tools can support organizations across all functional areas. In print production, AI tools are embedded in software and hardware to speed production, reduce errors, monitor and adjust printing equipment, conduct predictive maintenance, identify network security breaches, and ensure a smoother production process.

An example of AI in production print applications is in predictive maintenance. For example, Canon high-speed production inkjet presses feature built-in, self-maintenance and diagnostic systems with an automated corrective and “sense and support” predictive maintenance system.

Sense and support predictive maintenance leverages AI and machine learning to learn from historical and real-time data, detect anomalies, and to provide actionable insights and recommendations for optimal maintenance.

AI can also take on manual and monotonous tasks such as loading paper into a printer, and can free up employees to focus on areas where they can add more value.

Sales is another area where AI offers game-changing tools. AI applications in sales include predictive analytics that identify the most promising leads, to chatbots that engage and qualify prospects.

Print providers participating in the PRINTING United Alliance State of the Industry Update Second Quarter 2023 research report are using AI in the following ways beyond print production:

- **Analysis of keywords and phrases in communications with customers** (email, chats, calls, etc.) to measure the impact of customer interactions and ‘score’ those interactions to identify quality issues and potential customer needs.
- **Market analysis** to identify prospects; assemble, analyze, and summarize diverse data on trends, issues, developments, pain points, etc., in target markets; and to forecast key metrics.
- **Content creation and summary**, including marketing campaigns, headlines, articles, web pages, and to summarize long articles and email threads.
- **Generate code from text prompts** to create fully functional web applications.

Table 1 highlights a sampling of AI sales tools and their features.

Table 1: Sampling of AI Sales Tools and Key Features

AI SALES TOOL	KEY FEATURES
Salesforce Einstein	AI-powered analytics, lead scoring, predictive insights
Gong.io	Conversation analytics, sales coaching, call recording
Chorus.ai	Conversation intelligence, deal acceleration, insights
Conversica	AI-driven lead engagement, automated email and SMS
Outreach	Sales engagement platform, email sequences, analytics
SalesLoft	Sales engagement, cadence management, analytics
Drift	Conversational marketing, lead generation, chatbots
Clari	Revenue operations, forecasting, pipeline management
InsideSales.com	Predictive analytics, lead scoring, sales automation
FlyMSG	AI-driven messaging automation, lead generation

Source: [10 Best AI Sales Tools of 2023, WBCOM Designs](#), by Shashank Dubey, a contributor of Wbcom Designs and who is a blogger and a digital marketer.



AI is increasingly being implemented into printing equipment technologies and software, is improving production process productivity, and is aiding print providers in marketing and sales efforts. As AI use spreads, it has the potential to automate processes that could never be automated before, to enhance management activities, and to support superior decisions companywide. One thing is certain: AI can redefine everything.

3. CUSTOMIZED ONLINE ORDERING PORTALS PAVING PATHWAYS TO PROFIT

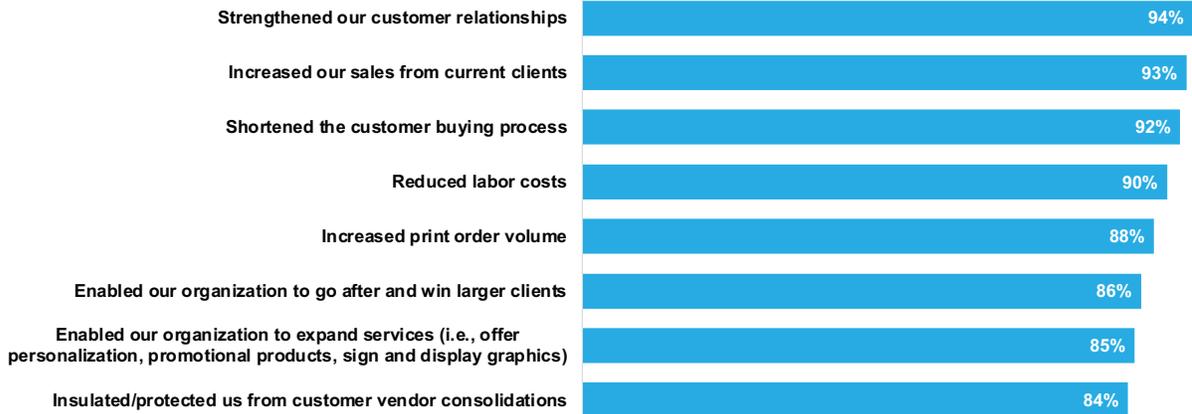
Offering customized online storefronts/web-to-print capabilities configured to the specific needs of a customer is becoming a necessity for print providers. A 2021 NAPCO Research study (sponsored by Canon U.S.A.), titled “Enhancing the Print Customer Connection,” found that 85% of commercial print customers prefer to work with providers that offer online ordering options, and 73% select providers based on online submission capabilities.

A 2023 NAPCO Research study “Web Portals, New Path to Print Profitability” found that printers offering customized web portals expected revenue from those portals to increase, on average, 12% over the next two years. Commercial printers participating in the research report that their customers use portals to order everything from marketing collateral and direct mail, to promotional products and digital marketing services.

In addition, respondents that offer customized web portals report reaping many benefits (Figure 1), including strengthening customer relationships, increasing sales and print volumes, reducing labor costs, and winning work from larger customers.

Figure 1: Benefits of Offering Customized Web Portals

Q. Offering customized WEB PORTALS to customers has...



n=102 Organizations who offer customers access to customized WEB PORTALS
 Source: *Web Portals, New Path to Print Profitability*, NAPCO Research/Propago 2023



Web portals that go beyond web-to-print are key to winning bigger customers, growing sales, and improving productivity. Commercial printers looking to pursue larger clients, grow share with existing clients, expand product offerings, and build strong customer bonds competitors cannot easily break, should consider adding customized web portals or expanding current offerings.

4. FACTORS REWRITING OPPORTUNITIES IN BOOK MANUFACTURING

Books are a print application that delivers value and growth. According to the PRINTING United Alliance State of the Industry Update Second Quarter 2023 (sponsored by Canon), printers expect books to grow between 2.3% - 6.6% compounded annually during the next three years.

Digital printing technology continues to offer book printers and publishers options to improve efficiency and profitability. The ability to print shorter runs, more versions, and as-needed, continues to make digital book printing attractive to publishers. While books have been produced on digital printing systems for more than two decades, production inkjet printing continues to move more work from offset presses to digital devices. Inkjet presses have redefined the economics of printing books on-demand in larger quantities, without sacrifices in quality. According to I.T. Strategies, [the fastest growing application for production inkjet is book printing](#).

Until now, the challenge for book manufacturers was finding a digital printing method that matches the quality, speed, flexibility, and affordability of offset printing. Production inkjet makes the offset-to-digital transition achievable. Toner-based systems, with their slower printing speeds and format limitations, don't offer the same breadth of capability.

Book printers were early adopters of production inkjet, mostly using it to print monochrome book blocks. Today, digital book production on sheetfed inkjet presses enables printers to affordably produce high-quality monochrome and color work on a variety of substrates. The following advances make inkjet an attractive method for book printing:

- Faster running speeds
- Higher print resolutions
- Larger sheet sizes and widths
- Increased longevity of inkjet heads and other critical components
- More options for inline and near-line finishing
- Increasing ability to print with sheetfed quality on standard offset papers without needing a coating or pre-treatment

A sheetfed or webfed inkjet press offers book printers the benefit of a fully integrated process for text, color imagery, and variable content that delivers a finished product in a single, high-speed pass. The high speed of production inkjet in both monochrome and color also enables it to compete with offset for non-variable work.

The benefits to publishers are many. Production inkjet printing offers book publishers the ability to:

- Add color pages to books as desired
- Update content for reprints and reruns
- Version books by language, regional, and seasonal material, etc.
- Enhance the reading experience with variable text and imaging, including personalized, reader-specific content
- Make book pages interactive by adding QR codes, AR tags, and/or other multimedia technologies

Digital printing continues to transform book manufacturing by offering print providers and publishers new options to improve efficiency, productivity, and profitability. Ongoing trends in the publishing market for shorter runs, personalization, production agility, lower costs, and waste reduction will drive more book production toward digital inkjet.

5. COMMERCIAL PRINTERS: MAKING THE TRANSITION TO INKJET

Steady advances in quality and productivity are moving inkjet to the forefront as a production method for the commercial print marketplace. Production inkjet presses are now able to print on coated, as well as uncoated, stock and a broad range of substrates. The speed, reliability, and affordability of today's production inkjet options make these presses attractive options. And, based on speed, turnaround, and the ability to do variable data, inkjet technology is rivaling offset in the commercial print space.

The PRINTING United Alliance's 2023-2023 State of Industry Report asked participants: "If you could make any capital investments you wanted over the next 12 months, what would they be?" Thirty-nine percent of commercial printers indicated that investment would be in production inkjet.

Production inkjet is an attractive investment for commercial printers for the following reasons:

- **Labor shortages:** A critical challenge for the printing industry is a lack of skilled press operators. With the United States economy at full employment, labor is a challenge for most businesses. But it is an even bigger challenge for the printing industry. In parallel, there are few young people entering the printing business to replace aging and retiring press operators. Constraints on immigration are further adding to the challenge. The result is that printing company owners need to invest in technology, like inkjet, that is easy to operate and aligns to the skill mix of today's workforce.
- **Drive for automation:** The ongoing trend toward shorter runs has commercial printers looking for ways to enhance efficiency and automate production tasks. The digital front ends of inkjet production presses are typically designed to exchange data with automated systems for designing, ordering, proofing, scheduling, color managing, and finishing all jobs that a print shop might receive. Inkjet enables commercial printers to do more with less resources.

- **Demand for personalized communications:** Customer demand for data-driven personalization and programmatic marketing campaigns are becoming commonplace, and inkjet offers commercial printers the opportunity to meet customer requirements.

Market opportunities and challenges have commercial printers investing in technology to automate, strengthen print offerings, and grow. These factors make production inkjet a key investment area for commercial printers.

6. INNOVATIONS OPTIMIZING DIRECT MAIL RESULTS

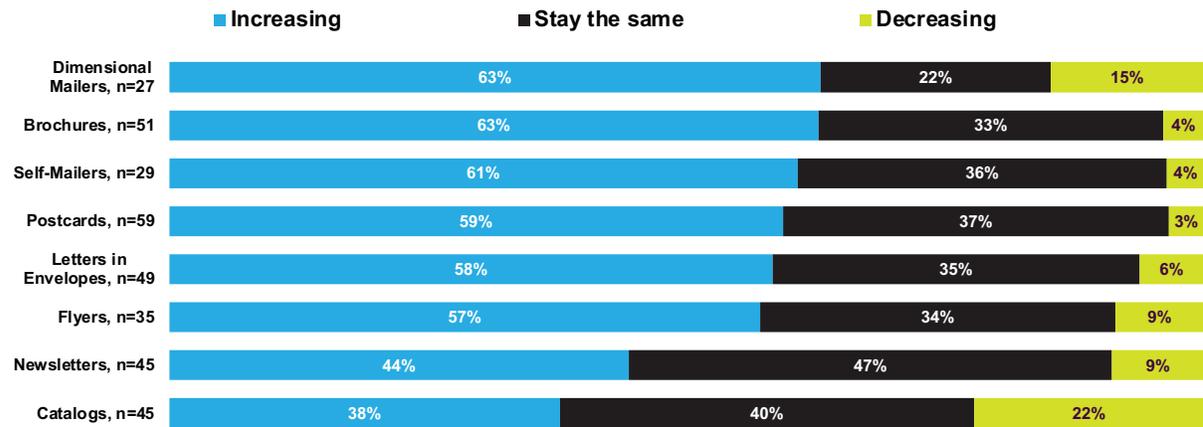
Innovations in digital printing, data analytics, and software have expanded direct mail features and possibilities, including personalization, embellishments, shorter order quantities, substrate options, and recipient targeting.

According to the latest [projections from Statista, direct mail annual advertising revenues in the U.S. will reach almost \\$13.2 billion by the end of 2023.](#)

Printed direct mail is a core component of many organizations' communications mixes because it delivers results. In a 2023 NAPCO Research survey of print providers that produce direct mail, more than half report increasing growth across many types, including dimensional mailers, brochures, self-mailers, postcards, letters in envelopes, and flyers (Figure 2).

Figure 2: Direct Mail Application Demand Trends

Q. Of the direct mail print applications you print, what are you expecting in terms of demand in the next 2 years?



n=70 Print providers that print direct mail
Source: NAPCO Research 2023



Increasing Demand for Personalization

NAPCO Research’s survey of print providers that produce direct mail also found that 56% report customer demand for personalization is increasing, and almost half the direct mail they produce includes personalized copy and images.

A different NAPCO Research survey of direct mail users indicates that personalization delivers direct mail results. NAPCO Research’s 2022 study, “Hitting the (re)Target Directly,” found that 96% of survey respondents that use personalized direct mail as part of their marketing strategy rate it as very/moderately effective.

In addition, respondents reported experiencing the following benefits from personalized direct mail compared to direct mail that is not personalized:

- Higher conversion rate.....69%
- Higher repeat purchase rate.....64%
- Higher customer lifetime value.....61%
- Improved marketing ROI.....60%
- Higher average order value.....57%

Boosting Performance with Digital Media

A more recent factor driving direct mail demand is the ability to boost its performance with digital media to create omnichannel campaigns. The goal of omnichannel marketing is to provide an integrated and unified customer experience across multiple communication channels in the customer’s buying journey. The idea is that presenting a unified message across every customer interaction will have more influence than a disconnected experience.

The U.S. Postal Service’s (USPS) Informed Delivery is motivating marketers to combine direct mail and digital media. This free service provides participants with a daily email that offers a digital preview of their incoming mail. In addition, marketers can customize interactive digital elements in the email message to present a unique offer, and a link to connect the recipient directly to a campaign landing page.

U.S. Postal Service Incentives

For more than a decade, the USPS has offered promotional discounts between 3% to 5% to encourage direct mail users to enhance the value and competitiveness of mail compared to other media. The annual promotion program offers mail discounts for direct mail campaigns that use emerging printing and marketing technologies like QR codes, tactile embellishments, personalization, voice assistants, and Informed Delivery. The USPS website offers a wealth of information on these promotions (www.usps.com/business/promotions-incentives.htm) that are creating customer incentives to use direct mail.

Integrating direct mail with personalization and digital elements can increase the value and return on investment for customers, while providing new revenue streams for their businesses. Direct mail is an attractive opportunity for print providers because a variety of market influences — from postal incentives to new features enhancing its ability to deliver results — continue to drive innovation, increase its effectiveness, and expand use by organizations.

7. THE RISE OF SHEETFED INKJET IN TRANSACTIONAL DOCUMENT PRINTING

Digital printing continues to transform production and output possibilities of transactional documents. Toner and inkjet presses enable transactional documents/statements, policies, contracts, and invoices to feature high levels of color and personalization. As the volume of printed transaction documents continues to decline (as organizations opt for digital alternatives), sheetfed inkjet is an attractive option.

The majority of sheetfed production inkjet presses can match the output quality of offset and digital color presses, while offering the productivity required to meet customer turnaround and job volume requirements. According to I.T. Strategies, [sheetfed production inkjet pages increased between 30% to 40% from 2021 to 2022. Of that, transactional pages accounted for about 20% of pages.](#)

As print volumes of transactional documents continue to decline, and as organizations push customers to paperless options, sheetfed production inkjet is an attractive alternative. These presses can meet the needs of organizations printing transactional documents on toner devices and those printing on webfed inkjet equipment, while offering application diversity to meet customer requirements for shorter-run work.

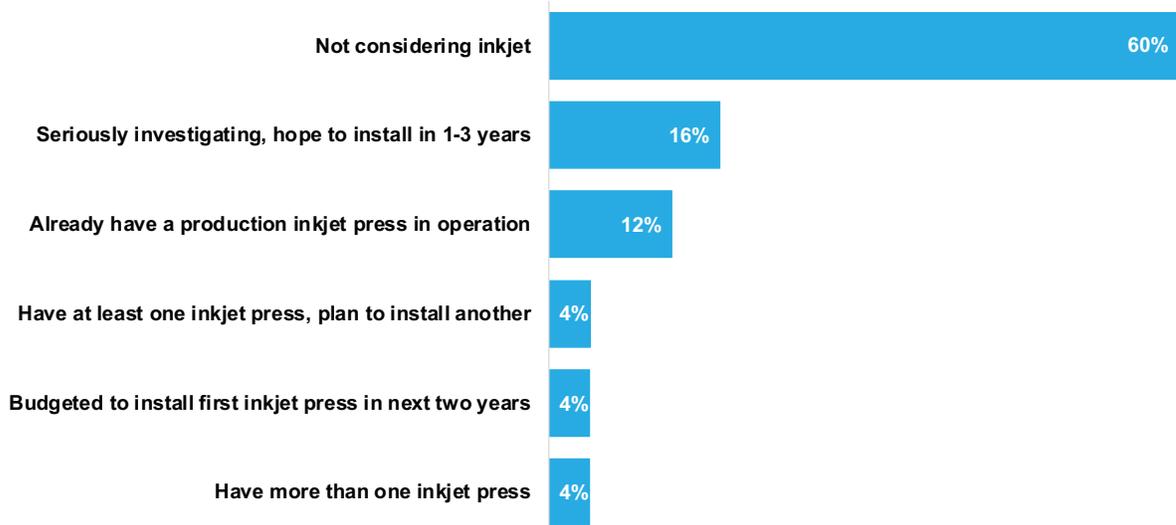
8. IN-HOUSE PRINTING OPERATIONS ADDING INKJET

In-house printing operations have a long history of pursuing technology to improve operating performance and communication effectiveness. Production color inkjet is a digital printing technology that offers in-plants new opportunities to serve their organizations. In-plants are investing in sheetfed inkjet because it offers affordable color printing, attractive running costs, smaller footprints, substrate flexibility, and enhanced productivity.

While digital printing is on the rise throughout the in-plant segment, inkjet technology is still relatively early in the adoption cycle. For in-plants, it is a major capital investment and not all in-plants have the necessary volumes to justify the technology. According to NAPCO Research's 2023 Print Business Outlook Series: Equipment Installations and Applications at In-plants, 40% of in-house printing operations either expressed plans to invest in inkjet or have already made the investment (Figure 3). Of those, 20% already have production inkjet, while 20% are seriously considering adding it, with 4% noting their organization is budgeted to add inkjet in the next two years.

Figure 3: In-plants Increasingly Eying Inkjet

Q. Which describes your in-plant’s strategy for adding a production inkjet press? (Not a wide-format inkjet printer nor inkjet addressing printer.)



n=154 In-plant printers

Source: Print Business Outlook Series: Equipment Installations and Applications at In-plants, PRINTING United Alliance 2023



Most in-plants are installing sheetfed technology. Based on the array of substrates now available, in-plant managers have leveraged the technology to diversify their offerings to include printing on coated, uncoated, synthetic, carbonless, and magnetic stocks. This means more applications moving into the in-plant. Users of inkjet technology highlight increased efficiency and productivity, affordability, quality, and substantially improved uptime versus toner technology. In addition, with real estate at a premium, inkjet has a substantially reduced footprint.

9. PHOTO PRODUCTS: A PROFITABLE INKJET APPLICATION

Production inkjet presses are a competitive platform for offering photo specialty products. Historically, photo products have been produced on offset or liquid toner presses, or with traditional chemically based silver halide photo processing. Today’s inkjet sheetfed and webfed presses are capable of producing stunning prints and allowing print providers new entry points into this growing application area.

According to market research firm Technavio, [the photo printing and merchandise market size is expected to increase to \\$7.40 billion from 2023 to 2028, and the market’s growth momentum will accelerate at a CAGR of 5.63%.](#)

There are several forces creating opportunities in photo specialty applications. The top one is that more than one trillion digital photos are taken annually by both consumers and professional photographers. This creates product demand. While photos are stored on digital devices and shared on social media, they continue to be printed for brochures and magazines, personalized photobooks,

postcards, calendars, yearbooks, children's books, and other types of customized print products. The quality and affordability of production inkjet, combined with the demand for printed materials incorporating photos, is generating a profitable business opportunity for print service providers.

Commercial printers have multiple options to serve the market, from acting as white label manufacturers — for firms like Shutterfly, Vistaprint, and Mixbook — to offering these services directly to customers.

Print providers looking to white label photo specialty printing applications must have the ability to meet potential partners' quality requirements and stringent service level agreements, as well as integrate with the order entry and shipping systems of the online storefront provider.

Commercial printers migrating into this product category need to have the right workflow — from order entry to shipment of the final product.

The photo market is a profitable growth market. Photo applications will continue to grow as smartphone users take more and more photos. Print service providers have multiple opportunities to participate in everything from white label manufacturing to specialty printing and photo-rich applications for existing clients. Inkjet quality, affordability, and reliability have made the photo market a profitable reality.

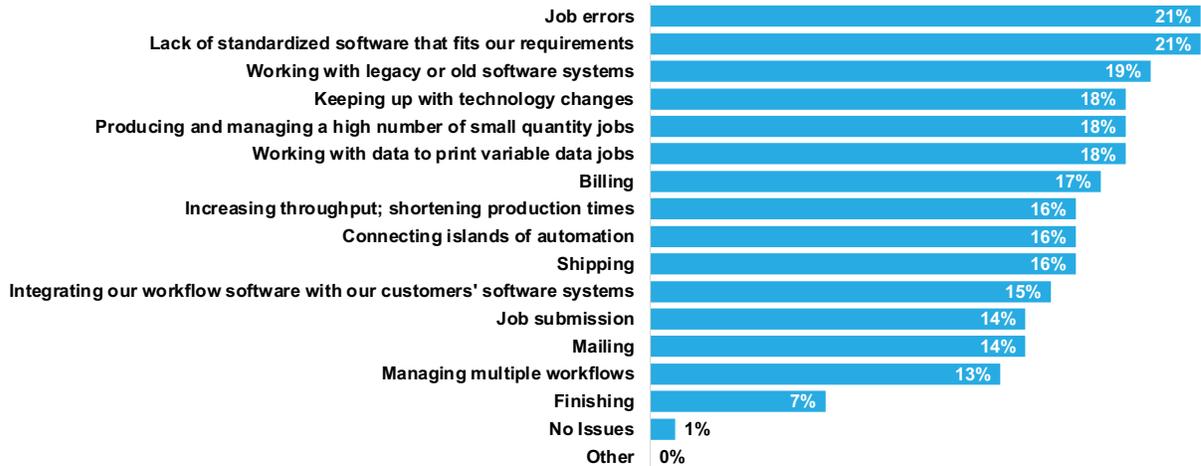
10. HARNESSING AUTOMATION TO GAIN A COMPETITIVE ADVANTAGE

Automation is a vital component for meeting customers' productivity and service delivery expectations. Customer demands for faster turnaround, shorter runs, lower costs, and better customer experiences combined with a focus on improving efficiency have print providers taking action to automate operations.

Automated workflows can often lead to higher revenue because they allow companies to produce higher volumes of work more efficiently. A 2023 NAPCO Research survey of commercial printers reports various points of inefficiencies in workflows (Figure 4) versus one or more dominant challenges. This finding points to the need to automate and explains why 66% of respondents in the same survey report taking action to automate their workflows.

Figure 4: Commercial Printer Workflow Pain Points

Q. Overall, what are your top THREE biggest pain points or inefficiencies in your current workflow?



n=104 North American commercial printers

Source: NAPCO Research Annual Commercial Print Industry Trends and Strategies Service, 2023



In the PRINTING United Alliance 2022-2023 State of the Industry, commercial printer respondents report making investments to increase productivity/efficiency (83.5%), increase production speed/decrease turn times (59.4%), and automate operations (50.4%).

In the year ahead, those organizations that invest in automation stand to gain substantial business and operational benefits, including:

- Removing production bottlenecks
- Lowering staff needs
- The ability to meet shorter deadlines
- Better printing device utilization
- Fewer manual interventions, reducing errors and unnecessary downtime
- Smart job batching to improve job efficiency and profitability
- Enhancing customer experiences through improved communications, better interactions, and more reliable service

Workflow automation offers print providers the opportunity to gain a competitive advantage by improving productivity, lowering costs, enhancing quality, reducing error rates, and enhancing customer experiences.

11. SUSTAINABILITY IS MORE THAN MARKETING

Recent NAPCO Research surveys of print users find sustainability is a key criterion when selecting a print provider, yet users don't view print as a sustainable. Consider the following:

- 80% of organizational decision makers consider sustainability to be a key factor in print buying decisions (Source: NAPCO Research Annual Commercial Print Industry Trends and Strategies Service, 2023)
- 91% of print users say printed materials produced by sustainable methods will be more important to their organization in the future (Source: NAPCO Research Annual Commercial Print Industry Trends and Strategies Service, 2023)
- 74% of print customers believe print is not eco-friendly (Source: *Propelling Your Business Forward in Everchanging Competitive Environment*, NAPCO Research 2022)

Print providers recognize the importance of sustainability, and 69% of commercial printers participating in NAPCO Research's 2023 Annual Commercial Print Industry Trends and Strategies Service survey indicate taking action to support and improve their organization's environmental sustainability initiatives.

To embrace real sustainability practices, print providers need to know what those are. Gary Jones, VP of environmental, health, and safety affairs for PRINTING United Alliance, believes sustainability is a framework for operating a business. He says the framework needs to include three key aspects of sustainability: people, planet, and profit.

There are many actions a printing operation can take to support environmental initiatives, including waste reduction, pollution prevention, clean energy, water conservation, and sustainable materials use. Whatever sustainability actions printing companies pursue, Jones advises to make them meaningful, as customers easily see through empty initiatives. He reports that organizations are hiring sustainability professionals to ask suppliers hard questions.

Jones recommends that print providers develop and share sustainability metrics that can be easily explained and tracked.

According to Jones, "The metrics include — but are not limited to — carbon emissions, solid waste generation and recycling, water consumption, energy consumption, emissions of volatile organic compounds and hazardous air pollutants, incorporation of recyclable substrates, using sustainable ink systems, employee injury and illness rates, and community activities."

Being able to explain what your company has done and plans to do, along with supporting metrics, provides a powerful message to customers, employees, and the community. Print customers also need to be educated about the recyclability of printed products and the role they play in the circular economy.

Digital printing can help contribute to less waste and, in turn, to more efficient and sustainable business models. It allows customers to print only what is needed, in shorter runs than traditional offset, while reducing waste and obsolescence, and eliminating the need for preprinted plates, forms, or chemicals. Some digitally printed materials can offer good deinkability, to help increase the ability to recycle it. In addition, it enables print service providers to produce targeted content that includes only what is necessary for the recipient, thereby allowing for lower page counts.

FINAL THOUGHTS

The year ahead offers print providers many opportunities and challenges to operational success and profitability. Charting the best path forward begins with understanding the most influential market, technology, and customer trends and their unique implications to operations. Use the trends, data points, and insights presented here to develop strategies and support decisions for investing in operations, equipment, staff, and market expansion.

WHO WE ARE

The Canon logo is displayed in white text on a black rectangular background.

About Canon U.S.A., Inc.

Canon U.S.A., Inc., is a leading provider of consumer, business-to-business, and industrial digital imaging solutions to the United States and to Latin America and the Caribbean markets. With approximately \$29.4 billion in global revenue, its parent company, Canon Inc., as of 2023 has ranked in the Top Five overall in U.S. patents granted for 38 consecutive years. † Canon U.S.A. is dedicated to its Kyosei philosophy of social and environmental responsibility. To learn more about Canon Production Printing Solutions, visit pps.csa.canon.com or call 877-623-4969.

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WHO WE ARE

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NAPCO Research can help with:

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- Opportunity discovery
- Market segmentation
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- User needs and wants
- Product features and functionality
- Content marketing strategy
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