



CONVERTING PRINTING INDUSTRY UNCERTAINTY INTO OPPORTUNITIES FOR SUCCESS

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■ TODAY'S SPEAKERS

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STATE OF THE INDUSTRY/ECONOMIC OUTLOOK

■ SOMETHING TO REMEMBER

“Always go on offense, defense rarely pays off.”

State of the Industry Participant responding to the question: What have you learned from the upheaval of the last three years?

We’ve been studying companies that have come out of the upheaval of the last three years strongest.

We’ve learned that despite fractured supply chains, unprecedented uncertainty, and the worst cost inflation in decades **while other were retreating into survival mode they moved ahead with capital investment, automation, labor force development, diversification, and other actions to build a sustainable competitive advantage.**

■ THE STATE OF OUR INDUSTRY

- The slowdown that started in early 2023 continues and is likely to extend well into 2024.
- Operating cost inflation has moderated but resistance to price increases has stiffened, limiting cost pass-through and ratcheting up the pressure on margins.
- Whether or not the current slowdown degenerates into a full-fledged recession, it will continue to deeply affect our industry, **creating winners who move aggressively to capture market share and talent and losers who retreat into survival mode, waiting for the economy to turn up and interest rates to turn down.**

■ GROWING PROFITABLY IN 2024 AND BEYOND

- **Embrace artificial intelligence as part of an all-out**, companywide focus on maximizing productivity. Five essential steps:
 1. Identify AI priorities
 2. Identify applications that address those priorities
 3. Evaluate the applications
 4. Train employees to capture the benefits of AI and avoid the pitfalls
 5. Learn to speak AI
- **Strengthen risk management** because the next market upheaval can come from anywhere.
- **Invest in workforce development**, particularly cross-training, and cultivate a company culture that attracts and retains the most productive employees.
- **Be data-driven** because success at any stage of the business cycle is all about the data.

■ THE MIDYEAR 2023 STATE OF THE INDUSTRY SURVEY

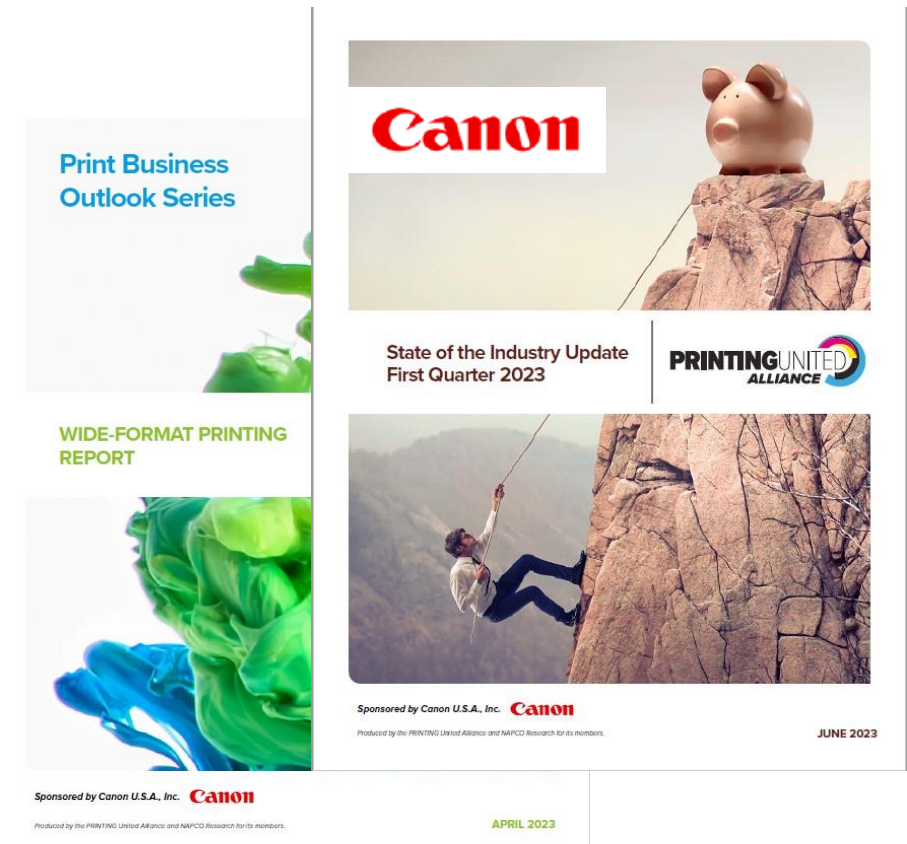
- **206 participants from across the printing industry.**
- Annual sales range from less than \$500,000 to more than \$500 million.
- 68.1% have diversified beyond their primary printing segment.

	Offer		As Primary		As Secondary	
Printing Segment	Number	Percent	Number	Percent	Number	Percent
Commercial printing	142	68.9%	103	50.0%	39	18.9%
Graphic and sign (wide-format) production	124	60.2%	31	15.0%	93	45.1%
Apparel decoration	65	31.6%	48	23.3%	17	8.3%
Package printing/converting	63	30.6%	15	7.3%	48	23.3%
Promotional product imprinting	49	23.8%	1	0.5%	48	23.3%
Functional printing	20	9.7%	8	3.9%	12	5.8%

■ STATE OF THE INDUSTRY AND PRINT BUSINESS OUTLOOK SERIES

All reports in the State of the Industry Series and Print Business Outlook Series are sponsored by Canon U.S.A., Inc.

- Results of our midyear 2023 survey will be published this month in the PRINTING United Alliance:
 - *State of the Industry Update*
 - *Print Business Outlook Report: Wide-Format Printing*
 - *Print Business Outlook Report: Commercial Printing*
- Alliance members can download the reports at **www.printing.org**.



■ WHERE WE ARE

Data are for the 206 participants to date in the midyear 2023 State of the Industry Survey.

Sales continued to grow but at a much slower rate and with much narrower breadth.

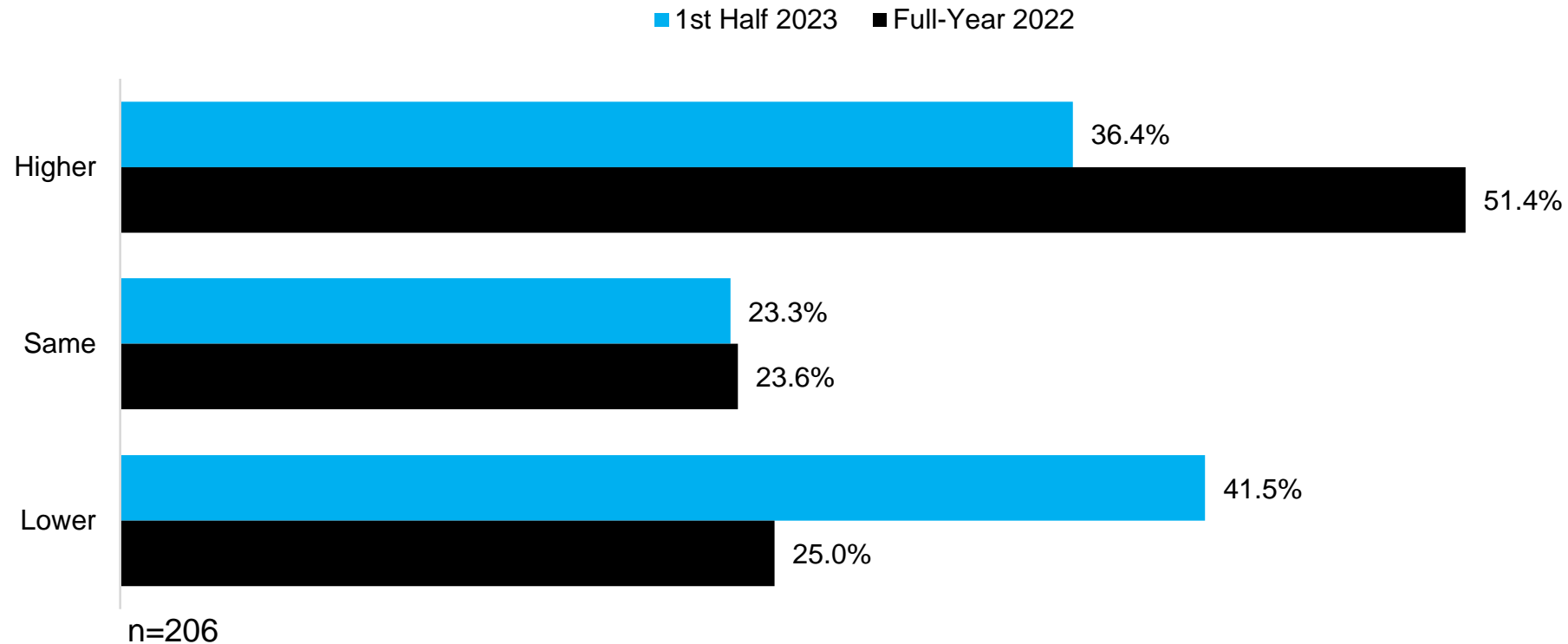
			Compared to Year Earlier		
Indicator	Period	Average	Increased	Same	Decreased
Sales	1 st Half 2023	2.6%	44.3%	22.2%	34.5%
	FY 2022	12.8%	79.2%	11.9%	8.9%
Operating cost inflation	1 st Half 2023	5.5%	80.0%	20.0%	0.0%
	FY 2022	11.1%	88.4%	11.6%	0.0%
Prices	1 st Half 2023	4.2%	64.4%	29.8%	5.8%
	FY 2022	11.4%	89.5%	9.8%	0.7%
Real (inflation-adjusted) sales	1 st Half 2023	-1.6%	37.6%	10.8%	51.6%
	FY 2022	1.9%	55.7%	10.2%	34.1%

n=206

MARGINS UNDER PRESSURE

Q: How does your pre-tax profitability compare with a year ago?

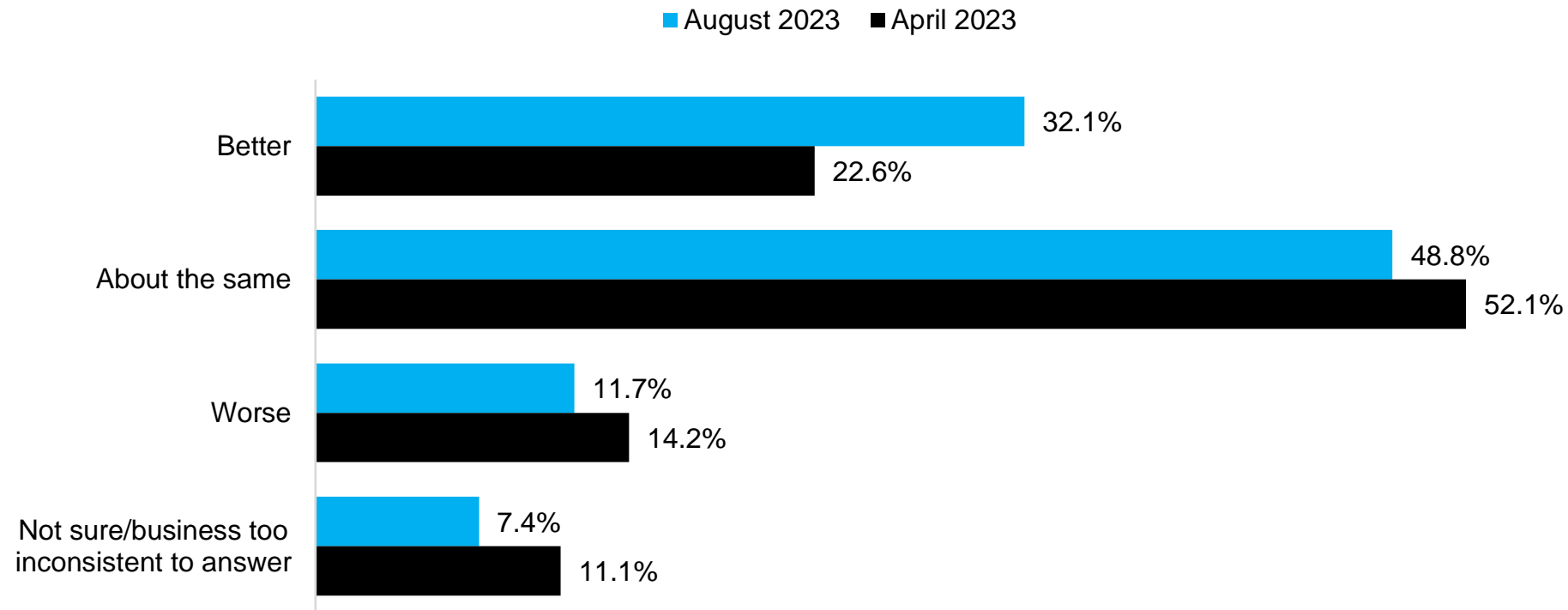
Where real sales go, profitability follows. Companies reporting an increase in profitability fell to 36.4% from 51.4% of our research panel and companies reporting a decrease rose to 41.5% from 25.0%.



■ CONFIDENCE INCREASES

Q: Apart from seasonal variation, how do you expect business conditions over the next three months to compare with current conditions?

More SOI participants – 32.1%, up from 22.6% last spring – expect business to improve during the three months ahead primarily because “recession fears seem to have



n=206

LITTLE CHANGE EXPECTED THROUGH YEAREND

Q: There is a lot of uncertainty. But approximately how do you expect your full-year 2023 sales, operating cost inflation rate, and prices to compare with 2022?

Indicator	Period	Average	Compared to Year Earlier		
			Increased	Same	Decreased
Sales	FY 2023(e)	2.2%	51.1%	19.3%	29.5%
	1st Half 2023	2.6%	44.3%	22.2%	34.5%
Operating cost inflation	FY 2023(e)	5.4%	80.6%	19.4%	0.0%
	1st Half 2023	5.5%	80.0%	20.0%	0.0%
Prices	FY 2023(e)	4.2%	69.9%	23.9%	6.3%
	1st Half 2023	4.2%	64.4%	29.8%	5.8%
Real (inflation-adjusted) sales	FY 2023(e)	-2.0%	39.2%	12.9%	48.0%
	1st Half 2023	-1.6%	37.6%	10.8%	51.6%

n=206

■ PRINTED PRODUCT OUTLOOK: HOW WE GOT THE DATA

- Survey covered more than 50 printed products.
- Asked for three years because a product's performance can vary significantly from year to year depending on sensitivity to the business cycle, the strength of industries served, pent-up demand, etc.
- Asked for expectations within a range because of the difficulty of forecasting three years out.

	Grow on Average per Year by ...						Flat	Decline on Average per Year by ...					
Product	20%+	20% to 16%	15% to 10%	9% to 7%	6% to 4%	3% to 1%	0%	1% to 3%	4% to 6%	7% to 9%	10% to 15%	16% to 20%	20%+
Books	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Direct Mail	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Promotional Products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

■ PRODUCT MARKETS EXPECTED TO BE STRONGEST

Product (Number Forecasting)	Projected Percent Change 2023-25		Grow			Flat	Decline
	Average Annual	3-Year (Compounded Annually)	6% or More	6% to 4%	3% to 1%		
T-shirts (183)	5.5% - 8.2%	17.3% - 26.8%	50.8%	18.6%	13.7%	15.3%	1.6%
Hats (181)	4.9% - 7.4%	15.5% - 24.0%	42.5%	21.5%	14.4%	19.9%	1.7%
Sweatshirts (183)	4.4% - 6.7%	13.8% - 21.3%	38.8%	21.9%	16.4%	21.3%	1.6%
Performance Wear (181)	4.0% - 6.2%	12.5% - 19.6%	32.6%	28.7%	15.5%	21.5%	1.7%
Outerwear (178)	3.9% - 6.0%	12.2% - 19.0%	33.7%	20.8%	20.8%	23.0%	1.7%
Wall/Architectural/Building Graphics (114)	3.9% - 5.7%	12.2% - 18.2%	29.8%	21.1%	13.2%	32.5%	3.5%
Banners/Soft Signage/Flags (141)	3.7% - 5.7%	11.6% - 18.2%	29.8%	19.9%	22.0%	24.8%	3.5%
Window Graphics (132)	3.7% - 5.6%	11.4% - 17.8%	31.1%	22.0%	18.2%	24.2%	4.5%
Folding Cartons (69)	3.7% - 5.6%	11.4% - 17.8%	34.8%	21.7%	13.0%	24.6%	5.8%
Promotional Products (123)	3.6% - 5.6%	11.0% - 17.7%	30.9%	21.1%	17.1%	25.2%	5.7%

■ PRODUCT MARKETS EXPECTED TO BE WEAKEST

Product (Number Forecasting)	Projected Percent Change 2023-25		Grow			Flat	Decline
	Average Annual	3-Year (Compounded Annually)	6% or More	6% to 4%	3% to 1%		
Floor Graphics (124)	0.8% - 2.1%	2.3% - 6.5%	9.7%	18.5%	19.4%	37.9%	14.5%
Blankets (172)	0.8% - 1.8%	2.3% - 5.4%	7.6%	9.3%	17.4%	60.5%	5.2%
Bus. Cards/Envelopes/Letterhead (157)	0.6% - 1.8%	1.8% - 5.5%	8.9%	11.5%	17.8%	45.9%	15.9%
Financial (136)	0.6% - 1.3%	1.7% - 4.0%	5.9%	13.2%	7.4%	64.7%	8.8%
Manuals/Directories (128)	0.3% - 1.7%	0.9% - 5.3%	9.4%	12.5%	19.5%	38.3%	20.3%
Fine Art/Art Reproduction/Photo (102)	0.0% - 0.6%	0.0% - 2.0%	2.9%	6.9%	10.8%	70.6%	8.8%
Periodicals/Catalogs (139)	-0.2% - 1.0%	-0.7% - 2.9%	5.8%	12.9%	14.4%	43.2%	23.7%
Swimwear (169)	-0.7% - 0.1%	-2% - 0.2%	3.0%	3.0%	9.5%	73.4%	11.2%
Statement/Transactions (115)	-0.7% - 0.1%	-2.1% - 0.2%	1.7%	5.2%	11.3%	64.3%	17.4%
Face Masks (169)	-8.4% - -5.4%	-23.1% - -15.3%	1.2%	2.4%	3.6%	31.4%	61.5%

■ MUST DO: EMBRACE ARTIFICIAL INTELLIGENCE

- AI can automate production and so must be part of an all-out, companywide effort to maximize productivity.
- **Revolutionary because of its ability to automate what we never could automate before, to enhance outcomes through learning by doing, and to support superior decision-making companywide.**
- “I have my marketing department using and learning about AI as much as they can, my designers have been using the image generators, and I have my website coder looking to see how she can use it. I have really pushed them to learn and experiment with it. **AI is the future for a lot of things, and I am continually pushing our people to work with it. I continually look for ways to automate or use AI anywhere we can.**” SOI participant

■ AI: WHAT'S THE BIG DEAL?

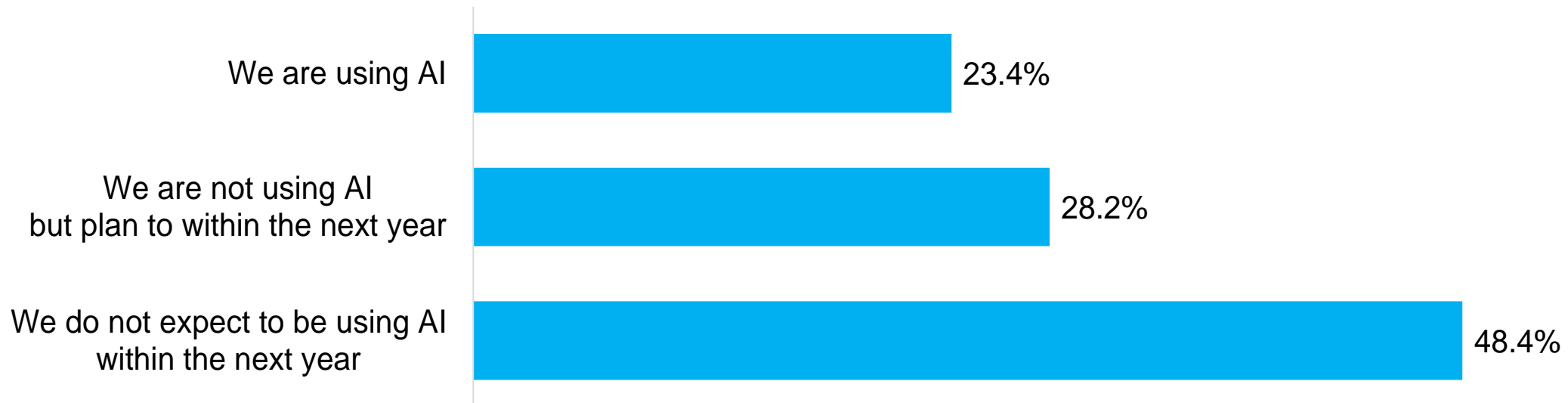
Through machine learning and natural language processing, AI applications:

- Don't just assemble data on customer behavior and generate a forecast, they learn to forecast with greater accuracy as they are exposed to more data.
- Don't just summarize results of a marketing campaign, they analyze responses, behaviors, and preferences of a target audience, suggesting how content, communication methods, and timing can be improved.
- Don't just generate boilerplate responses to customer questions, they generate custom, to-the-point responses based on analysis of comparable questions.

■ ARTIFICIAL INTELLIGENCE

Q: Which statement below is true for your company?

Slightly less than one-quarter (23.1%) of SOI participants have incorporated AI into their businesses, including indirectly through investments in workflow automation systems and management integration systems (ERP, CRM, MIS, etc.) with AI embedded.



■ HOW SOI PARTICIPANTS ARE USING AI

- **Analysis of keywords and phrases in communications with customers** (email, chats, calls, etc.) to “measure the impact of every customer interaction and ‘score’ that interaction, supporting early identification of quality issues and potential customer needs leading to product innovation.”
- **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, and “our entire sustainability page,” and to summarize “long articles and email threads.”
- **Generate code from text prompts** to create fully functional web applications.

■ ARTIFICIAL INTELLIGENCE: WHAT WE NEED TO KNOW

These sources are a good place to start

- **“Artificial Intelligence for Small Business: The Complete Guide,”** Mike Kaput, marketinginstitute.com
- **“AI for Small Business: A Beginner’s Guide,”** Microsoft Teams 365, microsoft.com
- **“The best AI productivity tools in 2023,”** Miguel Rebelo, zapier.com
- **“12 Tools for Small Businesses to Make Teams More Efficient,”** Mahima Dua, mailmodo.com.
- **“10 Best AI Tools for Startups & Small Businesses in 2023,”** Alex York, clickup.com.
- **“Artificial Intelligence as a Service (AlaaS),”** Kinza Yasar, techtarget.com.
- **“10 Best AI Tools for Startups & Small Businesses in 2023,”** Alex York, clickup.com

■ ARTIFICIAL INTELLIGENCE: WHAT WE NEED TO KNOW (cont.)

These sources are a good place to start

- **“6 Ways Small Business Owners Can Get Their Employee to Use AI,”** Nicholas Leighton, entrepreneur.com
- **“The essential small business guide to generative AI,”** Stacey Hartman, godaddy.com
- **“GoDaddy’s AI prompt library — the best AI prompts for small businesses,”** godaddy.com
- ***The Business Case for AI: A Leader's Guide to AI Strategies, Best Practices & Real-World Applications***, Kavita Ganesan
- ***AI for Small Business: Your Roadmap to Fuel Innovation & Amplify Profits***, Harrison Painter

■ AI APPLICATIONS FOR EVERYTHING

- **Lavender.ai.** Creates, evaluates, and upgrades content from blog posts to product descriptions to marketing campaigns by evaluating what's resonating with the target audience and what isn't.
- **Zia.** Generate sales forecasts, analyze sales trends and customer behavior, and automate sales activities such as lead classification, assignment, and follow-up.
- **Sniper AI.** Supports HR functions ranging from matching resumes with job descriptions, candidate selection, and interview scheduling to evaluating employee engagement levels, satisfaction, and performance metrics.
- **Lumen5.** Video application that creates short and engaging videos from scratch (or re-purpose written content into videos) for education, news, entertainment, or marketing purposes.”.

■ AI APPLICATIONS FOR EVERYTHING (cont.)

- **Otter.ai.** Transcription tool that converts audio files such as presentations and podcasts into text and records online meetings, creating complete transcripts, key takeaways, and action items.
- **Bricabrac.** Creates web applications from text inputs with no or minimal coding.
- **Crystal Knows.** Identifies personality type and customizes communication, including tone of voice and choice of words, to the preferences and values of that personality type.
- **SecondBrain.** Allows users to create bots specific to their businesses, clients, and industries.

■ STEP 1: IDENTIFY YOUR AI PRIORITIES

- How would my company most benefit from AI?
- Mike Kaput, “Artificial Intelligence for Small Business: The Complete Guide,” has a straightforward answer:

Ask what tasks – e.g., creating website content, responding to customer questions, forecasting customer demand – would benefit most from generative AI’s ability to automate tasks we’ve never been able to automate before, create, analyze, and communicate.

- Think of it this way: Every hour saved by applying generative AI to a cumbersome task is an hour that can be reallocated to activities most important to the company’s long-term success.

■ STEP 2: IDENTIFY AI APPLICATIONS

Source: "The best AI productivity tools in 2023," Miguel Rebelo, zapier.com.

Function	AI Apps	Function	AI Apps
Chatbots	ChatGPT, Bard, HuggingChat	Scheduling	Reclaim, Clockwise, Motion
Content creation	Jasper, Copy.ai, Anyword	Email inbox management	SaneBox, EmailTree
Grammar checkers and rewording tools	Grammarly, Wordtune, ProWritingAid	Slide decks and presentations	Decktopus, Beautiful.ai, Slidesgo
Video creation	Descript, Wondershare Filmora, Runway	Research	genei, Aomni
Image generation	DALL·E 2, Midjourney, Stable Diffusion	3D modeling	Spline AI, 3DFY.ai, Meshcapade
Note-taking	Mem	AI agents	AI Agent, AgentGPT, HyperWrite
Transcription and meeting assistants	Fireflies, Airgram, Krisp	Automation	Zapier

■ STEP 3: EVALUATE APPLICATIONS

- **Ease of use.** How user-friendly and intuitive is the interface?
- **Training and support.** What will be available: videos, training sessions, documentation? How strong is customer support?
- **Integration.** Applications must be able to extract data from a company's, CRM, ERP, communications, human resource management, and other core systems.
- **Scalability.** Can the application grow with the business?
- **Price.** "Strike a balance between cost and value. It should bring a good return on investment while not straying too far from your budget limits."

Artificial Intelligence as a Service

Outsourcing AI allows "companies to experiment with AI for various purposes without a large initial investment and with lower risk," Kinza Yasar, "Artificial Intelligence as a Service (AlaaS), techtarget.com.

■ STEP 4: TRAIN EMPLOYEES

Like all technologies, AI has benefits and pitfalls.

- **Define rules.** Establish and communicate “a clear and accessible policy, which should outline how AI can and should be used within an organization, which platforms are approved for its use and who is authorized to leverage it.”
- **Explain why AI.** Without getting bogged down in jargon, explain the applications being introduced, what they do, why them, why now, and how they will affect jobs.
- **Train employees who will be using AI in data analysis.** “The last thing you want is a team blindly inputting information and simply trusting the resulting analyses.”

■ STEP 4: TRAIN EMPLOYEES

- **Learn how to speak AI.** Generative AI applications respond to the text and image prompts we enter, with the output only as good as the prompts input.
- **Monitor advances.** Set up a team to monitor AI developments, including new applications, upgrades, uses, and challenges.
- Hartman adds two more key actions:
 - Understand that generative AI applications “**may save information that a user enters, so avoid entering any commercially sensitive or proprietary information in your prompts.**”
 - AI can misinterpret prompts so “**it is crucial to check and review the output of AI tools.**”

■ KEY STEP 5: LEARN TO SPEAK AI

- Draw on resources such as “GoDaddy’s AI prompt library — the best AI prompts for small businesses,” godaddy.com.
- **The library organizes prompts into categories such as business operations, content creation, customer support, digital marketing, productivity, sales, SEO, and social media.**
- GoDaddy also provides beginner’s guides for ChatGPT, Google Bard, and Microsoft Bing, as well as variable tutorials on topics such as the risks of chatbots.

■ MUST-DO: STRENGTHEN RISK MANAGEMENT

What have you learned from the upheaval of the last three years?

“No matter how well your business is doing or how well it is run, it can turn in an instant.”

“Always stay nimble, efficient, and able to pivot quickly. Have a plan, a risk-assessment strategy, and implementation plan.”

State of the Industry participants

■ CALCULATE KEY RISK INDICATORS

- Where KPIs measure a company's progress toward its goals, KRIs measure the risks that may get in the way.
- **“You can't discuss performance without discussing risk – they're like two sides of the same coin,”** Bernard Marr
- Develop KRIs by answering these questions:
 1. What are my company's primary goals?
 2. Which KPIs best track progress toward those goals?
 3. What major risks could prevent attaining the goals?
 4. Which metrics will most effectively monitor those risks, providing a heads-up early enough to take preventive action?
- Evaluate and refine regularly because risks change.

Sources

- “How Do You Develop Key Risk Indicators (KRIs)? And how do they differ from KPIs?,” Bernard Marr, bernardmarr.com
- “How to Develop Effective Key Risk Indicators + Best Practices for 2023,” secureframe.com

■ CALCULATE CUSTOMER HEALTH SCORE

- “The point of customer health scoring is to enable your team to improve the company’s relationship with each customer in a logical, mutually beneficial way,” Conor Bond.”
- Bond’s key steps:
 1. **Define the objective.** What do you want your customer health scores to capture?
 2. **Identify metrics or predictive signals.** Which metrics most closely reflect your objective?
 3. **Assign weights to signals.** Some metrics will be more important than others.
 4. **Create a scoring system.** It could be a numeric range such as 0-10 or 0-100, letter grades, or color coding.
 5. **Share results with appropriate staff and act on the scores.**

Sources

- “Why You need Customer Health Scoring (& How to do It Right!),” Conor Bond, wordstream.com.
- “What Is Customer Health Score & How to Use It to Measure Customer Retention,” Clint Fontanella, blog.hubspot.com

■ STRESS TEST: WORST-CASE SCENARIO ANALYSIS

- What if our most important client reduces spending with us by 20.0% or elevated interest rates slam our major market? How could we minimize the damage?
- Jacob Kirby, “How to ‘Stress Test’ Your Small Business,” recommends:
 - **Creating a contingency strategy for every client who accounts for more than 30% of sales or gross profit.**
 - Remembering that stress testing is important to securing credit during a downturn because banks will “analyze your ability to withstand adverse conditions every time that you apply for a loan.”
- **Worst-case outcomes may be unlikely. But unlikely things happen during economic downturns. It is best to be prepared for them.**

Sources

- “How to ‘Stress Test’ Your Small Business,” Jacob Kerby, rvrteam.com
- “How to Stress Test Your Small Business,” Bernadette Abel Kapitus, kapitus.com

■ MUST DO: WORKFORCE DEVELOPMENT

What are you doing to increase profitability?

- “We are developing a well-rounded employee offering. **If all things are equal, what makes us the employer of choice? Give them reasons to choose us.**”
- “**Ensure team members are properly cross trained** throughout the organization. Focus on providing a good working environment and competitive pay to keep great people. **We have worked to have a backup for every position throughout the company.** We are also providing increases to all qualifying employees and looking to improve benefits over the next 1-4 years.”
- “**Focus on culture.** Ensure all employees know their value. We are training all employees on “8 Wastes” and mid-managers on all things managing. Make it clear what we expect from all employees, specifically mid-managers.”

■ PRIORITIZE COMPANY CULTURE

- **Company culture is not some soft, feel-good concept but rather a foundation for coming out of economic downturns stronger than we went in.**
- The clarity and stability a strong culture provides boosts productivity and employee engagement by helping staff deal with the uncertainty, distractions, and stress that downturns create.
- Key components:
 1. Frequent, clear communication about setbacks as well as successes.
 2. Maintaining employee recognition programs.
 3. Maintaining employee development opportunities.

Sources

- “How to Maintain a Strong Corporate Culture During a Downturn,” Sebastien Ricard, cmswire.com.
- “6 Dos and Don’ts: Managing Employee Moral In a Recession,” Laura Saracho, blog.gonus.ly
- “Employer Branding: Definition, Process, Strategy, Measurement and Resources,” Ben Slater, beamery.com

■ COMPANY CULTURE: RUN WITH FORMULA 1'S BEST

Source: "Number One in Formula One," Anita Elberse, hbr.org

- We can learn a lot about company culture and leadership from the top team in Formula One racing, according to Anita Elberse, professor, Harvard Business School.
- Among the lessons learned from Toto Wolff, team principal, who has led Mercedes-AMG Petronas to "the longest winning streak the sport has ever seen" and "every reason to claim the title of most successful team in the history of F1 – and maybe all of sports":
 1. "Set the highest standards – for everyone."
 2. "Put people front and center."
 3. "Analyze mistakes – even when winning."
 4. "Foster an open, no-blame culture" (which is not a no-accountability culture).
 5. "Relentlessly battle complacency."

■ BUILD A COMPELLING EMPLOYER BRAND

- Quality employees will become available as the downturn persists and companies shake out, but there will be plenty of competition for them.
- Win the competition by developing a compelling employer brand.
- **Our employer brand should distinguish us in the minds of the most desirable job candidates**, just as our company brand should distinguish it in the minds of the most desirable clients and prospects.
- We either define our employer brand or others -- employees, former employees, job candidates, competitors, etc. – will.

Source

“Employer Branding: Definition, Process, Strategy, Measurement and Resources”

Ben Slater, beamery.com

■ ELEMENTS OF A COMPELLING EMPLOYER BRAND

- **An easy-to-navigate company career site, optimized for mobile.**
More than job openings, includes our vision, mission statement, DEI initiatives, and why what we do matters to our clients and community.
- **An employee value proposition.** “The unique policies, programs, rewards and benefits that you offer candidates.”
- **Content, especially employee generated.** Videos, blogs, podcasts, infographics, etc., that educate job seekers about our company.
Employee videos about:
 - What attracted them to the company and why they have stayed.
 - Their career path and satisfaction derive from their jobs
 - What distinguishes us from other places they have worked.

“A strong employer brand can reduce the cost per hire by as much as 50% ... and reduce turnover by as much as 28%.”

“Employer Branding: Definition, Process, Strategy, Measurement and Resources,”
Ben Slater, beamery.com

■ BE DATA DRIVEN

Success at any stage of the business cycle is now all about the data. Data-driven companies:

- **Treat data as a business asset**, recognizing its value in uncovering how client preferences are changing, whether a new production process is meeting expectations, which marketing campaign shows the most promise, etc.
- **Recognize data's value in reducing risk** by replacing gut instinct with hard evidence, which is critical in our industry, where the gamut of opportunity is expanding but the margin for error is shrinking.
- **Ensure “all departments share the same sources of truth and work toward the same shared metrics,”** Tom O'Neill, “11 Tips to Become a Truly Data-Driven Company.”

Sources

- “11 Tips to Become a Truly Data-Driven Company,” Tom O'Neill, sisense.com
- “6 Ways Small Businesses Can Become More Data Driven,” Larry Alton, smallbiztrends.com
- “6 Steps to Build a Data-Driven Company,” Toni Sekinah, thenextweb.com
- *Big Data for Small Businesses*, Bernard Marr, Founder and CEO, Advanced Performance Institute

SALES PER EMPLOYEE

Figures are for SOI participants.

		Average 2022 Sales per Employee		
2022 Sales	Number	Low	Midrange	High
All	280	\$159,961	\$172,582	\$185,625
\$1 million or less	51	\$93,627	\$106,098	\$118,627
\$1 million+ to \$3 million	63	\$134,563	\$147,794	\$161,111
\$3 million+ to \$5 million	30	\$158,333	\$170,333	\$182,500
\$5 million+ to \$10 million	46	\$177,250	\$190,152	\$203,261
\$10 million+ to \$20 million	38	\$192,184	\$204,513	\$217,105
\$20 million+ to \$40 million	29	\$207,017	\$220,172	\$233,621
\$40 million+	22	\$235,295	\$246,591	\$261,364

■ PRINTING UNITED ALLIANCE KEY FINANCIAL RATIOS STUDY

A new survey of the vital-few financial metrics

Metrics

1. Gross Sales	5. Factory/Production Overhead	9. EBITDA
2. Outside Materials and Services	6. Gross Profit	10. Employees
3. Total Payroll	7. Selling Expenses	11. Sales Personnel
4. Factory/Production Payroll	8. Administrative Expenses	12. Accounts Receivable

Ratios Calculated

1. Outside Materials and Services/Sales	8. Factory Overhead/Value Added	15. EBITDA/Sales
2. Value Added/Sales	9. Gross Profit/Sales	16. EBITDA/Value Added
3. Payroll/Sales	10. Gross Profit/Sales	17. Sales per Employee
4. Payroll/Value Added	11. Selling Expenses/Sales	18. Value Added per Employee
5. Factory Payroll/Sales	12. Selling Expenses/Value Added	19. Sales per Salesperson
6. Factory Payroll/Value Added	13. Administrative Expenses/Sales	20. Value Added per Salesperson
7. Factory Overhead/Sales	14. Administrative Expenses/Value	21. Average Receivables Days Outstanding

■ KEY FINANCIAL RATIOS STUDY (cont.)

A new survey of the vital-few financial metrics

- Participants will receive a report on the complete survey results.
- All responses will be strictly confidential.
- For added security each participant will be assigned a **four-digit participant code**. **Only that code, never a name, company name, email, or any personal information will appear on the survey.**
- **Results will only be available to participants.**
- Participation begins by completing the brief Key Financial Ratios Participant Profile at www.research.net/r/KFRProfile

■ IN THEIR OWN WORDS: WHAT ELSE SHOULD WE KNOW?

We close each State of the Industry Survey with an open-ended question:

What else do you want us to know about the industry, your business, or anything on your mind?

- “There is a big transition as customers demand **more sustainable production.**”
- “The adoption and acceptance of **online print procurement** is going to be the largest differentiator in terms of growth. Companies that lag or fail to invest in automation that extends to the client level will see declines in sales and growth rates.”
- “Labor shortages are not going away anytime soon,” so “**automate, automate, automate everything that can be automated.**”
- “**We will innovate faster.** We plan to use more tech such as **AI to improve and advance.**”

■ IN THEIR OWN WORDS: WHAT ELSE SHOULD WE KNOW? (cont.)

What else do you want us to know about the industry, your business, or anything on your mind?

- **“We are watching trends carefully and preparing for their impact even when our business is not feeling the effects.”**
- **“Be prepared to move before the market forces your hand.”**
- **“We have worked over the past five years to diversify our offerings** so we are not dependent on one revenue source, and it really helped our performance over the past two.”
- **“We continue to focus on production automation and the need to teach clients commercial printing.** Many designers have no clue how to convert from the screen to paper or other substrates

DEFINING TRENDS AND OPPORTUNITIES FOR SUCCESS

ABOUT NAPCO RESEARCH

- Division of NAPCO Media, parent company of *Printing Impressions*, *In-Plant Impressions*, *Packaging Impressions* and *Wide-Format Impressions*
- Capabilities
 - Strategic Content
 - Market Intelligence
 - Market Sizing & Forecasting
 - Consulting Engagements
 - Sales Training
 - Speaking Engagements
 - Build Training Programs



NAPCO RESEARCH/PRINTING UNITED ALLIANCE AND ECONOMICS TEAM



Nathan Safran
Vice President, Research

- Former Forrester Research Analyst
- Deep experience designing custom research solutions that solve business problems
- Research cited in Wall Street Journal, Reuters and Fortune Magazine



Lisa Cross
Principal Analyst

- 20+ year print industry research, analysis and reporting experience
- Award winning industry journalist
- Extensive experience using research to solve customer business challenges



Andy Paparozzi
Chief Economist

- Former NAPL Lead Economist
- Developed *State of the Industry* research series and *Capital Investment Report*
- Internationally in-demand public speaker on economic factors impacting the print industry



Cory Francer
Analyst

- Packaging industry specialist
- Served as editor-in-chief of *Packaging Impressions* for seven years
- More than a decade of experience as a professional reporter



Evan West
Data Analyst

- Experienced data analyst with deep trends and data analysis experience
- Skilled in analysis of business problems to drive revenue producing outcomes
- Skilled big-data practitioner



Onamica Dhar
Economist

- Experienced in economic analysis, forecasting, and reporting.
- Former survey analyst at the Center for Supply Chain Management, Marquette University.

RECENT RESEARCH REPORTS



**Direct Mail and Digital Media:
A Winning Omnichannel
Marketing Combination**



RETAIL LEVEL TECHNOLOGY INNOVATION IS
TRANSFORMING CONSUMER PERSONALITY TRACKING,
ATTRIBUTION, EFFECTIVENESS, POLICY, COMPLIANCE,
AND OPPORTUNITIES FOR PRINT PROVIDERS.

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**Direct Mail: Delivering
Strong Opportunity for
Commercial Printers**



Sponsored by Canon U.S.A., Inc., **Canon**

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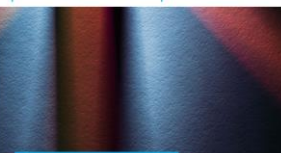
**Delivering on Customers'
Top Desires with Optimized
Wide-Format Production**



**Web Portals, New Path
to Print Profitability**



**Converting New Customer
Dynamics & Preferences
into Print Sales**



**Production Digital
Printing 2023:
Navigating the Year Ahead**



**CorelDRAW
GRAPHICS SUITE**

Industry report:
How the printing industry leverages
design software to maximize efficiency
and reduce waste.



**Convergence
in Print:
A SHIFT TO THE NEW NORMAL**



**Critical Considerations
When Evaluating
B2 Digital Production**



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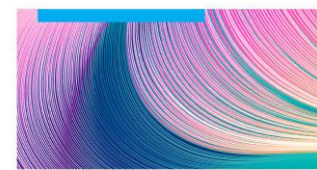
**Who Buys Wide-format
Display Graphics:
How, from Whom, and Why**



**How Packaging Materials
and Processes Are Driving
Sustainability Decisions**



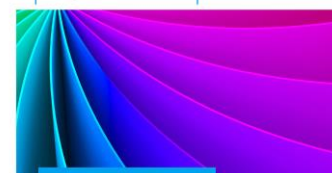
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a service of NAPCO MEDIA



**Enhancing Book Publishers'
Ability to Respond to
Changing Market Demands**



**Enhancing the Digital
Label Opportunity
How Digital Inkjet Printing is
Creating New Possibilities**



Canon

ENHANCING THE PRINT
CUSTOMER CONNECTION
DELIVERING CLIENT
EXPERIENCES THAT
BUILD COMPETITIVE
ADVANTAGE



A NAPCO Research Study and White Paper
Sponsored by Canon U.S.A., Inc.

■ PRINTING INDUSTRY MACRO FORCES

1. The Lines Between Print Market Segments Redrawn
2. Artificial Intelligence Is Making Its Mark
3. Competing for Staff in Difficult Labor Market
4. Print and Digital Media, Better Together
5. A New Breed of Print Buyer
6. Sustainability is More than Marketing Speak
7. E-commerce is Not Optional
8. Automation: Vital to Profitability
9. Mergers and Acquisition an Option for Expansion and Growth

TOP TRENDS

■ 1. LINES BETWEEN PRINT MARKET SEGMENTS REDRAWN

56% of commercial printers moving into adjacent print markets*

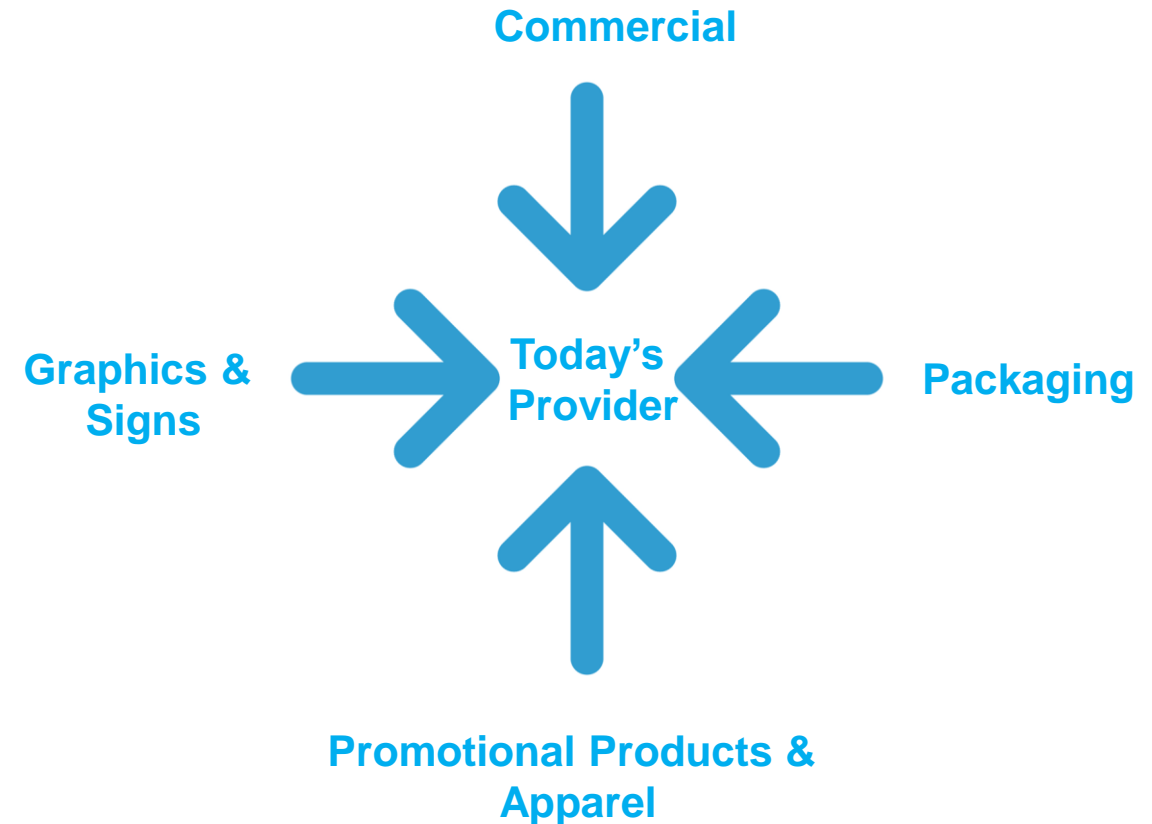
69% of sign and display graphic providers moving into adjacent print markets**

*n=104 Commercial Printers

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

**n=70 Sign and Display Graphic Providers

Source: Who Buys Sign and Display Graphics, NAPCO Research 2023



■ FORCES DRIVING SEGMENT CONVERGENCE

- Digital technology lowering entry barriers to enter adjacent markets
- Finding new sales/revenue sources 85%*
- Digital media reducing demand, 63% of print providers report customers decreasing use of print**
- More market and price competition
- Move to expand services to win customer share



Photo licensed under CC BY-SA-NC

*n= 73 Sign and display graphic providers; Source: Who Buys Sign and Display Graphics?, NAPCO Research 2023

**n=104 Commercial printers; Source: NAPCO Research Annual Commercial Print Trends and Strategy Service, 2023

■ HIGH CONFIDENCE IN PRINTERS FOR SERVICES

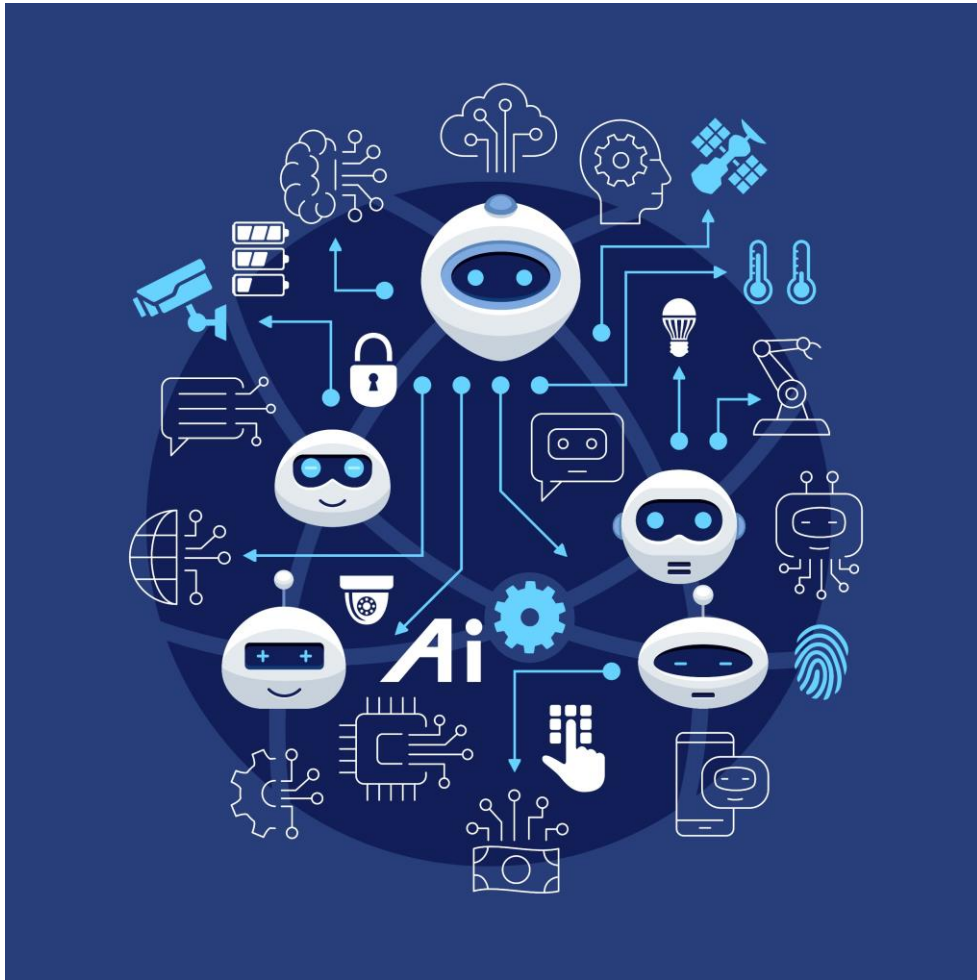
Q. Rate your level of confidence in using a print provider for the following services.

	Extremely/Very Confident	Somewhat Confident	Slightly Confident	Not Confident at All
Design services	79%	18%	3%	0%
Marketing services	73%	23%	4%	0%
Fulfillment	73%	19%	8%	0%
Promotional products	72%	20%	8%	0%
Signage	71%	24%	5%	0%
Video	69%	19%	9%	3%
Email marketing	67%	25%	7%	1%
Website development	66%	19%	12%	3%
Mailing	62%	30%	7%	1%

n=75 Communication buyers and influencers

Source: *Propelling Your Business Forward in an Everchanging Competitive Environment*, NAPCO Research 2022

2. ARTIFICIAL INTELLIGENCE IS MAKING ITS MARK



Credit: Getty Images

Definitions

- **Artificial intelligence (AI)**, the ability of a digital computer or computer-controlled robot to perform tasks commonly associated with intelligent beings.
- **Generative AI** is a category of AI algorithms that generate new outputs based on the data they have been trained on.

AI can automate prepress, file analysis, color correction, image enhancement, order management, job routing, scheduling and quality control to reduce turnaround time, minimizes errors, ensuring a smoother production process.

Integrating AI into print management software tasks such as estimating, quoting, and job tracking can be automated, reducing manual labor and saving time.

Many other applications, including:

- **Smart layouts**
- **Press monitoring and adjustments**
- **Job routing**
- **Workflow automation**
- **Targeted marketing**
- **Better security**

ARTIFICIAL INTELLIGENCE IN INDUSTRY NEWS

Adobe Announces All New AI-Powered Creative Cloud Release

Wednesday, September 13, 2023 09:02 AM

 [Adobe Announces All New AI-Powered Creative Cloud Release](#)



- Firefly-powered generative AI capabilities now natively integrated into Photoshop, Illustrator and Adobe Express
- New Firefly standalone web application and Adobe Express Premium now part of Creative Cloud plans
- Creative Cloud, Firefly and Express Premium plans now include Generative Credits

Printing Impressions



SOFTWARE

Hybrid Software Group Company Granted US Patent for AI-Enabled DFE

September 27, 2023 at 1:25 pm

Global Graphics Software, a Hybrid Software Group company, has been granted a patent for AI-enabled smart digital front end software.

Printing Impressions



BUSINESS MANAGEMENT

Generative AI: The Conversational Revolution is Reshaping E-Commerce

July 20, 2023 at 11:19 am

Generative AI holds the promise of enhancing our creativity and efficiency, revolutionizing problem-solving, and multitasking.

Printing Impressions



BUSINESS MANAGEMENT

How AI is Revolutionizing the Print Industry

November 16, 2020 at 3:26 pm

Here are some of the ways that we've seen Artificial Intelligence revolutionize the printing industry.

■ EXAMPLES OF AI APPLICATIONS ACROSS FUNCTIONAL AREAS

Marketing and Sales	Operations	IT/Engineering	Risk and legal	HR	Utility/employee optimization
Write marketing and sales copy, including text, images, and videos	Create or improve customer support chatbots	Write code and documentation	Draft and review legal documents	Assist in creating interview questions	Optimize communication of employees
Create product user guides	Streamline customer service by automating processes			Provide self-serve HR functions	Create business presentations
Analyze customer feedback					Automated accounting by sorting and extracting documents
Improve sales force					
Create or improve sales support chatbots					

Source: McKinsey & Company

AI IN OUR LIVES TODAY

Searching for: How AI is used in our everyday lives?



Bing Chat
Enterprise 

AI-powered copilot for the web [Preview](#)

Bing is powered by AI, so surprises and mistakes are possible. Please share feedback so we can improve! [Terms](#) | [Privacy](#)

Ads are not targeted based on your workplace identity or chat history. [Learn more.](#)

Result



Artificial Intelligence (AI) is already an integral part of our daily lives. Here are some examples of how AI is used in our everyday lives:

- 1. Face ID:** Many smartphones today use facial recognition technology to unlock the device. Apple's Face ID uses machine learning algorithms to compare the scan of your face with what it has stored about your face to determine if the person trying to unlock the phone is you or not ¹.
- 2. Social Media:** AI is used behind the scenes to personalize what you see on your feeds, identify and filter out fake news, and prevent cyberbullying ¹.
- 3. Emails:** Tools such as Grammarly and spell check use artificial intelligence and natural language processing to help you draft messages free from errors. On the receiving end of your messages, spam filters use artificial intelligence to either block emails that are suspected as spam or identify an email as something your recipient would like to receive in their inbox ¹.
- 4. Online Shopping:** AI is used in online shopping to provide personalized recommendations based on your browsing history and purchase behavior ².
- 5. Navigation:** AI-powered navigation apps like Google Maps use machine learning algorithms to predict traffic patterns and suggest the fastest route ².
- 6. Smart Home Devices:** Smart home devices like Amazon Echo and Google Home use AI-powered voice assistants like Alexa and Google Assistant to help you with tasks such as setting reminders, playing music, and controlling smart home devices ³.
- 7. Healthcare:** AI is used in healthcare for tasks such as diagnosing diseases, predicting patient outcomes, and developing personalized treatment plans ⁴.
- 8. Banking:** AI is used in banking for tasks such as fraud detection, risk assessment, and customer service chatbots ⁵.

These are just a few examples of how AI is used in our everyday lives. As technology continues to advance, we can expect AI to become even more integrated into our daily routines.

Hiring Stat: An April poll of 1,187 business leaders by ResumeBuilder.com, the job-seeker site, found that 91% (9 and 10) are looking for workers with ChatGPT skills.

■ 3. COMPETING FOR STAFF IN DIFFICULT LABOR MARKET



- Two-thirds of commercial printers and sign and display graphic providers report hiring production staff is a critical/moderate challenge.*
- 62% of commercial printers and sign and display graphic providers report hiring sales staff is a critical/moderate challenge.*

*Sources: NAPCO Research Annual Print Commercial Print Trends and Strategy Service, 2023 and Who Buys Sign and Display Graphics?, NAPCO Research 2023


WAYS PRINT PROVIDERS ARE FINDING AND RETAINING WORKERS

Recruiting	Retaining
<ul style="list-style-type: none">• Professional recruiting services• Recruiting via LinkedIn and other social media sources• Ongoing outreach to high school career advisors and community colleges• Formal apprenticeship programs• Referral bonus programs	<ul style="list-style-type: none">• Mentoring programs• Monetary bonus programs• Cross-training staff• Employee recognition programs• Spot incentives based on performance• Internal training and development programs

PRINTING United Expo Events

- Keynote: FULLY STAFFED: How to Find and Keep Great Employees in Difficult Labor Markets, Thursday, October 19 • 10:00 AM - 11:15 AM. employee engagement expert **Eric Chester**
- Create Career Pathways for Team Success, Wednesday, October 18 • 12:00 PM - 12:50 PM, **Adriane Harrison**, Vice President, Human Relations Consulting at PRINTING United Alliance

PRINTING UNITED ALLIANCE CENTER FOR HR SUPPORT



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Center for Human Resources Support

The Center for Human Resources Support (CHRS) at PRINTING United Alliance provides expert assistance in labor and employment issues and how those impact all businesses. CHRS helps businesses stay up to date on labor laws, regulations, trends, and how to implement them. CHRS also provides thoughtful perspectives on talent management, workforce training, education, diversity, equity, and inclusion, as well as expert analysis of the developments in the Human Resources and labor relations fields.



Adriane Harrison
Vice President, Human Relations Consulting
[Hire This Expert](#)

Adriane Harrison is the Vice President of Human Relations Consulting at PRINTING United Alliance. With a background in law, business, and non-profit sectors, Adriane brings a wealth of knowledge to address issues across all aspects of human [...more](#)

SAMPLE POLICIES & TEMPLATES

JOB DESCRIPTIONS

HR LISTSERV

HR Updates

Check out the HR Updates for emerging workplace issues, critical news, trends and analysis.



Wages, Salaries, and Benefits Report

August 22, 2022

Alliance Members - \$199 | Nonmembers - \$399

[printing.org](#)

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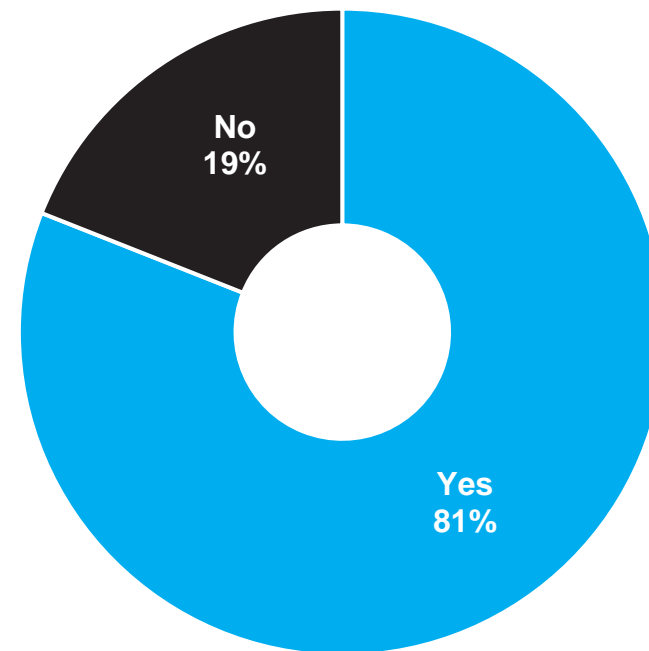
4. PRINT AND DIGITAL MEDIA, BETTER TOGETHER

Average number of media types used in a typical multi-channel/omni-channel communication: 4



81% Use Print in Multi-channel Campaigns

Q. Does your organization use multi-channel or omni-channel campaigns that include print to communicate with customers and prospects?



n=316 Communication buyers and influencers
Source: NAPCO Research Annual Commercial Print Industry Trends and Strategies Service, 2023

■ REASONS USING OR NOT USING PRINT IN MULTI-CHANNEL EFFORTS

Survey question asked for the reasons an organization included or didn't include print in their multi-channel or omni-channel communications



Top Reasons USE

- ✓ Captures attention
- ✓ Used before and delivered results
- ✓ Great way to show our products
- ✓ Adds credibility
- ✓ Proven ROI
- ✓ It's tangible

n=216 Communication buyers and influencers that use print in their multi-channel or omni-channel campaigns



Top Reasons DON'T USE Print

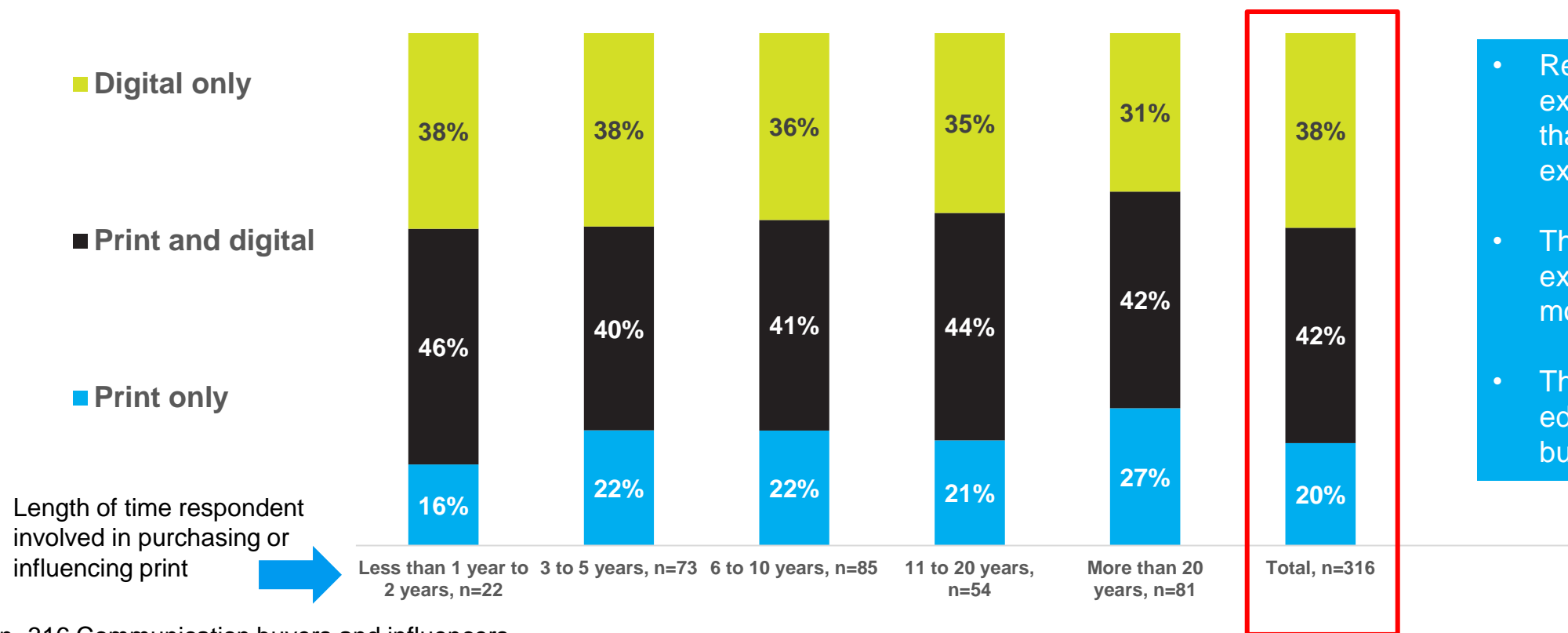
- ✓ Too expensive
- ✓ Too slow in getting our message to market
- ✓ Challenge to keep print up-to-date
- ✓ Have never used print
- ✓ Not directly interactive
- ✓ Used before and didn't get desired results

n=100 Communication buyers and influencers that don't use print in their multi-channel or omni-channel campaigns

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

■ ORGANIZATIONS' COMMUNICATION COMPOSITION

Q. What percent of your customer communications in the next 12 months will be?



- Respondents with more print experience tend to use it more than those with less print experience.
- Those with less print experience tend to use digital more.
- This points to an opportunity to educate less experience print buyers and influencers.

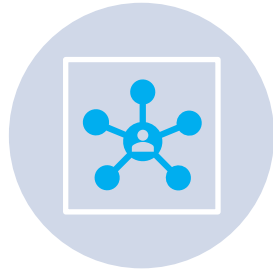
n=316 Communication buyers and influencers

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

5. A NEW BREED OF PRINT BUYER



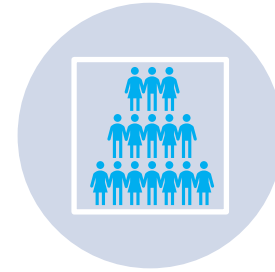
MANY JOB
RESPONSIBILITIES



OPTIONS BEYOND
PRINT



INTENSE PRESSURE
FOR COMMUNICATION
ROI



REPRESENT MULTIPLE
GENERATIONS AND
EXPERIENCE LEVELS

■ PRINT CUSTOMERS HAVE MANY RESPONSIBILITIES

Q. In your job, which of the following processes are you involved in as a decision maker/influencer?

- **100%** Specifying or Purchasing Print
- **83%** Selecting Vendors and Suppliers
- **79%** Marketing Strategy
- **71%** Hiring Job Candidates
- **71%** Budget Preparation
- **70%** Investing in Workplace Technologies
- **70%** Developing Products or Services
- **64%** Process and Policy Development



Photo licensed under CC BY-SA-NC

Multiple Responses Permitted

n=316 North American communication buyers and influencers

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

■ GENERATIONS: MILLENNIALS LARGEST IN THE WORKPLACE

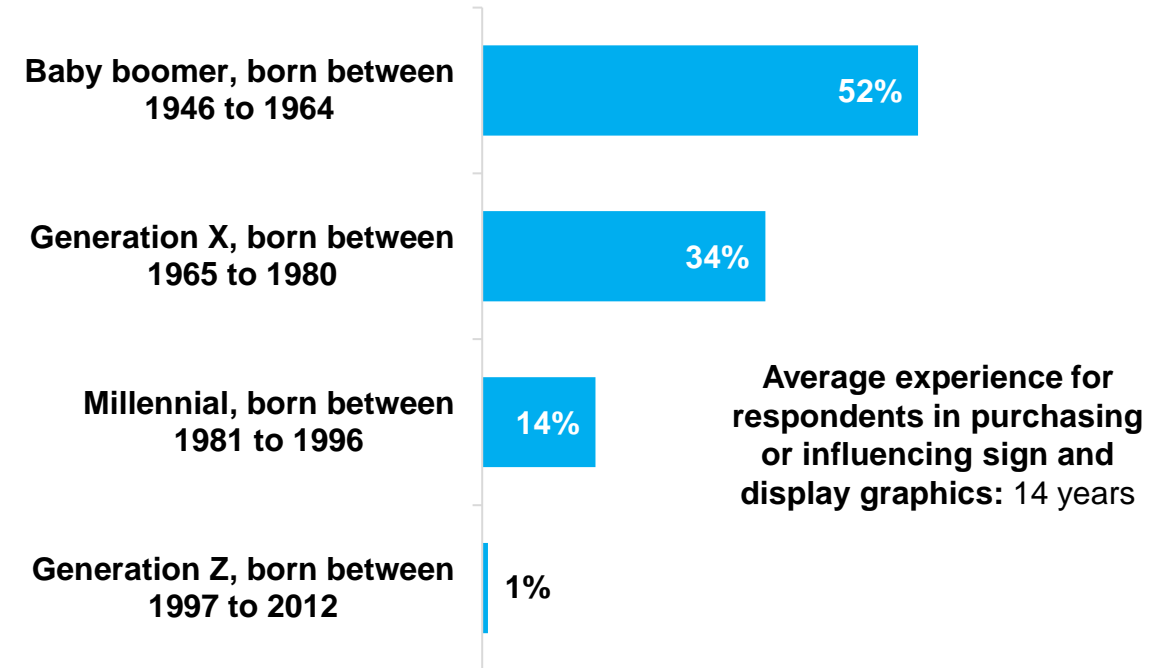
Generations: US Workforce

- The Silent Generation: Born 1928–1945, (age 75 or more), **1,804,000**
- Baby Boom Generation: Born 1946–1964 (ages 59 to 77), **20,703,000**
Often Forgotten
- Generation X: Born 1965–1980 (ages 43 to 58), **46,484,000**
- Millennial Generation or Generation Y: Born 1981–1996 (ages 27 to 42), **69,924,000**
Largest Group
- Generation Z or iGen: Born 1997–2010 (ages 13 to 26), **19,378,000**
Digital Natives

Employment values from U.S. Bureau of Labor Statistics, January 2023

Generations: Print User Example

Q. Which generation best describes you?



n = 148 Purchasers or Purchase Influencers of Sign and Display Graphics
Source: Who Buys Wide-format Display Graphics, NAPCO Research 2023

■ EDUCATING PRINT USERS ESSENTIAL: ARE WE?

- Print Customers and prospects represent various:
 - Generations
 - Demographics
 - Experience levels
 - Industries
- Top ways **PRINT CUSTOMERS** learn about print trends: online sources (52%), vendors/suppliers, e-newsletters (51%), trade magazines (46%), and social media (43%) **.
- Are there enough resources to educate print users on the merits and best ways to use print?
- Print providers offer content to customers and prospects, but is that enough?
- Do print users need more education and access to samples?

Print Customer Knowledge Drain?



Photo licensed under CC BY-SA

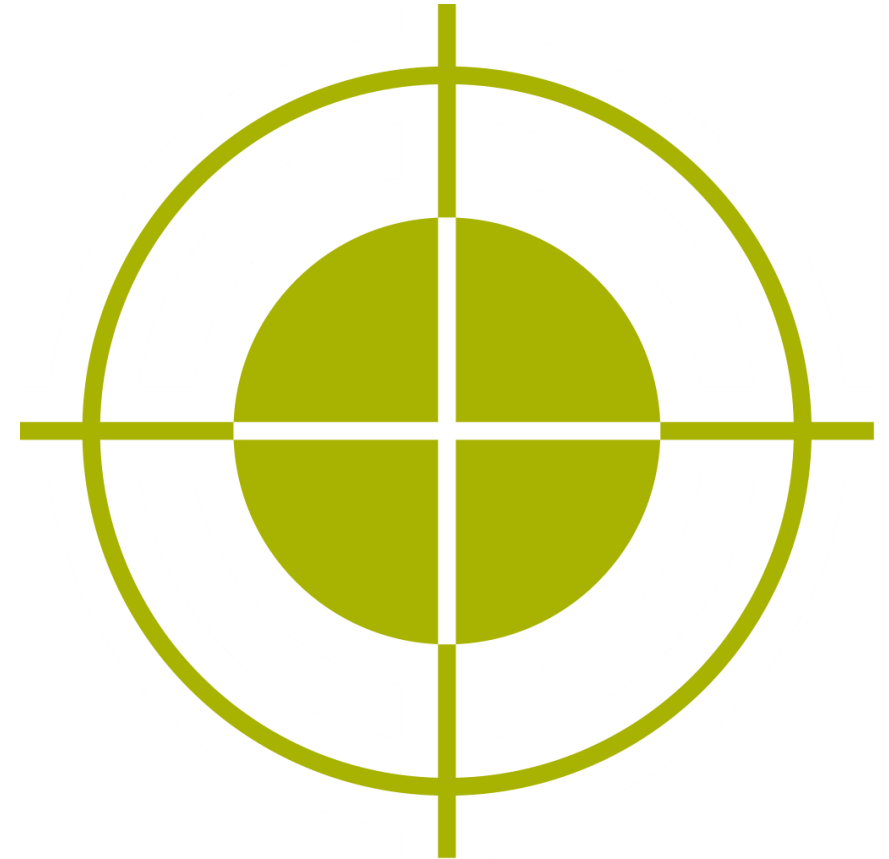
State of the Industry Panel Member: "We continue to focus on production automation and **the need to teach clients commercial printing**. Many **designers have no clue how to convert from the screen to paper or other substrates**. The ad agency print production manager is a dinosaur and **commercial printers are having to fill the void**."

*n=114 Purchasers or Purchase Influencers of Sign and Display Graphics, Source: Who Buys Wide-format Display Graphics, NAPCO Research 2023

■ 6. SUSTAINABILITY MORE THAN A CATCH PHRASE

Print buyers and influencers report:

- Sustainability is a key factor in our organization's print buying decision **80%***
- Printed materials produced by sustainable methods will be more important to our organization in the future **91%***
- Green/environmentally sustainable production processes is an important consideration when selecting a sign and display graphics provider **62%****



*n=316 North American communication buyers and influencers; Source: NAPCO Research Annual Commercial Print Industry Trends and Strategies Service, 2023

**n=120 Purchasers or purchase influencers of sign and display graphics; Source: Who Buys Sign and Display Graphics, NAPCO Research 2023

■ PRINT PROVIDERS FOCUSING ON SUSTAINABILITY

69% of commercial printers report **taking action to improve their organization's environmental sustainability.***

49% of sign and display graphic providers **offer “green”/eco-friendly wide-format printing,** *such as printing recyclable/biodegradable substrates or using more environmentally friendly inks.***




Photo licensed under CC BY


*n=104 North American Commercial Printers; Source: NAPCO Research Annual Commercial Print Industry Trends and Strategies Service, 2023

**n=73 Sign and Display Graphic Providers; Source: Who Buys Sign and Display Graphics, NAPCO Research 2023

PRINTING UNITED ALLIANCE SUSTAINABLY RESOURCES



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Sustainability


PRINTING United Alliance recognizes that today's global marketplace requires companies to address the needs of the environmental, social, and economic systems in which they operate, as well as the strong consumer demand for more sustainable products. A business strategy focusing on sustainability can add brand value, meet customer demands, increase efficiency, reduce costs, attract valuable talent, improve your environmental footprint, and create new business opportunities. The printing industry is committed to responsibly providing for future generations. Join us on the journey.



Gary Jones
Vice President of Environmental, Health, and Safety Affairs

[Hire This Expert](#)

Gary A. Jones is the Vice President of Environmental, Health and Safety (EHS) Affairs at PRINTING United Alliance in Fairfax, VA. His primary responsibility is to monitor and analyze EHS regulatory activities at all domestic and some international government [...more](#)



Sara Osorio
Environmental, Health and Safety Affairs Coordinator
PRINTING United Alliance

[Hire This Expert](#)

Sara Osorio is the Environmental, Health and Safety (EHS) Affairs Coordinator at PRINTING United Alliance. Her primary responsibility is to assist members with EHS regulatory compliance, sustainability, and EHS consulting. Sara also [...more](#)

PRINTING United Expo Sessions:
**The Sustainability Shift:
How Evolving Expectations
Are Reshaping Print's
Future**, Wednesday, October
18 • 12:00 PM - 12:50 PM,
Location: Meeting Room
C103

<https://www.printing.org/library/business-excellence/sustainability>

Carbon Footprint Calculator

PRINTING United Alliance's Carbon Footprint Calculator for Printing Operations is designed to help you quantify the 'E' of environmental impact in ESG and demonstrate your sustainability progress. The tool allows you to calculate your Scope 1 and 2 emissions data and report it as carbon dioxide equivalents (CO2e).

The carbon footprint calculator is one of the Alliance's sustainability tools that can help you create business value.

[DOWNLOAD THE CARBON FOOTPRINT CALCULATOR](#)

Extended Producer Responsibility (EPR)

Extended Producer Responsibility (EPR) laws shift the costs associated with recycling plastic and paper packaging and in some instances, printed paper products, to the producer of the product by imposing a fee based on the amount of product. PRINTING United Alliance can help your company navigate the complexities involved with EPR compliance. The Alliance is closely monitoring proposed and passed legislation at the state and federal level, and our state EPR legislative summaries provide detailed guidance for your business.

[LEARN MORE](#)

Environment, Social, Governance (ESG)

PRINTING United Alliance recognizes that integrating key considerations of Environmental, Social, and Governance (ESG) components into business policies and practices plays a central role in the successful growth of the print and packaging marketplace. The Alliance offers resources to help your company create enterprise value and manage ESG objectives.

[LEARN MORE](#)

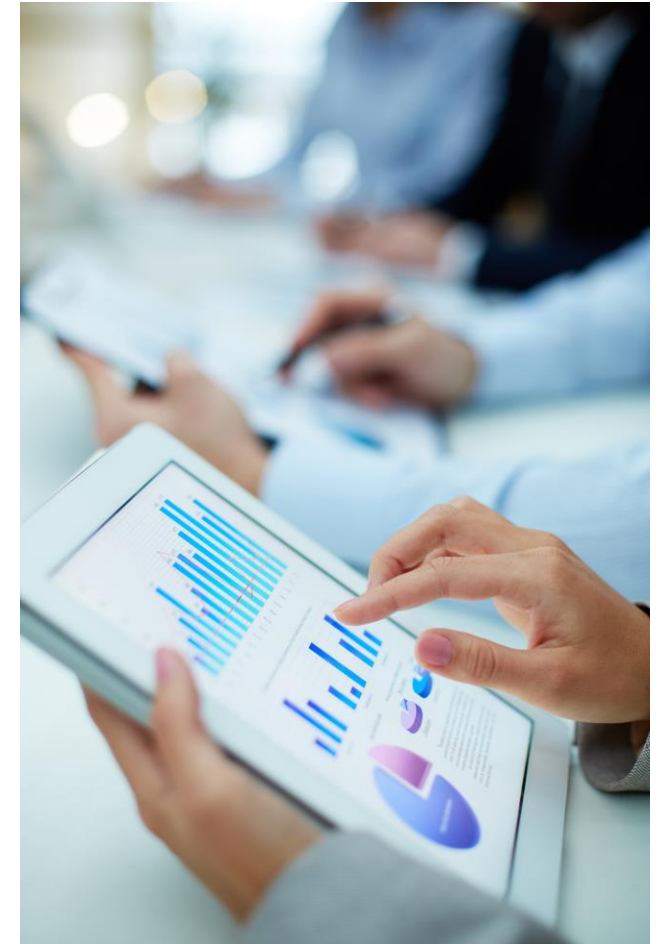
Energy Efficiency, Renewable Energy, and Reducing Carbon Footprint

The field of energy has been rapidly changing since the creation of technology that reduces demand or produces renewable energy. Printing establishments, both large and small, can learn how to reduce their carbon footprint and achieve energy efficiency using renewable energy resources. Learn about the benefits of reducing your carbon footprint, and funding opportunities available to help offset the costs.

LEARN MORE

■ 7. E-COMMERCE/ONLINE JOB SUBMISSION IS NOT OPTIONAL

- Offering online ordering/web-to-print (W2P) services **allows print providers to strengthen customer relationships, automate production, grow revenue, automate, and expand services.**
- Print customers expect online job submission:
 - **73%** report that providing online job submission capabilities is very important when selecting a print provider.*
 - **85%** prefer to *work with providers that offer online ordering options that enable us to better control print spending and brand management.**
 - **72%** of communication buyers and influencers report the ability to place print orders at any time is highly valuable.*
- W2P is a key influencer of a customer's experience in working with a print provider because includes major client touch points — from job quotes, to submission, to order management, to delivery.
- Printing companies offering web-to-print solutions, are reaping many benefits.
- Customized web portals that are configured to a customer's specific needs, can increase customer retention because they make it easier for clients to order and manage items, while making a printing company part of a customer's marketing and communication ecosystem.



*n=211 Communication Buyers and Influencers; Source: Enhancing the Print Customer Connection, NAPCO Research/Canon U.S.A. 2021

■ BENEFITS OF OFFERING CUSTOMERS WEB PORTALS

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

- Strengthened our customer relationships **94%**
- Increased our sales from current clients **93%**
- Shortened the customer buying process **92%**
- Reduced labor costs **90%**
- Increased print order volume **88%**
- Enabled our organization to go after and win larger clients **86%**
- Enabled our organization to expand services **85%**
- Insulated/protected us from customer vendor consolidations **84%**

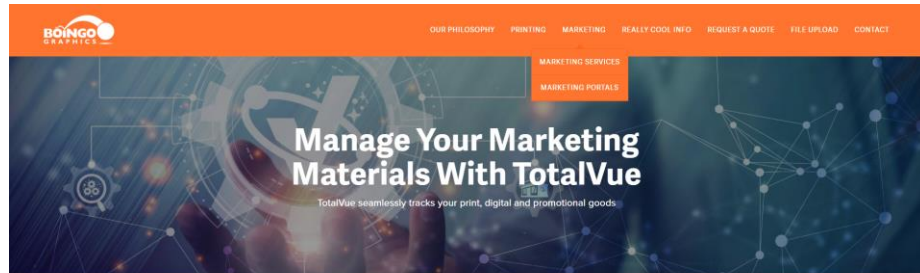


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n=102 organizations who offer customers access to customized WEB PORTALS
Source: *Web Portals, New Path to Print Profitability*, NAPCO Research/Propago 2023

PRINT PROVIDERS OFFERING CUSTOM WEB PORTALS

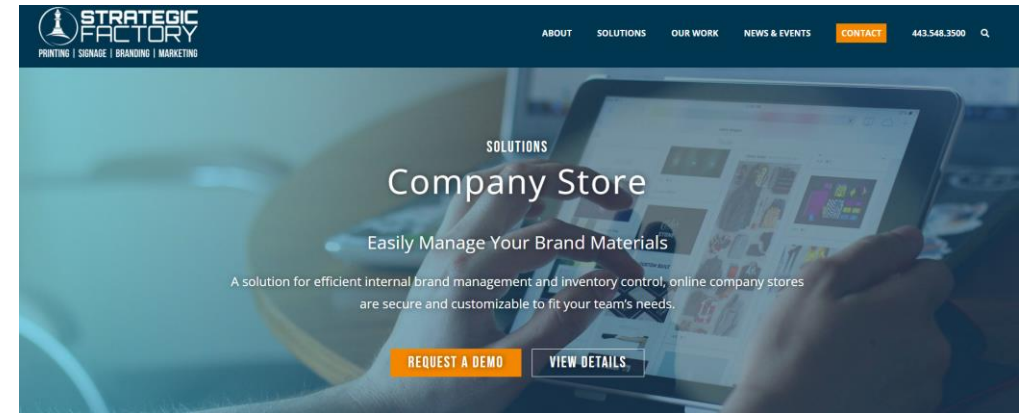
www.boingographics.com



TotalVue

Marketing Management with TotalVue by Boingo Graphics

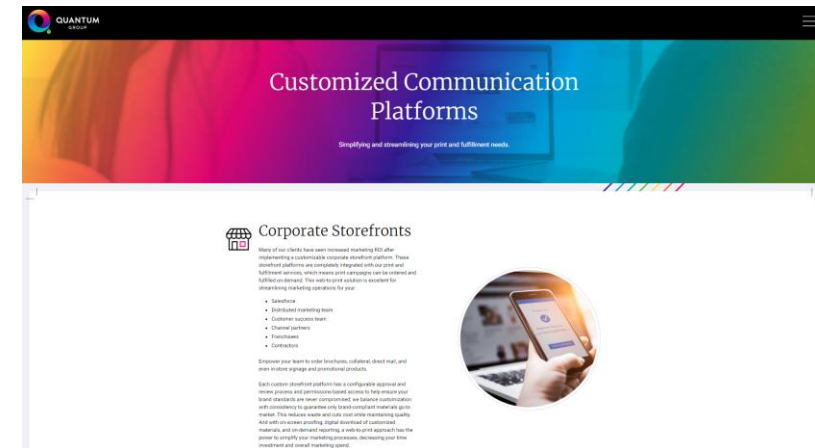
www.strategicfactory.com



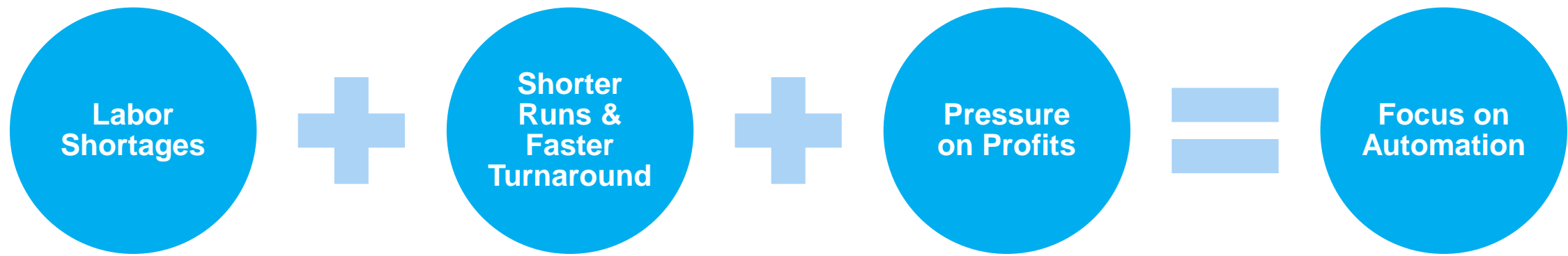
www.dmscolor.com



www.quantumgroup.comm



■ 8. AUTOMATION: VITAL TO THE PROFITABILITY



67% of print providers report taking action to *automate workflows*.

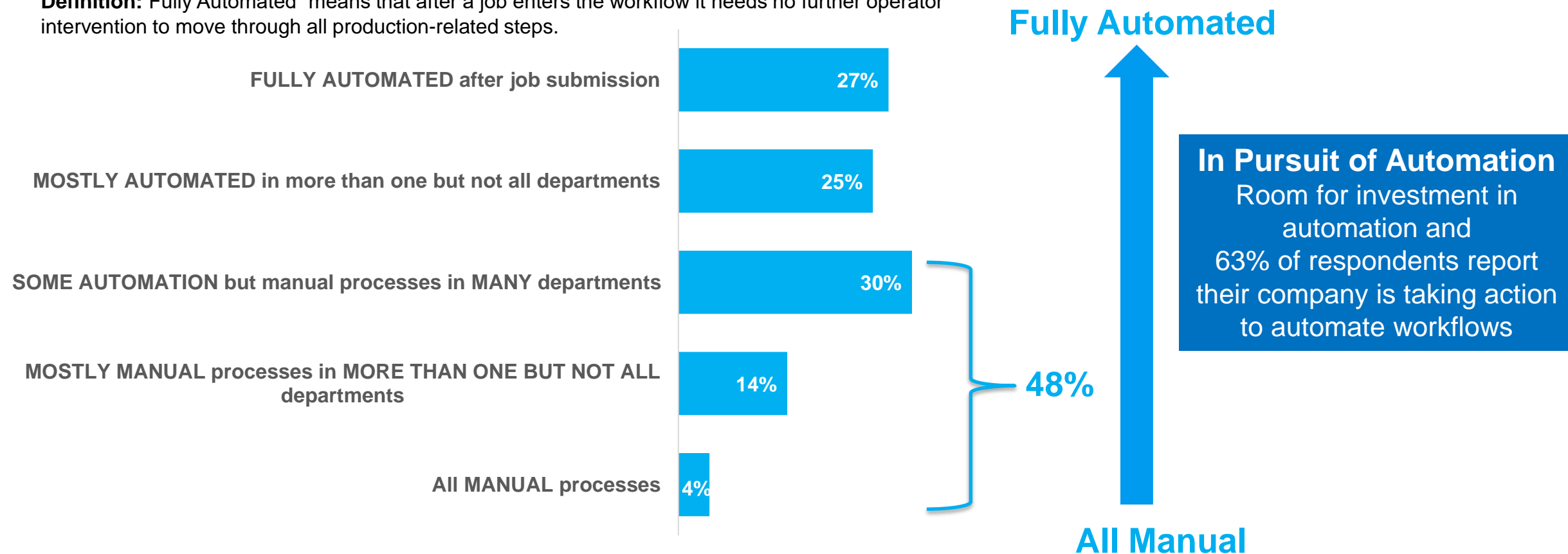
n=104 North American commercial printers

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

LEVEL OF AUTOMATION

Q. What best describes your operation's level of workflow automation?

Definition: Fully Automated" means that after a job enters the workflow it needs no further operator intervention to move through all production-related steps.

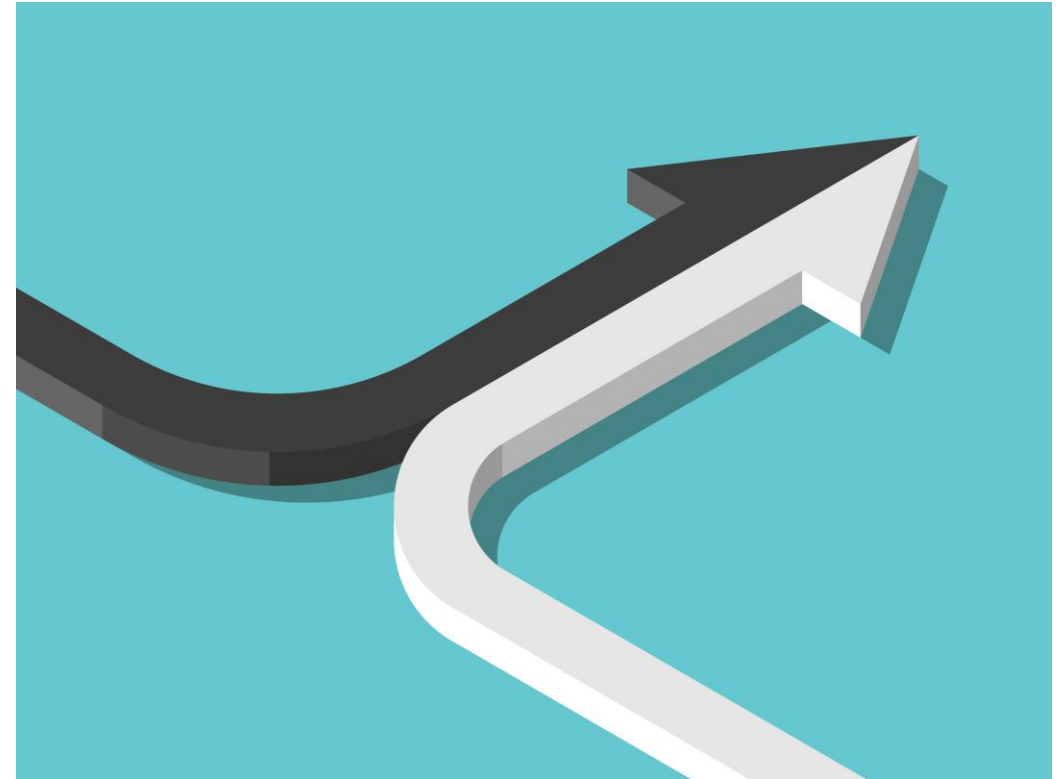


n=203 Commercial Printers in North America and Europe

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

■ 9. MERGERS AND ACQUISITION AN OPTION FOR EXPANSION & GROWTH

- 62% of print providers looking to acquire another firm
- 45% of print providers looking for merger partners
- M&A is a way expand into new segments or grow current services
- PRINTING United Expo Session: **Buy, Sell, or Merge...Which Option is Best for You?** Peter Schaefer, Founding Partner, New Direction Partners, Thursday, October 10 1:00 pm to 1:50 pm, Room B211

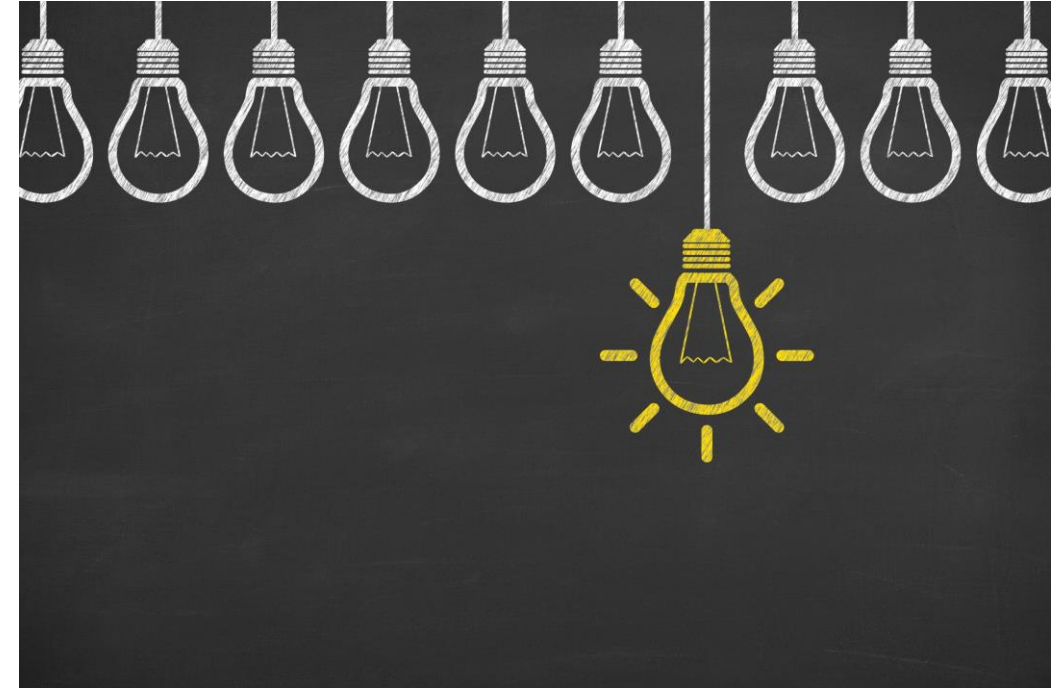


n=104 North American commercial printers

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

■ FINAL THOUGHT: INSIGHTS TO ACTION

- The road ahead presents new challenges and opportunities **BUT** industry organizations that strategize, plan, invest, and take actions will be in the best position to reap profits, enhance operational efficiency, attract and retain talent, win customers, and succeed.
- Invest in operations, people, and new business areas/print segments.
- Use the all of insights provided today to develop strategies for improving productivity, sales, and profitability.
- Leverage all the resources of the PRINTING United Expo and the PRINTING United Alliance to support your organization's success.



Thank You!

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