Beyond CMYK:
The Use of Special Effects in Digital Printing

A Multi-Client Study
Introduction

With the exception of a few devices, production color digital printing has been a process color world, where everything is reproduced with cyan, magenta, yellow, and black inks or toners. Many years ago, market leaders at the high end envisioned opportunities with value-added special effects beyond process color. They implemented the use of spot colors, clear toners, dimensional, and other effects that took advantage of the unique capabilities of digital print, namely the ability to personalize, on-demand print, and just-in-time manufacture documents that could not easily be reproduced using conventional methods. These trailblazers at the high end showed how production digital print could push beyond the short runs and quick turnarounds of much process color work.

In time, others followed, bringing special effects like white, clear, and metallic (silver and gold) to a new class of users. The market expansion over the last few years has been dramatic, not only with in-line devices supporting more than process color, but also with a new class of off-line devices (mostly leveraging UV inkjet technologies) that produce a range of innovative effects. Still, we are in the early days of this trend. Print service providers are looking for the best model to market, price, and sell these value-added special effects. Most designers are unaware that digital print
offers these capabilities. System vendors wonder where they should make their future investments in these features.

The time is ripe for a thorough study that explores this topic through research with print service providers, print buyers, and system developers. There is also a need to quantify the current market size and future potential for these special effects. This study “Beyond CMYK: The Use of Special Effects in Digital Printing” will provide both research and market sizing to help demonstrate the impact of this trend.

**Project Objectives**

The objectives of this study will:

- Explore the usage, effectiveness, pricing, and customer requirements of digitally printed special effects in the U.S. and Western Europe (U.K., France, Germany)
- Help printer technology vendors with product development decisions and accelerating market adoption
- Help print service providers with product investment decisions and accelerating revenue growth

**Research Methodology**

InfoTrends used a mix of research methods to achieve the objectives of this study. They include desk research, technology vendor interviews, digital CMYK+ print service provider in-depth interviews, a print service provider structured survey, and print customer interviews.

**Desk Research**
- Market size
- Product profiles - in-line, off-line
- Service providers

**Technology Vendor Interviews (8 to 10)**
- Adoption rates
- Usage patterns
- Applications
- Critical features

**Digital CMYK+ PSP In-depth Interviews (16 to 20)**
- Equipment (digital, offset, finishing)
- Usage and productivity
- Other services
- Applications
- Job characteristics, types of enhancement
- Sales & marketing
- Pricing, margins of CMYK+
- Unmet needs
- Future plans

**PSP Structured Surveys (300-> 150 U.S./150 W. Europe)**
- Targets
  - Have digital CMYK+ today
  - Have digital CMYK and considering digital print enhancement
  - Print special effects using offset presses and considering digital
• Topics
  - Awareness, perceptions of digital print enhancement
  - Print volumes, applications
  - Percentage eligible for print enhancement
  - Pricing of CMYK vs. CMYK+
  - Critical requirements
  - Purchase plans

Print Customer Interviews
(100–50 U.S./50 W. Europe)
• Targets
  - Corporate/SMB marketing and agencies
  - Publishers (books)
  - Consumers (greeting cards, photobooks, stationery)

• Topics
  - Preference of samples – CMYK vs. CMYK+ versions
  - Value of CMYK+ (expected price, business impact)
  - Critical requirements, trade-offs
  - Awareness, perceptions of digital print enhancement
  - Print volumes, applications
  - Percentage benefit from print enhancement

• Print enhancement ROI model (Excel)
  - Base analysis
  - Ability to change assumptions (equipment, job mix, pricing, etc.)

• Survey tabulations (Excel) and charts (PowerPoint)
  - PSP interviews
  - Print customer interviews

• Private webinar presentation (PowerPoint) and discussion
  - 2-hour review with your team

Analysis & Project Deliverables
InfoTrends’ professional staff will perform an extensive analysis of the research to develop an understanding of the opportunities and issues surrounding the use of special effects in digital printing. Subscribers will receive:
• Summary analysis report with recommendations (PowerPoint)
• Market size and forecast (Excel)

Milestone Completion
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<tr>
<td>Desk research and vendor interviews</td>
<td>August/September</td>
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<tr>
<td>PSP survey</td>
<td>September/October</td>
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<td>Print customer interviews and samples</td>
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<td>Research analysis</td>
<td>September/October</td>
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<td>Publish report and deliverables</td>
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About InfoTrends
InfoTrends is the leading worldwide market research and strategic consulting firm for the digital imaging and document solutions industries. We provide research, analysis, forecasts, and advice to help clients understand market trends, identify opportunities, and develop strategies to grow their businesses.

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**Subscriber Rate**

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**Deliverables include:**
- Summary analysis report with recommendations (PowerPoint)
- Market size and forecast (Excel)
- Print enhancement ROI model (Excel)
- Survey tabulations (Excel and charts (PowerPoint)
- Private webinar presentation (PowerPoint) and discussion

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