

# In-House Production Printing: Critical Trends for Corporations, Government, Education, and Non-Profits

## Report Fast Facts

**Published:** February 2009

**Pages:** 137

**Tables & Figures:** 121

**Price:** Technology Providers:  
\$12,995

End Users: \$6,995

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## Abstract

The in-plant print market is an important indicator of the market need for document production. Historically, in-plants have played a leading role in technology adoption. For example, the in-plant market's use of black & white digital printing technologies helped establish the print-on-demand market. Because grasping the complexity of the evolving in-plant landscape is not easy, InfoTrends is returning to this topic area after its 2004 landmark study entitled *Corporate Print Services: The In-Plant Printing Opportunity*. InfoTrends is well-positioned to address this market segment because of its previous research on in-plants as well as its recently completed study on the commercial print market entitled *The Future of Commercial Printing in the United States: Digital Technology Driving Change*. InfoTrends understands the needs of the print-for-pay and print-for-cost environments. This study examines the full range of corporate printing services. Where appropriate, our 2008 survey results are compared to those obtained during our 2004 study.

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## Project Objectives

In conducting this study, we sought to:

- Define and size the in-plant printing market
- Profile the installed hardware and software products used in in-plants
- Identify product purchasing plans
- Measure the penetration of digital print hardware as well as software tools for Web job submission, variable data, and other functions
- Quantify the volume and growth of various print applications and other services
- Explore the differences between documents that are produced on-site versus those produced off-site
- Gauge the rate of convergence by identifying whether in-plant sites operate solely as print service providers to internal users, solely as in-plant data centers, or in a combined role Investigate and understand the operation of sites that are run by facilities management firms
- Formulate a vision of the factors that will impact the in-plant print shop of the future

## Methodology

In December 2008, InfoTrends launched a Web-based survey to U.S. in-plant employees. Survey participants were selected via InfoTrends' internal lists and a rented list from NAPCO/In-Plant Graphics Magazine. InfoTrends also cooperated with IPMA (In-Plant Managers Association), XPLOR, and ACUP (Association of College and University Printers). The responses were split rather evenly among InfoTrends' internal list, NAPCO, and IPMA. InfoTrends received a total of 376 qualified responses to this survey. To qualify for participation, respondents were required to work in an in-plant establishment in the United States and have some level of knowledge regarding business decisions. As an incentive for participation in this survey, respondents received a \$20 Amazon.com gift certificate as well as a PowerPoint presentation of a previously published InfoTrends report. Those who responded within the first week were also entered into a drawing for an Apple iPhone. Participants in the phone interview received an additional \$75 Amazon.com gift certificate. We conducted a total of 15 in-depth phone interviews that ranged from 30-45 minutes in length. These were conducted during the month of January 2009. These are discussed in a section entitled In-depth Phone Interviews at the end of this document. This study involved a combination of research activities, including:

- Desk research
- Web surveys, including a Web-based questionnaire
- Telephone interviews, with follow up email questions

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