

Headquarters

U.S.

Libbey Industrial Parkway
Weymouth, MA 02189
USA
+1 781 616 2100
info@infotrends.com

Europe

Sceptre House
7-9 Castle Street
Luton, Beds LU1 3AJ
United Kingdom
+44 1582 400120
euro.info@infotrends.com

Japan

Hiroo Office Building
1-3-18 Hiroo Shibuya-ku
Tokyo 150-0012
Japan
+81 3 5475 2663
info@infotrends.co.jp

InfoTrends is the leading worldwide market research and strategic consulting firm for the digital imaging and document solutions industry. We provide research, analysis, forecasts, and advice to help clients understand market trends, identify opportunities, and develop strategies to grow their businesses. Additional information about InfoTrends is available on the Web at www.infotrends.com.

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

- Prioritize product and market opportunities
- Understand how the market is segmented
- Understand the trends impacting the in-house production printing market
- Identify new business opportunities
- Support product and service strategic planning
- Improve sales and marketing activities in key market segments
- Understand the purchasing process and the impact of technology on that process
- Understand customer perceptions and requirements
- Identify potential growth opportunities and value-added document services

Prospectus

Who Should Subscribe?

- **Print equipment vendors and suppliers** *offering digital or traditional printing solutions, paper suppliers or distributors, providers of front-end systems, finishing and mailing equipment vendors*
 - **Facilities management and other outsourcing providers** *in the document services space*
 - **Software solutions providers** *to the graphic arts and data processing industries*
 - **Executives** *concerned with trends in internal printing services*
 - **In-plant printing services professionals**
 - **Commercial and quick printers** *interested in understanding how in-plant printing trends may impact their current and future business potential*
 - **Managers, document owners, and print buyers** *seeking information on the future of business communications*
-

Introduction

The in-plant market is a complex mix of service providers operating inside the walls of large corporations; businesses of varying sizes; educational institutions; and local, state, and national government sites. They offer print, mail, and other services while competing with outside service providers for many applications. At the same time, they are targeted by facilities management and outsourcing firms that woo executives with talk of operational efficiency and lowered costs. They are also an attractive target for vendors of hardware and software for the graphic arts and transactional printing markets, and they are at the center of the market convergence trends between graphic arts and data processing environments.

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.

The results of this study will help you:

- Prioritize product and market opportunities
- Understand how the market is segmented
- Understand the trends impacting the in-house production printing market
- Identify new business opportunities
- Support product and service strategic planning
- Improve sales and marketing activities in key market segments
- Understand the purchasing process and the impact of technology on that process
- Understand customer perceptions and requirements
- Identify potential growth opportunities and value-added document services

Project Objectives

Through a combination of e-mail surveys, phone interviews, and desk research, InfoTrends intends to:

- Define and size the in-plant printing market
- Profile the installed hardware and software products used in in-plants
- Identify product purchasing plans

Prospectus

- 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

Early subscribers will have the option to view the e-mail survey questionnaire and provide input prior to the launch of the survey.

Market Research

The research for this multi-client study will be divided into three main components:

E-mail surveys

InfoTrends will conduct an e-mail survey of approximately 400 professionals within the in-plant print services sector to assess strategic direction for these operations, including scope, size, organizational trends and strategies, document distribution strategies, sales process and pricing trends, and perceptions about unmet market needs and emerging opportunities.

Phone interviews

InfoTrends will conduct in-depth telephone interviews with ten in-plant print services managers, including managers of print and mail operations, to explore the structure and configuration of in-plant print services, the extent to which outsourcing is used or planned, and the process by which users submit jobs and choose between internal and external suppliers. These discussions will cover current and future plans, key trends, and planned spending for equipment software and services.

Desk research

InfoTrends will define and size the market through desk research that builds on its previous research (such as the 2004 in-plant study) as well as government, industry data sources, and our own sizing figures. Previous studies, such as our 2008 commercial print study, will enable us to compare differences between print-for-pay and print-for-cost environments.

Analysis and Project Deliverables

This study will provide an extensive analysis of the desk research, personal interviews, and surveys to develop a comprehensive understanding of the opportunities and issues presented by the in-plant segment of the in-house production printing market. The research will clearly define and detail this segment of the printing industry, including market size and potential.

Prospectus

The report will have five main components:

- **Report:** The report will provide the full written description of the study, including the survey results, an analysis of the in-depth personal interviews, and InfoTrends' view on in-plant market definition and sizing.
- **Presentation:** The PowerPoint presentation will contain bullet points, pie charts, and bar graphs relevant to the results of the survey. It will also include an executive summary.
- **The tabulated data:** This information will represent the full set of data responses to the e-mail surveys. It will be divided into three separate banners.
- **The banner index:** This document will provide the full details on the breakout by question of each of the banners.
- **Questionnaire/frequency report:** This document will contain the full questionnaire as well as annotations showing the top-level responses.

Project Schedule

Survey development will occur in mid-October through November. The survey will go into the field in December. Desk research, market sizing, and in-depth interviews will occur throughout this period. Data tabulation and assessment will occur in January. Early results should be available late in January. The written report will be completed by the end of February. In-person presentations, if required, will occur in March.

Terms and Conditions

Liability for Advice

Although all reasonable efforts will be made by InfoTrends to ensure the completeness and accuracy of the information contained in written and oral reports in connection with the proposed study, no liability can be accepted by InfoTrends for the results of any actions taken by the client in connection with such information, opinions, or advice.

Copyrights

InfoTrends retains all Copyrights. Reproduction of any material can be made only with the written consent of InfoTrends.

Confidentiality

InfoTrends will use its best efforts to ensure that any confidential information obtained about the client and its business during the course of the proposed study is not, unless agreed otherwise in advance, disclosed to any third party without the prior written permission of the client. InfoTrends retains the right to reuse any non-proprietary information as part of our ongoing analysis of the print buyer market.

Timely Delivery

InfoTrends will take all reasonable steps to ensure that the time scales called for by the proposed study are met in accordance with the agreed schedule, but no liability can be accepted for the consequences of delays, howsoever caused.

Terms

One half of the fee upon initiation and one half upon report delivery.

Prospectus

Authorization Form

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

I would like further information. Please have a representative call.

Please enter my order as follows (fax completed form to +1 781 616 2121):

Technology providers- *Primary business is printing equipment manufacturer, software and systems vendor, paper manufacturers, and equipment and supplies distributors or providers of facilities management/outsourcing services.*

- Early subscriber (on or before October 3, 2008): \$11,995
- Subscriber (after October 3, 2008): \$12,995

Corporate, government, education, or non-profit end-users:

- Early subscriber (on or before September 30, 2008): \$5,995
- Subscriber (after September 30, 2008): \$6,995

Purchase order number: _____

Signature _____

Name _____

Title _____

Company _____

Address _____

City, State, Zip _____

Country _____

Telephone _____

Email _____