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ENHANCING THE PRINT
CUSTOMER CONNECTION

NAVIGATING A
NEW CUSTOMER
ENVIRONMENT

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

Navigating a New Customer Environment

Marketers, brand owners, and other types of communication decision-makers are under enormous pressure to better manage and cost-justify their communication investments. Many organizations no longer employ full-time, dedicated print buyers but have communication buyers that handle multiple media formats. In this new environment, buyers rely more on print providers (in-plant or outside provider) for their experience and knowledge for all matters related to print.

Communication buyers expect print providers to understand their needs and industry; provide excellent service; possess strong technical capabilities; and advise on the most creative, innovative, and effective ways to communicate with an audience.

At the same time, organizations across industries have changed how they communicate and distribute messages. Print is one form of communication in a mix that often includes digital media, such as email, PDFs, websites, social media, video, and mobile.

This new customer environment can present an opportunity for print providers to strengthen customer relationships by providing tools, processes, and workflows designed to better assess, manage, create, track, and control communication production and spending.

Offering communication buyers such services can help improve their results, enhance their customer experience, build loyalty, and reduce the threat of price competition.

Looking to define and understand the best practices and methods for improving the print provider/customer connection, a 2021 NAPCO Research* study, sponsored by Canon U.S.A., Inc., offers insights into job submission trends, customer communication requirements, data security features, and how the pandemic has impacted customer business needs.

Navigating a New Customer Environment
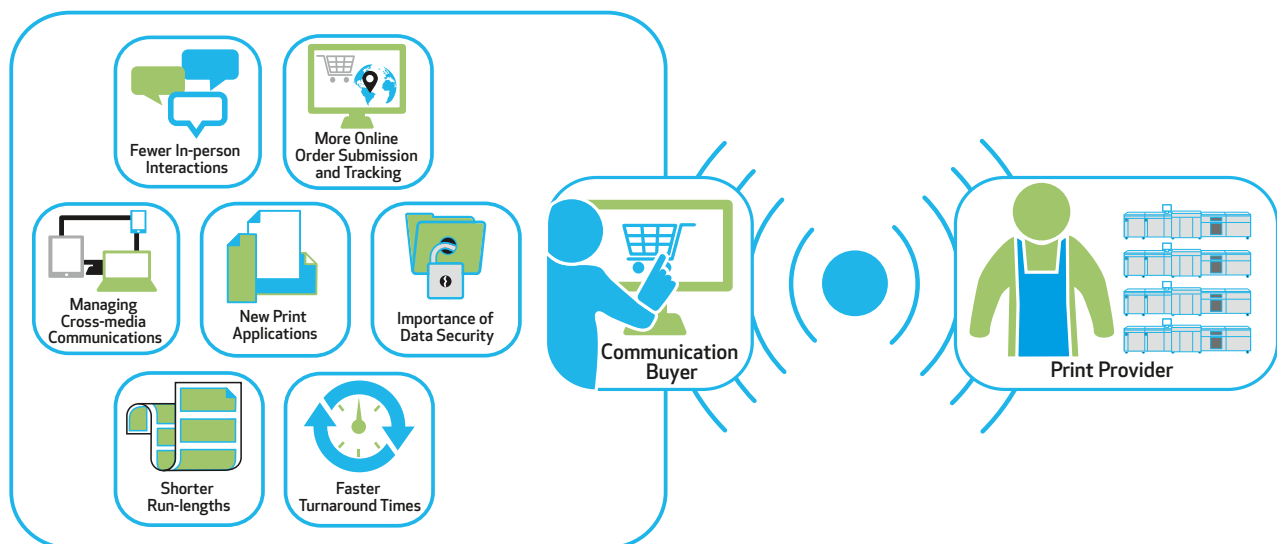
* A unit of NAPCO Media, the parent company of Printing Impressions and In-Plant Impressions.

The overarching theme of *Enhancing the Print Customer Connection* is that communication buyers expect virtually seamless and transparent experiences with their print providers — from job quotes through delivery. Print providers that invest in enhancing customers' overall service experience can build stronger client relationships that are less likely threatened by price competition.

This research aims to identify buyer expectations and print providers' actions in meeting their requirements. Print providers can apply these research findings to help enhance customer experiences, increase customer utilization of web-to-print ordering, guide investments, and potentially improve sales efforts.

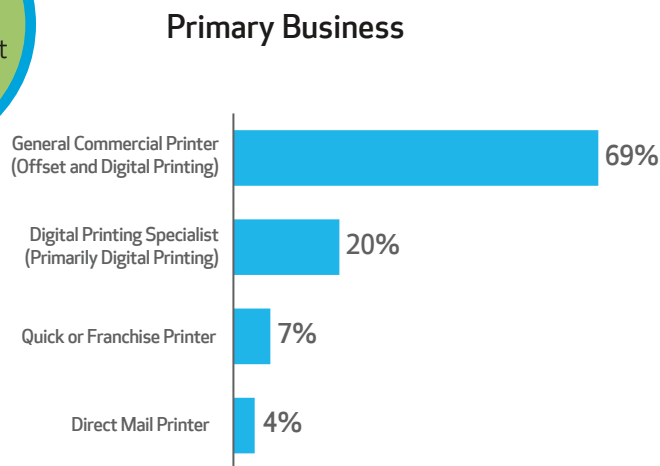## Key Survey Takeaways: Navigating a New Customer Environment

Communication buyers are looking for print providers that are easy to work with and continually focus on improving their experiences. Understanding buyer needs is essential for capturing new, and keeping existing, customers. Here's a summary of key survey findings on buyer requirements:

- Today's communication buyers are highly astute when selecting print providers and specifying work. An important influencer in selecting a print provider is job submission options because job onboarding is typically where a customer's experience with a print provider begins.

- Buyers prefer, and select, print providers that offer a variety of services that can improve the effectiveness, efficiency, and engagement of their customer communications.

- While price is an important factor in print provider selections, it's not the most important influencer.

- Commercial printer and in-plant respondents report that the COVID-19 pandemic reduced customer print use overall, but mission-critical print applications (i.e., financial/legal materials, general office materials, business forms, and bill/statements) held strong.

- Over half of commercial printers and in-plant respondents strengthened their customer relationships as a result of the pandemic by adding products and services to help meet new customer needs.

- G7 color certification is very important to communication buyers, as the use of multiple media types has increased the need for color consistency.

- Communication buyers believe print providers can do a better job at improving quality, meeting deadlines, and providing price quotes in a timely manner — two of the three can be accomplished through job order submission and workflow automation.

- Data security features are of growing importance to communication buyers and an important consideration when selecting a print provider.

- Communication buyers expect fast turnaround on print jobs; close to half (49%) of these respondents report needing work turned around in five days or fewer.

- Buyers value print providers that offer collaborative programs to improve job execution, and the majority of buyer respondents report participating in these efforts.

Over 200 Print Providers and Print Buyers Surveyed

The study surveyed 193 commercial printers, 80 in-plants, and 211 communication buyers to assess print job submission and production trends across the print supply chain. Figures 1 and 2 describe the types of printers participating in the survey.

Figure 1 — Commercial Printer Respondent Profiles

Primary Business

General Commercial Printer (Offset and Digital Printing) — 69%

Digital Printing Specialist (Primarily Digital Printing) — 20%

Quick or Franchise Printer — 7%

Direct Mail Printer — 4%

Q. Which category best describes your company's PRIMARY business?
N = 193 Commercial Printers

Employees

250 or More 7%
100 to 249 12%
50 to 99 13%
1 to 9 36%
10 to 49 32%
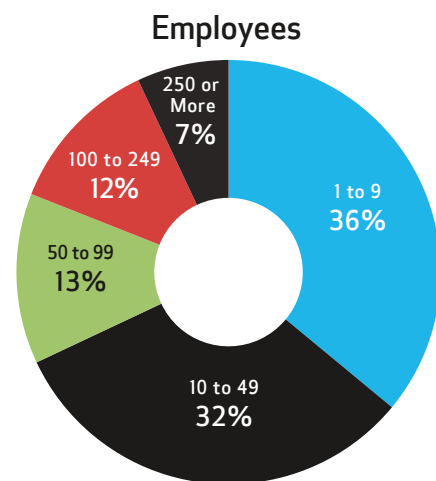
Q. How many employees work at your company or in-plant?
N = 193 Commercial Printers

Source: Enhancing The Print Customer Connection, NAPCO Research 2021

Figure 2 — In-Plant Respondent Profiles

Operating Model

Fully-funded Department and Do Not Charge Back For Any of Our Work — 14%

Partial Cost Recovery Center and Charge Back to Clients, But Not at Full Cost — 19%

Full Cost Recovery Department and Charge Back for All Work — 46%

Profit Center and We Can In-source Work for Outside Organizations — 16%

Profit Center But Only Serve Our Organization — 5%
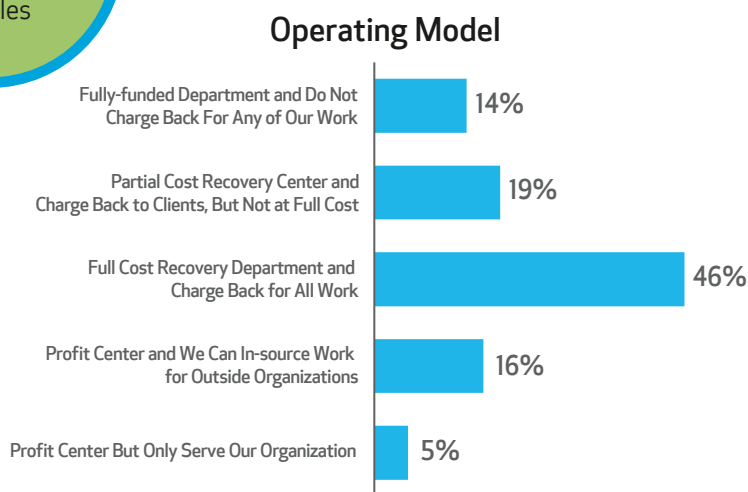
Q. Which of the following best describes your in-plant operation?
N = 80 In-Plants

Employees

50 or More 7%
10 to 49 30%
1 to 9 63%

Q. How many employees work at your company or in-plant?
N = 80 In-Plants

Source: Enhancing The Print Customer Connection, NAPCO Research 2021

Over 200 communication buyers (print buyers and influencers) participated in the survey. Respondents hold top-level or key management positions and work at organizations representing a mix of sizes, with most employing over 100 people (Figure 3).

Figure 3
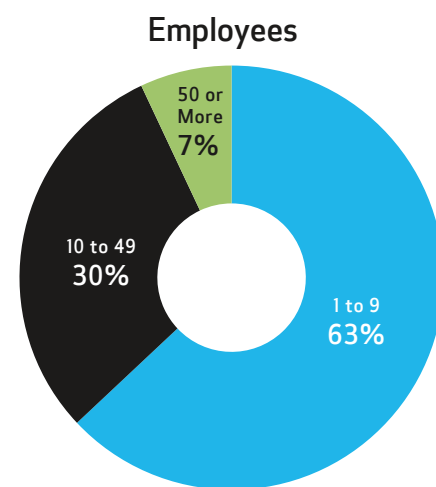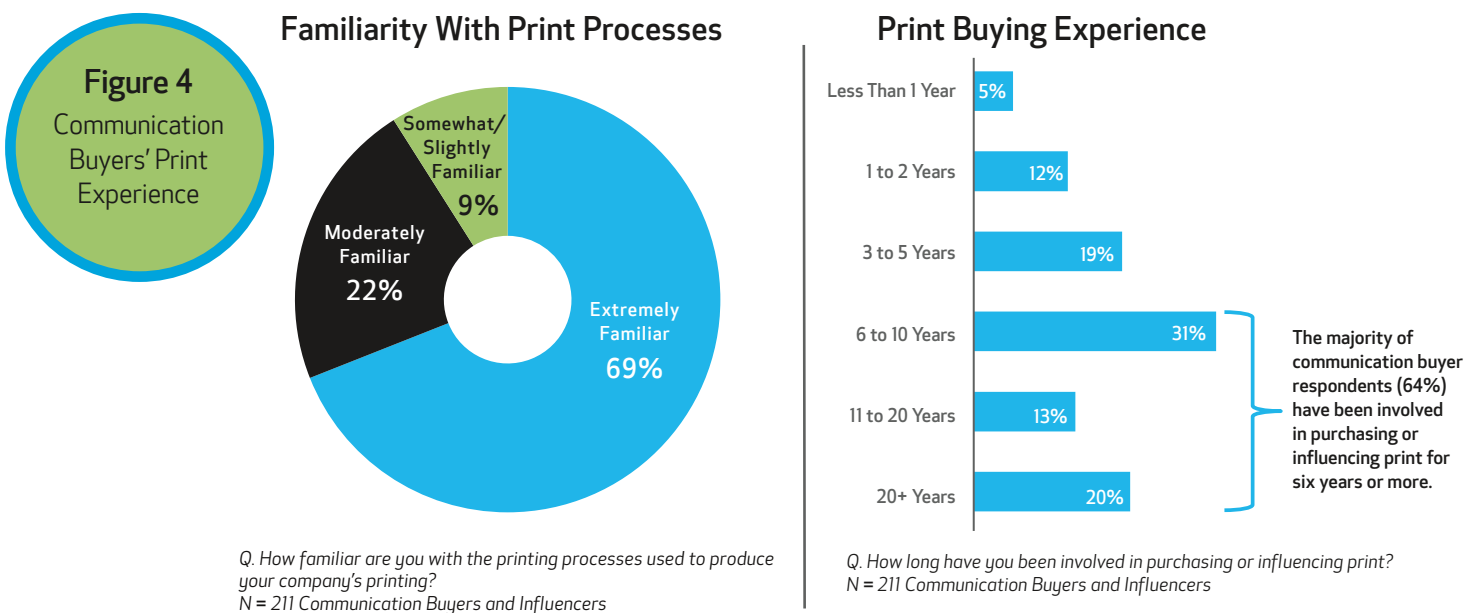Communication Buyer Respondent Profiles

Job Titles

Job Title	Percentage
CEO/President/Owner/Director	36%
Manager	18%
Marketing Executive	10%
Management Executive	9%
Marketing Program Manager/Marketing Manager	7%
Designer	4%
Purchasing	4%
Brand Manager	4%
Product Manager	2%
Event Manager	2%
Other	4%

Q. Which of the following describes your role in your organization?
N = 211 Communication Buyers and Influencers

Number of Employees

Number of Employees	Percentage
Fewer Than 19	14%
20 to 99	7%
100 to 399	18%
400 to 999	26%
1,000 or More	35%

Q. In total, how many people does your organization employ?
N = 211 Communication Buyers and Influencers

Source: Enhancing The Print Customer Connection, NAPCO Research 2021

To qualify to take the survey, buyer respondents needed to either purchase or influence print and be familiar with the methods used by their organizations to submit print jobs. Two-thirds of respondents (69%) report they're extremely familiar with those printing processes while 22% are moderately familiar, and 9% are somewhat/slightly familiar (Figure 4). Most communication buyer respondents (63%) have been involved in purchasing or influencing print for six years or more. And two-thirds of respondents (66%) report having an in-house printing operation.

Figure 4
Communication Buyers' Print Experience

Familiarity With Print Processes

- Somewhat/Slightly Familiar 9%
- Moderately Familiar 22%
- Extremely Familiar 69%

Q. How familiar are you with the printing processes used to produce your company's printing?
N = 211 Communication Buyers and Influencers

Print Buying Experience

Print Buying Experience	Percentage
Less Than 1 Year	5%
1 to 2 Years	12%
3 to 5 Years	19%
6 to 10 Years	31%
11 to 20 Years	13%
20+ Years	20%

The majority of communication buyer respondents (64%) have been involved in purchasing or influencing print for six years or more.

Q. How long have you been involved in purchasing or influencing print?
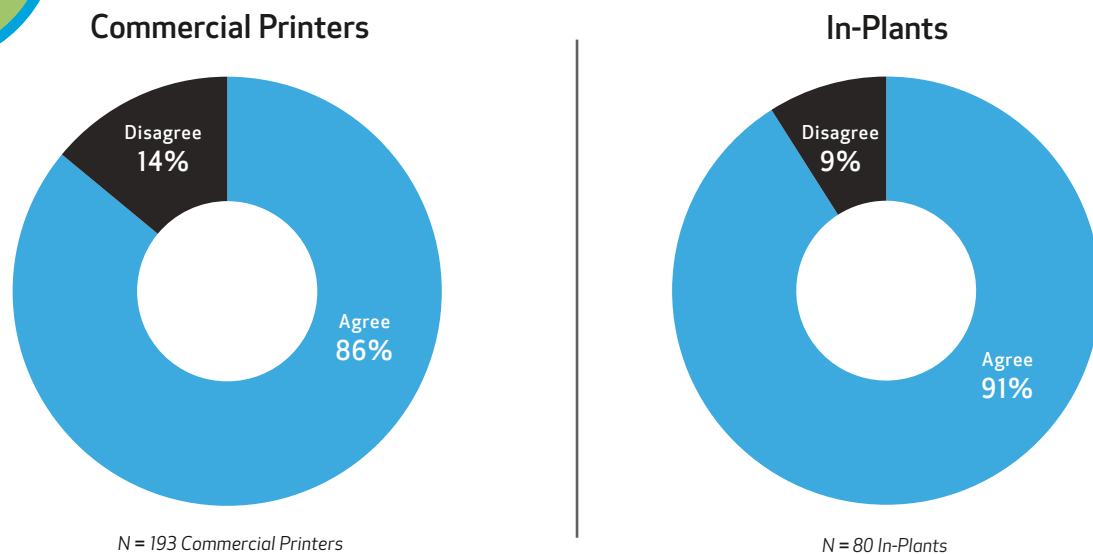*N = 211 Communication Buyers and Influencers*

Source: Enhancing The Print Customer Connection, NAPCO Research 2021

The Implications of COVID-19

The COVID-19 pandemic disrupted virtually every facet of business and forced all types of organizations to rethink how they engage and connect with customers. Commercial printers and in-plants participating in the survey reported that the pandemic reduced some customers' print use (Figure 5).

Figure 5
Print Providers Say COVID-19 Reduced Print Use

Commercial Printers

Disagree
14%

Agree
86%

N = 193 Commercial Printers

In-Plants

Disagree
9%

Agree
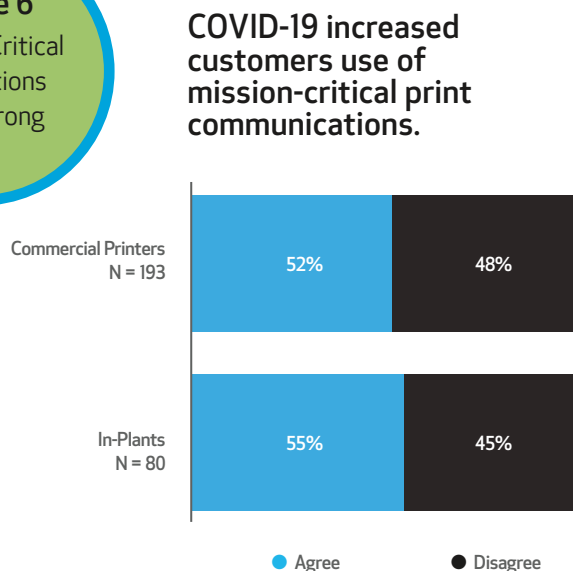91%

N = 80 In-Plants

Source: Enhancing The Print Customer Connection, NAPCO Research 2021

One print application proved resilient during the pandemic: mission-critical communications. Over half of commercial printers and in-plants report the COVID-19 pandemic increased their customers' use of mission-critical print applications (Figure 6); communication buyer respondents indicate the same. When asked how the pandemic influenced print demand for various applications, buyers indicate the top print applications to increase were financial/legal materials, general office materials, business forms, and bill/statements.

Meanwhile, buyer respondents report that printed materials geared toward events and venues where people gather — such as invitations, event materials, and sign and display graphics — experienced the greatest decline.

Figure 6
Mission-Critical Applications Held Strong

COVID-19 increased customers use of mission-critical print communications.

	Agree	Disagree
Commercial Printers N = 193	52%	48%
In-Plants N = 80	55%	45%

Applications Increasing

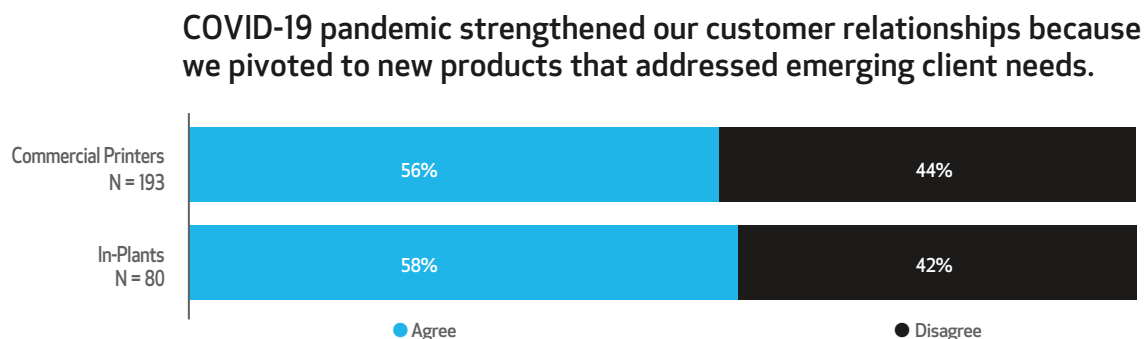| Application	Percent
Financial/Legal Materials, N = 66	56%
General Office, N = 120	44%
Business Forms, N = 57	42%
Bills/Statements, N = 53	42%
Magazines/Periodicals/Journals, N = 51	41%
Direct Mail, N = 102	41%
Books, N = 37	38%
Training Materials, N = 80	38%
Marketing Collateral, N = 121	37%
Invitations/Event Materials, N = 78	36%
Postcards, N = 73	36%
Documents/Manuals, N = 81	32%
Catalogs, N = 50	32%
Signage/POP/Display Materials, N = 77	29%

Q. Of the print applications you influence or purchase, how has the COVID-19 pandemic influenced print volume?
Base = 211 Communication Buyers and Influencers

Source: Enhancing The Print Customer Connection, NAPCO Research 2021

Over half of commercial printers and in-plants report that the COVID-19 pandemic strengthened their customer relationships because they added products and services to meet emerging customer needs (Figure 7). Providers offered their customers new or different applications created by the pandemic (e.g., social distancing graphics, menu table cards with QR codes, personal protection equipment, disposable menus, and print for testing and vaccine sites).

Figure 7
Pandemic Helped to Strengthen Customer Relationships

COVID-19 pandemic strengthened our customer relationships because we pivoted to new products that addressed emerging client needs.

	Agree	Disagree
Commercial Printers N = 193	56%	44%
In-Plants N = 80	58%	42%

Q. What is your level of agreement with the following statements?
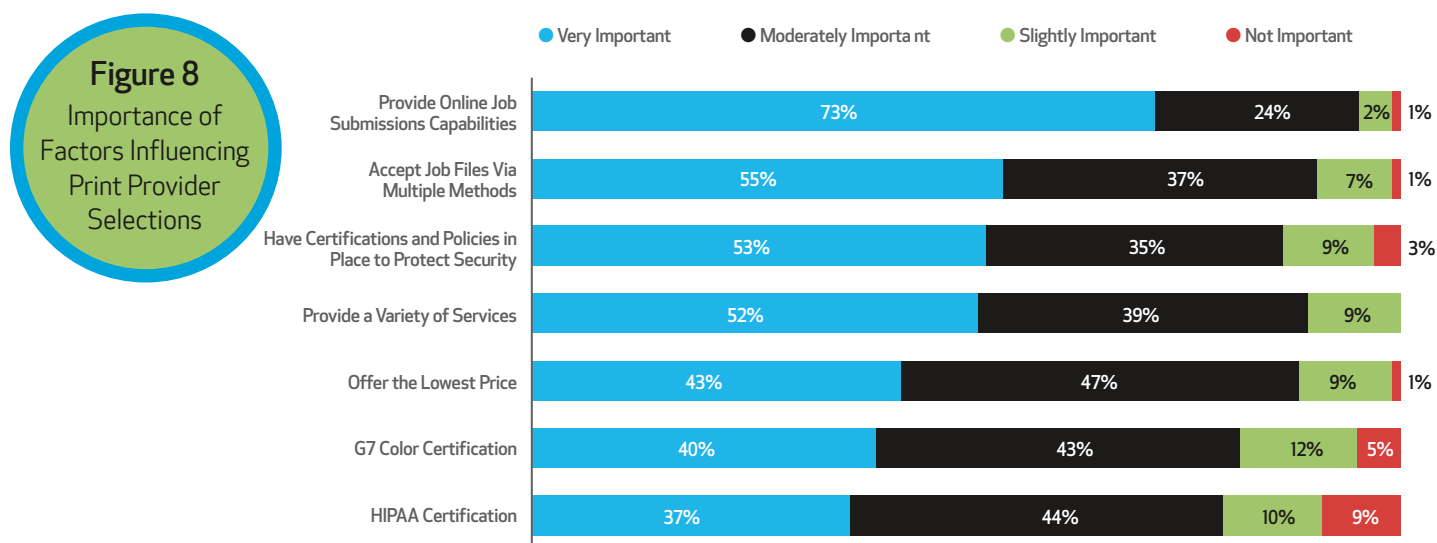*Source: Enhancing The Print Customer Connection, NAPCO Research 2021*

Educated Communication Buyers Have High Expectations

As noted previously, survey respondents report a high level of familiarity and experience in purchasing print (Figure 4). This finding reflects a broader trend of communication buyers being highly astute when selecting print providers and specifying work. The survey asked communication buyers and influencers to rate the importance of various factors considered when selecting a print provider. The top two most important factors focused on job submission, where a customer's experience with a print provider begins (Figure 8).

For communication buyers, the most important factor identified in selecting a print provider is that the company offer online job submission capabilities, even though buyers reported in a different survey question that most work is submitted via file uploads or email. The second most important factor was a provider's ability to accept print jobs via multiple methods. The combination of these two responses points to communication buyers requiring flexibility, control, and simplicity when submitting print jobs. While online job submission portals are beneficial management tools for monitoring and managing work, respondents value the ease of uploading files to an online storage platform such FTP or Dropbox, or emailing a file.

A possible factor holding back communication buyers' use of online ordering is that typically they rely on multiple print vendors. Over two-thirds (68%) of communication buyer respondents report they work with multiple print vendors, and learning and implementing each vendor's job submission solution challenges resources. According to a 2020 NAPCO Research/Canon U.S.A. study, *Print in the Eye of the Buyer*, on average, communication buyers report using three print providers. This number is dictated by a variety of reasons, including organizational rules, volume and turnaround time requirements, demand for specialized services, security requirements, redundancy/disaster recovery, and others.

Figure 8
Importance of Factors Influencing Print Provider Selections

Legend: ● Very Important ● Moderately Important ● Slightly Important ● Not Important

Factor	Very Important	Moderately Important	Slightly Important	Not Important
Provide Online Job Submissions Capabilities	73%	24%	2%	1%
Accept Job Files Via Multiple Methods	55%	37%	7%	1%
Have Certifications and Policies in Place to Protect Security	53%	35%	9%	3%
Provide a Variety of Services	52%	39%	9%	
Offer the Lowest Price	43%	47%	9%	1%
G7 Color Certification	40%	43%	12%	5%
HIPAA Certification	37%	44%	10%	9%

Q. How important are the following services and features when selecting a print provider? N = 211 Communication Buyers and Influencers.

Source: Enhancing The Print Customer Connection, NAPCO Research 2021

Over half of respondents indicate they expect their print providers to offer a variety of services. Today's communication buyers are tasked with many responsibilities beyond managing print. Because today's buyers must be versed in all types of communication channels — including email, social media, video, print, and mobile — this presents an opportunity for print providers to build deeper relationships by simplifying customers' experiences in better managing print.

Provider Selection Goes Beyond Price

Interestingly, offering the lowest price, while important, was not at the top of the list. This survey finding likely reflects that buyers are looking beyond price-per-job and considering the value of the services and features offered by a provider. Many organizations no longer employ full-time, dedicated print buyers but, instead, have moved to roles that handle multiple media formats. As a result, print buyers rely more on print providers (in-plant or outside provider) for their experience and knowledge for all matters related to print.

In addition, communication buyer respondents prefer to work with print providers that are G7® certified. This was a very important provider selection feature for 40% of respondents and underscores buyers' demand for providers that can ensure consistent color across their various print jobs.
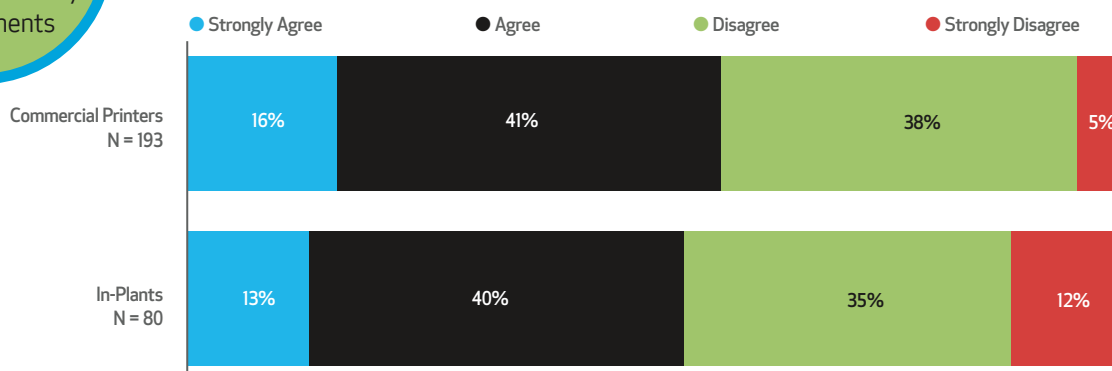
Data Security Growing in Importance

Another important consideration of communication buyers when selecting a print provider is their security certifications and processes. As noted in Figure 8 (see page 8), more than half of communication buyer respondents (53%) report that a print provider's focus on security is very important. Data security is becoming more critical as cyberattacks and database breaches continue to plague organizations.

Print providers participating in the survey report that data security is of growing importance to communication buyers. Commercial printers (57%) and in-plants (53%) agreed that job file and data security are growing concerns for their customers, and their organizations are taking action to meet these requirements (Figure 9).

Figure 9
Providers Taking Action to Meet Customer Security Requirements

Job file and data security are of growing in importance to our customers, and our organization has taken action to meet these requirements.

● Strongly Agree   ● Agree   ● Disagree   ● Strongly Disagree

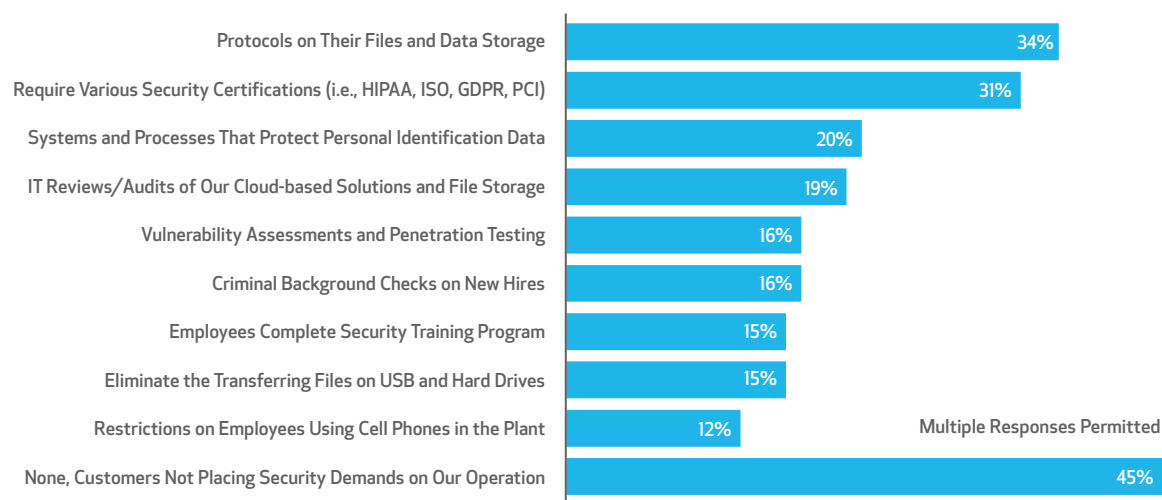|	Strongly Agree	Agree	Disagree	Strongly Disagree
Commercial Printers N = 193	16%	41%	38%	5%
In-Plants N = 80	13%	40%	35%	12%

Q. What is your level of agreement with the following statements?

Source: Enhancing The Print Customer Connection, NAPCO Research 2021

Commercial printer respondents report (Figure 10) that customers require they follow protocols for storing files and data (34%), obtain various security certifications (i.e., HIPAA, ISO, GDPR, PCI) (31%), have systems and processes that protect personal identification data (20%), and conduct IT reviews/audits of cloud-based solutions and file storage (19%).

Figure 10
Communication Buyer Security Demands of Commercial Printers

Security Demand	Percentage
Protocols on Their Files and Data Storage	34%
Require Various Security Certifications (i.e., HIPAA, ISO, GDPR, PCI)	31%
Systems and Processes That Protect Personal Identification Data	20%
IT Reviews/Audits of Our Cloud-based Solutions and File Storage	19%
Vulnerability Assessments and Penetration Testing	16%
Criminal Background Checks on New Hires	16%
Employees Complete Security Training Program	15%
Eliminate the Transferring Files on USB and Hard Drives	15%
Restrictions on Employees Using Cell Phones in the Plant	12%
None, Customers Not Placing Security Demands on Our Operation	45%

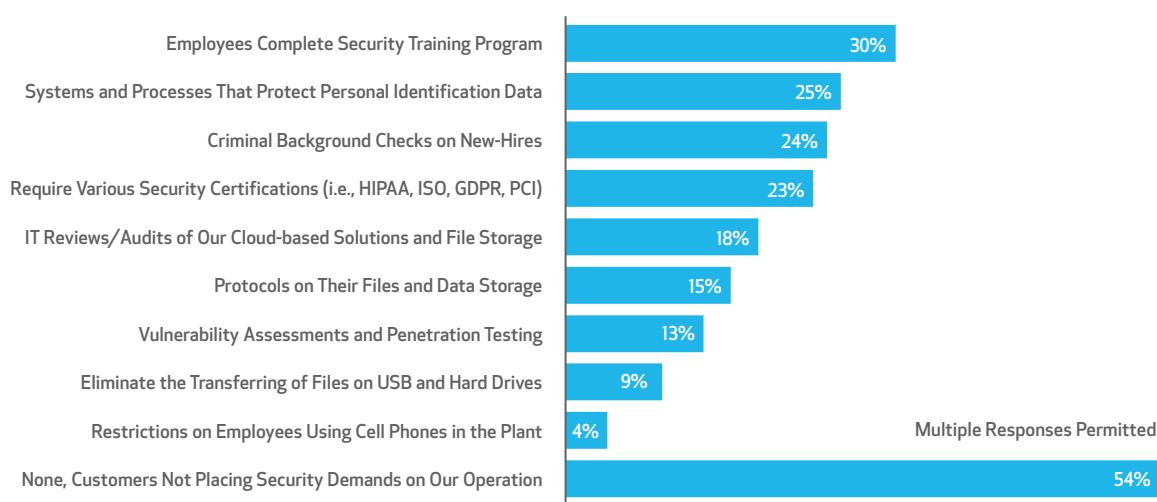Multiple Responses Permitted

Q. Which of the following security demands are customers placing on your operation?
N = 193 Commercial Printers

Source: Enhancing The Print Customer Connection, NAPCO Research 2021

As for in-plant respondents, they report the following to be their customers' top security demands (Figure 11): requiring employees to complete a security training program (30%); having systems and processes in place that protect personal identification data (25%); conducting criminal background checks on new-hires (24%); and, obtaining various security certifications (i.e., HIPAA, ISO, GDPR, PCI) (23%).

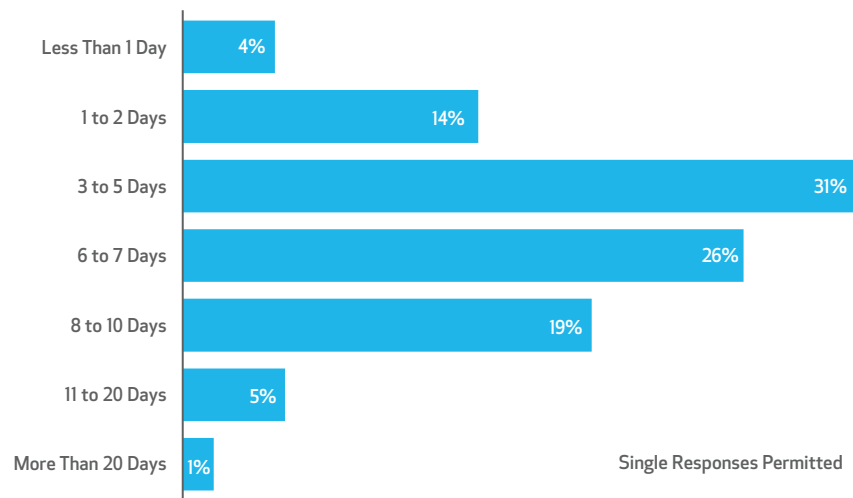**Figure 11**
Communication Buyer Security Demands of In-plants

Security Demand	Percentage
Employees Complete Security Training Program	30%
Systems and Processes That Protect Personal Identification Data	25%
Criminal Background Checks on New-Hires	24%
Require Various Security Certifications (i.e., HIPAA, ISO, GDPR, PCI)	23%
IT Reviews/Audits of Our Cloud-based Solutions and File Storage	18%
Protocols on Their Files and Data Storage	15%
Vulnerability Assessments and Penetration Testing	13%
Eliminate the Transferring of Files on USB and Hard Drives	9%
Restrictions on Employees Using Cell Phones in the Plant	4%
None, Customers Not Placing Security Demands on Our Operation	54%

Multiple Responses Permitted

Q. Which of the following security demands are customers placing on your operation?
N = 80 In-Plants

Source: Enhancing The Print Customer Connection, NAPCO Research 2021

ENHANCING THE PRINT CUSTOMER CONNECTION — Navigating a New Customer Environment

Turnaround Times at the Speed of Now!

Communication buyer respondents require fast turnaround times for their print work. While they reported that the average turnaround time for print was six days, close to half (49%) of communications buyer respondents report needing work turned around in five days or fewer (Figure 12). Meeting customer demands for quick turnaround work can be accomplished by automating workflow.

Figure 12
Buyers Demand Quick Turnaround

Turnaround	Percent
Less Than 1 Day	4%
1 to 2 Days	14%
3 to 5 Days	31%
6 to 7 Days	26%
8 to 10 Days	19%
11 to 20 Days	5%
More Than 20 Days	1%

Single Responses Permitted

Q. What is the average turnaround time you require for your print work?
N = 211 Communication Buyers and Influencers that specify the printing process used to print their materials

Source: Enhancing The Print Customer Connection, NAPCO Research 2021
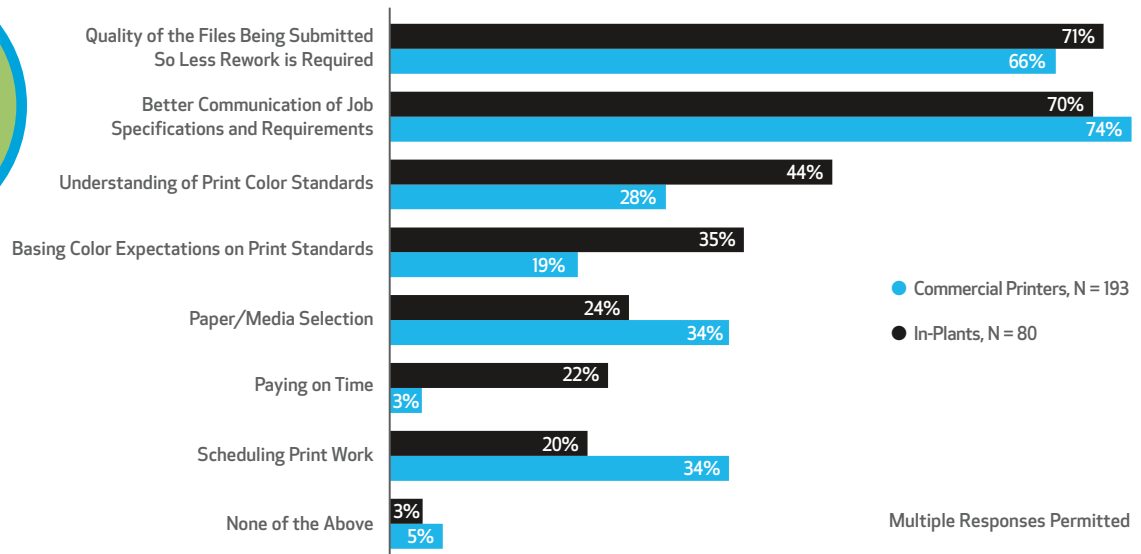
Workflow automation is at the heart of productivity and profitability for both print customers and providers. Automated print production workflows can help reduce costs, improve productivity, improve color consistency, optimize equipment and communication investments, enable more profitable revenue streams, and meet requirements for faster turnaround.

A finding from the NAPCO Research/Canon U.S.A. 2019 *Digital Printing 5.0* survey makes a strong case for the value of automation. Commercial printers reporting double-digit sales growth incorporated higher levels of automation than those that reported flat or declining sales.

The Quest to Improve the Quality of Print Files Received

A key challenge to automating workflow is the quality of job files submitted by customers. Print provider respondents report that customers often send print files that require rework and they don't adequately communicate job requirements (Figure 13).

Figure 13
Areas Customers Can Improve When Ordering Print Work

Quality of the Files Being Submitted So Less Rework is Required
- In-Plants: 71%
- Commercial Printers: 66%

Better Communication of Job Specifications and Requirements
- In-Plants: 70%
- Commercial Printers: 74%

Understanding of Print Color Standards
- In-Plants: 44%
- Commercial Printers: 28%

Basing Color Expectations on Print Standards
- In-Plants: 35%
- Commercial Printers: 19%

Paper/Media Selection
- In-Plants: 24%
- Commercial Printers: 34%

Paying on Time
- In-Plants: 22%
- Commercial Printers: 3%

Scheduling Print Work
- In-Plants: 20%
- Commercial Printers: 34%

None of the Above
- In-Plants: 3%
- Commercial Printers: 5%

● Commercial Printers, N = 193
● In-Plants, N = 80
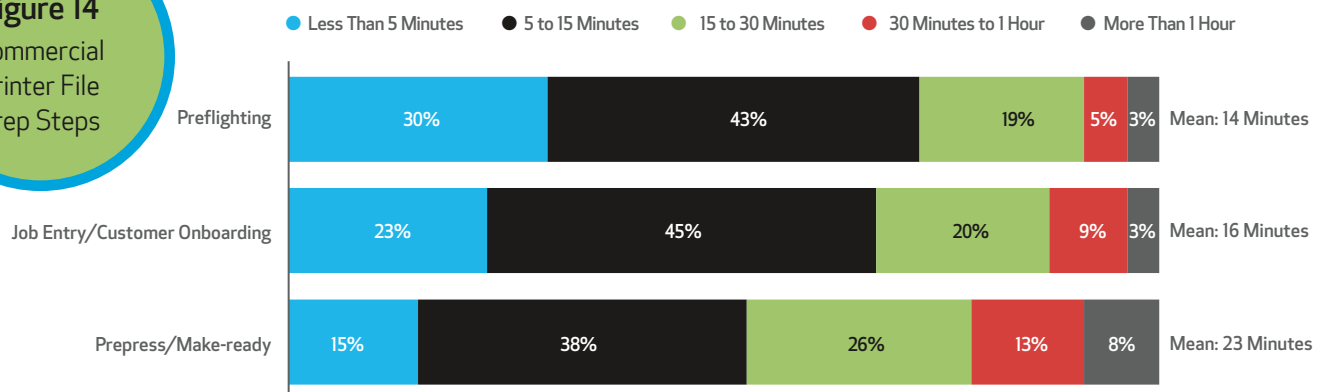
Multiple Responses Permitted

Q. What are the top areas where customers can improve in ordering and specifying print jobs?
Source: Enhancing The Print Customer Connection, NAPCO Research 2021

Figures 14 and 15 help put the opportunity to improve customer-submitted job files into perspective. Print provider respondents were asked to estimate the average time required for various steps in making customer files print-ready.
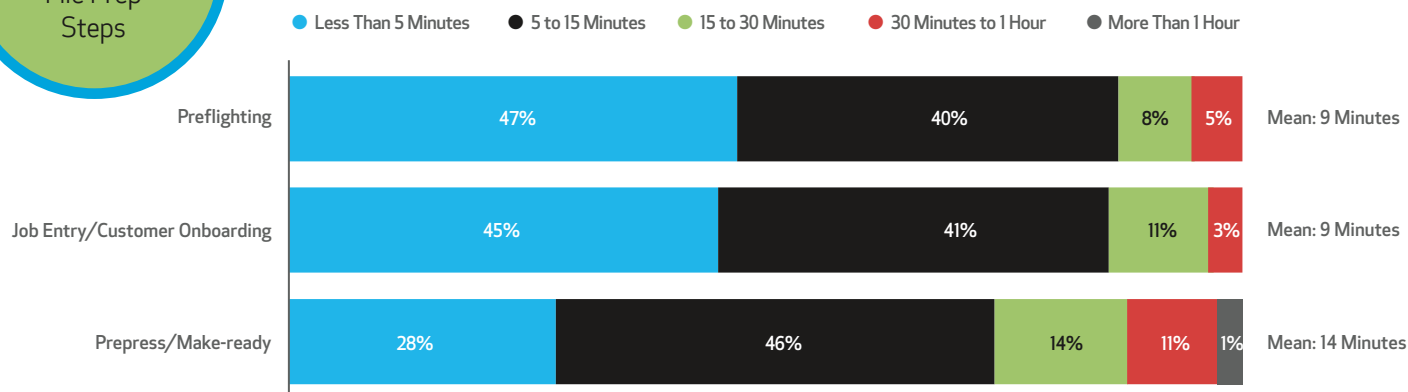
Figure 14
Commercial Printer File Prep Steps

● Less Than 5 Minutes ● 5 to 15 Minutes ● 15 to 30 Minutes ● 30 Minutes to 1 Hour ● More Than 1 Hour

Step	Less Than 5 Minutes	5 to 15 Minutes	15 to 30 Minutes	30 Minutes to 1 Hour	More Than 1 Hour	Mean
Preflighting	30%	43%	19%	5%	3%	Mean: 14 Minutes
Job Entry/Customer Onboarding	23%	45%	20%	9%	3%	Mean: 16 Minutes
Prepress/Make-ready	15%	38%	26%	13%	8%	Mean: 23 Minutes

Q. What is the average time required for each of the following steps in creating a print-ready file?
N = 193 Commercial Printers

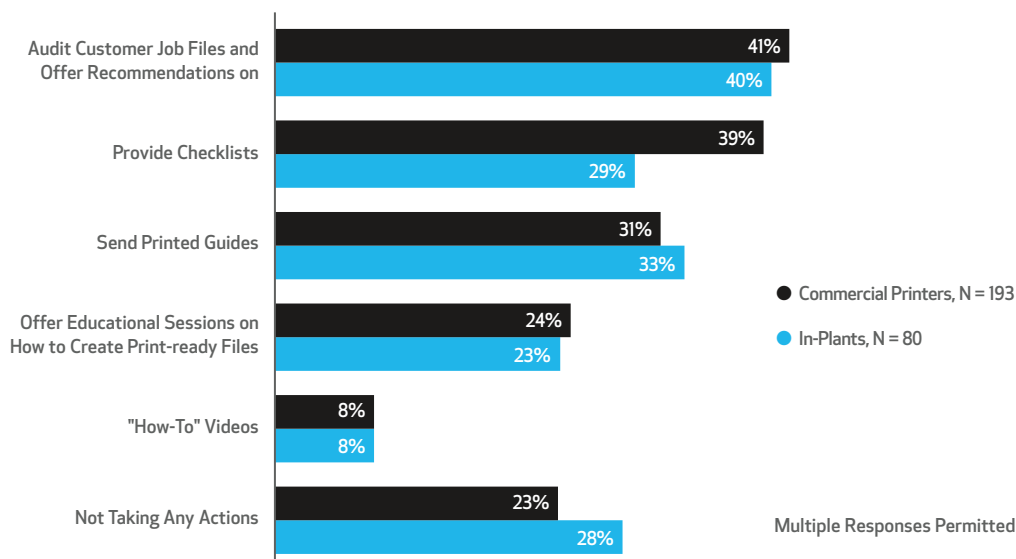*Source: Enhancing The Print Customer Connection, NAPCO Research 2021*

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Figure 15
In-plant File Prep Steps

Legend: ● Less Than 5 Minutes ● 5 to 15 Minutes ● 15 to 30 Minutes ● 30 Minutes to 1 Hour ● More Than 1 Hour

Step	Less Than 5 Minutes	5 to 15 Minutes	15 to 30 Minutes	30 Minutes to 1 Hour	More Than 1 Hour	Mean
Preflighting	47%	40%	8%	5%		Mean: 9 Minutes
Job Entry/Customer Onboarding	45%	41%	11%	3%		Mean: 9 Minutes
Prepress/Make-ready	28%	46%	14%	11%	1%	Mean: 14 Minutes

Q. What is the average time required for each of the following steps in creating a print-ready file?
N = 80 In-Plants

Source: Enhancing The Print Customer Connection, NAPCO Research 2021

Print providers report taking action to support customers in improving file preparation and job submission (Figure 16). Commercial printer and in-plant respondents are auditing customers' job files, providing preflight checklists, supplying printed guides, and hosting educational sessions to help communication buyers to produce print-ready files that don't require rework.

Figure 16
Actions of Print Providers to Educate Customers

Action	Commercial Printers	In-Plants
Audit Customer Job Files and Offer Recommendations on	41%	40%
Provide Checklists	39%	29%
Send Printed Guides	31%	33%
Offer Educational Sessions on How to Create Print-ready Files	24%	23%
"How-To" Videos	8%	8%
Not Taking Any Actions	23%	28%

● Commercial Printers, N = 193
● In-Plants, N = 80
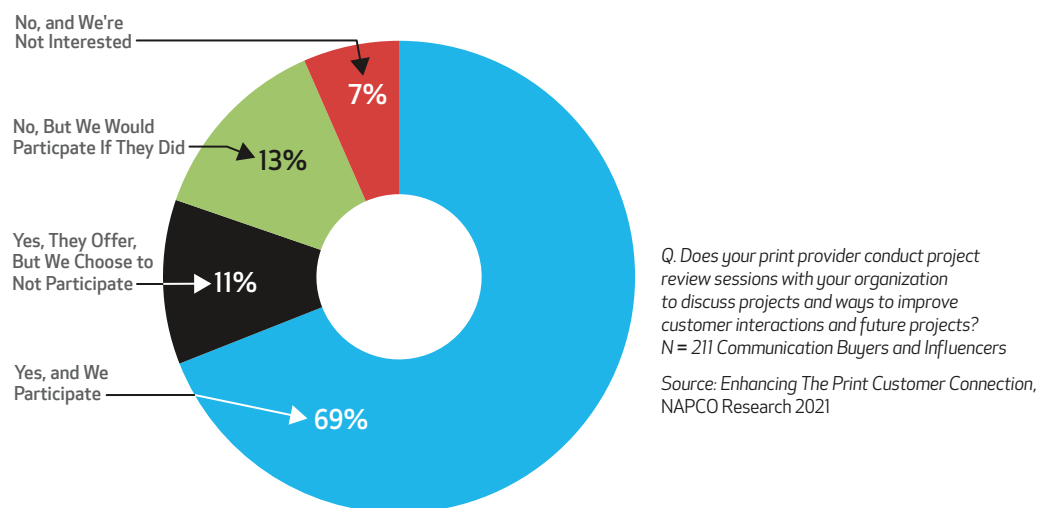
Multiple Responses Permitted

Q. What actions are you taking to better education customers on print file preparation?
Source: Enhancing The Print Customer Connection, NAPCO Research 2021

Buyers Value Collaboration

Communication buyer respondents value print providers' efforts to help improve job execution and workflow interactions. Over two-thirds of buyer respondents report they participate in collaborative project review sessions held by their print providers to discuss ways to improve customer interactions (Figure 17).

Figure 17
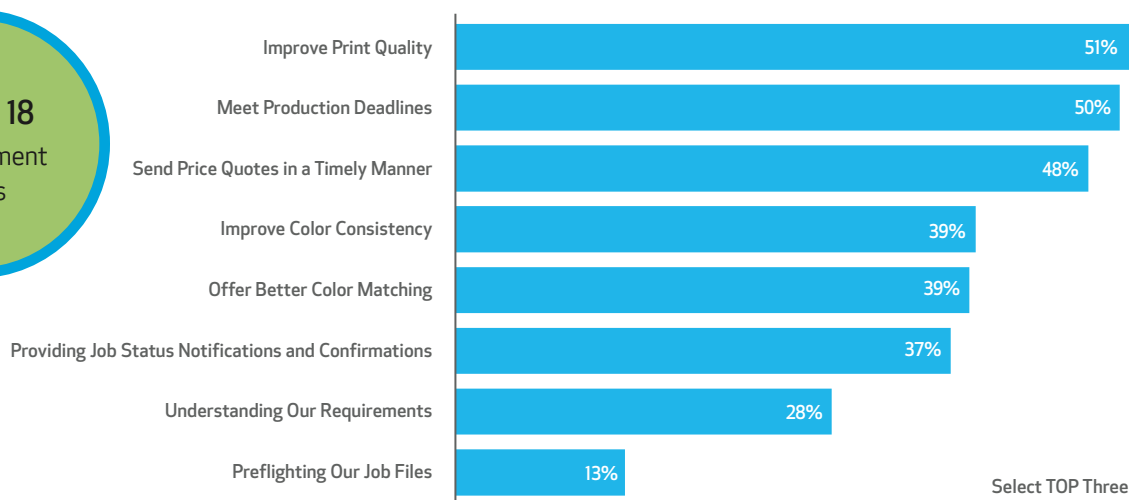Buyers Value Collaborative Efforts to Improve Interactions

No, and We're Not Interested — **7%**

No, But We Would Particpate If They Did — **13%**

Yes, They Offer, But We Choose to Not Participate — **11%**

Yes, and We Participate — **69%**

Q. Does your print provider conduct project review sessions with your organization to discuss projects and ways to improve customer interactions and future projects? N = 211 Communication Buyers and Influencers

Source: Enhancing The Print Customer Connection, NAPCO Research 2021

Improving Print Quality and Services

Communication buyer respondents say their print providers can do a better job at producing quality work, meeting deadlines, sending price quotes in a timely manner, and improving color consistency and matching (Figure 18).

Print quality and color matching are top concerns for many buyers. Print providers that implement standards and processes like G7, along with customer education, can help meet customer requirements and improve results. Process optimization and workflow automation both address buyers' demanding production and communication deadline expectations.

Figure 18
Improvement Areas

Improvement Area	Percentage
Improve Print Quality	51%
Meet Production Deadlines	50%
Send Price Quotes in a Timely Manner	48%
Improve Color Consistency	39%
Offer Better Color Matching	39%
Providing Job Status Notifications and Confirmations	37%
Understanding Our Requirements	28%
Preflighting Our Job Files	13%

Select TOP Three

Q. What are the top areas where your print provider(s) can improve in producing your jobs? N = 211 Communication Buyers and Influencers

Source: Enhancing The Print Customer Connection, NAPCO Research 2021

Conclusion

Communication buyers are turning to print providers for services, tools, and production workflows that help ensure color consistency, data security features, high productivity, and fast turnaround. Buyers are looking beyond price-per-job and considering the value of the services and features offered by a provider.

Navigating today's new customer environment — where buyers are tasked with many responsibilities, pressured to justify communication spending, and faced with multiple communication options — necessitates print providers adapting processes and services to enhance the customer connection. Print providers that focus on ways to automate print workflow, from job submission to delivery, offer solutions to core customer challenges while helping to strengthen relationships and improve profitability.

About Enhancing the Print Customer Connection

Enhancing the Print Customer Connection is a series of thought-leadership content pieces based on a NAPCO Research survey of communication buyers, commercial printers, and in-plants that was sponsored by Canon.

1. Delivering Client Experiences that Build Competitive Advantage
2. The Job Submission Challenge – Onboarding Your Customers
3. Navigating a New Customer Environment
4. Advancing Productivity and Service Delivery
5. Strengthening the Value of the In-Plant

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