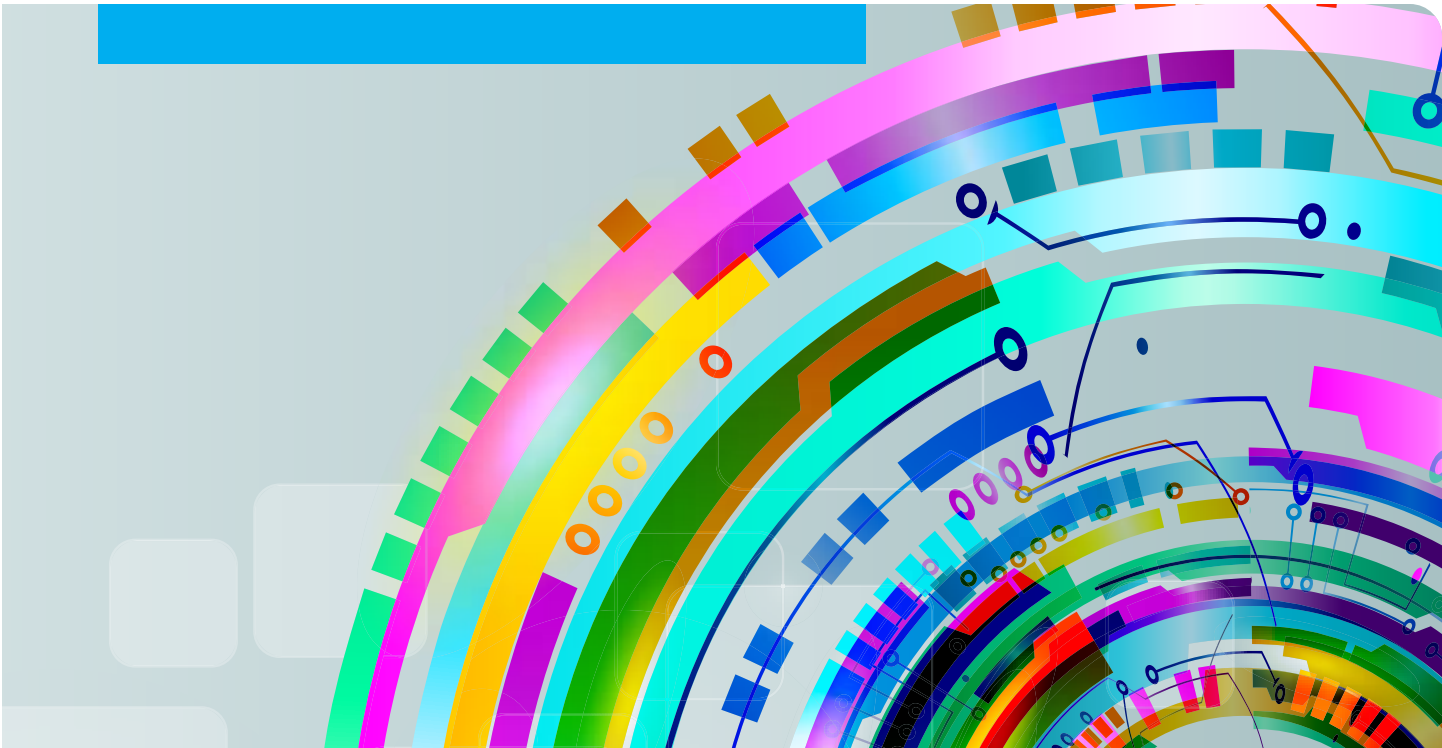
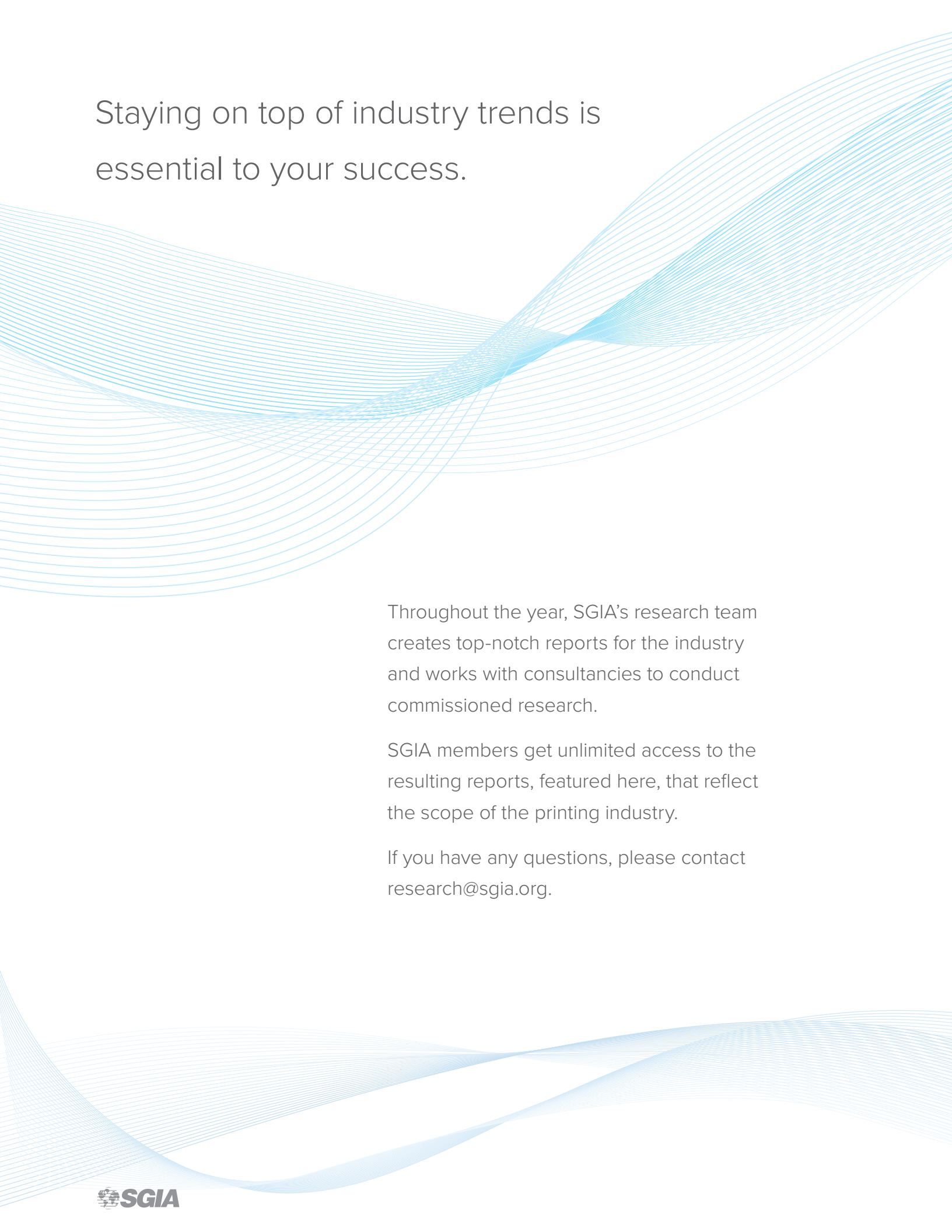




Growth Strategies and Capital Investment Report: Commercial Printing





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Table of Contents

Executive Summary	4
Key Findings	4
Participant Profile	5
Company Size, Annual Sales	5
Geographic Markets Served	5
Segments Served, Technology and Capacity Utilization	6
Segments Served	6
Printing Technology	6
Capacity Utilization	7
Sales Growth	8
Sales Growth, 2019	8
Barriers to Growth	9
Biggest Barriers to Growth	9
Attracting New Customers	10
Attracting New Clients: Methods and Effectiveness	10
Use of Social Media	11
Social Media for Advertising/Marketing Purposes: Platforms Used and Effectiveness	11
Building Competitive Advantage: Production Steps	12
Building Competitive Advantage: Production Steps Taken and Effectiveness	12
Building Competitive Advantage: Future Production Steps	13
Building Competitive Advantage: Management and Sales Steps	14
Building Competitive Advantage: Management and Sales Steps Taken and Effectiveness	14
Building Competitive Advantage: Future Management and Sales Steps	15
Capital Investment: In What	16
Printing Technology in Use, Purchased During Last 12 Months and Purchase Plans for the Next 12 Months	16
Capital Investment: How Much and Why	17
Planned Investment in Production-Related Equipment, 2020	17
Reasons for Capital Spending	17
Factors Affecting Supplier Selection	18
Hiring Plans	19
Hiring Plans and Reasons for Hiring	19
Reasons for Hiring, 2020	19
Positions Commercial Printers Most Want to Fill	20
2020 Expectations	21
Company Expectations, 2020	21
Expectations 2020, Commercial Printing Industry and National Economy	22
Creating Opportunity	23

Executive Summary

The fourth quarter 2019 SGIA Industry Survey — Growth Strategies and Capital Investment investigated the steps printing companies are taking to create profitable growth, how effective those steps have been, the technologies in which they plan to invest, their investment objectives and the positions they would most like to fill. A total of 238 companies from across the printing industry participated in the survey. This report presents results for the 62 who define their primary business as commercial printing.

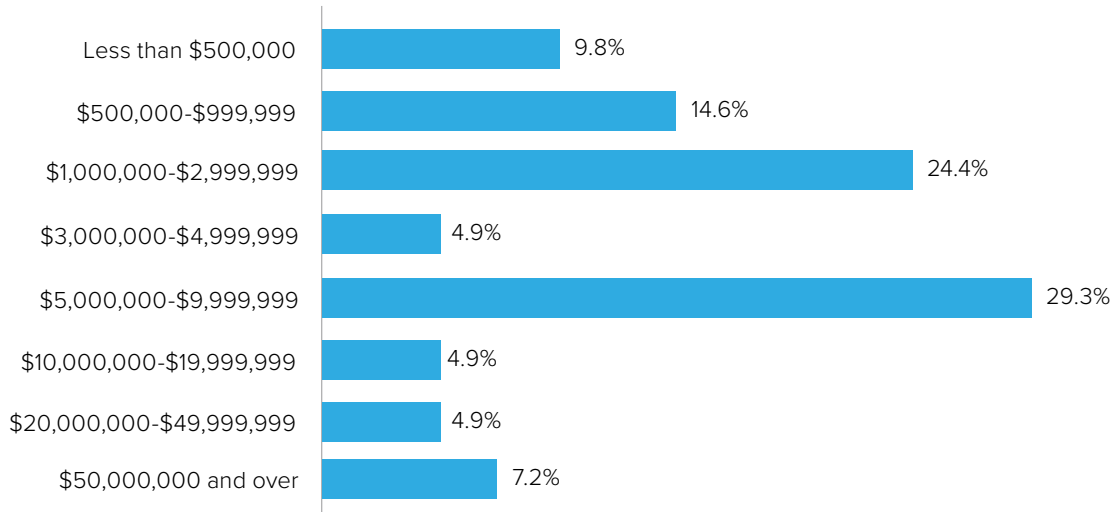
KEY FINDINGS

- The company website, social media, direct mail and trade shows are among the more than one dozen tools used by commercial printers surveyed to attract clients. Referrals is the only tool rated very effective by a majority of companies surveyed.
- A number of steps are being taken in production, management and sales to build competitive advantage. Lean manufacturing/continuous improvement (79.2%), improving customer service (64.3%), maximizing the value of current customers (61.9%) and operating cost reduction (50.0%) are the most widely taken. Adding imaging capacity and streamlining workflow are rated most effective.
- Nearly 55.0% plan to invest in capital equipment this year. Inkjet, including wide format (15.2%), direct-to-garment (13.0%) and commercial (12.9%), is the top investment target. The need to increase efficiency and to increase speed, cited by 74.3% and 68.6%, respectively, are the primary reasons for investing. Customer support (58.8%) and durability of equipment (52.9%) are the most frequently cited considerations in selecting a supplier.
- Nearly 59.0% plan to hire this year, with digital press operator (75.0%), sales representative (55.0%) and customer service representative (50.0%) the top targets.
- The large majority of respondents are optimistic about their 2020 prospects: 81.1% expect to increase sales, 83.8% production and 59.5% pre-tax profitability. Acquiring or merging with another company, diversification, especially into wide format, automation and a focus on cultivating profitable work are the primary reasons.
- Expectations for the commercial printing industry are mixed: 48.6% have a positive view of the industry's 2020 prospects, while 51.4% have a neutral (40.5%) or negative (10.9%) view. Expectations for the national economy are low: 41.2% have a positive view, while 58.8% have a neutral (41.2%) or negative (17.6%) view.

Participant Profile

A diverse group of commercial printing companies contributed to this report. Representative of the industry, most are smaller, with 48.8% selling less than \$3 million per year. But both mid-sized and larger companies are represented: 29.3% have annual sales of \$5,000,000 to \$9,999,999 and 7.2% sales of \$50 million or more (Figure 1).

Figure 1: Company Size, Annual Sales



Q. What was your company's total annual sales revenue for 2019?

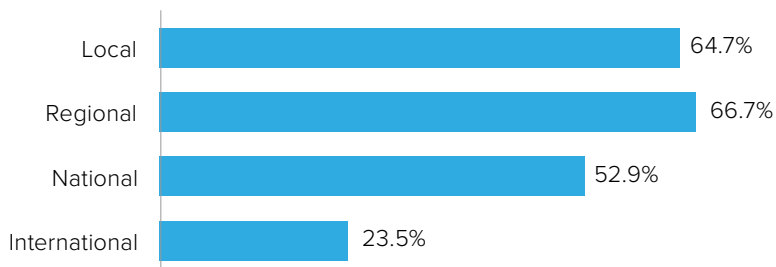
n=41

Nearly 86.0% are located in the United States, 4.8% in Canada and 9.7% in other countries, including India, Israel and Pakistan. Geographic markets range from the local, served by 64.7%, to the international, served by 23.5%, with 54.9% serving two or more areas and 37.3% serving three or more (Figure 2).

Nearly 61.0% sell exclusively to businesses, 36.1% to both businesses and consumers and 3.3% exclusively to consumers. Exchanging services with other printers is common: 74.5% provide production services and 54.9% provide finishing/post-print services to other printers, while 70.6% purchase production services and 62.7% purchase finishing/post-print services from other printers.

All companies surveyed have been in business at least three years, and 80.3% have been in business more than 20.

Figure 2: Geographic Markets Served



Q. Which of the following areas does your company serve?

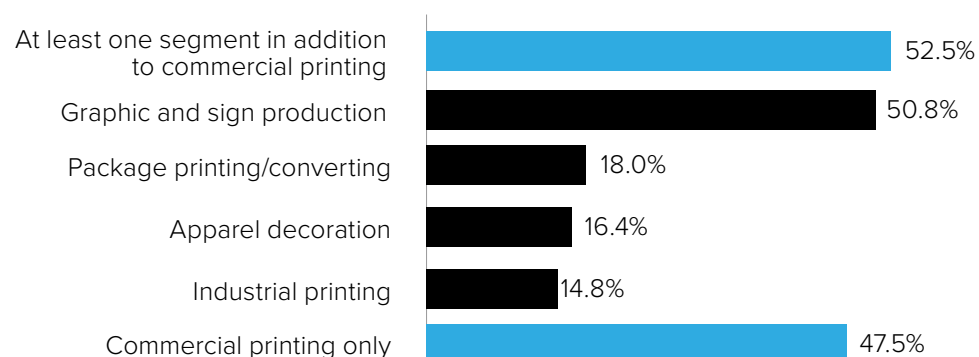
n=51

Segments Served, Technology and Capacity Utilization

Printing segments served, technology in place and the utilization rate of technology in place all affect growth strategies and capital investment plans. As Figure 3 shows, 52.5% of our research group serve at least one segment in addition to commercial printing. Graphic and sign production, offered by 50.8%, continues to be the top target. Eighteen percent have moved into package printing/converting, 16.4% into apparel decoration and 14.8% into industrial printing.

But commercial printers have new competition as well as new opportunity: 25.0% of the graphic and sign producers and 16.7% of the apparel decorators surveyed now offer commercial printing, as boundaries between who prints what, how and for whom continue to break down.

Figure 3: Segments Served



Q. Which industry segments does your company serve?

n=61

Printing technology in place is a mix of digital and analog for 72.2%. Neither technology is dominant for 25.9%. Digital is dominant for the others: 53.7% are entirely or mostly digital, while just 20.4% are entirely or mostly analog (Figure 4).

Figure 4: Printing Technology

Technology Mix	Percent
Entirely digital	25.9%
Multi-technology, but mostly digital	27.8%
Multi-technology, with no single dominating process	25.9%
Multi-technology, but mostly analog	18.5%
Entirely analog	1.9%

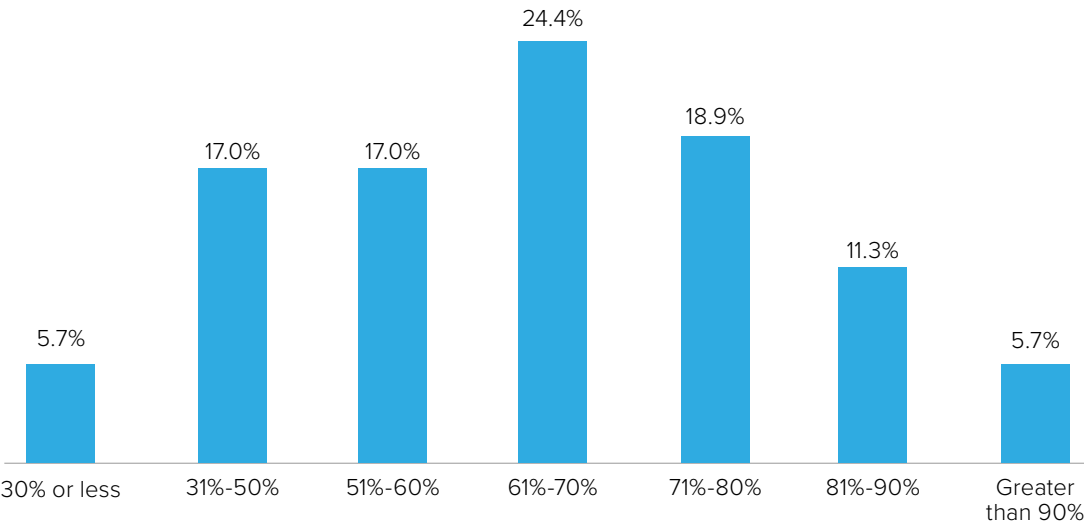
Q. Which of the following best describes your company's printing process?

n=54

Concerning capacity utilization, rates vary from less than 30% to more than 90%, with no rate typical for the commercial printers surveyed. The highest percentages operate in the 61%–70% range (24.4%) or the 71%–80% range (18.9%). And while 77.3% normally operated at more than 50% of capacity, just 17% normally operate at more than 80% (Figure 5).

It is important to remember that utilization rates alone say little about profitability. Utilization may be relatively high because the company has loaded up on work that keeps the equipment running but contributes little to margins. Or it may be relatively low but very profitable because the work fits the company’s capabilities and supports superefficient production. SGIA financial benchmarking analysis, which looks closely at what’s happening between the top line and the bottom line, helps distinguish between the two.

Figure 5: Capacity Utilization

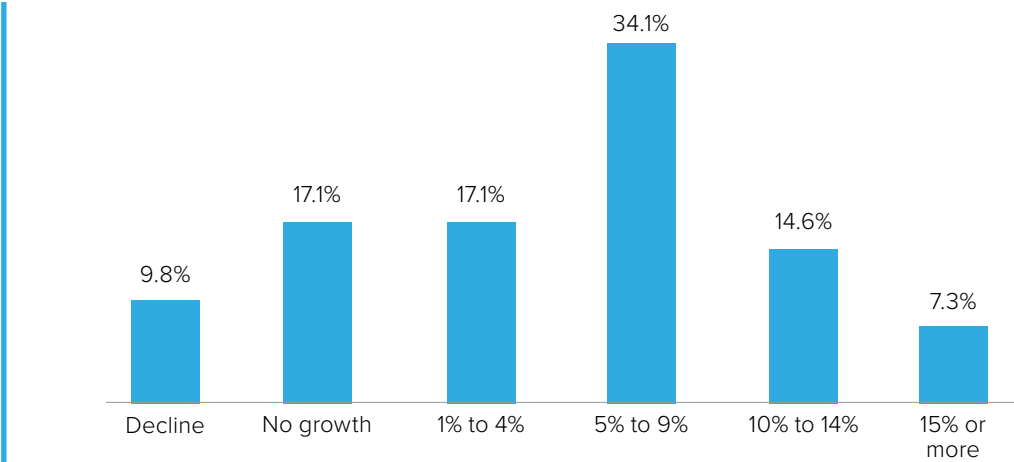


Q. What is your company’s average production in use as compared to total potential production?
n=53

Sales Growth

Sales increased last year for 73.1% of commercial printers surveyed, were unchanged for 17.1% and decreased for 9.8%. More than one-third grew 5%–9%, and more than one-fifth grew 10% or more (Figure 6). The gains primarily came from outside commercial printing — as noted, more than half of companies surveyed work in at least one other segment — and by taking share in a market that is growing modestly at best.

Figure 6: Sales Growth, 2019



Q. What was your company’s sales growth during calendar year 2019?
n=41

Barriers to Growth

Nearly 20 barriers to growth were identified, ranging from weakness in major product markets to understanding new technology. Finding new customers (58.9%) was cited most often by far. Downward pressure on prices (44.6%) and the cost of new technology (37.5%) came next. The barriers are on both the revenue side and cost side, adding up to intense pressure on margins across commercial printing (Figure 7).

Figure 7: Biggest Barriers to Growth

Barrier	Citing
Finding new customers	58.9%
Downward pressure on prices	44.6%
Cost of new technology adoption	37.5%
Recruiting/retaining production personnel	26.8%
Rising costs	25.0%
Recruiting/retaining sales personnel	23.2%
Training employees	19.6%
Weakness in major product markets/weak overall business conditions	17.9%
Understanding new technology	8.9%
Finding new channels of distribution	7.1%
Recruiting/retaining management personnel	7.1%
Ability to secure credit/lines of credit	1.8%
Environmental issues/regulations	1.8%
Globalization (offshoring, outsourcing)	1.8%

Q. What are your biggest barriers to growth? Select the top three.

n=56

Attracting New Customers

More than one dozen tools are used to attract new clients, with each company surveyed using six, on average. The company website, (79.1%), social media (69.8%), referrals (67.4%) and networking events (60.5%) are most widely used. More than half use electronic communication, outside sales and direct mail, while nearly half use inside sales. Only small percentages use pay-for-click advertising, classified ads or purchased sales leads (Figure 8).

Referrals, at 69.0%, is the only tool rated very effective by a majority. Outside sales are rated very effective by 48.5% and somewhat effective by 48.5%. Neither the company website nor social media, the two most widely used tools, scores particularly well: The former is rated very effective at attracting clients by 20.6% and only somewhat effective by 50.0%, while the latter is rated very effective by 6.7% and neutral or ineffective by 43.3%.

Figure 8: Attracting New Clients: Methods and Effectiveness

Method	Rating			
	Currently Using	Very Effective	Somewhat Effective	Neutral/ Ineffective
Company website	79.1%	20.6%	50.0%	29.4%
Social media	69.8%	6.7%	50.0%	43.3%
Referrals	67.4%	69.0%	31.0%	0.0%
Networking events	60.5%	19.2%	57.7%	23.1%
Electronic communication	55.8%	8.3%	58.3%	33.3%
Outside sales	55.8%	45.8%	45.8%	8.3%
Direct mail	53.5%	30.4%	47.8%	21.7%
Inside sales	46.5%	25.0%	55.0%	20.0%
Boards and civic organizations	27.9%	33.3%	50.0%	16.7%
Trade shows	25.6%	27.3%	63.6%	9.1%
Online directory listings	18.6%	0.0%	37.5%	62.5%
On-site advertising	14.0%	16.7%	50.0%	33.3%
Pay-for-click advertising	11.6%	20.0%	40.0%	40.0%
Classified ads	7.0%	0.0%	33.3%	66.7%
Purchased sales leads	2.3%	0.0%	0.0%	100.0%

Q. What methods do you use to attract new clients, and how effective has each method been? Select all that apply.
n=43

Use of Social Media

Many companies we surveyed use social media for advertising and marketing purposes, as well as to attract clients. Among those who do, Facebook (86.7%), LinkedIn (73.3%) and Instagram (56.7%) are the most widely used platforms. As Figure 9 shows, very effective ratings are rare. Majorities rate Google+ and Twitter as somewhat effective. Facebook, LinkedIn and Instagram are most often rated as neutral or ineffective.

Figure 9: Social Media for Advertising/Marketing Purposes: Platforms Used and Effectiveness

Platform	Rating			
	Using	Very Effective	Somewhat Effective	Ineffective/ Neutral
Facebook	86.7%	15.4%	34.6%	50.0%
LinkedIn	73.3%	4.5%	36.4%	59.1%
Instagram	56.7%	0.0%	41.2%	58.8%
Google+	33.3%	10.0%	70.0%	20.0%
Twitter	33.3%	10.0%	50.0%	40.0%

Q. Which social media platforms do you use for advertising/marketing, and how effective has each been? Select all that apply.
n=30

Building Competitive Advantage: Production Steps

Production steps aimed at building competitive advantage, summarized in Figure 10, have three major objectives:

- Increase efficiency/reduce costs: Includes lean manufacturing/continuous improvement, at 79.2%, the most widely taken step, operating cost reduction, taken by 50.0%, and workflow optimization, taken by 43.8%.
- Product and service expansion: Includes becoming a one-stop shop (50.0%) and adding new product lines (41.7%). Also includes expanding capacity — particularly in finishing (47.9%) to create print with “wow” power and to ensure that speed and productivity gains in press are not lost to bottlenecks in the bindery — but also in fulfillment (18.8%) and imaging (18.8%).
- Labor force development: Includes staff training (41.7%) and employee appreciation/incentive programs (16.7%).

Concerning effectiveness, adding imaging capacity (55.6%), streamlining workflow (45.0%) and staff training (42.1%) scored the most very effective ratings. In contrast, results for the three most widely used methods are mixed at best: Lean manufacturing/continuous improvement was rated very effective by 25.0%, somewhat effective by 50.0% and neutral or ineffective by 25.0%; becoming a one-stop shop was rated very effective by 20.8% and only somewhat effective by 66.7%; and operating cost reduction was rated very effective by 26.1% and neutral or ineffective by 39.1%.

Figure 10: Building Competitive Advantage: Production Steps Taken and Effectiveness

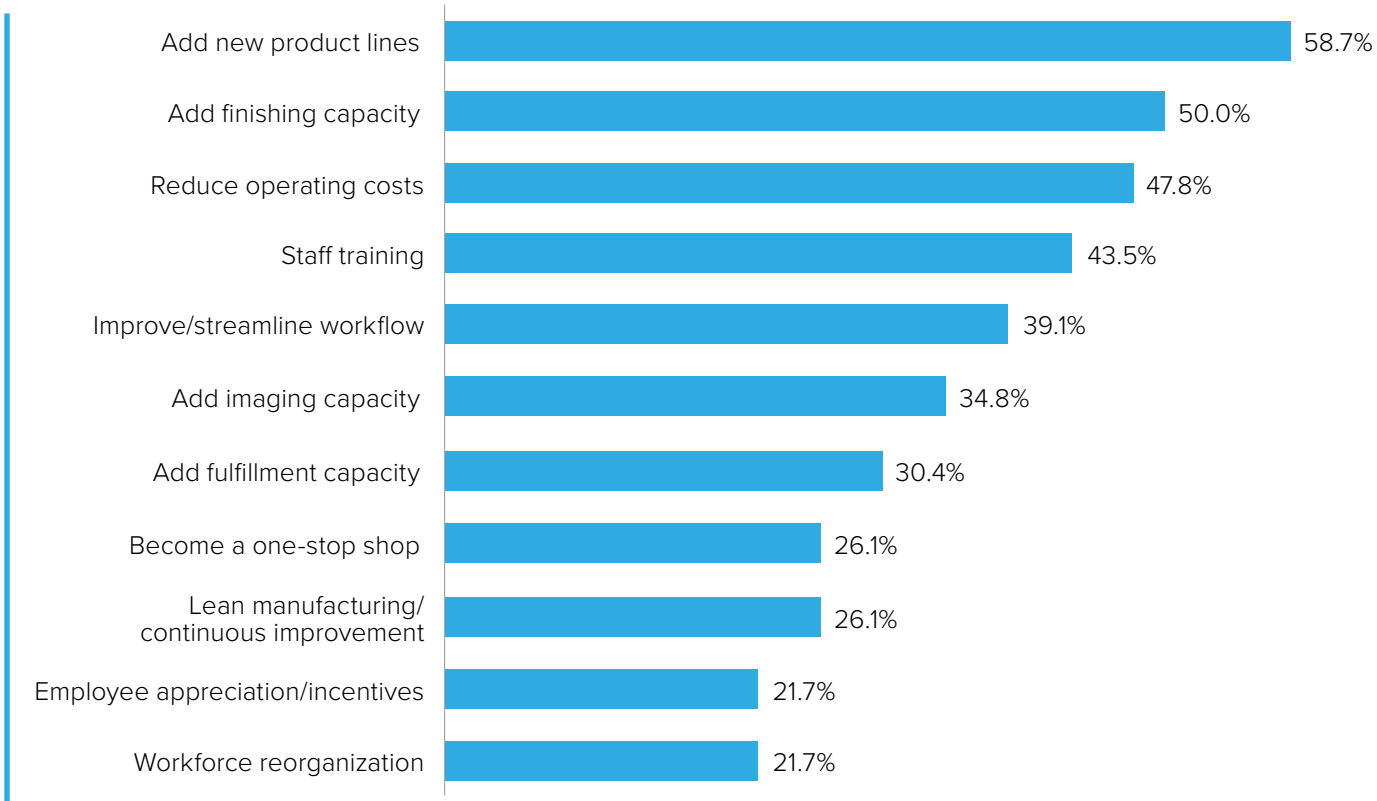
Step	Rating			
	Currently Using	Very Effective	Somewhat Effective	Neutral/ Ineffective
Lean manufacturing/continuous improvement	79.2%	25.0%	50.0%	25.0%
Become a one-stop shop	50.0%	20.8%	66.7%	12.5%
Reduce operating costs	50.0%	26.1%	34.8%	39.1%
Add finishing capacity	47.9%	39.1%	39.1%	21.7%
Improve/streamline workflow	43.8%	45.0%	45.0%	10.0%
Add new product lines	41.7%	25.0%	60.0%	15.0%
Staff training	41.7%	42.1%	42.1%	15.8%
Workforce reorganization	22.9%	20.0%	60.0%	20.0%
Add fulfillment capacity	18.8%	22.2%	33.3%	44.4%
Add imaging capacity	18.8%	55.6%	33.3%	11.1%
Employee appreciation/incentives	16.7%	12.5%	75.0%	12.5%

Q. Which production steps are you taking to build competitive advantage, and how effective have the steps been?
Select all that apply.

n=48

Figure 11 lists the production-based steps our research group would most like to take in the future. Adding new product lines, cited by 58.7%, and operating cost reduction, cited by 47.8%, are ranked first and third, respectively. As noted, neither has yielded particularly good results to date. The consensus: Improvement in these critical areas, not accepting so-so results, is the path to profitability.

Figure 11: Building Competitive Advantage: Future Production Steps



Q. Which production steps would you like to take in the future? Select all that apply.
n=46

Building Competitive Advantage: Management and Sales Steps

In addition to production steps, commercial printers surveyed are taking nearly one dozen steps in management and sales to build competitive advantage. The customer is the primary focus. Specifically, 64.3% are focused on improving customer service, 61.9% on maximizing the value of current customers and 83.3% on at least one of the two.

A series of steps are aimed at boosting revenue, either directly by adding sales personnel (50.0%), developing new vertical markets (28.6%) and expanding geographically (16.7%), or indirectly by increasing visibility through greater internet presence (42.9%) and a bigger marketing budget (33.3%). Because organic growth is difficult in commercial printing, 21.4% are pursuing an acquisition and 9.5% are pursuing a merger. Just 7.1% include price reductions in their plans to build competitive advantage.

What's worked? Acquiring another company (66.7%) has the most very effective ratings, followed by maximizing the value of current customers (44.0%) and improving customer service (37.0%). Increasing internet presence and increasing the marketing budget were rated somewhat effective by 66.7% and 78.6%, respectively, but only rarely rated very effective. Hiring additional sales personnel and expanding geographically were rated neutral or ineffective more often than they were rated very effective.

Figure 12: Building Competitive Advantage: Management and Sales Steps Taken and Effectiveness

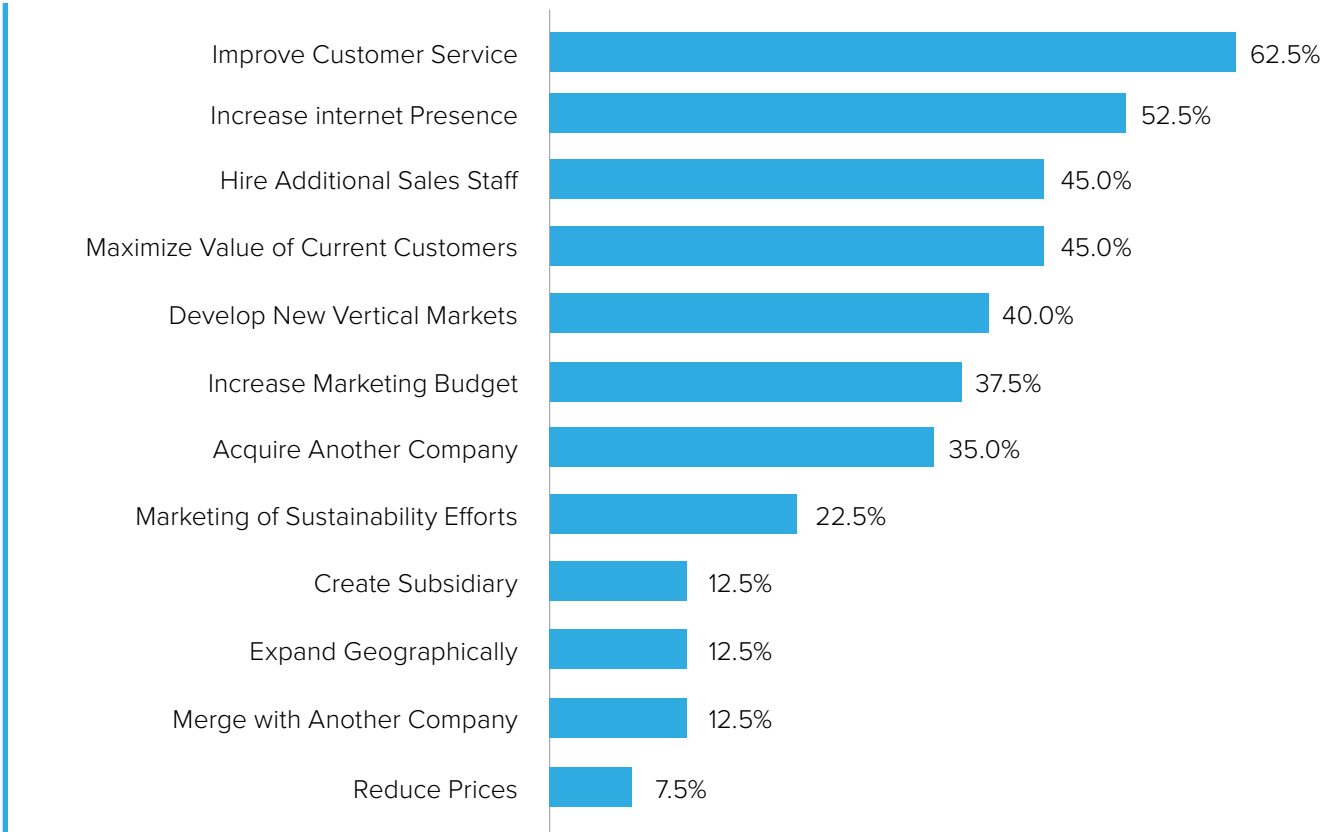
Step	Rating			
	Currently Using	Very Effective	Somewhat Effective	Neutral/ Ineffective
Improve customer service	64.3%	37.0%	59.3%	3.7%
Maximize value of current customers	61.9%	44.0%	52.0%	4.0%
Hire additional sales staff	50.0%	19.0%	52.4%	28.6%
Increase internet presence	42.9%	16.7%	66.7%	16.7%
Increase marketing budget	33.3%	14.3%	78.6%	7.1%
Develop new vertical markets	28.6%	33.3%	41.7%	25.0%
Acquire another company	21.4%	66.7%	22.2%	11.1%
Expand geographically	16.7%	14.3%	57.1%	28.6%
Marketing of sustainability efforts	14.3%	0.0%	83.3%	16.7%
Merge with another company	9.5%	0.0%	75.0%	25.0%
Reduce prices	7.1%	0.0%	66.7%	33.3%

Q. Which management and sales steps are you taking to build competitive advantage, and how effective have the steps been? Select all that apply.

n=42

Future steps, like current steps, focus on the customer. As Figure 13 shows, 62.5% want to improve customer service and 45.0% want to maximize the value of current customers. Although results to date have been mixed, increasing internet presence (52.5%) and hiring additional sales staff (45.0%) are also high on the list. Like operating cost reduction, both are widely viewed as too important to accept mediocre results. More than one-third plan to build competitive advantage by acquiring another company, while less than 10.0% plan to get there by reducing prices.

Figure 13: Building Competitive Advantage: Future Management and Sales Steps



Q. Which management and sales steps would you like to take in the future? Select all that apply.

n=40

Capital Investment: In What

Representative of the commercial printing industry, large majorities of our research group use toner-based printing, primarily dry (85.3%) but also wet (25.9%), and offset printing, primarily sheetfed (62.5%) but also web (20.0%). Interest in graphic and sign production is evident in the 63.6% who offer wide-format inkjet and the 15.2% who plan to invest in it over the next 12 months. Interest in apparel decoration, currently offered by 16.4%, is evident in the 13.0% who plan to invest in direct-to-garment inkjet and the 8.0% who plan to invest in dye sublimation. Commercial inkjet is currently offered by 38.7% and in the investment plans of 12.9%. In total, 54.8% of commercial printers surveyed plan to invest in printing technology this year (Figure 14).

Figure 14: Printing Technology in Use, Purchased During Last 12 Months and Purchase Plans for the Next 12 Months

Technology	Currently In Use	Purchased During Last 12 Months	Planning to Purchase During Next 12 Months
Dry Toner	85.3%	5.9%	2.9%
Wide Format Inkjet	63.6%	3.0%	15.2%
Sheetfed Offset	62.5%	0.0%	0.0%
Commercial Inkjet	38.7%	3.2%	12.9%
Narrow-Format Inkjet	29.2%	0.0%	4.2%
Custom Inkjet Solutions	26.9%	3.8%	3.8%
Wet Toner	25.9%	0.0%	3.7%
Web Offset	20.0%	0.0%	0.0%
Laser Etch/Engrave	12.5%	0.0%	4.2%
Screen Printing	12.5%	0.0%	0.0%
Pad Printing	12.0%	0.0%	4.0%
Dynamic Signage	8.3%	0.0%	0.0%
Dye Sublimation	8.0%	0.0%	8.0%
Cylinder Inkjet	4.5%	0.0%	0.0%
Direct-to-Garment Inkjet	4.3%	0.0%	13.0%
Embroidery	4.3%	4.3%	0.0%
3D Printing	4.2%	0.0%	4.2%
Flexographic Printing	4.2%	0.0%	0.0%
Subtractive Conversion	0.0%	0.0%	4.3%

Q. Which printing technologies do you currently use, which have you purchased during the last 12 months and which do you plan to purchase during the next 12 months? Select all that apply.

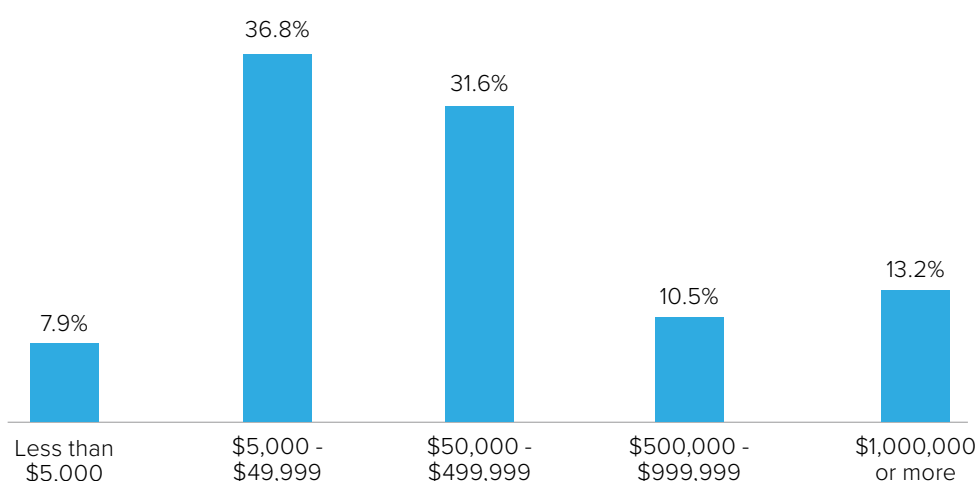
n=53

Capital Investment: How Much and Why

How much will be invested in production-related equipment varies widely from company to company. More than 68.0%, however, plan to invest between \$5,000 and \$499,999. In comparison, 13.2% plan to invest \$1 million or more, and 7.9% plan to invest less than \$5,000 (Figure 15).

The reasons for investing reflect the “get better or get left behind” reality of the hypercompetitive commercial printing market. Specifically, 74.3% are investing to increase efficiency/automation, 68.6% to increase speed/reduce turn times and 51.4% to replace aging equipment that hinders both. Nearly 46.0% are investing to meet growing demand for their products and 37.1% to accommodate new products or processes. For 25.7%, improved financial performance makes investment possible in 2020 (Figure 16).

Figure 15: Planned Investment in Production-Related Equipment, 2020



Q. How much do you plan to invest in production-related equipment during the coming year?
n=38

Figure 16: Reasons for Capital Spending

Reason	Percent
Need to increase efficiency/automation	74.3%
Need to increase speed/reduce turn times	68.6%
Need to replace other capital goods	51.4%
Increased demand for our products	45.7%
Need to increase overall capacity utilization	40.0%
Capital investments due to new products or innovations in our processes	37.1%
Improved financial position allowing us to invest more in our business	25.7%
Reduced global economic uncertainty	5.7%

Q. What are the major contributing factors to your capital spending decision? Select all that apply.
n=35

Concerning supplier selection, customer support, cited by 58.8%, tops the list of most important factors. Durability of equipment (52.9%), price to operate (44.1%) and brand name/reputation (41.2%) follow. In contrast, fewer than one in 10 included financing, user references, warranty or upgrade capabilities on their top-three list (Figure 17).

Figure 17: Factors Affecting Supplier Selection

Factor	Percent
Customer support	58.8%
Durability of equipment	52.9%
Price to operate/maintain	44.1%
Brand name/reputation	41.2%
Purchase price of equipment	32.4%
Range of capabilities	29.4%
Service plan	14.7%
Financing	8.8%
User references	8.8%
Warranty	5.9%
Upgrade capabilities	2.9%

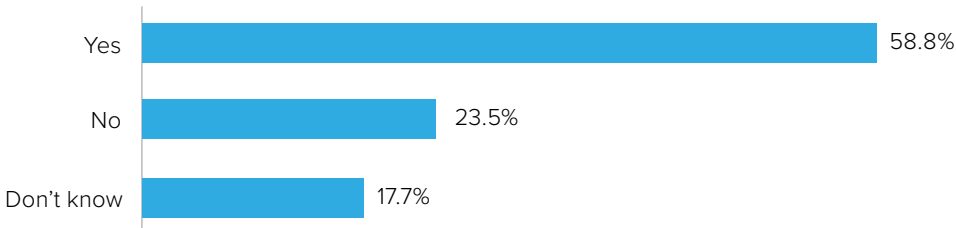
Q. When shopping for new or replacement equipment, which factors influence your purchasing decision? Select your top three.

n=34

Hiring Plans

Nearly 59.0% of commercial printers surveyed plan to hire this year, 23.5% do not plan to hire and 17.7% don't know whether they will or will not hire (Figure 18). The shortages are not just cyclical, or the product of the lowest unemployment rate in 50 years. They are also structural, or the product of an aging workforce and an old-economy image that makes attracting young talent difficult. And they are driving decisions such as this: "We have capacity and I'd rather pay overtime with reliable staff. They get the added pay, and we get peace of mind that the job is being done right. Plus, it takes a lot of time and money to train new staff members."

Figure 18: Hiring Plans and Reasons for Hiring



Q. Do you plan to hire this year?
n=34

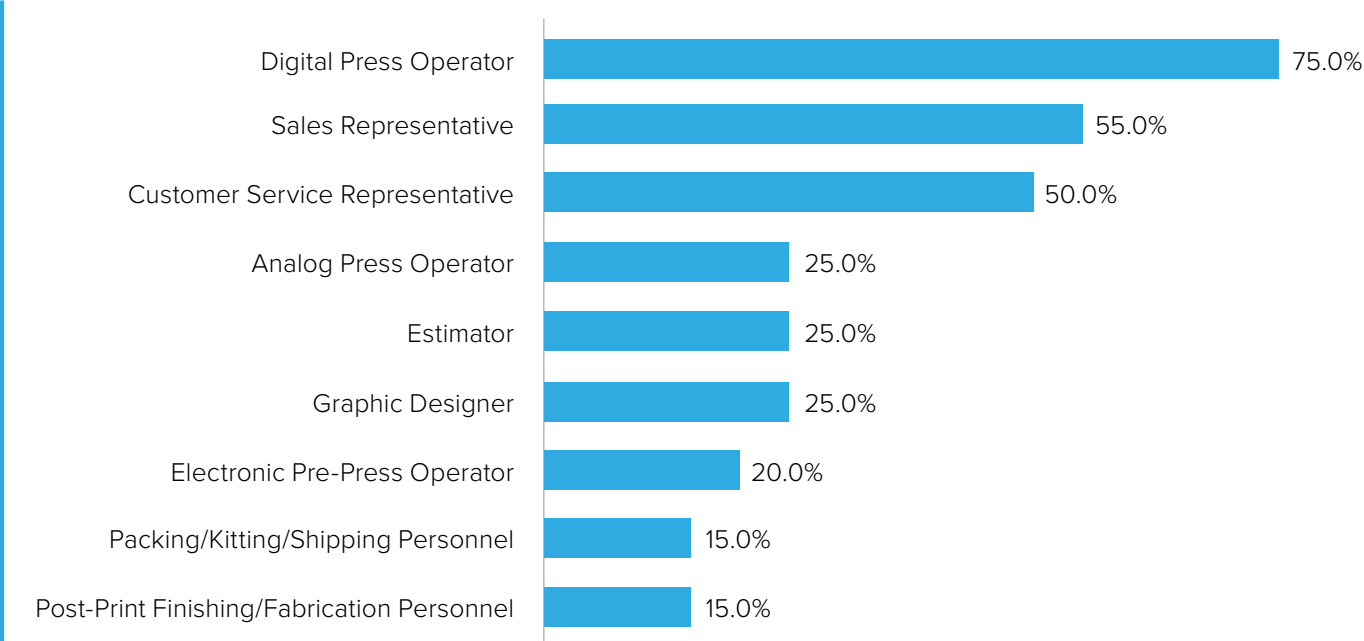
Reasons for hiring, summarized in Figure 19, include the need to accommodate growing demand for the company's products (65.0%), new products or innovation (40.0%) and an improved financial position (35.0%). The positions participants in our research would most like to fill, listed in Figure 20, include digital press operator, cited by 75.0%, or three times the percentage who would like to hire an analog press operator; sales representative, listed by 55.0%; and customer service representative, listed by 50.0%.

Figure 19: Reasons for Hiring, 2020

Reason	Percent
Increased demand for our products	65.0%
Increased hiring due to new products or innovations in our processes	40.0%
Improved financial position is allowing us to invest more in our business	35.0%
Other	10.0%

Q. What are the major contributing factors to your hiring decision? Select all that apply.
n=20

Figure 20: Positions Commercial Printers Most Want to Fill



Q. Which full-time positions would you most like to fill? Select all that apply.
n=20

2020 Expectations

We closed our survey by asking participants what they expect in 2020 for their companies, the commercial printing industry and the national economy. As Figure 21 shows, 81.1% expect to increase sales and 83.8% to increase production. The consolidation occurring across commercial printing is a major reason:

- “We recently made an acquisition, which will increase our top line while only marginally increasing our overhead.”
- “Our company has been in discussions to sell to a larger print organization. Our production facility will take advantage of the increased sales force and production through the merger/acquisition.”

Other reasons include market specialization and diversification, particularly into wide-format: “It is difficult to predict with certainty, but we feel good about the upcoming year, primarily due to adding increased wide format capability and capacity.”

Just 43.2% expect to raise prices. As noted earlier, commercial printing is growing only modestly at best. And despite record consolidation — SGIA estimates that the number of commercial printing establishments has declined by more than 3,200, or 12.0%, since 2010 — the industry is getting more competitive as printers of all types expand beyond their traditional roles.

As for the 59.5% who expect to increase pre-tax profitability this year, it’s more about what they are going to do for themselves than what they expect the market to do for them:

- “Our company is strategically pursuing more creative, higher-profit work.”
- “We continue to invest in automation, which expands our capacity and leads to increased profits.”

Figure 21: Company Expectations, 2020

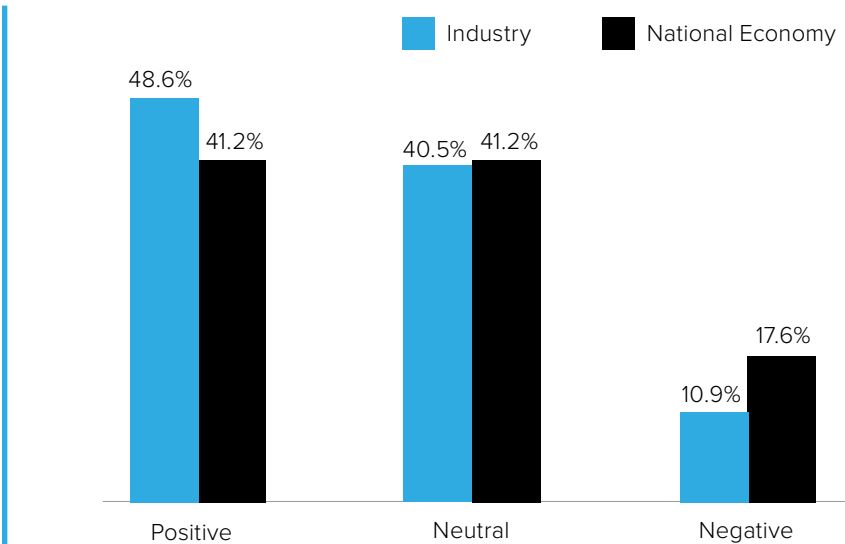
Performance Metric	Increase	Stay the Same	Decrease
Sales	81.1%	16.2%	2.7%
Production/amount of work	83.8%	13.5%	2.7%
Prices for products sold	43.2%	51.4%	5.4%
Pre-tax profitability (pre-tax income as percent of sales)	59.5%	37.8%	2.7%

Q. What do you expect for your company in these areas during the coming year?

n=37

Finally, Figure 22 shows that expectations for commercial printing are mixed: While 48.6% have a positive view of the industry’s 2020 prospects, 51.4% have a neutral (40.5%) or negative (10.9%) view. There is even less enthusiasm for the economy: 41.2% are positive, while 58.8% are neutral (41.2%) or negative (17.6%).

Figure 22: Expectations 2020, Commercial Printing Industry and National Economy



Q. How confident are you in the commercial printing industry and in the national economy?
n=37

Creating Opportunity

Knowing what's happening and what's likely ahead is helpful. But the difference maker is knowing what to do right now to make what's happening and what's ahead an opportunity rather than a threat. The SGIA presentation "Creating Opportunity" includes 20 actions any company — regardless of size or role in our industry — can take to build a sustainable competitive advantage. Among the actions covered:

- **Hearing the Voice of the Customer.** Understanding what clients really value and never assuming we already know.
- **Acting on the Voice of the Customer.** Why ask customers what they value most if we aren't going to act on what they tell us?
- **Option Evaluation.** Sure, it's creating a lot of buzz. But is it really an opportunity given my company's resources, capabilities and circumstances?
- **Strategy.** Figuring out where we want to go and how we're going to get there.
- **Executing Effectively.** Even the most well-thought-out strategies and plans don't get us very far if we can't execute them.
- **Labor Force Development.** No company, no industry prospers if it cannot recruit, develop and retain a skilled, productive labor force.

Participants in SGIA industry surveys can get a complimentary copy of "Creating Opportunity" by emailing research@sgia.org.

WHAT CAN SGIA RESEARCH DO FOR YOU?

SGIA research provides firsthand accounts, analysis and ongoing monitoring of critical industry trends influencing the printing industry, future trends and the underlying factors influencing change. SGIA Research is now part of an expanded research team that includes NAPCO Research experts, survey and analysis capabilities, and additional audience reach.

- **SGIA Research LEVERAGES** its extensive member community and staff of industry economic, legislative, marketing, and technical experts to support customers in identifying market opportunities and improving business profitability and operations.
- We partner with our clients to **IDENTIFY** their unique business challenges and create solutions that **ENABLE** deeply informed decision-making and **DELIVER** results.
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