

## IN-PLANT EQUIPMENT AND APPLICATIONS REPORT: KEY RESULTS

- In-plants are seeking to expand their services and applications, evidenced by the 63% of respondents that stated their in-plants are increasing the types of services they provide. College and university in-plants expressed significant application diversity, with 14 different applications being selected by more than 70% of respondents from the higher education segment.
- The application mix at higher-education in-plants includes traditional commercial print applications and more specialized items. The more traditional applications included booklets, brochures, and business cards, which are produced by all college and university printers participating in the survey. Common specialized applications in the higher-education segment include direct mail (90%), recruitment materials (83%), printed course packs (83%), and textbooks (31%).
- Digital production printing tops in-plants' wish lists and recent investments. Forty-four percent of respondents said they have invested in digital color printing equipment in the past two years and 39% said they plan to in the next two years. Meanwhile, 27% cited digital monochrome as an investment area over the past two years and 25% see it on the horizon in the next two years.
- Inkjet technology is also an area of interest for in-plants, as 27% of respondents said they recently installed roll-fed wide-format inkjet, and 11% stated they have installed production inkjet in the past two years. Meanwhile, 16% of respondents said they are currently investigating production inkjet and would like to install the equipment in the next one to three years.
- Specialty equipment is also making in-roads at in-plants. Contour cutters have been installed by 21% of in-plant respondents in the past two years, while digital presses with 5th stations for embellishment have been added by 22%. Other recent additions include laminators (17%) and digital embellishment equipment (16%).
- Those with inkjet equipment are producing a variety of applications, the most prominent being letters and reports (59%), transactional statements, direct mail (both 52%), and books/publications (48%).
- *Investment and investment intention in offset technology is at a minimum, as just four respondents reported investing in offset in the past two years, and four indicating they plan to invest in offset in the next two years.*
- In-plants largely turn to trade magazines and trade shows as top sources of information when researching new equipment. Sixty-two percent of respondents purchase their equipment from a dealer, 40% state they lease from a dealer, and 30% indicate they purchase equipment directly from an OEM.
- Automation and increased efficiency emerged as top priorities for in-plants. Of respondents that stated they are actively seeking out automation, 91% stated it is to increase productivity. Using automation to compensate for a lack of skilled employees was not among the top reasons, as just 24% stated this was a driver behind their automation initiatives.
- Wide-format applications are viewed as a desirable application for in-plants. More than half of in-plant respondents have at least two wide-format devices, with 18% saying they have three or more. The majority (70%) report increased wide-format volumes over the past 12 months, with 36% indicating a "major increase" of 10% or more.

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