

# ANALYSIS

## WEB-TO-PRINT

UNDERSTANDING TODAY'S MARKET

APRIL 2022





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## Introduction

Print service providers (PSPs) are always seeking solutions to help them automate job submission, but many continue to rely heavily on e-mail messages and phone conversations in their processes. Unfortunately, recent research from Keypoint Intelligence tells us that the adoption of web-to-print software tools remains low. The good news is that software adoption rates are expected to experience healthy growth as time goes on. Building on Keypoint Intelligence's annual research, this document provides important insights into where PSPs stand today regarding web-to-print tools.

## About the Survey Respondents

In 2021, Keypoint Intelligence conducted its annual software investment survey of 106 PSPs in North America (US and Canada). The survey reached a wide variety of PSPs, but the most common types included general commercial printers (41%), in-plant print shops (24%), digital print specialists (13%), and quick print/copy shops (10%). Respondents came from companies of all sizes, ranging from very small independent shops to firms with 1,000+ employees. The greatest share of PSPs reported working for firms with 20 to 49 employees.

Even before the onset of the COVID-19 pandemic, many print providers were struggling to achieve growth. In fact, the PSPs that Keypoint Intelligence surveyed reported an average revenue increase of just 1.7% over the past five years. Of course, disaster really struck in 2020, when these same PSPs reported an average revenue decrease of -13.5% compared to the previous year. Although the pandemic continued through 2021, many PSPs saw this as a rebounding year and expected their annual revenues to increase by 2.8%. This isn't a huge rebound coming out of what was a dismal year for many, but any growth is nonetheless encouraging.

The median number of jobs for these PSPs was 300 jobs per month, but quite a few sites were producing many more jobs than that. This large influx of jobs has numerous implications for productivity, automation, and workflow. Not surprisingly, respondents noted that dealing with a large number of jobs was their most problematic workflow inefficiency.

## Use of Web-to-Print Tools

When respondents were asked about the percentage of their total jobs that were submitted through web-to-print tools, 27% reported that none were. Another 26% put the figure at less than 10%. On average, under 20% of total jobs were submitted via web-to-print, which is remarkably low.

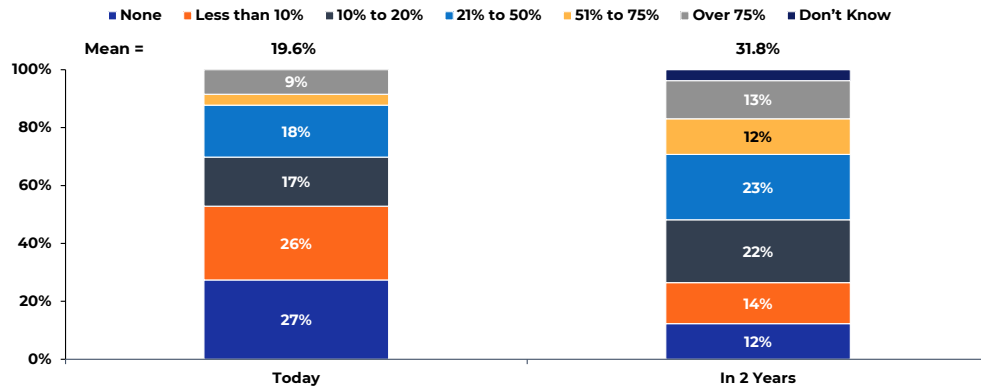
These same respondents were also asked to predict how their web-to-print use would change over the next two years. Although only 12% of respondents expected none of their



jobs to be submitted via web-to-print in 2 years' time, this is likely a case of expectations being more optimistic than reality. It is encouraging to think that the share of web-to-print jobs might increase from under 20% to nearly 32% over the next two years, but this is a dramatic surge that is unlikely to come to fruition in such a short timeframe. PSPs are clearly optimistic about the future of web-to-print, but their predictions probably won't prove completely accurate.

**Figure 1: Web-to-Print Job Submission (Current and Future)**

What percentage of the jobs produced at your site are/will be submitted via web-to-print software today/in 2 years?



N = 106 Total Respondents  
 Source: North American Software Investment Survey; Keypoint Intelligence 2021

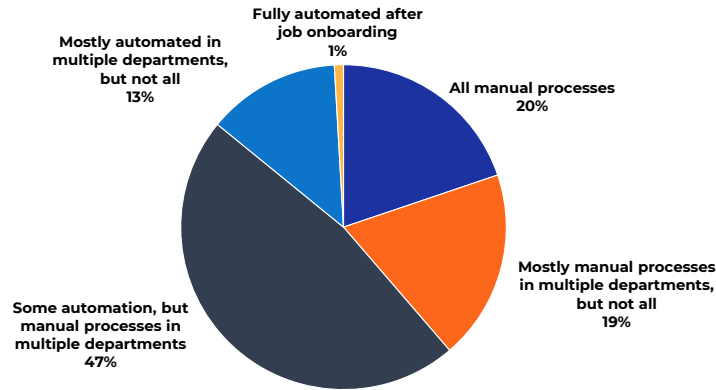
## Levels of Workflow Automation

Overall, the level of workflow automation reported by the PSPs that responded to this survey was quite low. 20% of respondents report completely manual processes, while nearly as many admit that their processes are mostly manual. Although 47% of PSPs reported some automation, processes were still manual in multiple departments. Clearly, there is much room for improvement; only 1% of respondents report full automation after onboarding.



Figure 2: Workflow Automation

Which of the following best describes your current level of workflow automation?



N = 106 Total Respondents  
 Source: North American Software Investment Survey; Keypoint Intelligence 2021

Elsewhere in the study, respondents reported that the two highest areas of workflow automation activity were in prepress and job onboarding, closely followed by accounting and job tracking.

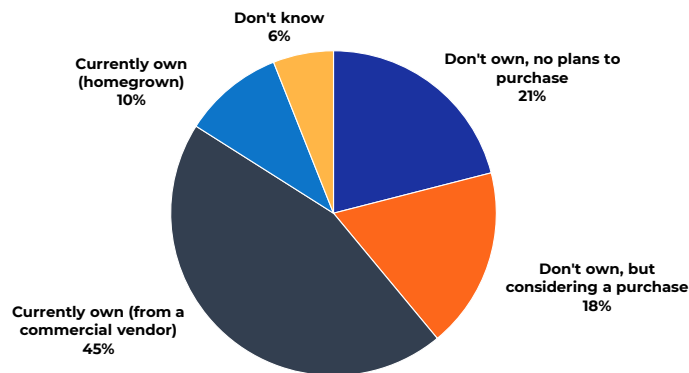
Alarming, the top method of order placement as reported in this study was e-mail... followed by phone! On average, e-mail orders required 2.2 follow-up messages. E-mail job submission, as an estimate of the percentage of orders placed, accounted for 35% of all jobs, followed by direct sales (16%) and web-to-print (16%). Overall, e-mail was the top method mentioned for job submission.

### Web-to-Print Software Ownership

When total respondents were asked about their ownership of web-to-print software, over 21% didn't own web-to-print software and had no plans to invest. Another 18% did not own any of this software, but they were at least considering a purchase.

Figure 3: Ownership of Web-to-Print Software

Which of the following best describes your current ownership of web-to-print software?



N = 106 Total Respondents  
 Source: North American Software Investment Survey; Keypoint Intelligence 2021



It is also interesting to note that PSPs with fewer employees or lower revenues are less likely to own web-to-print software.

Those respondents who didn't currently own web-to-print software but were considering a purchase were asked why they might consider such an investment. The top motivator was to improve the customer's ordering experience. Over half of respondents hoped to increase the efficiency of the job onboarding process, and nearly as many wanted to attract new customers via a public-facing storefront.

**Figure 4: Web-to-Print Purchasing Motivations**

*Why are you considering an investment in web-to-print software in the future?*



N = 19 Respondents that don't own web-to-print software but are considering a purchase  
Source: North American Software Investment Survey; Keypoint Intelligence 2021

Among those respondents who had already deployed web-to-print software, over half reported using a Software-as-a-Service (SaaS) model. Meanwhile, about a quarter had the software on premises. The remaining respondents were evenly split between self-hosting, either in their own data center or on a cloud platform.

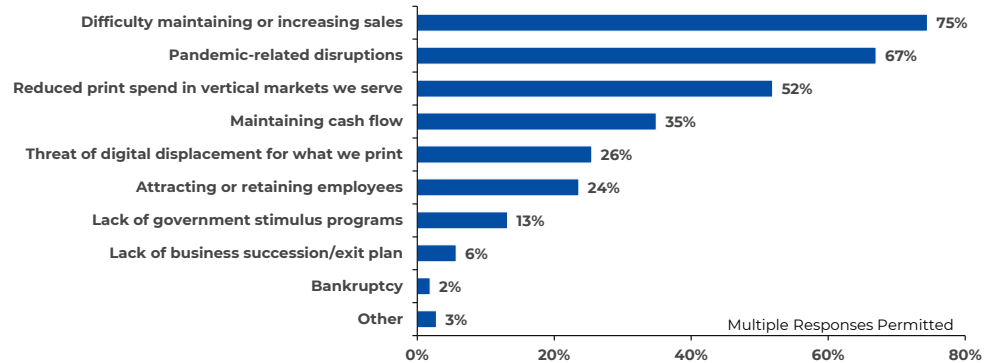
## Looking Ahead

When respondents were asked about the biggest business threats they encountered throughout the year, difficulty maintaining or increasing sales was the top issue. Pandemic-related disruptions and concerns about reduced spending were also frequently cited. Life-and-death operational issues like maintaining cash flow, employee retention, hiring, exit plans, and bankruptcy garnered smaller numbers, but they were still clearly on respondents' minds.



Figure 5: Business Threats

What do you consider to be the biggest threats to your business at this time?



N = 106 Total Respondents

Source: North American Software Investment Survey; Keypoint Intelligence 2021

## Key Takeaways

Based on the results of this survey, we can conclude the following about the current state of the web-to-print market:

- ◆ **Job submission is the top workflow issue.** The most significant workflow issue among today's PSPs is dealing with a large number of jobs each month.
- ◆ **Web-to-print adoption is low.** On average, less than 20% of jobs are currently submitted via web-to-print interfaces.
- ◆ **Optimism abounds for the future.** Our survey respondents predict that web-to-print use will jump from under 20% to nearly 32% in just two years. Although some increase in web-to-print adoption is certain, these projections will probably prove to be overly optimistic. Implementation and adoption struggles of the past are easily forgotten when considering the future.
- ◆ **Full automation is an unfulfilled dream.** Approximately 40% of PSPs respondents report using all or mostly manual processes. Although nearly half of respondents have some level of automation, manual processes are still rampant in multiple departments.
- ◆ **E-mail rules in 2022.** It seems crazy in 2022, but job submission via e-mail remains the most popular (and most preferred) method for job submission.
- ◆ **Web-to-print software adoption leaves room for improvement.** Nearly 40% of respondents do not have web-to-print software at this time.
- ◆ **An improved customer experience is key.** Among those respondents who have yet to invest in web-to-print but are considering it in the future, an improved customer experience is the top motivation for investing.
- ◆ **Sales conversions are still king.** Independent of any decisions regarding web-to-print software, PSPs consider maintaining or increasing sales to be their #1 business threat.



# opinion

## The Bottom Line

What can be concluded from these findings? First, the relatively low levels of web-to-print adoption and usage remind us that print job submission can be an extremely complex process. Automating all portions of that process may not be feasible. Print buyers want assurances that things will go right, and success often requires a series of e-mail, phone, or chat messages. This challenge is even greater for smaller PSPs, which may lack the scale, budget, or desire to make web-to-print software investments. They might also find that by providing their staff members with the proper tools for price estimates and onboarding, the job submission process does not need to be put into the customer's hands.

Perhaps the best recommendation for PSPs is to focus first on in-house tools that simplify job submission for staff members as much as possible. Only after this goal has been achieved should the firm seek more inventive ways of working with outward-facing tools that customers can use as desired.





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