



PRINTING INDUSTRY PERFORMANCE & INSIGHTS

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a printing industry outlook view and actionable knowledge.

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A Micro Look at Printing Firms: Employee Counts, Adjusting Estimating, Effects of Other Mergers, & AI *Insights from our Printing Industry Performance & Insights Survey*

From February/March 2025 Survey

***A Micro Look at Printing Firms:
Employee Counts, Adjusting Estimating, Effects of Other Mergers, & AI
(Insights from our “Printing Industry Performance & Insights” Survey)***

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Introduction

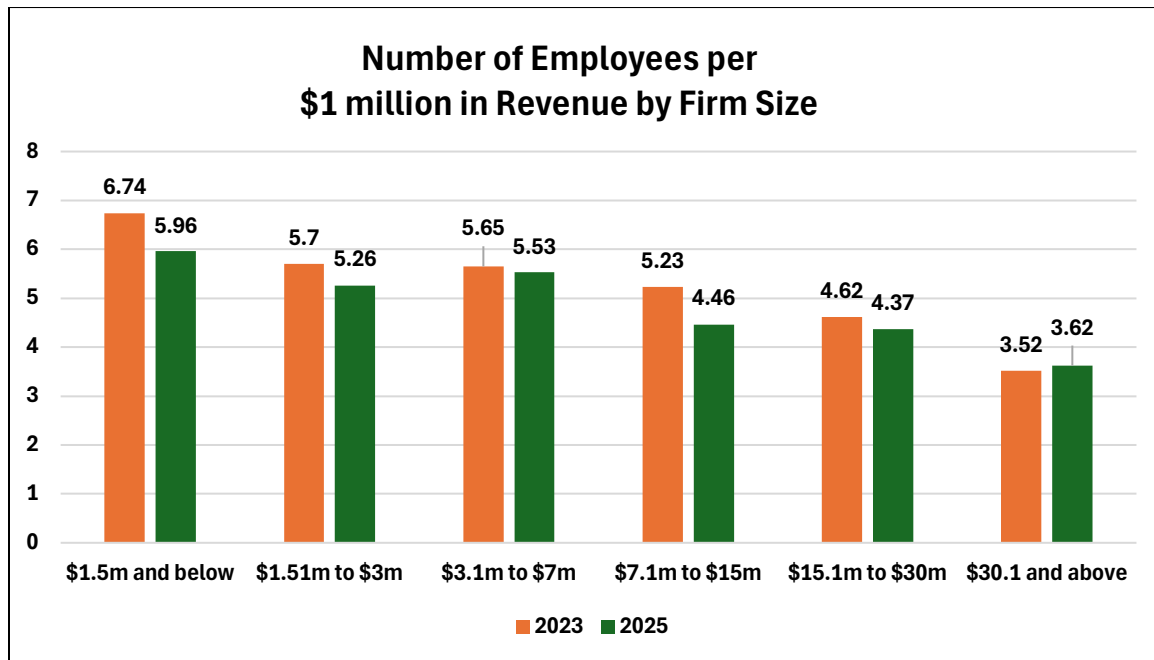
We provide below a view of various topics that individual printing firms deal with, a “micro” look. Our findings came from our February/March 2025 “*Printing Industry Performance and Insights*” survey. We appreciate the 14 regional printing associations that sponsor and support our research. We list those associations at the end of the report.

The topics explored here include the following: employee numbers (page 1) (*number of employees per one million in revenue, employee turnover, temporary employees*); estimating (page 7) (*how often to review the estimating system; passing along cost increases; measuring estimate wins*); the effect of other mergers, acquisitions, and closures (page 15); Artificial Intelligence (page 18) (*is AI use related to higher performance; benefits; challenges*). We aim to provide actionable knowledge for each topic.

Employee Numbers

Employees per \$1 million in Revenue – We open by exploring the number of employees per \$1 million in revenue by firm size. See the graph below, which shows our 2023 and 2025 numbers. The first takeaway is that larger printing firms have fewer employees per \$1 million in revenue, which we often see in our surveys. Why do we consistently see that? Larger firms may have the resources to invest more in automation and technology. In larger firms, employees may focus on one task, whereas in smaller firms, employees may focus on multiple tasks (wearing multiple hats) – this may produce more employee efficiency in larger firms. Longer runs in larger firms may produce more revenue per employee.

From the graph below, one will see that in five of our six revenue categories, the number of employees per \$1 million in revenue shrank from 2023 to 2025. One might conclude that this change from 2023 to 2025 was the result of higher print prices. However, we see growing efficiency in printing companies.



Printing company leaders, you might calculate the number of employees per \$1 million in revenue over recent years. How do your numbers compare to the graph above? Is your number of employees per \$1 million in revenue declining, especially if you are growing? How might this affect your planning and budgeting? If your company is growing, don't assume your number of employees should grow. As your firm grows, see that as an opportunity to focus on growing efficiency.

Here are some other thoughts for improving printing company employee efficiency:

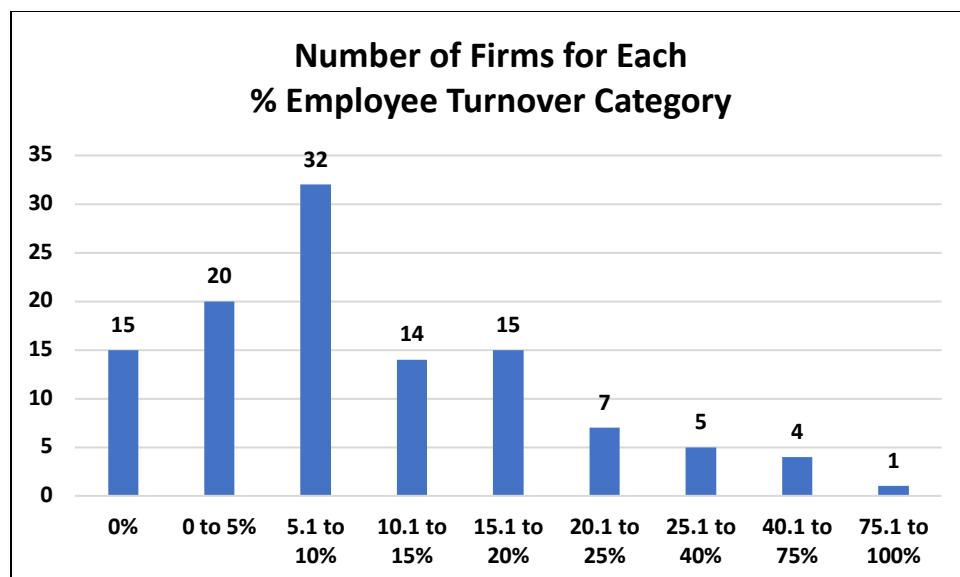
- Consider applying an ERP (Enterprise Resource Planning) and an MIS (Management Information System) to streamline order management and scheduling.
- Automation in prepress and in-line finishing systems may help.
- Examine each process applied in your company and eliminate unnecessary steps.

- Look for ways to reduce the path jobs take through your plant.
- Continue to measure and monitor production, for individuals and as a company team. For example, in the third printing company I led, we measured the number of chargeable hours per day produced by each press crew, and we celebrated strong numbers. That raised the bar.
- Our financial benchmarking studies continuously show that higher-performing printing firms spend a smaller percentage of revenue on administrative costs. After I shared this at a luncheon, a printing company leader said, “You know, we don’t manage production in our office like we do in our plant.” Continuously analyze the efficiency in your entire building, including the office.

The ideas shared above are obvious, but they may prompt an open door to seeking more efficiency, producing more with fewer folks.

Employee Turnover – To assess employee turnover, we asked, “In the past 12 months, approximately how many employees in your company have left the company (voluntarily or involuntarily)?” We then divided that number by the total number of employees to calculate the percentage of employees who left (voluntarily or involuntarily). One hundred and thirteen printing company leaders provided the information to calculate employee turnover. Those companies averaged 12.8% employee turnover. Of those 113 companies, 15 (13.3% of the respondents) reported *no* employee turnover.

The graph below shows the number of firms in each percentage of employee turnover category. Yes, the average employee turnover in our responses was 12.8%. However, gleaned from the graph below, we propose that printing firms should shoot for 5% or lower employee turnover.



Given the skills and knowledge employees need in our industry, employee turnover is disruptive. If your firm has a trend of over 5% employee turnover, you and your team might explore proactive strategies to reduce employee turnover. Here are some thoughts:

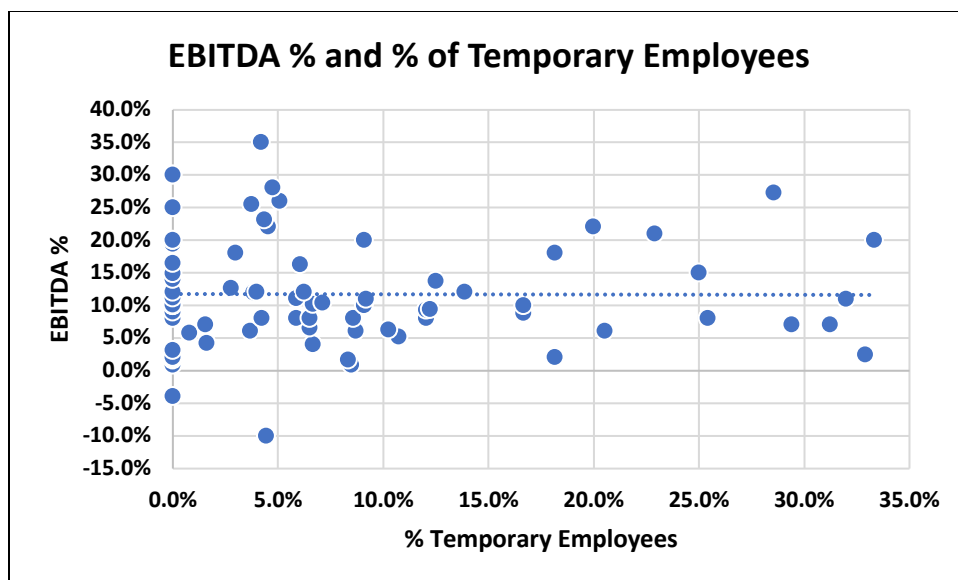
- You might look at previous employee turnovers and try to find trends. Are employees departing for a common reason? If so, how can you address that?
- For employees you parted ways with, what could your firm do to reduce the chances of that happening again?
- Consider candid interviews with departing employees – ask questions and listen.
- Benchmarking your compensation and benefits against industry averages might help reduce employee turnover. APAN (Americas Printing Association Network) provides compensation reports through the 14 regional printing associations.
- Helping employees develop through training might also help. APAN associations provide training courses through *The Print University* - more than 50 on-demand courses and educational tracks on the fundamentals of print and graphic communications.
- Providing performance bonuses might also help. It did in the three printing companies I led. We discussed our performance goals with our entire team quarterly, sometimes monthly. After our year-end, I walked around the

building and handed out checks to everyone in the building. (That was one of the best days of my year!) Our employees knew those profit bonuses were connected to our firm's performance. This helps commit employees to our firm, and we experienced low employee turnover.

- A recent study we conducted in our industry found that “workplace branding” (communicating how and why your firm is a good place to work) was important in successful recruiting. You can brand your firm as a good place to work through your website, social media, or through printed brochures. Recently, I have seen printing companies' workplace branding on LinkedIn. However, in workplace branding, it's vital that you have an “Employee Value Proposition (EVP)” - *the value our employees gain for working at our firm*. An EVP may include employee training and development, team participation, listening to employees, work-life balance, and other items. However, leaders must continuously show commitment to their stated EVP. Yes, we found that workplace branding and having an EVP positively affect recruiting. But one would think workplace branding and having an EVP also reduce employee turnover.

Temporary Employees – We asked, “On average, how many temporary employees does your company typically have in addition to permanent employees?” We added the temporary employee numbers to the permanent employee count to calculate the total number of employees. We then divided the number of temporary employees by the total employees to calculate the percentage of temporary employees. One hundred and fourteen firms provided their temporary employees count, and the average percentage of temporary employees was 9.1%. Forty of the 114 firms reported “zero” temporary employees – they do not use temporary employees.

We wondered if using more temporary employees would increase EBITDA or reduce it. Seventy-seven firm leaders provided their number of temporary employees and their EBITDA percentage. The flat trendline in the graph below suggests that the use of temporary employees does not affect EBITDA, either positively or negatively. This surprised us a bit.



If you are considering using temporary employees, you might consider the advantages and disadvantages of that approach. Likewise, if you are using temporary employees, awareness of the advantages and disadvantages might help manage that process.

Here are some advantages of using temporary employees:

- Staffing flexibility – the ability to scale up for seasonal peaks or large, short-term projects. Helps avoid overstaffing during slow seasons.
- As temps typically do not receive full benefits, you may lower overall labor costs.
- Temp agencies may provide quick access to urgently needed workers.
- You may consider temporary workers as potential permanent hires. We did this in the third printing business I led. We worked with a temp agency to find permanent employees. If they sent us a worthy candidate, that employee would work through the temp period, and then we would hire them. If they sent us a temp who we did not see as a permanent fit, we would part ways with that candidate, and the temp agency would send us another candidate in a day or so (that didn't happen often). We made some good hires by working through that temp agency. Indeed, that agency connected us with "Big John," who loaded trucks as a temporary employee, became a permanent employee working in our bindery, then took a

position as a press helper, and after five or so years with us, became a solid pressman.

Here are some disadvantages of using temporary employees:

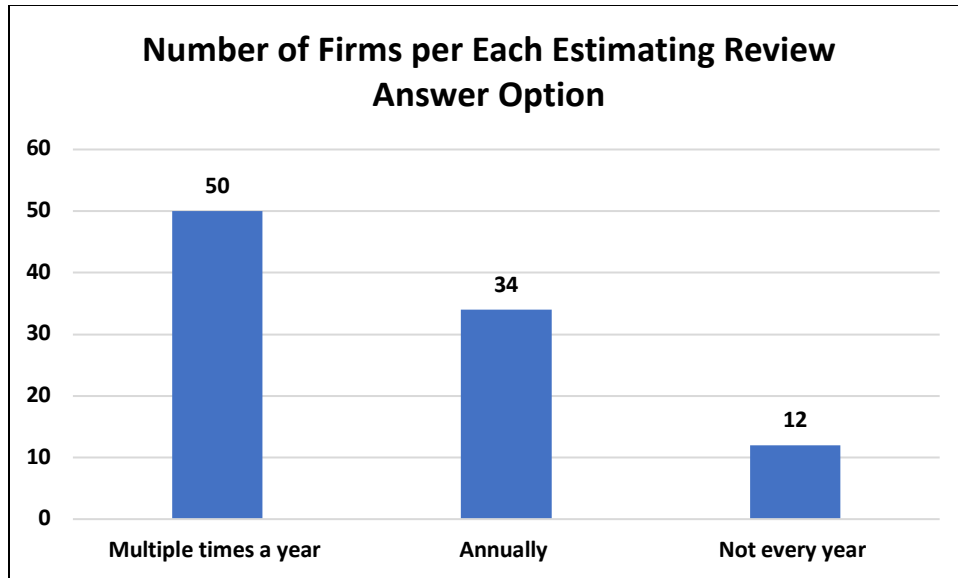
- You might not find temp workers as productive and efficient as permanent employees.
- Temps may not embrace company goals or quality standards, which could affect work quality or customer satisfaction.
- You may find it difficult, maybe impossible, to embed company culture into temporary employees.
- Using temporary workers may prompt permanent employees to feel less valued.
- Higher hourly costs and agency fees may increase costs, especially if you can't scale down at some point.

I often teach a graduate management class in which students from the health care industry are enrolled. They share that hospitals are using “subcontractor nurses,” who are temporary employees. Those students see the disadvantages mentioned above as relevant to nurse subcontractors, especially the demotivation of permanent employees and the inability to embed culture in temporary employees. Using temporary employees worked in the third business I led, but it required management and a committed team effort.

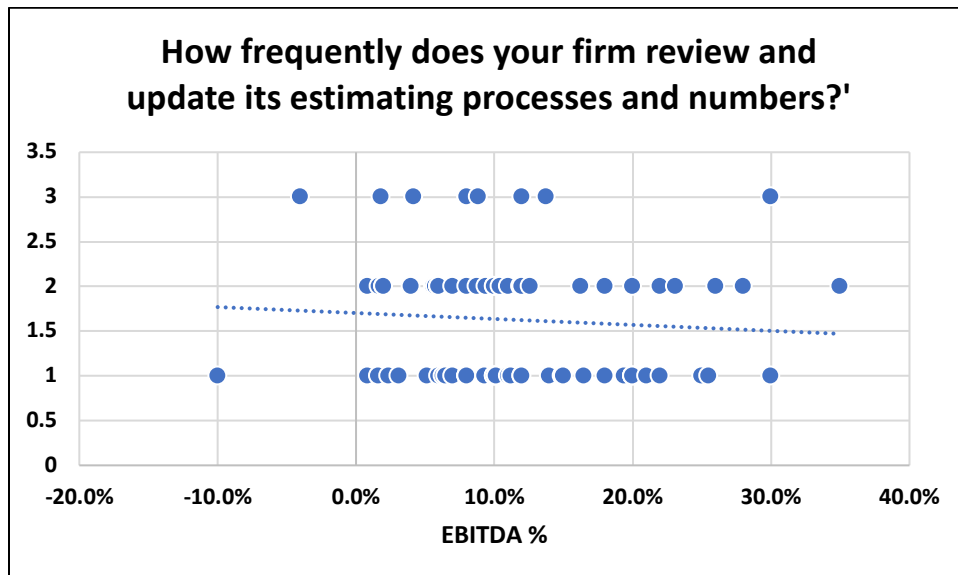
Estimating

How Often to Review the Estimating System – We asked, “How frequently does your firm review and update its estimating processes and numbers?”

Respondents had these three answer options: Multiple times a year (1), Annually (2), or Not every year (3). Ninety-seven respondents answered that question with an average of 1.6, which is between “Multiple times a year” and “Annually.” The graph below shows the number of responses for each answer option. It appears that most printing companies are reviewing their estimating processes and numbers often, at least once a year.

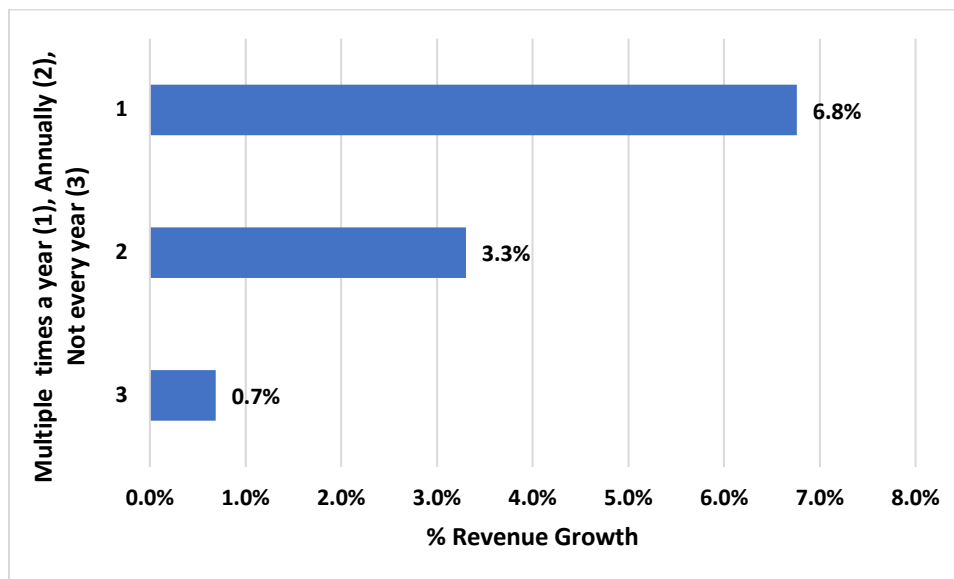


We wondered if the frequency of reviewing the estimating process and numbers connected with firm performance, so we looked at the connection of estimating review frequency to EBITDA percentage. Seventy-five respondents provided their EBITDA percentage and answered the estimating review question. The downward trendline in the graph below suggests that higher-performing companies tend to review their estimating process more often [lower numbers indicate more often...Multiple times a year (1), Annually (2), or Not every year (3)]



We next looked at the potential relationship between the frequency of reviewing the estimating process and numbers with sales growth. Ninety-four firms answered our estimating review frequency question and provided their 2023 and

2024 revenue numbers, from which we calculated percentage growth. The chart below shows that the 50 firms that review their estimating multiple times a year averaged 6.8% growth; the 32 firms that review their estimating annually averaged 3.3% growth; and the 12 firms that do not review their estimating annually averaged 0.7% growth. This suggests a positive relationship between more frequent estimating review and revenue growth.



To dig a little deeper into the estimating process and numbers review, we asked this open-ended question: “What factors or events typically prompt your firm to review its estimating processes and numbers?” The responses are shown below in categories.

The current economic environment

- With the current economy, we check and update monthly. The tariffs will require fast action in pricing.

Completed job costs

- When job “Costs Low / High return on estimates”

Estimate wins and/or performance

- When we start losing bids.
- We are in a very competitive market. To be as competitive as possible without hurting the bottom line, it is necessary to stay on top of cost

changes relative to our estimating standards. I review budgeted hourly rates annually, and I update material costs (plates, ink) when increases occur. Paper and shipping costs are quite fluid and are entered into each order as they occur.

- Changes to monthly sales and/or profits.
- Feedback from missed bids and client feedback.
- Large contract renewals or client requests to reduce costs.
- Change in sales.
- If performance is poor for a year.
- Weekly feedback from sales and customers.
- Monthly monitoring of P&L performance. Unexplained trends in the P&L performance must be addressed in the estimating of projects.
- P&L statements from the previous month.
- Business levels.
- Many areas - profit and loss, win/loss ratio of jobs won...
- Feedback from customers.
- ... competitive pricing.
- Estimate losses.

Costs adjustments

- When we see increases in raw materials over 5%, or when equipment or software maintenance service agreements increase by any percentage.
- New equipment, personnel pay increase, and raw material increases.
- Wild fluctuations in paper and energy costs.
- When we receive increases from primary suppliers.
- Paper pricing is updated consistently. Material price changes. New equipment.
- Paper and wage increase.
- Larger increases in major costs like paper/board and wages.
- Cost increases.
- Customs duties, shipping costs, taxes, etc.
- Constant increase from the paper industry.
- We update prices when there are paper price increases related to envelopes.

- Receipt of invoices from vendors.
- Material price increases.
- The cost of materials is significantly rising.
- Large price increases from vendors.
- Wage increase and large swings in cost of materials.
- As we receive paper/material increases, we update our estimating software to reflect the new cost.
- Raw material increases. Wage increases.
- Large price increases with our materials and labor increases.
- When reviewing cost increases or materials in-availabilities, new vendors, general price updates, etc.
- New equipment.
- Costs in general.
- Cost increases from materials.
- Cost increases, new equipment...
- Inflation or new equipment
- Adding new equipment...
- When we have a significant change in our costs. Labor, paper, plates, etc.
- Postage and paper increases, plus competition
- Rising costs, efficiencies, new equipment.

As a system

- We also adjust our inventory pricing in our system and manage the BHR's for our operation and add those into the software's Hourly Rate annually.
- Part of our standard operating procedure.
- Just to make sure we are on the right track.
- End of year or significant paper increases.
- Quarterly review.
- Ever since COVID, we have updated customer pricing with every purchase order. (Recently, the price has remained the same.) We have dedicated 2 associates to do regular time studies on the production floor to provide more accurate job costing.
- We just do multiple times a year... a little here and there is better than a bunch at once.

- Cases by case as it comes up.
- End-of-year financial statements.
- We do it all the time.
- We are constantly reviewing costs and adjusting those inputs in our systems. Estimating is about accurately costing a job. The sale price is selling it for what the market will bear. Ideally, the sale price must be greater than the estimate.
- We see increases in costs, check paper costs at least yearly compared to what is in our system, and if we see a trend in our monthly financials, that would cause a review of prices.

One respondent shared that “The realization that we do not do this enough” prompted a review of their estimating system.

Passing along cost increases – We asked, "To what extent do you agree with the statement: 'We are able to pass along all cost increases by raising prices, so increasing costs do not impact our firm's profitability'?" Respondents answered using a one-to-five scale with these options: Strongly disagree (1), (2), Neither agree nor disagree (3), (4), or Strongly agree (5). Ninety-six printing company leaders answered that question, with an average of 2.7, leaning slightly to the lower side of our scale. (Toward disagreeing with “We are able to pass along all cost increases by raising prices, so increasing costs do not impact our firm's profitability?”) However, we did see fifteen “4” responses and three “5” responses – some printing companies are able to pass along cost increases.

We looked at the average response for this question by firm size, in six revenue size categories. The average response was very consistent among the six firm size categories. Indeed, the average ranged from 2.6 to 2.8. It appears that larger firms can’t pass on cost increases easier than smaller firms, and vice versa. That surprised us a bit. We could make either argument: larger firms can more easily pass on increasing costs, or smaller firms can more easily pass on increasing costs.

We looked at the average responses for this question by strategic group, different industry sectors, as shown in the table below. There wasn’t a significant amount of difference among the strategic groups. However, one *might* take from the table

below that printing firms that provide supplemental products or services can more easily pass along cost increases. This would align with potential “one-stop-shop” benefits – a firm might have an easier time passing along cost increases to customers who depend on them for multiple products or services.

Strategic Group	Number of Firms	Average Response
General Commercial and labels	8	2.3
General Commercial	30	2.5
General Commercial with a high amount of non-traditional products	6	2.7
General Commercial with web printing	12	2.7
General Commercial with high amount of direct mail	18	2.8
Labels	11	2.8
General commercial with high amount of wide format	10	3.0

We looked for a relationship between the ability to pass along cost increases and the percentage of EBITDA, and we looked for a relationship with revenue growth. We didn’t see any relationships. That surprised us a little. One might expect the ability to pass on cost increases would positively affect growth or profit.

So, what can printing company leaders do to enhance their ability to pass along cost increases? Here are a few thoughts:

- Keep customers informed about potential upcoming cost increases. That transparency may reduce the “shock” when cost increases occur. Those conversations may help build relationships with customers.
- Focus on the value your firm provides customers, such as superior service or quality, adaptability, fast-turnarounds, or a bundle of related products/services. The more unique value your firm provides (differentiated from competitors), the more customers will accept cost increases.
- Brand the value you provide, maybe through your website, social media, or printed brochures. Consider sharing testimonials. The more a customer

sees what value your firm provides, the more they may accept cost increases.

- Continue to focus on productivity and efficiency. This may help your firm pass on fewer cost increases.

Measuring Estimate Wins – Prompted by a printing company leader, we asked, “Does your firm track its percentage of estimate wins?” Ninety-seven respondents answered that question: 41 (42%) said “yes,” and 56 (58%) said “no.” We were a little surprised to see that over forty percent of respondent track their percentage of estimate wins. I didn’t track estimate wins in the three printing firms I led (well, live and learn 😊).

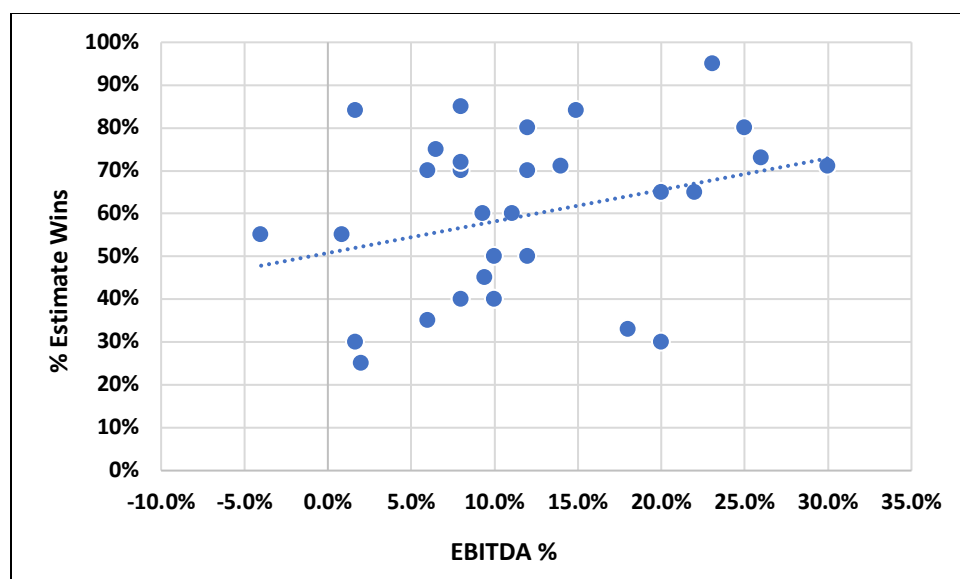
What knowledge can printing company leaders gain from tracking estimate wins?

- What are our effective sales, pricing, and customer engagement approaches?
- Who are our valuable customers?
- What customers are we successfully obtaining, and what products are we successful in selling? And do those customers and products align with our mission? If not, do we need to adjust our mission or our strategy to apply that mission?
- What’s common about the estimates we do not win? What do we need to change?
- If our percentage of estimate wins is changing, how will that affect our forecast and budget?

Forty-one printing company leaders shared their average percentage of estimate wins. The average response was 59.6%.

Thirty-two printing firm leaders provided their EBITDA percentage and their estimate win percentage, which is shown in the graph below. The upward trendline indicates a positive relationship between EBITDA percentage and estimate win percentage. (That makes sense! *Dah!* 😊)

From these findings, you might continually track estimate wins and analyze what you find. USE that data to strategically plan and adjust.



The Effect of Other Mergers, Acquisitions, and Closures

Mergers, acquisitions, and closures are happening in our industry. In future studies, we may explore effective ways for finding and evaluating merger, acquisition, and closure possibilities. We also might explore execution keys for those actions.

Related, we heard from a few printing company leaders that mergers, acquisitions, or closures of other firms were affecting their business. Seeking whether that is common in our industry today, we asked this question: “Have closures, mergers, or acquisitions of other printing companies impacted your business?” Respondents answered with this one-to-five scale: Not at all (1), (2), Some (3), (4), or Greatly (5). One hundred and one leaders answered that question, with a 2.6 average. That average is a little under “some.”

We looked at the response average for different strategic groups – see the chart below. It’s interesting that “General Commercial with a high amount of non-traditional products” showed the highest effect from other mergers, acquisitions, or closures. Theirs was the only average over 3.0. Does that mean they are able to leverage their diversification to take advantage of local ownership changes? Or does their lack of product focus hurt them when local ownership changes? I wish we had included a “Is the effect positive or negative?” question.

Strategic Group	Number of Firms	Response Average
General Commercial and labels	8	2.0
General Commercial with high amount of direct mail	28	2.6
General Commercial with web printing	12	2.6
Labels	11	2.6
General Commercial	33	2.7
General Commercial with a high amount of non-traditional products	7	3.4

To get a better picture of how other mergers, acquisitions, or closures are affecting printing firms, we asked, “If so, please share how please share how closures, mergers, or acquisitions of other printing companies have affected your firm.” We posted the answers below and divided them into “positive” and “negative or neutral” effects. Printing firm leaders shared interesting points. The last positive comment posted caught my attention – “...requiring our company to sharpen our sales approach and strengthen how we identify and message our value proposition.” There are more positive than negative comments, which show the potential positive effects of other mergers, acquisitions, or closures. However, the negative comments provide some things to watch when companies around your firm change ownership or close. Here’s the big message – when other printing companies around yours merge, get acquired, or close, look for opportunities and leverage them.

Positive Effects

- The location was closed and moved out of the local area
- I know that a company local to our market was purchased at the end of 2024. I actually expect to see more business for us to come out of that merger, as I don't believe some of the customers will like working with the new company.
- Closures and mergers have provided some new opportunities. We have one competitor that regularly attacks our customer base with basement pricing. I would rather they do the work for a loss than win something that does not support our operation. This situation has been ongoing for the last twenty

years, you get used to it and tend to expect something every couple of years.

- We have acquired numerous new customers due to printing closures.
- Many smaller operators have either closed or downsized and rely on outsourcing more.
- Gained customers.
- Provides opportunities for growth.
- Yes, two companies merged in our area. The company doing the purchasing does not have the best fit for commercial printing in my market, sending many customers to us.
- We have gained some valuable employees from layoffs.
- Other companies close, and their business migrates somewhere... essentially musical chairs.
- Firms going out of business help to free up business and force clients to shop. Fewer competitors mean a healthier overall environment. It only takes one low baller in a market to affect everyone, and I have observed a pattern of lowballing when a company is in financial distress.
- Picked up a few clients from other shops closing or merging.
- We've gained some market share with other firms closing in 2024.
- We have, if anything, benefited from a few mergers/acquisitions in our area. Mainly due to the customer service declining and lead times extending beyond what they were used to. Several competitors have closed in the past couple of years, so we have potential customers calling all the time.
- We can pick up clients from closures and mergers of other companies by providing a better value than the old or new merger.
- It has allowed us to source employees to fill open positions. We have had to move some of our outsourced bindery to other states versus intercity partners.
- It may give us the potential to gain business.
- Acquisitions have strengthened some competitors, requiring our company to sharpen our sales approach and strengthen how we identify and message our value proposition. Other acquisitions have eroded local competitors, bringing opportunities for market share and sales growth.

Negative or Neutral Effects

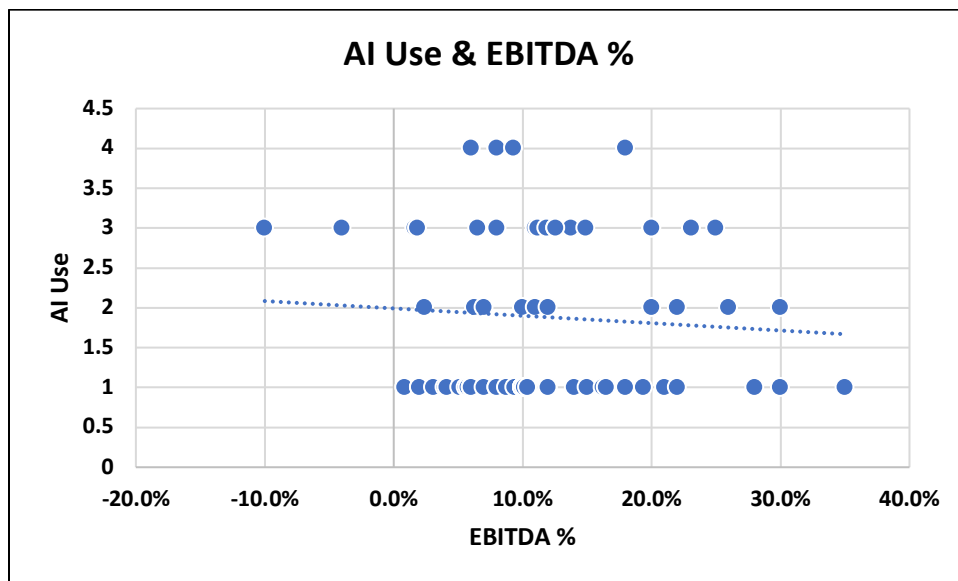
- We lost a major subcontractor printer to a merger that fell apart within months. This would have allowed us to have an even greater opportunity for the Political printing projects we had to pass on.
- We had a couple of mergers in our region recently, so it is too soon to tell what the impact is going to be.
- Growth by acquisition and taking on new technologies have made the industry more competitive since large companies need and want more volumes.
- I'm competing with larger printing companies with more locations and huge teams of salesmen.
- It affects us. In one case, a printing vendor through acquisition became a competitor. It makes some companies stronger and, in some cases, opens the door for us to new sales.
- Local closures have led to some new business. The consolidation of printers has led to new capabilities for some of our competitors.
- The print industry is shrinking. More and more small shops are being absorbed. The cost of doing business is increasing.
- The mergers put some pricing pressure on smaller firms. They can buy raw materials less expensively than we can. Mergers can also offer opportunities. There is generally more turnover in the sales and customer service areas, and so they can offer better service.

Artificial Intelligence

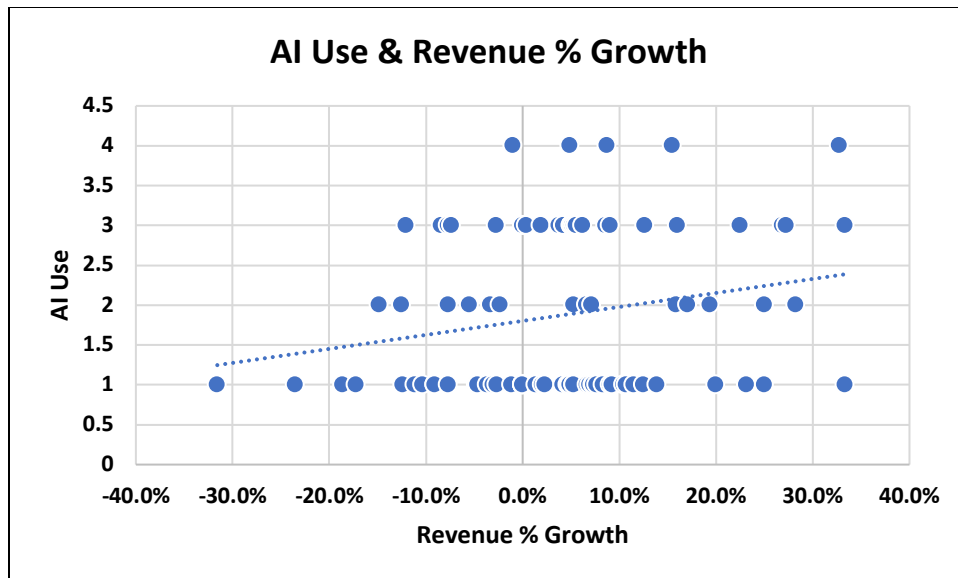
Oh, there's a lot of talk about Artificial Intelligence (AI) in your world today and in my world (college academia), too. We sought to provide some simple and helpful insights about AI use in printing companies. To gauge the extent of AI use in our industry, we asked, "To what extent is your firm currently utilizing AI?" Here are the one-to-five scale answer options: Not at all (1), (2), Some, in few areas (3), (4), or A lot! In multiple areas (5). Ninety-five leaders answered that question. The average response was 1.9, which suggests that, as of now, there is not "overwhelming" AI use in our industry. Indeed, forty-nine of the respondents (51.6%) answered "Not at all." And no one answered "A lot! In multiple areas."

We also asked, “To what extent has the use of AI contributed to improving your firm's performance?” Here are the one-to-five scale options: Not at all, yet (1), (2), Some (3), (4), or Greatly (5). Seventy-one leaders answered that question, with an average of 1.9, significantly below “Some.” Similar to the AI question discussed just above, 34 leaders (47.9%) responded “Not at all, yet.” And, like above, no one answered that AI was improving performance “Greatly.”

Seventy-one respondents answered the AI use question and provided their EBITDA percentage – see the graph below. The downward trendline indicates a negative relationship between AI use and EBITDA percentage, suggesting that higher-performing firms are using AI less, or that AI is not connected to higher performance.



Ninety respondents provided their 2023 to 2024 revenue growth and answered the AI use question – see the graph below. The upward trendline suggests that growing printing companies are using AI more, or maybe AI is helping spur growth.



Does the upward trendline in the revenue growth/AI graph just above indicate that, in the future, we will see a positive relationship between AI use and printing firm performance? Who knows? But, printing company leaders, you must wrap your arms around this evolving technology and make proactive (not reactive) decisions about your firm's AI future path. To help provide you with actionable AI knowledge, we asked three open-ended AI questions in our survey. The questions are below in italics, and the responses follow each question.

Please describe how your firm is utilizing AI and list the specific AI tools or technologies you are using.

- Graphics uses AI to develop art, and to improve the quality of customers' art.
- We use some prepress AI along with marketing research.
- Used in some of our marketing materials and used in our Wide Format imposition.
- Enfocus switch & ChatGPT.
- Copywriting.
- Anthropic for administrative purposes.
- I use it as the owner for drafts of legal documents, assistance in marketing processes, and some outbound selling activities.
- For blog writing, video creation, pod podcast creation

- We use AI in our sales efforts, accounting, and pre-press. We use ChatGPT in sales, Claude in accounting, and vendor add-ons in prepress.
- Sales generation, workflow automation, A/P, and A/R input.
- To build databases and production profitability feedback in real time.
- Sales client retention.
- In prepress, research, and some ROI numbers type stuff.
- Chat GPT to revise contract verbiage.
- AI is being used to create ideas, solve problems, and refine writing.
- Writing, research, and programming – occasionally for design.
- We use AI in Marketing and sales communications
- Preproduction processes.
- We are using AI to enhance documents that are sent to our customers.
- We're using it for metrics creation and tracking, email/blog communications, marketing, and some social media efforts.
- Mostly in the design area and researching new customers
- In the graphic design area. Implementing processes and procedures. Polishing letters to vendors or customers.
- We are using AI in estimating and customer engagement.
- Automated workflows.
- Using it for scripting sales communications.
- We use it to generate content in our sales process.
- Writing of computer code. Writing of content for marketing. Review of design quality and design concepting. SOP drafting. Translation.
- We use a system called Plan Prophet that tracks who has ordered and sends out reminders, marketing messages and asks why the individual has not ordered.
- Use it to improve email lists. Transcribe calls. Proof text.
- Sales leads, general business issues.
- Our graphic designer is experimenting with AI.

What specific benefits has your firm experienced from using AI?

- Finding prospects and increasing productivity in order entry/file approval.

- Lower legal and outside admin costs.
- None yet.
- One person now does the job of 2+ people.
- Sales is becoming more effective. Accounting processes are going more quickly, and the workflow automation in pre-press have made a significant difference in speed and cost savings.
- Better speed, lower labor cost.
- Improved real-time performance for each piece of equipment for operators and managers to see.
- Client retention.
- Time savings.
- Faster problem solving and troubleshooting.
- Increased efficiency in communication and higher speed programming.
- Improved marketing communication and frequency.
- Automation and efficiency
- Not much yet.
- We're increased certain processes and systems, increased digital marketing successes, strategic planning and KPIs.
- Still searching.
- Increases intelligence.
- Saved time and costs
- Faster, more concise letters, emails. Faster research.
- Ease of research and data collection.
- Speed at which we can generate sales collateral.
- Higher volume of content. Faster code development. Better headlines, or at least more options. Research assistance.
- Reconnect with clients that might have fallen by the wayside.
- Increased efficiency
- Identifying sales leads

What specific challenges has your firm encountered in implementing or using AI?

- Finding the right AI for us and how it would apply.
- Learning curve and adoption

- None.
- Finding the time and platform(s) to do so.
- Doesn't seem like there's an easy plug and play obvious AI investment for us right now, as soon as there is we will jump on it.
- It is moving so fast it is hard to keep up with it.
- Adoption. Habits are hard to break.
- Knowledge base.
- Not much so far, haven't gotten too far into AI yet.
- Overuse has eroded trust in certain individuals along with long form emails hurting efficiency with AI providing too much information than needed.
- We need to figure out how to manage it and control our message to our customers.
- Mostly in not utilizing it to the fullest extent, rather than by having used it, unless taking the human elements out of things.
- Need to still check to see how accurate the information is.
- Many.
- Just knowing the best way to use it for our business.
- Standards and controls continue to be a problem, but we are focused on getting our staff to use AI tools where they can so that they don't have a fear of them.
- We firmly believe in person-to-person communication and do not want a client to feel they are being handled by AI.
- Learning how to use it.
- The technology is still in its early stages, older workforce tends to revert to what works for them, and there is difficulty in identifying day-to-day tasks that could be accomplished using AI.

Closing Thoughts

We hope you find the knowledge provided above helpful. If you have any suggestions or questions related to this report or the *“Printing Industry Performance & Insights”* studies, please email Ralph Williams at ralph.williams@mtsu.edu

Participating Regional Printing Associations

FGA – Florida Graphic Alliance

GLGA – Great Lakes Graphics Association

GMA – Graphic Media Alliance

PGCA - Print & Graphic Communications Association

PIA – Printing Industry Association

PIAG – Printing & Imaging Association of Georgia

PIAMA – Printing and Imaging Association MidAmerica

PIAS – Printing Industry Association of the South

PIASD – Printing Industry Association of San Diego

PICA – Printing Industry of the Carolinas

PIMW – Printing Industry MidWest

PINE – Printing Industries of New England

PMA – Print Media Assoc.

VMA – Visual Media Alliance