



Succeeding in the “And Era”: How Printers Are Embracing Offset And Digital



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The global printing industry has entered a new phase, best described as the “And Era,” where the combined use of digital and offset presses is transforming printing companies’ competitive edge. The “And Era” approach is enabling commercial printers to harness the unique strengths of both technologies to improve operational profitability and offer customers the utmost flexibility, quality, and efficiency.

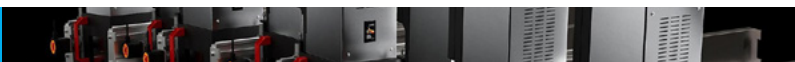
By integrating digital printing’s flexibility, quick turnarounds, and personalization capabilities with offset printing’s high-quality, consistent output and cost-effectiveness for large runs, print providers can offer a versatile and efficient solution to their clients. This hybrid model allows for the production of high-volume, high-quality prints while also enabling customization and on-demand printing, ultimately enhancing productivity, reducing waste, and opening up new opportunities for targeted marketing and customer engagement.

Print providers that embrace this “And Era” approach are in a strong position to meet customers’ diverse and evolving printing needs with greater efficiency and creativity. Printing companies that are integrating these two printing methods can meet diverse demands, enhance productivity, and offer innovative solutions that cater to the evolving needs of their clients. This constructive collaboration sparked a significant evolution in the printing industry, moving it towards a more dynamic and versatile future.

KEY SURVEY TAKEAWAYS

NAPCO Research conducted a survey to learn more about the “And Era” and found the following:

1. Digital printing is growing but far from overtaking offset.
2. Cost efficiency is the main benefit of an “And Era” approach.
3. Digital printing is still mainly for short runs.
4. Managing workflow complexity is the top challenge when integrating offset and digital.
5. Digital requires extensive staff training.
6. Finishing equipment is on many printers’ shopping lists.
7. Investments are aimed at lowering costs and gaining a competitive edge.



SURVEY TO UNLOCK TRENDS

NAPCO Research conducted a study, sponsored by Kodak, to understand the “And Era” and how commercial printers are embracing the combination of digital and offset printing, the benefits of approach, and any challenges. Commercial printers in the United States, Germany, and Japan participated in the study’s survey. (See the appendix for survey respondent demographics.)

The survey revealed that commercial printers recognize and are taking advantage of the “And Era” approach, citing increased flexibility, improved quality, and cost savings as key advantages. Commercial printer respondents indicated that they are leveraging digital printing for short runs and personalized prints, while relying on offset printing for high-volume, high-quality jobs. Survey results also highlighted that print providers are investing in training and technology to seamlessly integrate both methods, ensuring they can meet the diverse needs of their clients.

KEY RESEARCH TAKEAWAYS

The survey revealed the following key takeaways that offer essential insights on why commercial printers are combining offset and digital printing or considering it.

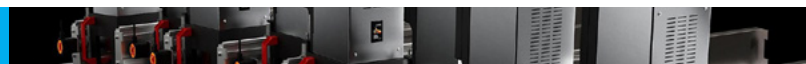
Takeaway 1: Digital print volume is increasing but offset continues to dominate.

Digital printing is on the rise, complementing offset rather than replacing it. Most survey respondents, 60%, anticipate their digital print production will increase and offset will decrease. It’s important to note that this question’s responses focus on the direction of change (increase or decrease) rather than the magnitude. Digital production volume may increase but offset still dominates and represents a significant share respondents work. Commercial printers reported 71% of their work is printed on offset press and 19% on digital presses. Survey respondents across all countries reported that 70% to 73% of print work is produced on offset presses.

Offset printing is still dominant and continues to improve in terms of automation and efficiency.

Offset printing is the dominant process responsible for producing the majority of the world’s print volume and its use isn’t disappearing anytime soon. When digital presses came on the scene and offered commercial printers affordable short-run production and a more automated process, offset press makers responded with technology innovations. Today’s offset presses now feature faster makeready, reducing setup times, and enhanced automation, increasing efficiency. Prepress technology has also continued to innovate with faster, more flexible, and automated computer-to-plate (CTP) along with rules-based workflow solutions that boost production efficiencies.

Both technologies have secured a solid place in the printing industry’s press arsenal as commercial printers recognize how the technologies complement each other. During a roundtable discussion at drupa 2024 on press technology, Andy Robbins, managing director of Blackmore Ltd., Shaftesbury, Dorset, UK, shared the value of the “And Era” approach is delivering to his organization. Robbins said,



"We are relatively new adopters of digital and really the keyword is complement. In the commercial printing business, we print short runs, jobs with variable data, and advance copies digitally. We're quite heavily into packaging. Short-run packaging or prototypes are also being produced on our digital presses, so this is certainly a growing area for us."

Over the next three years, over one-third of survey respondents expect increasing integration of digital and offset printing and use of hybrid solutions.

Takeaway 2: The biggest benefit of an "And Era" approach is cost efficiency.

The "And Era" technology strategy significantly enhances commercial printers' production cost efficiency by leveraging the strengths of both technologies. The top reason commercial printers operated both digital and offset presses, reported by three-quarters of survey respondents, is the technology duo offers cost efficiency.

In a survey question, those with both offset and digital presses offered these views on how digital printing influences their operations:

- A U.S. commercial printer with 100 employees reported, "It [digital printing] helps increase production speed and reduce labor costs, enhancing productivity and enabling our company to handle more work with fewer resources, thus increasing profitability."
- In addition, a German commercial printer with more than 100 employees commented, "Digital printing has reduced waste, so we have been able to lower our operational costs."
- Meanwhile, a Japanese printer with 26 – 50 employees reported, "By minimizing labor expenses and streamlining operational costs, we have substantially improved profit margins and enhanced our overall financial performance."

By balancing the strengths of both offset and digital presses, commercial printers can enhance their operational efficiency, reduce costs, and provide high-quality, versatile printing solutions. **Table 1** shows the value respondents reported in operating both digital and offset presses. Beyond offering cost efficiency, the top response for commercial printers across all countries, the offset digital press combination enables meeting customer demands for customization, faster turnaround, and quality, while offering production flexibility.

"Digital printing has reduced waste, so we have been able to lower our operational costs."

— German commercial printer with more than 100 employees

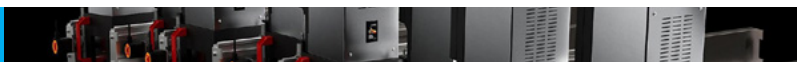


Table 1: Reasons for Following an “And Era” Approach

Q. What are the primary reasons you operate both digital and offset presses in your printing facility?

	Total n=166	U.S. n=118	Germany n=32	Japan n=16
Offers cost efficiency	75%	70%	84%	88%
Meets customer demand for customization	61%	59%	67%	63%
Enhances flexibility and faster turnaround time	58%	52%	81%	63%
Enables meeting customer quality requirements	57%	50%	75%	69%
Minimizes production waste	30%	30%	41%	13%

Source: NAPCO Research/Kodak 2024



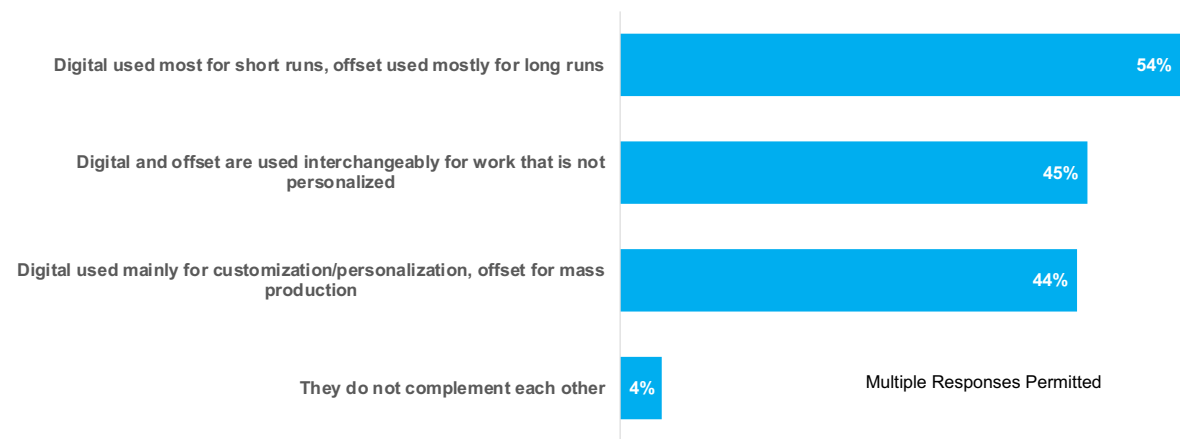
Because offset presses are ideal for high-volume, consistent print jobs, while digital presses excel at short runs and quick turnarounds, the combination of both allows commercial printers to accommodate a wider range of job types efficiently. By using both types of presses, printers can allocate jobs to the most cost-effective press. High-volume jobs can go to the offset press, while short runs and personalized jobs can be handled by the digital press.

Takeaway 3: Digital printing viewed primarily as a process for short runs.

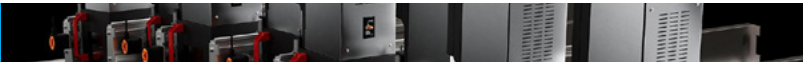
A key advantage of digital printing is that it excels in short run production. Because digital presses don’t have the extensive press makeready steps necessary for offset printing, initial set up costs are lower. As shown in Figure 1, when asked how digital and offset complement each other, over half of survey respondents (54%) reported that digital printing is used most for short runs, while offset is used mostly for long runs — as it excels in delivering high-quality, consistent output for large volumes. In addition, 44% of commercial printers reported digital is used mainly for customization/ personalization while offset is used for mass production.

Figure 1: The Benefits of the “And Era”

Q. How do digital and offset printing technologies complement each other in your business?



n=166 Commercial Printers in USA, Germany, and Japan that Print on Both Offset and Digital Presses
Source: NAPCO Research/Kodak 2024



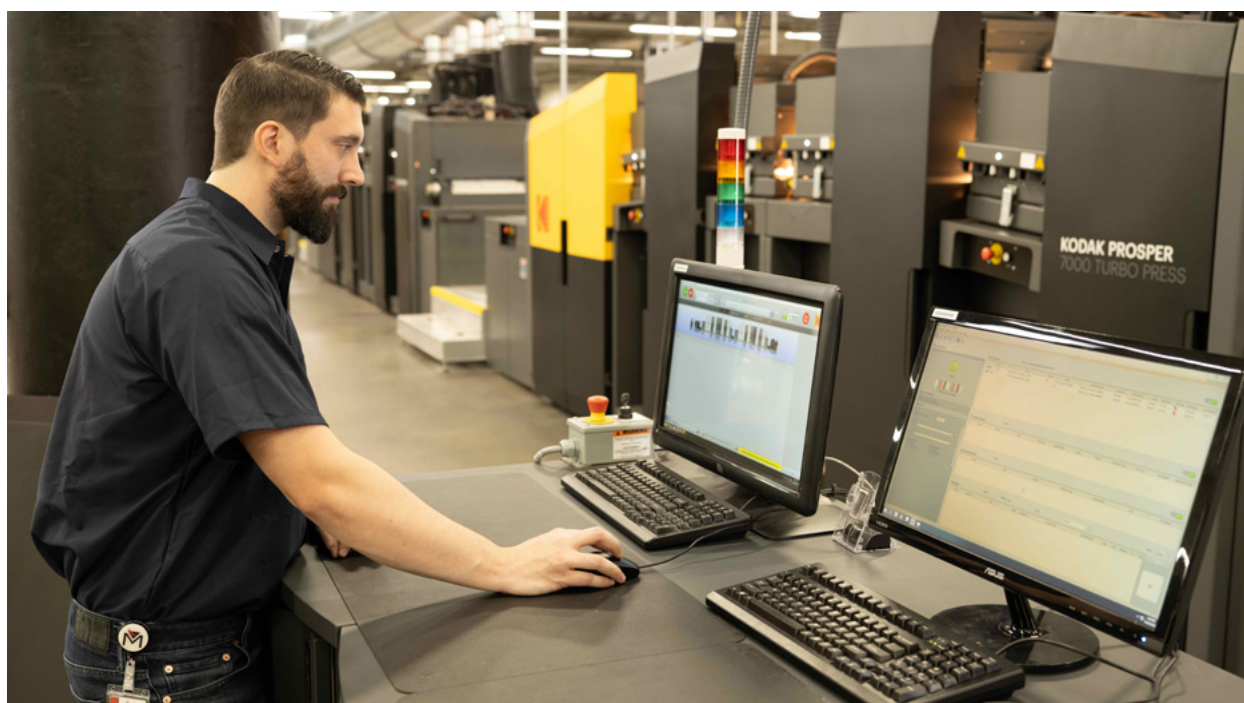
When asked about digital printing's effect on their operations, respondents noted the following:

- “Lower setup costs have made smaller jobs more profitable, improved workflow efficiency, and saved operational costs.” — U.S. Commercial Printer with more than 100 employees
- “Digital printing is a more cost-effective option as it eliminates the need for expensive printing plates and is able to produce shorter print runs at lower cost.” — Japanese Commercial Printer with 26-50 employees
- “Digital printing has reduced waste, so we have been able to lower our operational costs.” — German Commercial Printer with more than 100 employees
- “[Digital printing] Has allowed us to successfully draw in a growing number of new clients while also maintaining strong relationships with our existing customers. This has not only enhanced our overall sales figures but has also allowed us to broaden the range of services we offer.” — U.S. Commercial Printer with 26 to 50 employees

“Lower setup costs have made smaller jobs more profitable, improved workflow efficiency, and saved operational costs.”

**— U.S. Commercial Printer
with more than 100 employees**

By integrating these two printing processes, print providers are meeting diverse market demands, enhancing productivity, and offering innovative solutions that cater to evolving client needs. The synergy between offset and digital printing processes offers commercial printers a competitive edge by enhancing their versatility in meeting customer needs. This advances the printing industry's evolution by propelling it towards a more dynamic and adaptable future.



Takeaway 4: #1 challenge in integrating offset and digital is workflow complexity.

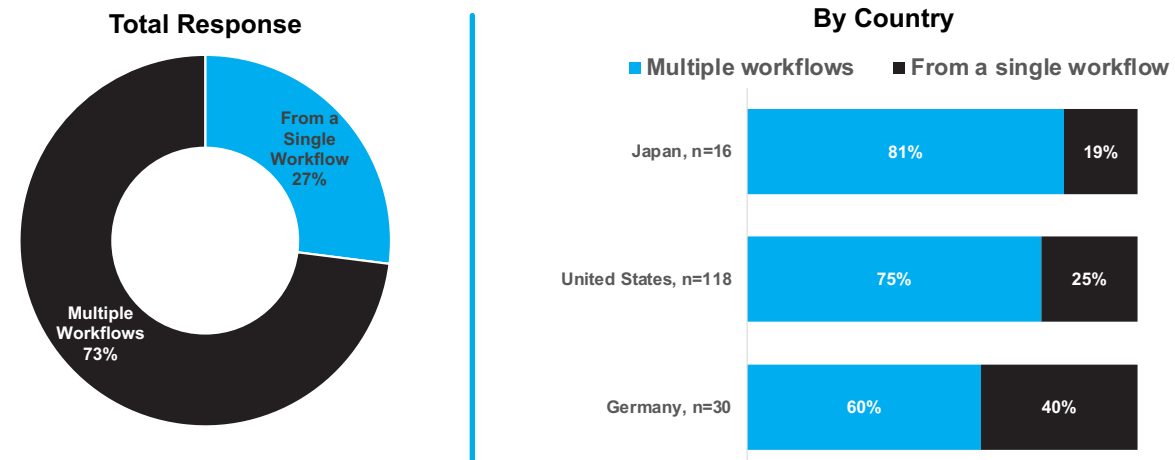
The top challenge when integrating digital and offset printing technologies, reported by 45% of respondents, is workflow complexity (e.g., ability of ERP, MIS, and production workflow tools to manage a hybrid workflow). German and Japanese respondents had a higher incidence, 67% and 56% respectively, of reporting workflow complexity is a challenge compared to 37% of U.S. respondents.

A significant aspect intensifying the difficulty in integrating workflows is that 73% of respondents that print on both offset and digital presses support multiple workflows. **Figure 2** highlights that multiple workflows are common across countries surveyed.

A key factor in advancing the “And Era” will be the implementation of unified workflows.

Figure 2: Multiple Workflows Most Common for Mixed Production

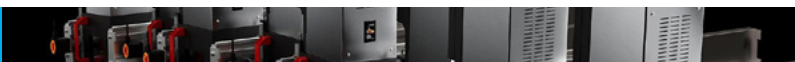
Q. Overall, how are you managing your offset and digital printing workflow processes?



n=164 Commercial Printers in USA, Germany, and Japan that Print on Both Offset and Digital Presses
Source: NAPCO Research/Kodak 2024

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Managing two separate workflows can reduce job flexibility, complicate scheduling, hinder productivity, duplicate resources, increase operational costs, create bottlenecks, and elevate the risk of errors. A key factor in advancing the “And Era” era will be the implementation of unified workflows.



Takeaway 5: Introducing digital printing requires specific staff training to be successful and an integrated, cross-trained staff capable of managing mixed workflows.

Respondents reported that adding digital printing required increasing staff training (Figure 3). In addition, in a different survey question, 43% of respondents reported workflow automation and integration skills are essential for staff to manage both digital and offset technologies; that was the top response, followed by 43% indicating expertise in color management is essential.

Figure 3: Digital Printing's Impact on Training and Staffing

Q. How has the introduction of digital printing impacted your staffing and training requirements in any of the following ways?



n=164 Commercial Printers in USA, Germany, and Japan that Print on Both Offset and Digital Presses
Source: NAPCO Research/Kodak 2024

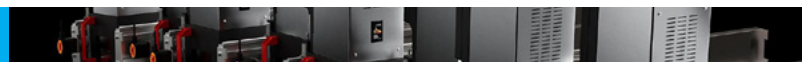
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Staff training on both technologies was a key challenge in integrating digital and offset technologies for 39% of U.S. respondents, 53% of German respondents, and 56% of Japanese respondents. A likely reason training staff on both technologies was a less of a challenge reported by U.S. printers is that they were early adopters of digital printing and have already integrated digital workflows extensively, reducing the need for dual training.

Training is key to successfully implementing the “And Era” approach as it helps staff understand how to seamlessly incorporate digital printing into the overall production workflow. By investing in staff training, print providers can fully leverage the benefits of digital printing technology and ensure a successful transition.

Furthermore, offset and digital printing require different staff skill sets and operators need to be proficient in both technologies. Each printing method has its own complexities. Offset printing involves understanding ink, plates, and mechanical adjustments, while digital printing requires knowledge of digital file preparation, color management, and machine maintenance.

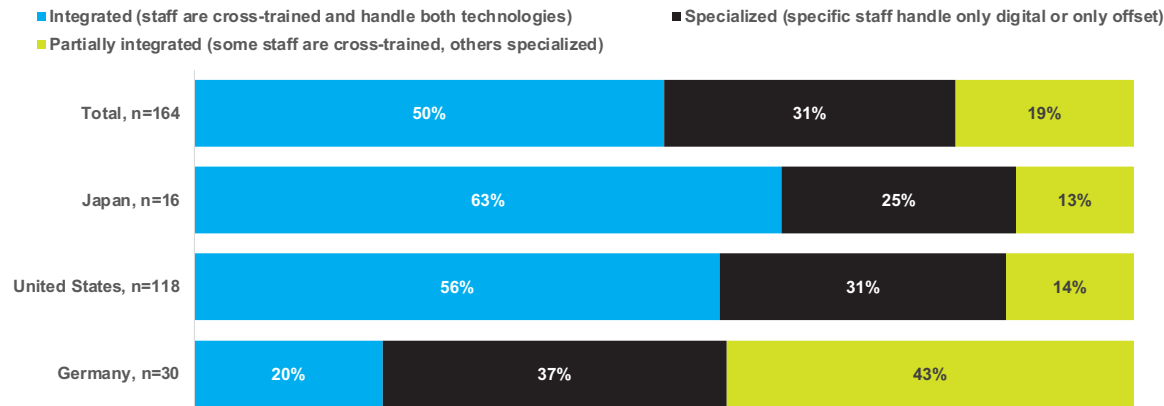
Successfully integrating offset and digital workflows requires a deep understanding of how each process works and how they can complement each other. This integration can be complex and requires well-trained staff to manage it effectively.



Respondents with both offset and digital presses reported only half of staff were cross trained in both offset and digital press operations (Figure 4).

Figure 4: Press Staff Roles in Mixed Workflow

Q. Which of the following best describe the roles of your press operators?



Commercial Printers in USA, Germany, and Japan that Print on Both Offset and Digital Presses

Source: NAPCO Research/Kodak 2024

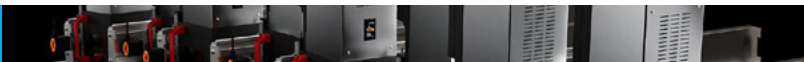
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Managing both digital and offset presses requires cultivating proficiency and expertise in the following technical staff skills:

- Workflow automation and integration
- Color management
- Digital printing technologies
- Variable data tools

Investing in comprehensive and ongoing training programs can ensure that press staff are able to efficiently manage a combined offset and digital printing workflow. Because the printing industry is constantly evolving with new technologies and techniques, continuously training staff on advancements in both offset and digital printing is solid strategy for ensuring high productivity, quality output, and staying ahead of the competition.

By investing in staff training, print providers can fully leverage the benefits of digital printing technology and ensure a successful transition.



Takeaway 6: Finishing equipment is on many printers' shopping lists.

Finishing, or postpress, is one of the most labor-intensive stages of print production. Many tasks and processes required to finish printed pieces are time-consuming, labor-intensive, and prone to errors. Investing in finishing equipment is essential for commercial printers to maximize the benefits of a combined digital and offset printing workflow. Survey responses revealed that finishing is the top investment respondents with both offset and digital presses expect to make in the next 12 to 24 months.

Respondents with both offset and digital presses expect to invest in finishing.

Bindery and finishing equipment are desired capital investments for leveraging the benefits of the “And Era” approach. The short-run jobs and customized orders enabled by digital printing require frequent changes in the finishing setup, which can create inefficiencies and slow down the process. Additionally, digital presses can produce prints at high speed, but if the finishing equipment can’t keep up, it creates a bottleneck, slowing down the entire production process.

As print providers increase the share of work they print digitally, they often find that their conventional finishing equipment isn’t ideally suited to digital formats and quantities. The increasing pressure to turn around short runs on tight delivery schedules has many print providers pursuing new alternatives.

Today’s finishing equipment includes automated binding and folding machines that can handle a variety of formats and sizes. These machines improve efficiency and reduce manual labor.

Takeaway 7: Printers expect their investments in both technologies to reduce costs and provide a competitive edge.

Commercial printers have high expectations for their technology investments. As shown in **Table 2**, when evaluating equipment investments, respondents reported that their organization’s priorities include delivering competitive advantage, reducing costs, improving quality, ensuring compatibility with current technology, and expanding business.

Table 2: Print Equipment Investment Decision Factors

Q. How important are the following factors when deciding on a printing equipment investment?
Responses Ranked Extremely/Very Important

	Total, n=230	Offset Only, n=64	Digital and Offset, n=166
Establish competitive advantage	71%	66%	73%
Long-term saving in operational costs	69%	67%	69%
Cost per print/job	66%	59%	68%
Quality improvement	65%	64%	66%
Compatibility with existing workflow	64%	63%	64%
Drive new business	64%	55%	64%

Base= Commercial Printers in U.S., Germany, and Japan
Source: NAPCO Research/Kodak 2024



The “And Era” approach addresses these investment priorities by leveraging the strengths of both digital and offset printing. Commercial printers adopting this strategy are expanding their business capabilities, staying ahead of competitors, and achieving long-term success.

FINAL THOUGHTS

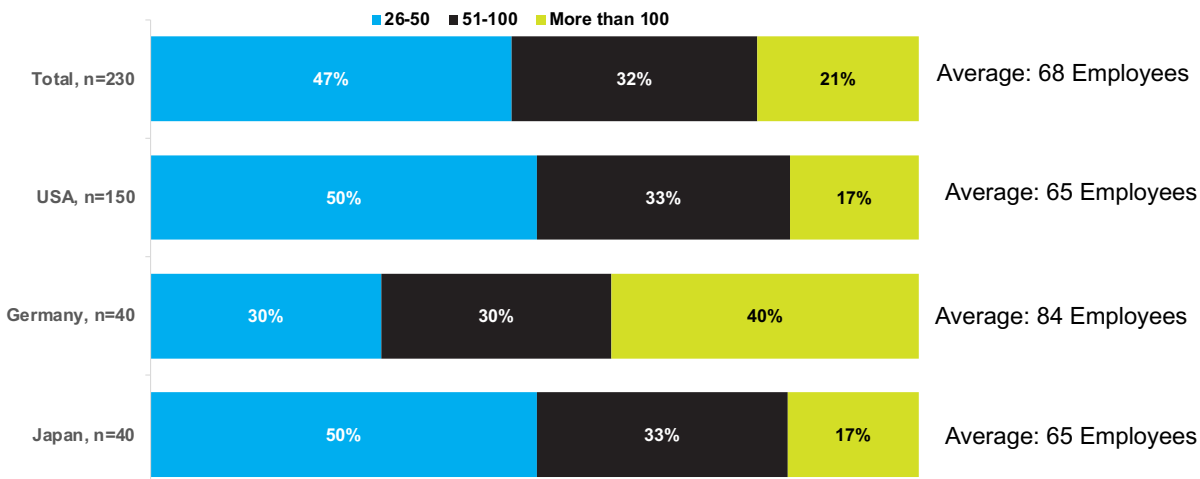
The “And Era” era marks a transformative period for the global printing industry, where the combined use of digital and offset presses is redefining competitive advantage. Survey respondents are leveraging the unique strengths of both technologies to gain flexibility, improve productivity, enhance quality, and better meet customer requirements. This integrated approach is enabling commercial printers to meet the diverse demands of today’s market but also position printing companies to thrive in an ever-evolving landscape. The survey results indicate that embracing the “And Era” strategy ensures that print providers can deliver exceptional value, stay ahead of the competition, and continue to innovate in a dynamic industry.

APPENDIX: SURVEY DEMOGRAPHICS

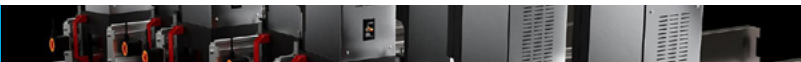
An online survey was distributed to commercial printers in the U.S., Germany, and Japan. To qualify for participation, commercial printers needed to have a minimum of 25 employees. **Figure A-1** illustrates the breakdown of survey respondents by employee size, both overall and by country.

Figure A-1: Respondents by Employee Size

Q. How many employees does your print business have?



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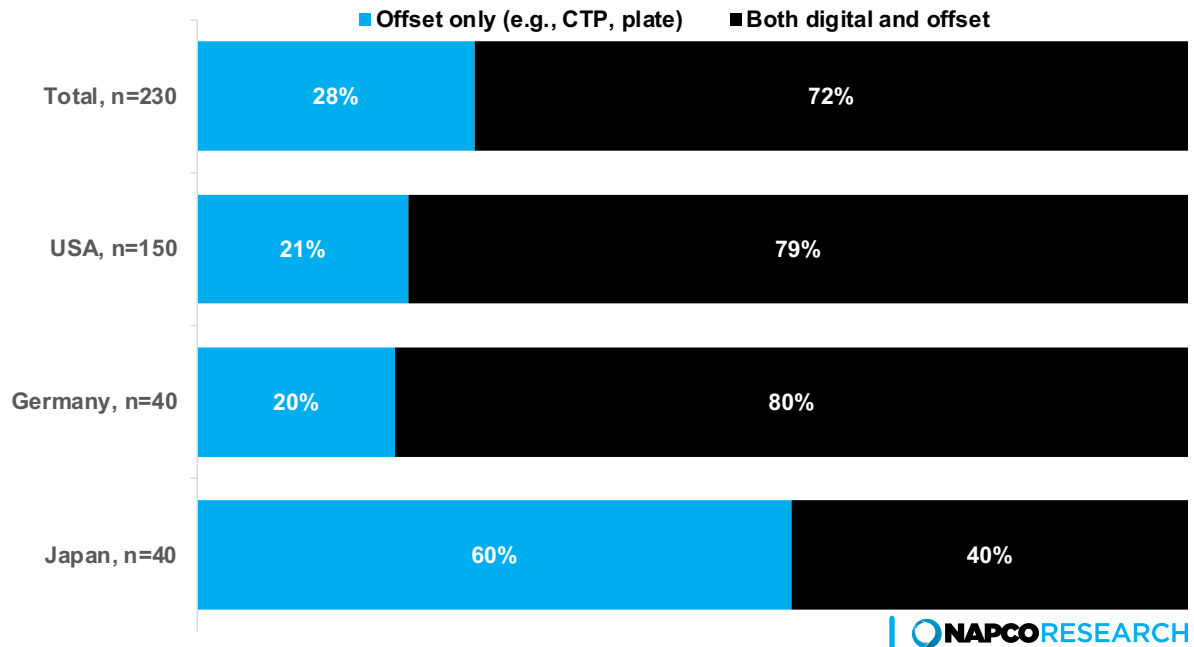


Source: NAPCO Research/Kodak 2024

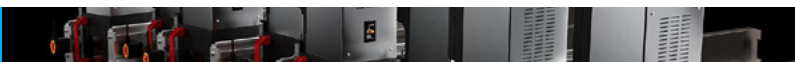
The research aimed to capture responses from commercial printers operating both offset and digital presses, as well as those with offset presses planning to invest in digital within the next 12-24 months. **Figure A-2** illustrates the respondent pool, distinguishing between those with only offset presses and those with both offset and digital presses.

Figure A-2: Respondents by Printing Technology Used

Q. What type of printing technology do you use in your business?



Source: NAPCO Research/Kodak 2024



WHO WE ARE

NAPCORESEARCH

NAPCO Research crafts custom data-centric solutions that leverage our highly engaged audiences across the markets in which we operate, our industry subject matter experts and in-house research expertise. We partner with our clients to identify their unique business problem and create solutions that enable deeply informed decision-making.

NAPCO Research can help with:

- Business goal prioritization
- Opportunity discovery
- Market segmentation
- Landscape insight
- User needs and wants
- Product features and functionality
- Content marketing strategy
- Sales strategy and tactics
- Market conditions
- Benchmarking
- Industry trends
- Brand awareness



WHO WE ARE



About Kodak

Kodak (NYSE: KODK) is a leading global manufacturer focused on commercial print and advanced materials & chemicals. With 79,000 worldwide patents earned over 130 years of R&D, we believe in the power of technology and science to enhance what the world sees and creates. Our innovative, award-winning products, combined with our customer-first approach, make us the partner of choice for commercial printers worldwide. Kodak is committed to environmental stewardship, including industry leadership in developing sustainable solutions for print. For additional information on Kodak, visit us at [Kodak.com](https://www.kodak.com) or follow us on LinkedIn [Kodak Print](#).

