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## A Vertical-Market Approach to Document Services in the U.S.: The Evolution from Printer to Partner

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### Introduction

The successful document services provider of today has evolved from the average provider of just a few years ago. Many of today's providers are savvier, business-process-focused, and capable of delivering a broad range of document services beyond print. They have cultivated a comprehensive knowledge of their customers' business challenges, and understand how to leverage that knowledge to enable greater success for their customers as well as their own enterprises.

In *A Vertical-Market Approach to Document Services in the U.S.: The Evolution from Printer to Partner*, InfoTrends surveyed document owners and print services buyers across eleven vertical industries in the United States to profile, in detail, the document services requirements in each market. InfoTrends defines a *document owner* as an individual who is responsible for making decisions about and managing the creation, production, and/or distribution of documents. Examples include a marketing manager who is responsible for marketing collaterals or a training manager who develops a course curriculum. Part of this role may include buying print. We define a *print buyer* or a *print services buyer* as an individual for whom some portion of their job responsibility includes the purchase of print and related services from outside vendors for others within the organization.

This study focuses on the document services provided on-site or off-site by internal, staffed print or copy centers or by external printers, service bureaus, or document outsourcing providers. It explicitly excludes document applications produced on un-staffed, self-service workgroup or personal devices.

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The industries were selected by the charter subscribers to the study, and are defined by their North American Industrial Classification System (NAICS) code. The following industries are included:

- Accommodation (NAICS 721: includes hotels, motels, bed & breakfasts, inns, convention centers, RV parks, and recreational camps)
- Educational services (NAICS 611: includes elementary and secondary schools, higher education, and business/technical/trade schools)
- Executive, Legislative, and Other General Government Support (NAICS 921)
- Financial Services (NAICS 522 and 523; includes credit intermediation and related activities, securities, commodity contracts, and other financial investments and related activities)
- Food Manufacturing (NAICS 311)
- Hospitals (NAICS 622)
- Insurance Carriers and Related Activities (NAICS 524)
- Legal Services (NAICS 5411)
- Retail (NAICS 44 and 45)
- Telecommunications (NAICS 517)
- Transportation Equipment Manufacturing (NAICS 336: includes motor vehicles, aerospace, railroad and ship building)

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