

35TH ANNIVERSARY DEALER SURVEY

Thank you for taking the time to respond to our 35th Anniversary Dealer Survey. It's hard to put into words how much we appreciate your participation as you conduct business in one of the most uncertain economic environments in history.

One thing we do know for certain is that the dealer channel is resilient. Dealers have proven that time and again by overcoming a vast array of challenges that forever changed the marketplace. With today's unprecedented challenges, your data and insights on the trends that propelled the channel in 2019 will be instrumental as the industry moves forward in the months and years to come. We feel this year's Survey will prove to be one of the most important of all we have ever conducted.

We are grateful to **TIAA Bank** and **Canon, Kyocera, Ricoh, Sharp, and Toshiba** for their unwavering support of the Survey, and for continuing to provide their dealer partners with a subscription. This year, it is our pleasure to give all respondents who are eligible to receive a subscription via a dealer partner with an additional subscription courtesy of The Cannata Report. We hope that this, in some small way, conveys how grateful we are to you for completing the Survey, and how we remain dedicated to our editorial mission to assist you in preparing your business for future success.

Please be assured that all responses to our Survey are kept confidential. While we do require participants to provide us with a name, company affiliation, and email address, it is only to register subscriptions or deliver digital issues of The Cannata Report.

If you have any questions at all, please don't hesitate to contact me at cjcannata@cannatareport.com or (917) 514-9501. We welcome your feedback and are forever grateful to you for your participation in our 35th Anniversary Dealer Survey.

We wish you all the best of health and a prosperous future.

Regards,



Charles J. Cannata
President and CEO

TIAA Bank, Canon, Kyocera, Ricoh, Sharp, and Toshiba Dealers: receive a one-year subscription, compliments of a select partner* and an additional subscription courtesy of The Cannata Report.

Other Dealers: receive complimentary access to our October and November 2020 Special Annual Dealer Survey Issues via PDF.**

1. Check the box for only one applicable partner—your choice if multiple partners apply.

If no partners apply, check **"other."**

- TIAA Bank
- Canon
- Kyocera
- Ricoh
- Sharp
- Toshiba
- Other

2. ALL Respondents: Please fill out these mandatory fields with your contact information. **The Cannata Report will keep all contact information confidential.**

First Name

Last Name

Company Name

Address 1

Address 2

City

State

Zip / Post Code

Email

3. Respondents who qualify for a complimentary subscription: Please provide the name and email address of a colleague you would like to receive the second complimentary subscription:

First Name

Last Name

Email

Answer every Survey question and click **"Submit"** button upon completion.

FOOTNOTES

*Subscription offer subject to eligibility. You must be a current partner of TIAA Bank, Canon, Kyocera, Ricoh, Sharp or Toshiba to be eligible. The Cannata Report will verify all partnership claims. If you are an existing subscriber, we will extend your subscription and give an additional subscription to a colleague at the Gold level for one year. If you are a new subscriber, we will activate your two subscription at the Gold level within seven days of Survey completion. Note: A Gold level subscription includes full access to all content featured on thecannatareport.com, and a downloadable PDF of each monthly issue.

**Non-subscribers who are not eligible to receive the TIAA Bank, Canon, Kyocera, Ricoh, Sharp and Toshiba subscription offer will receive our Annual Dealer Survey issues via PDF upon publication in October and November 2020.

If you have any questions, please email cj Cannata@cannatareport.com.

If you wish to remove your name from our database, please click [HERE](#) to opt out.

* Please fill out these mandatory fields if you would like to receive your complimentary Gold subscription to The Cannata Report.

1. Please list the A3 MFP manufacturer you represent in order of importance.

A3 MFP Manufacturer #1

A3 MFP Manufacturer #2

A3 MFP Manufacturer #3

A3 MFP Manufacturer #4

2. Please list the A4 MFP manufacturer you represent in order of importance.

A4 MFP Manufacturer #1

A4 MFP Manufacturer #2

A4 MFP Manufacturer #3

A4 MFP Manufacturer #4

3. Please list the desktop printer (a device with a print-only capability) manufacturers you represent in order of importance.

Desktop Printer #1

Desktop Printer #2

Desktop Printer #3

Desktop Printer #4

4. List the leasing companies that currently support your dealership in order of importance to your business:

Leasing Company #1

Leasing Company #2

Leasing Company #3

Leasing Company #4

5. What was your total revenue for 2019?*

**Note: The Cannata Report will keep this and all other survey data confidential. It will not be shared with anyone outside of The Cannata Report executive team but is essential for us to provide an accurate depiction of the dealer universe.*

6. What percentage of your revenue was from imaging technology (MFPs, printers, etc.)?

7. Was your 2019 total revenue up, down, or the same in 2019 compared to 2018?

- Up
- Down
- Same

9. Do you provide managed print services (MPS)?

- Yes
- No

10. If you answered "no" to 9., skip to 13. If you answered "yes" to 9., what percentage of your 2019 revenue did MPS represent?

11. Was your MPS revenue, up, down or the same in 2019 compared to 2018?

- Up
- Down
- Same

12. If you answered "same" to 11., skip to 13. If you answered "up" or "down" to 11., by what percentage were you...?

% up % down

13. Do you provide managed network services (MNS)?*

***Note:** A positive response would indicate: (1) You manage entire networks, not just the devices that that feed into it; and (2) you maintain a help desk for clients under contract.

- Yes
- No

13a. If you answered "no" to 13., skip to 16. If you answered "yes" to 13., please check all that apply:

Please check all boxes that apply.

- I built it myself.
- I partner with a manufacturer, leasing company, or other vendor.
- I acquired (an) IT company (companies).

Other (please specify)

13b. What percentage of your 2019 revenue did MNS represent?

14. Was your MNS revenue up, down or the same compared to the previous year?

- Up
- Down
- Same

15. If you answered "same" to 14, skip to 16. If you answered "up" or "down" to 14, by what percentage were you....?

% up % down

16. Do you engage in production print?*

***Note:** We define production print as the marketing of a digital press with a digital front end such as a Fiery controller that enables variable data printing, at minimum. We do not consider print-for-pay as production print.

16a. If you answered "no" to 16., skip to 19. If you answered "yes" to 16, what percentage of your 2019 revenue was derived from production print?

- Yes
- No

17. Was your production print revenue up, down or the same compared to last year?

- Up
- Down
- Same

18. If you answered "same" to 17, skip to 19. If you answered "up" or "down" to 17, by what percentage were you....?

% up % down

19. How many break-and-fix service technicians were on your staff in 2019?

Note: If any questions from 19a through 20c do not apply to your business, please mark "NA."

19a. How many "other" technicians do you employ to service your MPS and MNS clients?

20. How many hardware salespeople do you employ?

20a. How many MPS/MNS specialists do you employ who support or actively engage in selling MPS and MNS contracts for or with your hardware reps?

of specialists who support MPS # of specialists who support MNS # of specialists who do both

20b. Did you increase or decrease the number of MPS specialists in 2019 vs. 2018 and by how many (indicate the #)?

- Increased
- Decreased

20c. Have you increased or decreased the number of MNS specialists since last year and by how many (indicate the #)?

- Increased
- Decreased

21. What is the total number of your machines in field (MIF)?

21a. Please break out the number of your MIF as follows:

A3 MFPs A4 MFPs Single-function printers

22. Did you make any acquisitions in 2019 to expand your business?

- Yes
- No

22a. If you answered "no" to 22., skip to 22b. If you answered "yes" to 22., how many dealerships/companies did you acquire in 2019, and what was the total revenue of those acquisitions?

Number of total acquisitions Dealerships IT Service Companies

Other (please specify)

Approximate revenue from all acquired businesses

22b. Are acquisitions in your plan for 2020 and beyond?

- Yes
- No

23. Looking ahead in 2020, which do you believe are the most significant growth opportunities in order of importance for the independent dealer?

Please rank from 1 – 7 (or 1 – 8 if you list an additional growth opportunity in “other”)

<input type="text"/>	MPS
<input type="text"/>	MNS
<input type="text"/>	Production print/wide format/industrial print
<input type="text"/>	Document Management/ECM
<input type="text"/>	Digital Signage and/or Whiteboards
<input type="text"/>	Security (Physical Security/Cybersecurity)
<input type="text"/>	Smart Office/Smart Meeting Rooms

Other(s) (please specify)

24. What are the areas that give you the greatest cause for concern? Please check no more than six from the following: Please check all that apply:

- Competing against manufacturers’ branches
- Declining print clicks
- Hiring and retention
- Maintaining profitability
- Keeping up with new technology
- Keeping up with the growing number of solutions on the market
- Maximizing revenue and profits from MPS
- Maximizing revenue and profits from MNS
- Effectively diversifying your product/solutions/services offerings
- Succeeding in production and/or industrial print
- A clear vision for where the industry is heading

Other(s) (please specify)

25. How would you rate your primary A3 supplier?

- Excellent
- Very Good
- Good
- Fair
- Poor

25a. Why? Please share just a few words to qualify your rating.

26. How would you rate your primary A4 MFP supplier?

- Excellent
- Very Good
- Good
- Fair
- Poor

26a. Why? Please share just a few words to qualify your rating.

27. How would you rate your primary leasing partner?

- Excellent
- Very Good
- Good
- Fair
- Poor

27a. Why? Please share just a few words to qualify your rating.

28. Please vote for the following Frank Awards for our 35th Anniversary Awards & Charities Gala.

a. ECM/Document Management Provider (Provides you outstanding products and support and enables you to compete most effectively in the marketplace)

b. Print Management Software Provider (Provides you outstanding products and support and enables you to compete most effectively in the marketplace)

c. Best Manufacturer (Provides you with the best overall quality product line and support, particularly inclusive of A3, production and any related devices and A4)

d. Best A4 Manufacturer of the Year (Provides you with the best overall quality A4-specific product line and support)

e. Best Production Print Manufacturer (Must provide a high-volume digital press with speeds in excess of 75 PPM in color and 125 PPM in monochrome that you are currently selling; provides you with the best overall quality production print and product line[s] and support)

f. Best-in-Class (Provides you the highest level of support overall and is the "easiest" to do business with, which includes facilitating excellent communication between the manufacturer/its corporate headquarters and the independent dealer)

g. Best Third-Party IT Services Provider (An IT services provider that offers a combination of the following as applicable to your needs, which could include one or more of the following: an array of IT services, including Help Desk, Network Operating Center [NOC], and strategic planning, as well as excellent communication, support, education, and training)

h. Best Marketing Strategy (The manufacturer that most clearly defines how a dealer can capture more market share through a support structure that includes training, onsite visits from OEM personnel and executives, and conveys a clear and concise marketing strategy)

i. Best Technical Service (This new award recognizes the organization that provides you the fastest response time, offers the most detailed updates and bulletins to address technical issues, and has the most proficient service team to support your service personnel)

j. Male Executive of the Year* (include full name and company)

k. Female Executive of the Year* (include full name and company)

***Note:** We have expanded these award categories to include executives from all segments of the industry not just those who work at an OEM.

30. How would you rate the most recent dealer meeting conducted by your primary hardware manufacturer? If there are two equal manufacturers, please share your opinions of both. Please name the manufacturer you are reporting on.
Manufacturer A

Rate Manufacturer A:

- Excellent
- Very Good
- Good
- Fair
- Poor

Manufacturer B

Rate Manufacturer B:

- Excellent
- Very Good
- Good
- Fair
- Poor

31. As a result of the business challenges caused by the COVID-19 pandemic, how optimistic or pessimistic are you about the long-term viability of your dealership?

- Very Optimistic
- Optimistic
- Somewhat Optimistic
- Neutral
- Somewhat Pessimistic
- Pessimistic
- Very Pessimistic

32. What topic(s) would you like to see The Cannata Report cover more frequently in 2020?

