

THE CANNATA REPORT

38TH ANNUAL DEALER SURVEY

Thank you for participating in our 38th Annual Dealer Survey. As you know better than anyone, this is a critical time for our industry.

Our last two surveys monitored the pandemic's impact on the industry and revealed some noteworthy trends. The channel is at a crossroads, and the proverbial stick or twist moment is here.

Your participation in our Annual Dealer Survey is crucial, and we thank you for sharing your intel and insights with us. We appreciate your support.

We extend our thanks to Epson, Kyocera, Ricoh, Sharp, Toshiba, and US Bank for supporting our Annual Dealer Survey and providing their dealer partners with a subscription for participation. Any dealer authorized to sell products from our Survey sponsors is eligible to receive a complimentary subscription. It's our pleasure to give all eligible Survey respondents an additional subscription courtesy of *The Cannata Report*.

As we enter our 41st year covering the independent dealer channel, we remain dedicated to providing you with industry-leading news and analysis to help you help your business thrive.

We wish you the best in the new year.

Regards,



CJ Cannata
President and CEO

Please be assured that all responses to our Survey are kept confidential. While we 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*.

A. Select **one** applicable partner—if multiple partners apply, choose only one. If no partners apply, check **"other."**

- Epson
- Kyocera
- Ricoh
- Sharp
- Toshiba
- US Bank
- Other

B. 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

C. 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

NOTES

Subscription offer subject to eligibility. You must be a current partner* of Epson, Kyocera, Ricoh, Sharp, Toshiba or US Bank to be eligible. The Cannata Report will verify all partnership claims. (*It does not matter if the OEM partner you choose is your primary or a secondary partner, or your A3 or A4 supplier.)

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 subscriptions 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 not eligible to receive the Epson, Kyocera, Ricoh, Sharp, Toshiba, and US Bank subscription offer will receive our Annual Dealer Survey issues via PDF upon publication in October and November 2023.

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

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. 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 2022?*

***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. It is essential for us to collect revenue data 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 2022 total revenue up, down, or the same compared to 2021?

- Up
- Down
- Same

8. If you answered "same" to 7., skip to 9. If you answered "up" or "down" to 7., by what percentage were you...?

% up % down

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 2022 revenue did MPS represent?

11. Was your 2022 MPS revenue, up, down or the same compared to 2021?

- 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 IT services?

Note: We define providing managed IT services as (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 2022 revenue did managed IT services represent?

14. Was your 2022 managed IT services revenue up, down or the same compared to 2021?

- 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

15a. What is the biggest challenge your organization has as a managed IT services provider?

- Hiring and retaining IT personnel
- Compensating IT personnel
- Building customer trust
- Finding new customers
- Onboarding new IT personnel

Other (please specify)

16. Do you engage in production print?*

- Yes
- No

***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 light production devices or devices sold for 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 2022 revenue was derived from production print?

16b. What is the leading production print brand and model that you sell? (Please limit your response to one product.)

17. Was your 2022 production print revenue up, down or the same compared to 2021?

- 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 hardware salespeople do you employ?

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

21. Did you make any acquisitions in 2022?

- Yes
- No

21a. If you answered "no" to 21., skip to 21b. If you answered "yes" to 21., how many dealerships/companies did you acquire in 2022, and what was the total revenue of those acquisitions? (select all that apply)

Number of total acquisitions Dealerships IT Service Companies

Other (please specify)

Approximate revenue from all acquired businesses

21b. Are acquisitions in your plan for 2023 and beyond?

- Yes
- No

22. What are the 3 most significant areas of diversification for your business? Select three from the following and rank them in order of importance.

- Managed IT Services
- Managed Print Services
- Production print/wide format/industrial print
- Document Management/ECM
- Digital Signage and/or Whiteboards
- Cybersecurity/ Physical Security
- Managed Office/Managed Meeting Rooms
- VoIP

Other(s) (please specify)

22a. What do you consider the biggest impediments to diversifying your products, solutions, and services offerings?

- Cost to diversify
- The time required to train staff on a new technology, product, or service
- The need to meet hardware manufacturer's sales quotas for legacy print technology
- Existing sales team capabilities

Other(s) (please specify)

23. What are the areas that give you the greatest cause for concern?

Please check no more than three from the following:

- Competing against manufacturers' branches
- Declining print clicks
- Hiring and retention
- Maintaining profitability
- Effectively diversifying your product/solutions/services offerings

Other(s) (please specify)

24. How would you rate your primary A3 supplier?

- Excellent
- Very Good
- Good
- Fair
- Poor

24a. Why? Please share just a few words to qualify your rating.

25. How would you rate your primary A4 MFP 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 A3 supplier's most recent dealer meeting?

(Only rate your supplier if they had a dealer meeting in 2022.)

- 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 38th Annual Awards & Charities Gala.

a. ECM/Document Management Solution Partner

(The company that provides outstanding products and support and enables you to compete most effectively in the market-place.)

b. Print Management Software Provider

(The company that provides outstanding products and support and enables you to compete most effectively in the marketplace.)

c. Best Manufacturer

(Provides 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 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 Manufacturer

(Provides 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 Leasing Company

(The leasing company that provides the best service, financing, programs, and communication.)

h. Best IT Services/Cybersecurity Partner

(The company or organization that provides the best IT solutions, services, guidance, and support to be successful in the IT services space.)

i. Best Diversification Partner

(The company or organization, not counting your copier/MFP providers, that has best helped you diversify your hardware, solutions, and/or services offerings.)

j. Best Marketing Strategy

(The OEM that most clearly defines how a dealer can capture more market share with a support structure that includes clear and concise marketing strategies and training and onsite visits from staff.)

k. Best Technical Service

(This 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:** You may vote for an executive from any segment of the industry.