

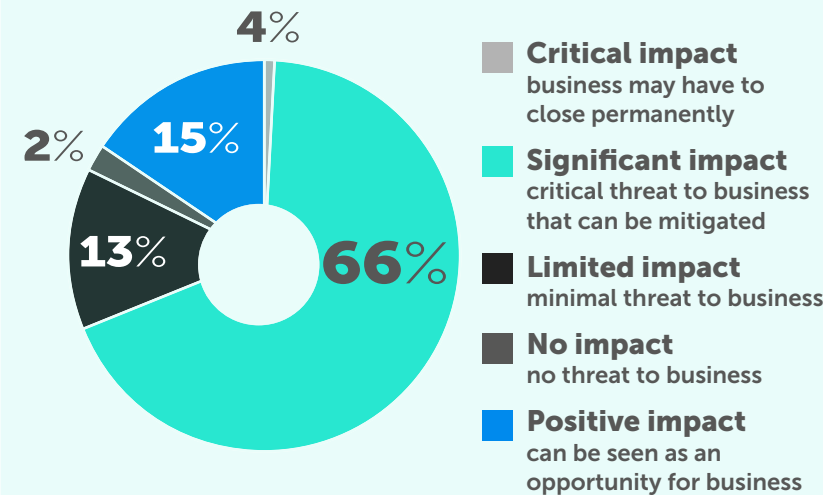
COVID-19: Accelerating Print Industry Transformation

Quocirca Business Impact Tracker Study (Second Edition)

Survey conducted between 8th April and 23rd April amongst print industry executives. 114 respondents participated from a mixture of OEMs, Channel Partners and ISVs.

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EXECUTIVE SUMMARY FINDINGS**

Impact of COVID-19 on business



Market disruption will drive innovation

Agree or Strongly Agree responses

COVID-19 has caused significant industry disruption **84%** ▲

COVID-19 presents an opportunity for innovation **77%** ▲

We will need to change our operating model as a result of COVID-19 **66%** ▲

Office print volumes are in free fall

What impact are you seeing on customer print volumes?

68% Significant decline ▼

27% Marginal decline

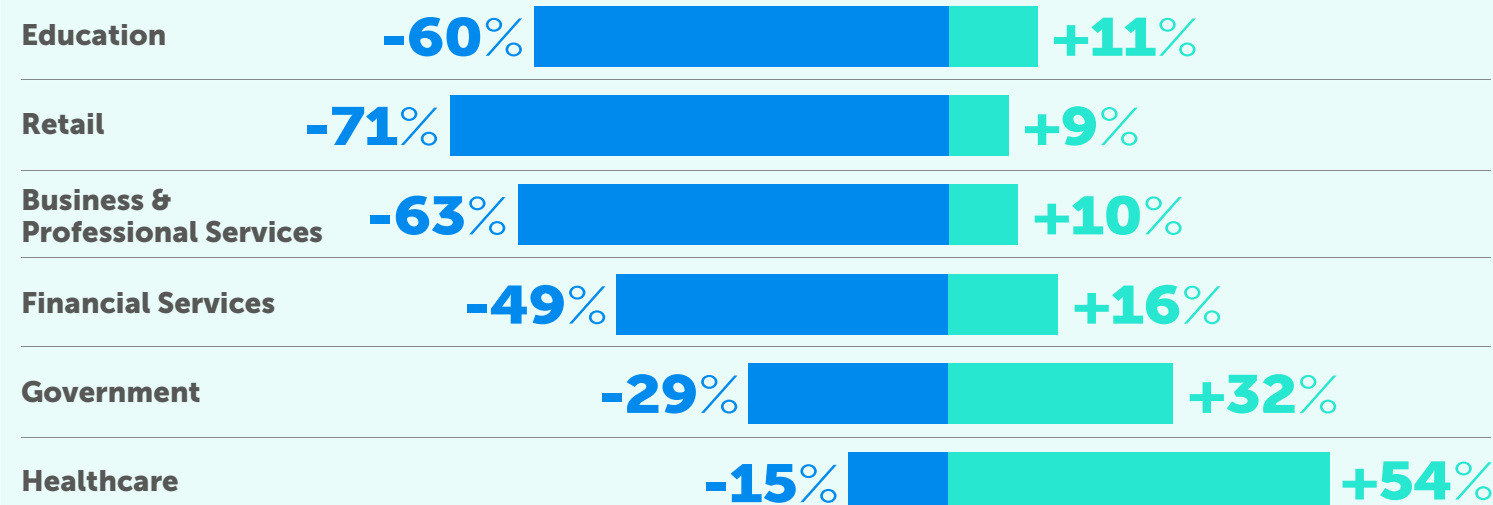
3% No change

2% Marginal increase



Vertical demand varies

How is demand changing by industry sector?



Collaboration, cloud and digitisation opportunities

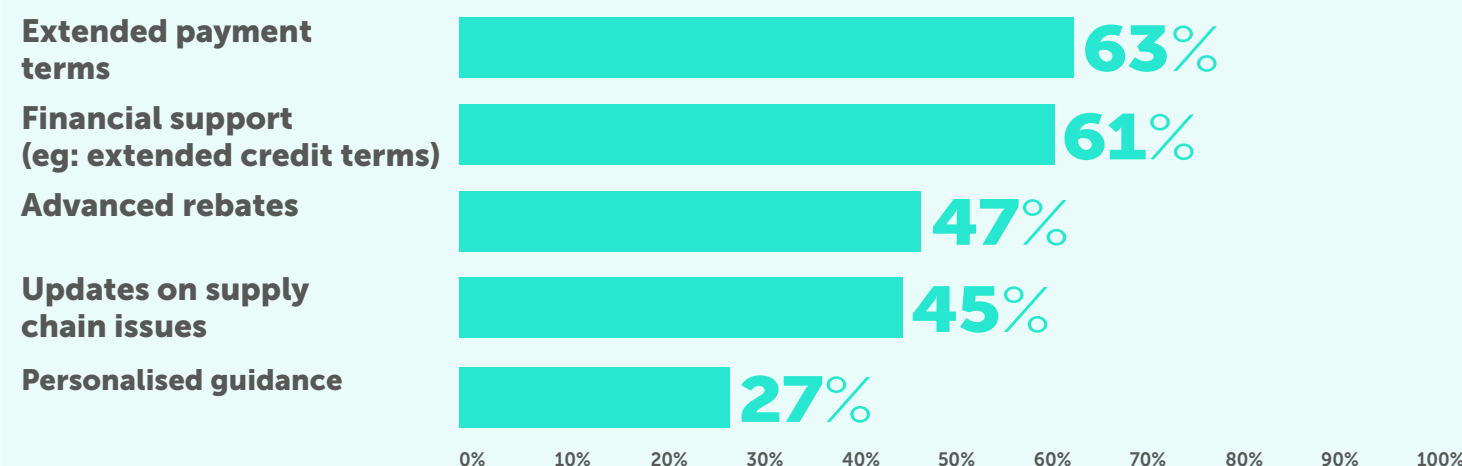
Anticipated future interest

Collaboration services **96%** ▲

Cloud digital workflow solutions **89%** ▲

Digitisation of paper-based process **85%** ▲

Channel partners expect more support from their suppliers



Most are cautious about business recovery time

