

Wide Format Printing: A Critical Element in the Communications Mix

Executive Summary Deck



Tim Greene

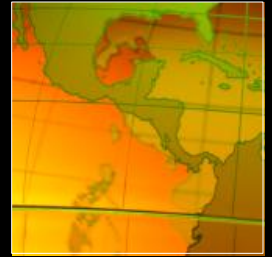
Director

Lisa Cross

Associate Director

Arianna Valentini

Research Analyst



Introduction

- **Wide format, including signage and graphics is an integral part of the marketing mix and it represents a major opportunity for print service providers**
- **Entering the market or growing an existing business starts with understanding key trends driving buyer markets**
- **InfoTrends new study, now in its third iteration, will uncover:**
 - Who Buys Wide Format Graphics
 - What They Buy
 - Why They Buy

The Importance of Signage & Graphics

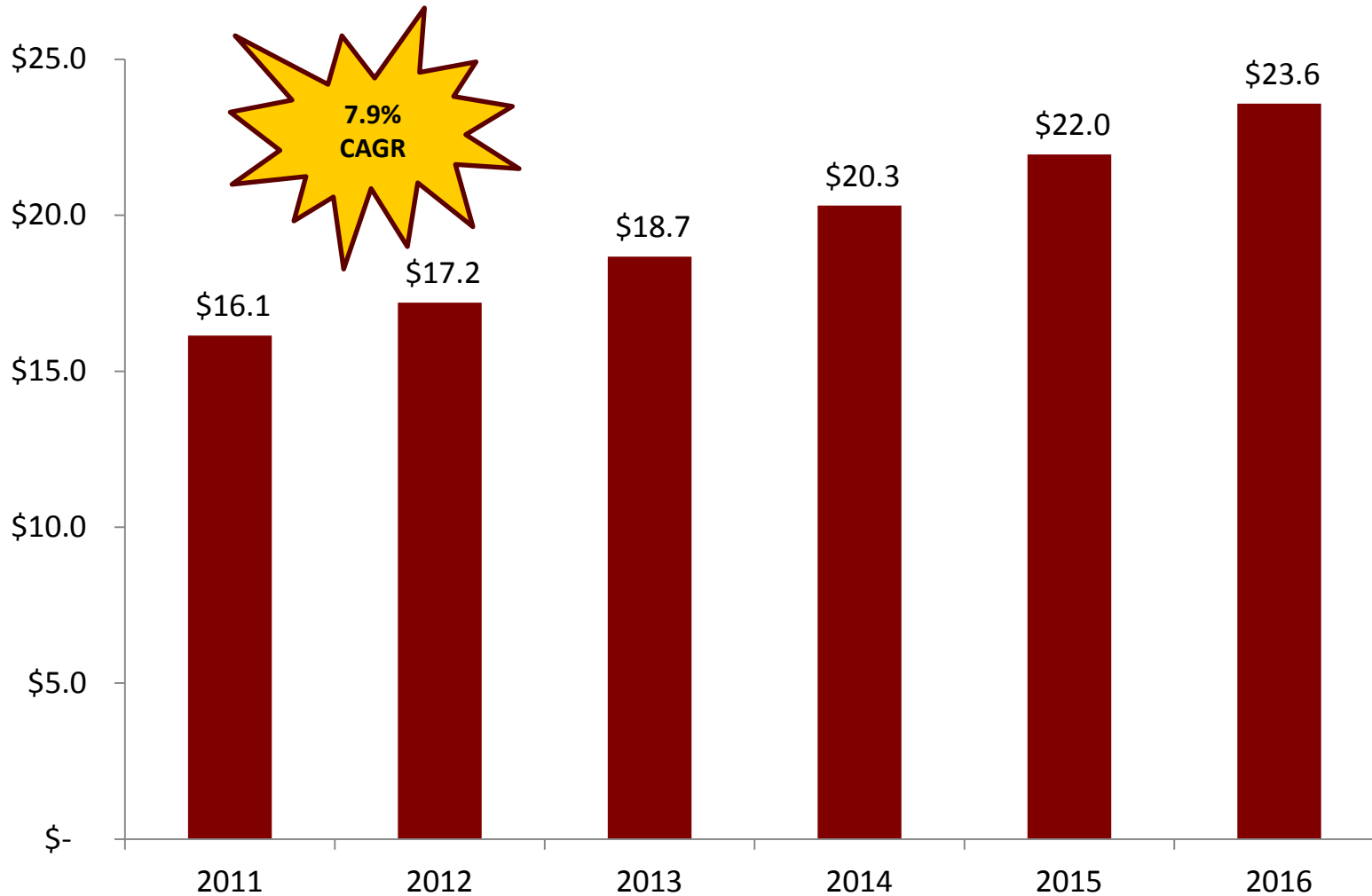
- Nearly 8 in 10 (76%) consumers say they have entered a store they have never visited before based on its signs.
- Almost 7 in 10 (68%) consumers surveyed have purchased a product or service because a sign caught their eye.
- 3 out of 4 consumers have told someone about a store based simply on its signage.
- More than two-thirds (68%) of consumers believe that a store's signage is reflective of the quality of its products or services.
- Poor signage can deter consumers from entering a store. Over half (52%) of respondents say they are less willing to enter a store if they spot misspelled or poorly-made signs.



Source: *Printing Impressions*, "FedEx Office Survey Finds Effective Signage Critical to Store Sales", May 14, 2012.

Wide Format Is a Growth Market!

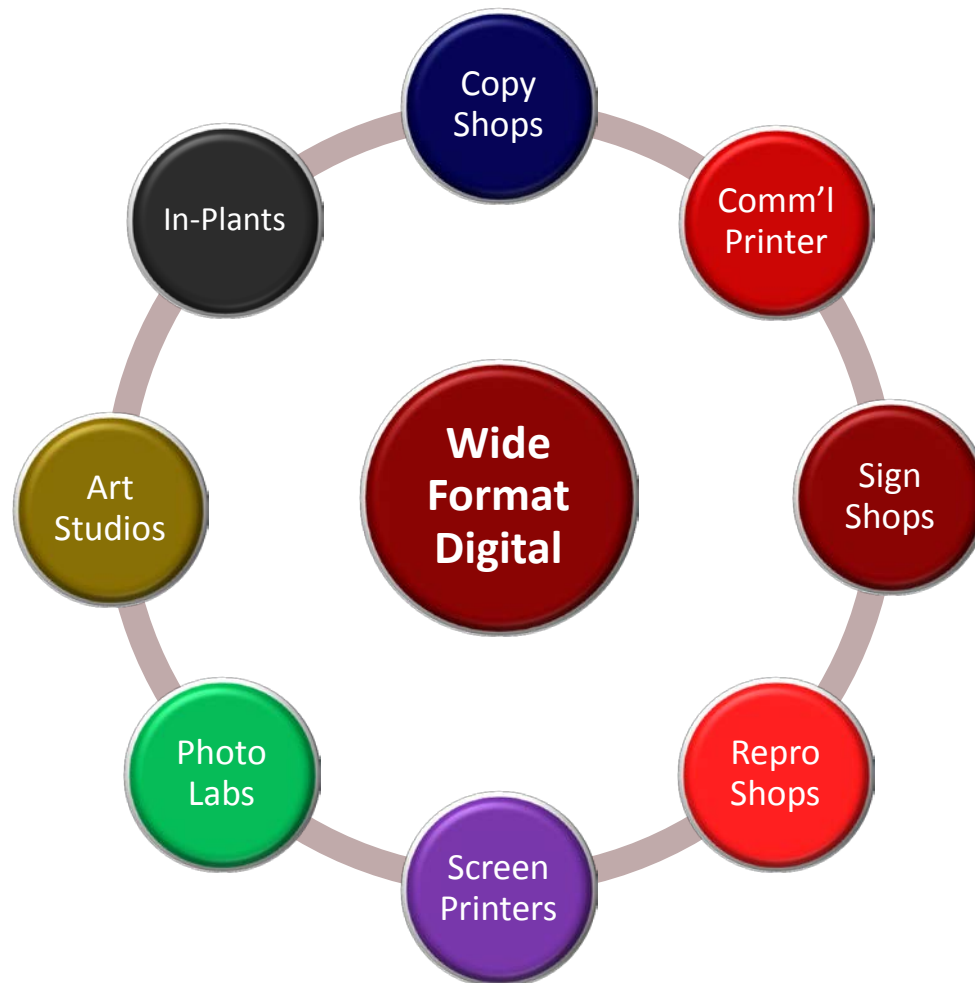
North America Digital Wide Format: Retail Value of Print (\$Billions)



Source: InfoTrends Wide Format Service

Wide Format Graphics Market Developments

Segment Convergence



Study Objectives



- **Define market and communications trends driving purchasing of wide format digital graphics**
- **Benchmark key trends in applications, order volume, frequency, and more, compared to previous versions of this study completed in 2009 and 2011**
- **Generate a definition of application eco-systems for key applications & markets according to:**
 - Sizes & substrates
 - Selection criteria
 - Run lengths
 - Integration with cross-media solutions

Market Segments Studied

- **Advertising and Media Agencies**
- **Amusement/Entertainment**
- **Events**
- **Healthcare***
- **Hospitality**
- **Retail**

*Added as a bonus segment.

Examination of Various Market-Defining Trends

- **Market forces driving wide format graphics demand**
- **Purchasing behaviors compelling wide format buyers**
- **Top purchasing criteria—i.e. turnaround times, run lengths, applications, sizes, substrates**
- **Wide format graphics role in a cross-media-world**
- **Mobile technologies' impact on wide format applications**
- **Best practices and the rationale for moving from transactional to value-added selling**
- **Tools and information PSPs require from equipment and supplies manufacturers to grow their wide format business**

Research Methodology

- **Desk research**
- **In-depth interviews with 10 companies across targeted industries**
- **375 to 500 Web-based surveys of executives and decision makers within each vertical**
 - 75 to 100 per vertical (estimate of 5 verticals)
 - Survey sample will include a mix of job titles including VPs directors , functional owners ,and marketing executives
- **300 Web-based surveys with wide format print service providers**

Research Deliverables

- **8 PowerPoint Decks**
 - **Executive Summary with Key Study Findings and Recommendations**
 - **Wide Format Buyers (7 Total)**
 - Total Response
 - Advertising and Media Buying
 - Entertainment/Amusement
 - Events
 - Healthcare
 - Hospitality
 - Retail
- **Excel and PDF files of survey data**
- **Data cross-tabulations**

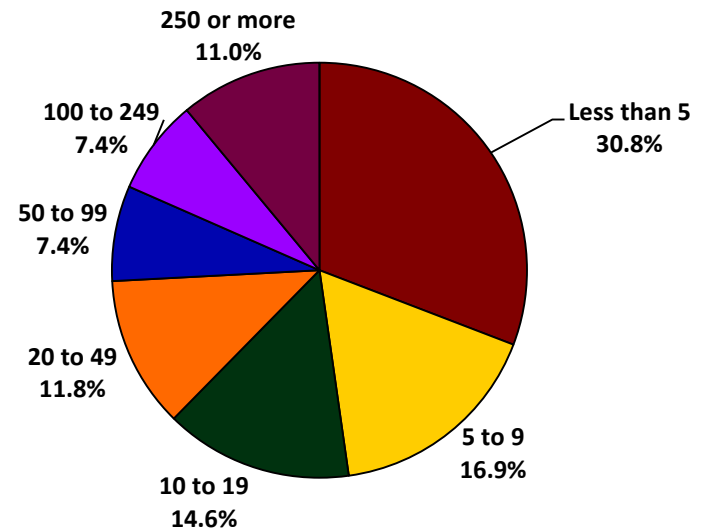


Wide Format Print Buyer Survey Demographics

Vertical Industry

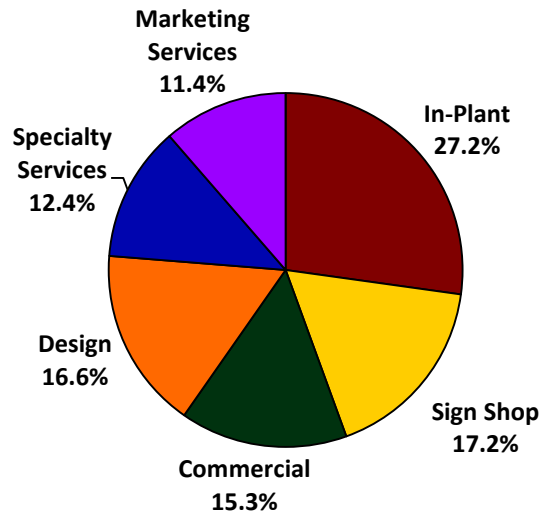
Vertical	Number of Responses
Events	261
Retail	100
Hospitality	100
Advertising/Media Agencies	100
Entertainment	99
Healthcare	101

Number of Employees

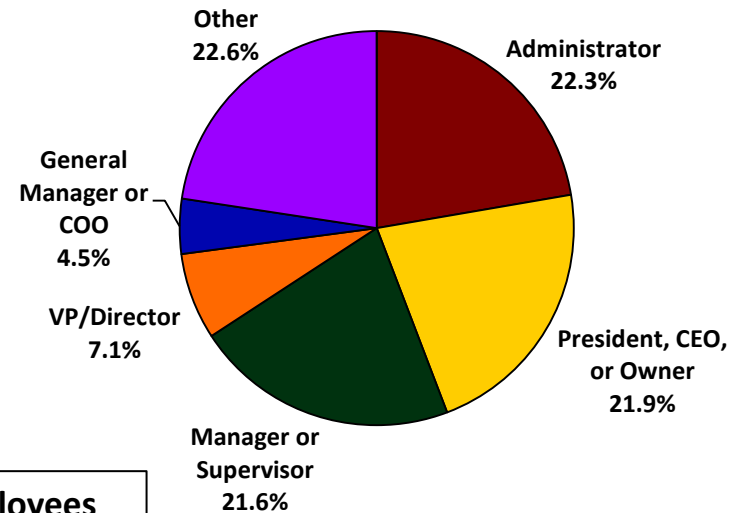


Wide Format Provider Survey Demographics

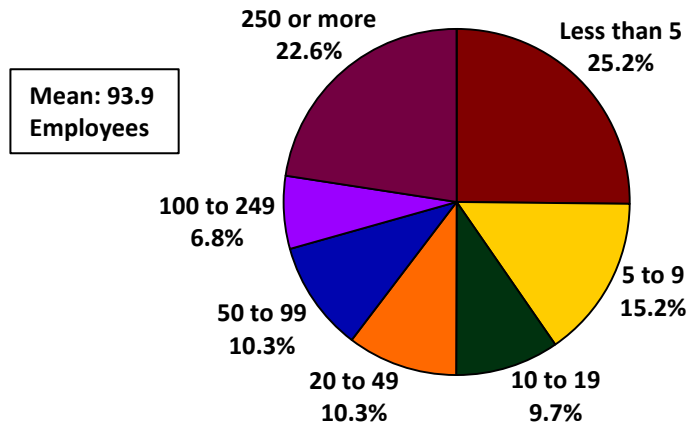
Type of Company



Job Title



Number of Employees



Mean: 93.9
Employees