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*InfoTrends is the leading worldwide market research and strategic consulting firm for the digital imaging and document solutions industry. We provide research, analysis, forecasts, and advice to help clients understand market trends, identify opportunities, and develop strategies to grow their businesses. Additional information about InfoTrends is available on the Web at [www.infotrends.com](http://www.infotrends.com).*

## **Trans Meets Promo: A European Perspective**

This landmark study examines the market realities associated with “TransPromo” marketing communications in Western Europe. It provides a view of the Western European TransPromo market that has never been aggregated at this level.

The study focuses quantitative research on five major economies – France, Germany, Italy, Sweden, and the United Kingdom. Some results from this study are contrasted against our recent report focused on North America, entitled *Trans Meets Promo... Is It More Than Market Hype?*

This study is designed to provide statistically significant data to companies that sell printing, finishing, and mailing equipment; software providers; print service providers; businesses that provide alternate services such as electronic bill presentment; postal organizations across Europe; and marketing executives. The findings will also be of interest to marketing professionals and providers of Marketing Performance Measurement (MPM) tools.

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## Who Should Subscribe?

- Hardware Providers
  - Software Providers
  - E-Bill Presentment Businesses
  - Investment Companies
  - Marketing Executives
  - Outsourcing Providers
  - Postal Organizations
  - Print Service Providers
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## TransPromo... A European Take

In 2008, InfoTrends conducted a study entitled *Trans Meets Promo . . . Is It More than Market Hype?* to better grasp the dynamics of the unfolding TransPromo market. North America is only one market where TransPromo is being implemented. To further investigate this growing opportunity, InfoTrends brought this research to Western Europe. Some considerations unique to this region include strict data protection and privacy regulations; the liberalization of the postal market; and the differences that are present in consumer behavior, ethics and business conduct across the various countries of Europe.

## Introduction

InfoTrends has been researching and documenting changes in mail volumes for many years, but the research base has generally been limited to North America. In 2008, InfoTrends conducted a study entitled *Trans Meets Promo... Is It More Than Market Hype?*. This study was meant to build on previous research in North America, but also to tap into a growing niche market in the transaction space—TransPromo. TransPromo is the addition of promotional, educational, or informational messaging to the face of transaction documents. This information does not have to be in color, nor does it need to be printed. By moving these messages onto the face of the document, companies have reduced and eliminated separate direct mailings, representing substantial cost savings. InfoTrends' research covered this topic with consumers, marketers, print service providers, and the "owners" of the transaction documents (those who send them to their customers) in an attempt to better understand the market opportunity for TransPromo in North America.

Due to positive feedback from study sponsors and the necessity to investigate the unique considerations of other global markets regarding TransPromo, InfoTrends brought the same research to the Western European market in 2009. The study is entitled *Trans Meets Promo: A European Perspective*. It focuses on five Western European economies, namely France, Germany, Italy, Sweden, and the United Kingdom.

The concept of TransPromo is built on the fact that transaction documents are better read and understood than direct mail, since they are often based on a trusted relationship between a supplier and consumer. By combining promotional, informational, and educational direct mail with transactional mail, organizations can communicate more effectively than by using the traditional method of sending each type of mail separately.

This evolution provides new opportunities for technology vendors of printing and finishing equipment, as well as providers of software enablers for content

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management and electronic presentment. It also offers a tremendous opportunity for print service providers in the document outsourcing arena to assist customers in migrating to more productive and efficient operational strategies relative to transactional data flow and the overall value of customer communications.

This study evaluates the transition that is currently underway in the corporate world in Western Europe relative to transactional documents. It also considers the longer-term effects of recent events on the perceptions and practices associated with the creation, management, and distribution of transactional documents.

In short, this study provides document technology vendors and service providers that are serving the European market with critical information to guide the development of product/service portfolios and strategic business planning that is designed to capture revenue from direct mail and transaction-based document applications.

This document reports on the results from the individual communities that were interviewed, including print/mail service providers, document owners, marketers, agency executives, and consumers. It then draws a series of conclusions based on this aggregated data and offers recommendations for the various constituencies.

From a consumer perspective, InfoTrends surveyed over 2,000 Internet-connected respondents older than 18 years of age. Survey participants provided a range of information that ultimately enabled us to paint an accurate picture of consumer habits and preferences regarding their interaction with transaction documents. We also surveyed over 700 direct marketers and the transaction document owners responsible for the purchase or development of direct marketing programs as well as the purchase, development, or deployment of transaction documents, respectively. Similar to the consumer surveys, these were delivered via the Internet.

The print service provider portion of the research took a qualitative approach, with InfoTrends analysts conducting individual phone interviews with more than a dozen print service providers in Western Europe that have at least 20% of their volume in transaction printing and processing. These interviews included organizations of various sizes with a range of views on the TransPromo concept.

## Project Objectives

This landmark study examines the market realities associated with “TransPromo” marketing communications in Western Europe. It provides a view of the Western European TransPromo market that has never previously been amassed at this level. The study includes quantitative research on five major economies, namely France, Germany, Italy, Sweden, and the United Kingdom. Where appropriate, the results of this study are contrasted against our recent study focused on North America (United States and Canada), entitled *Trans Meets Promo... Is It More Than Market Hype?*

The study identifies the current state and future prospects for transaction documents, transpromotional documents, acquisition direct mail, and retention direct mail from the perspective of consumers, marketers, document owners, and document producers (print service providers, service bureaus, etc.). It evaluates a transition that is underway in the corporate world relative to transactional documents and provides document technology vendors and service providers with critical information to guide the development of product/service portfolios and strategic business planning initiatives.

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Specific project objectives include:

- Identify the current state, future prospects, and market size for transpromotional documents
  - o Page growth through 2013
- Review privacy regulations and data protection requirements
  - o Understand privacy regulations and data protection requirements
  - o Evaluate the impact that privacy regulations and data protection requirements have on the adoption of TransPromo
- Assess the changing requirements of consumers segmented by typical demographics
  - o Acceptance of promotional content on transactional statements among consumers
  - o Understand the effect of color, personalization, quantity of messages, and other properties of the promotional content on the effectiveness of the campaign (e.g., response rates) as perceived by consumers
- Understand how key marketing executives are assessing marketing channels and evaluating success
  - o Current marketing communications channels
  - o Future marketing communications options
  - o Current metrics in place for evaluating effectiveness
  - o Awareness of digital color personalization technology
  - o Awareness of TransPromo communications
- Understand how key IT and organizational initiatives are affecting document production and distribution technologies and services
  - o Content and document management
  - o Electronic presentment and other distribution alternatives
- Assess market opportunities for high-speed print technology
  - o High-speed full color technology (60+ ppm cut sheet and continuous feed)
  - o Spot color solutions over 50 ppm
  - o High-speed black & white technology (90+ ppm cut sheet and continuous feed)
  - o Mix of black & white and color on full color printers
- Assess market opportunities for software solutions
  - o Variable data/document composition
  - o Output management solutions
  - o Multi-channel communications solutions

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## Market Research

This study focuses on primary research discussions with marketing executives, document owners, and print buyers to determine the current and future plans for direct mail and transaction documents. It includes an assessment of each of their unique perspectives on the transpromotional opportunity. The research identifies critical success factors; unmet customer requirements; purchase plans; and other items that drive vendors' and service providers' product, service, marketing, and sales activities.

### Primary Research

#### Print/Mail Service Provider Interviews: 10-15 In-depth Interviews

Service provider and vendor interviews were critical in assessing the current state and future direction of direct mail, transaction, and transpromotional documents. Existing capabilities and planned investments are covered in detail, as are strategies, pricing trends, and perceptions on unmet market needs and emerging opportunities.

##### Service Providers

- Statement printers/service bureaus
- Direct mail firms
- In-plant data centers and printing establishments

Of particular focus are corporate positioning, perceptions about TransPromo and its market penetration, barriers to implementation, insights into selling TransPromo, the move from inserts to onserts and print to electronic, as well as a view into critical applications for the future.

Interview subjects included service providers that conduct business in Western European countries including Belgium, Denmark, Finland, France, Germany, Italy, the Netherlands, Norway, Poland, Spain, Sweden, and the United Kingdom.

#### Direct Marketers and Transaction Document Owners: 700+

InfoTrends conducted a series of structured interviews to develop industry statistics on current use and future plans concerning direct mail, transaction documents, and transpromotional opportunities. We obtained data on adoption plans and their impact on print volumes, unmet needs, new service requirements, and other factors affecting document technology and service purchases.

The interviews enabled projections of demand and other quantitative information that is critical for business planning.

Interview subjects are responsible for the purchase, development, or deployment of direct marketing programs and/or transaction documents with operations in France, Germany, Italy, Sweden and the United Kingdom.

#### Consumers/End-Users: 2,000+

InfoTrends conducted a series of structured interviews with consumers to evaluate receptivity to various communications alternatives, including a number of questions designed to measure receptivity to TransPromo, their use of electronic presentment and direct marketing preferences. This research provides wide demographic coverage in terms of age, gender, geography, income, and Web use, and identifies how and where statements and invoices are printed. We also tested time spent reviewing the statement and the effectiveness of personalization and color with this group.

Interview subjects were 18+ years of age, Web-enabled, and living in France, Germany, Italy, Sweden or the United Kingdom.

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## Desk Research

InfoTrends thoroughly examined existing market information on key applications, market segments, competitors, and product categories. We used a variety of sources including:

- Industry trade associations
- Government agencies
- Published industry reports
- Eurostat Periodicals and trade articles
- Industry databases
- Web sites
- Other sources, including vendor white paper, user groups, research reports, etc.

InfoTrends also reviewed research it has previously published as part of its continuous consulting services and multi-client studies.

## Analysis and Project Deliverables

InfoTrends conducted extensive analysis of the desk research, personal interviews, and surveys to develop a comprehensive understanding of the opportunities and issues for document technology and service providers.

Sponsors will gain a better understanding of the TransPromo opportunity in Western Europe. They will be able to use this information to help sculpt their strategies relative to transaction documents, electronic presentment, and TransPromo going forward. This will include an annual TransPromo impressions forecast and a forecast relative to the value of print services.

Technology providers will also receive a PowerPoint presentation to share charts with company executives, extensive data tables with cross-tabulation for their internal analysis, and equipment placements and revenue data.

<b>Deliverables</b>	<b>Technology Providers</b>	<b>Service Providers</b>
Executive Summary (key findings and recommendations)	X	X
Detailed Written Report (150 pages)	X	X
<i>Market Sizing and Impressions Forecast</i>	X	
PowerPoint Presentation	X	
Extensive Data Books with Cross-tabulation	X	

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## Authorization Form

### Trans Meets Promo: A European Perspective

For more information on the study or how to order, please send an e-mail to [sales@infotrends.com](mailto:sales@infotrends.com)

Please enter my order as follows (fax completed form to +1 781 616 2121)

#### **Technology Providers** (€19.995/\$25,995)

Primary business is printing equipment manufacturer, software and systems vendor, paper manufacturers, and equipment and supplies distributors

#### **Service Providers** (€10.995/\$14,495)

Primary business is direct mail or transaction printing, quick printing, corporate print facilities, commercial printing, facilities management/ outsourcing provider, data center service bureau, fulfillment company, or carrier

Purchase order number \_\_\_\_\_

Signature \_\_\_\_\_

Name \_\_\_\_\_

Title \_\_\_\_\_

Company \_\_\_\_\_

Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Country \_\_\_\_\_

Telephone \_\_\_\_\_

Email \_\_\_\_\_