

Headquarters

U.S.

Libbey Industrial Parkway
Weymouth, MA 02189
USA
+1 781 616 2100
info@infotrends.com

Europe

Sceptre House
7-9 Castle Street
Luton, Beds LU1 3AJ
United Kingdom
+44 1582 400120
euro.info@infotrends.com

Japan

Hiroo Office Building
1-3-18 Hiroo Shibuya-ku
Tokyo 150-0012
Japan
+81 3 5475 2663
info@infotrends.co.jp

Business Applications for Photo Publishing: Digital Printing Opportunities for Photo- Intensive Documents

- **Application Profiles and Drivers**
- **Market Segmentation**
- **Market Size and Forecast**
- **Customer Requirements**
- **Business Models & Strategies**

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.

Prospectus

Who Should Subscribe?

- **Providers of photo related:**

- *Hardware*
- *Software*
- *Services*
- *Online solutions*

- **Print service providers**

- *Photo retailers*
- *Large commercial photo labs and commercial printers*
- *Office superstores*
- *Warehouse clubs*

- **Print equipment vendors offering digital printing solutions**

- **Paper and finishing suppliers**

- **Software solution providers to the graphic arts industry**

Introduction

Pictures are a powerful means for communicating messages and promoting business. They can effectively help customers understand a product or service, attract customers, and evoke emotional responses that help generate business. Examples of photo-intensive business and commercial documents and products that can be customized include:

- Booklets
- Brochures
- Calendars
- Catalogs
- Commemorative books
- Directories
- Greeting cards
- Newsletters
- Portfolios
- Postcards
- Promotional photo books
- Yearbooks

The majority of these documents are produced by commercial printers in centralized facilities on offset presses using traditional production processes and creative specialists. With the advent of digital cameras, digital presses, and web-to-print design and fulfillment operations, much of the market is shifting to digital production methods. InfoTrends also believes there are emerging opportunities for retail print service providers and “do-it-yourself” solutions to serve many small and micro-businesses.

While consumer photo books, calendars and greeting cards have provided an important lift in the market, the majority of this volume has been limited to a relatively small number of service providers and manufacturers of digital presses. Business applications for photo-intensive documents have attributes that make them attractive as compared to consumer photo books, cards and calendars.

- Lower degree of seasonality
- Different price sensitivity, product requirements, and decision factors
- Variety of production methods – centralized, retail, web-to-print, do-it yourself
- Wider range of production methods, equipment platforms and software
- Different brand allegiances and preferences
- Incremental growth/new customer base

Photo imaging technology vendors (equipment, software, finishing, paper manufacturers), print service providers and retail photofinishers need new opportunities to grow their business. InfoTrends is conducting a detailed study focusing on digital printing opportunities for photo-intensive business and commercial products in the United States to address the potential of this market.

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Objectives

The objective of the project is to provide technology vendors and print service providers with the insights they need to understand the opportunities and develop the market for digital production of photo-intensive business and commercial applications in the United States.

- Segment and profile the market for photo-intensive business applications, including:
 - o Usage, interest, and preferences among various business segments (by company size)
 - Home-based, micro, SMB, large
 - o Most beneficial applications
 - o Industries
 - o Purchase patterns and locations
 - o Customer service requirements
 - o Awareness & interest
 - o Price sensitivity
 - o Workflow processes and unmet needs
 - Design & layout tools and services
 - Image and content management software and services
 - Centralized and distributed/local print production options
 - o Barriers to adoption
- Identify and profile photo-intensive business applications.
 - o Application examples:
 - Booklets
 - Brochures
 - Calendars
 - Catalogs
 - Commemorative books
 - Directories
 - Greeting cards
 - Newsletters
 - Portfolios
 - Postcards
 - Promotional photo books

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- Yearbooks
- o Attributes
 - Production methods
 - Price points
 - Print quality requirements
 - Design & creative processes
- Identify and profile key industry players
 - o Technology vendors
 - o Supplies
 - o Print service providers
- Forecast the market for digitally printed photo-centric business applications by focusing on the following areas:
 - o Page volume by application category
 - Promotional (e.g. booklets, catalogs, portfolios, post cards, greeting cards, flyers, calendars, marketing collaterals)
 - Publishing (e.g. photo books, photo directories, yearbooks, newsletters)
 - o Retail value of print by application category
 - Promotional (e.g. booklets, catalogs, portfolios, post cards, greeting cards, flyers, calendars, marketing collaterals)
 - Publishing (e.g. photo books, photo directories, yearbooks, newsletters)
- Identify opportunities and strategies for technology vendors and service providers
 - o Application focus
 - o Key market segments
 - o Go-to-market
 - o Positioning
 - o Market development

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Market Research

The research will include extensive review of both new and existing research, as well as interviews with technology vendors, end users, and print service providers across a variety of market segments. Ultimately, the research will identify market segments, critical success factors, customer requirements, usage patterns, purchase plans, and other items that will drive vendors' product, service, marketing, and sales activities.

Secondary Research

InfoTrends has conducted extensive research over the past 24 months with technology vendors, service providers, and consumers related to digital imaging. Relevant research reports that we can leverage when producing this study include:

- Photo Merchandise Products for the U.S. and European Markets: Adding Value to Consumer Generated Content
- U.S. Print On Demand Market Forecast
- The Future of Commercial Printing in the United States: Digital Technology Driving Change
- U.S. Photo Kiosk and Digital Minilab Forecast
- U.S. Digital Photo Prints Forecast
- North American Professional Photography Study

We will also thoroughly examine existing market information on key applications, market segments, competitors, and product categories. InfoTrends anticipates utilizing a variety of sources that include but are not limited to:

- Industry trade associations
- Published industry reports
- Web sites
- Government statistics
- Industry databases
- Vendor white papers
- Research reports

In-depth Interviews with Industry Players (15)

InfoTrends will conduct a series of in-depth interviews with critical industry vendors and content owners. The intent of the interviews will be to map out the structure of the industry, quantify the market size, and understand how the market will develop over the coming years.

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- Technology vendors
 - o Printing equipment
 - o Digital photo software vendor
 - o On-line service providers
- Print service providers
 - o Commercial/Web-to-print/on-line print services companies
 - o Retail print service providers
 - o Retail and online photofinishing vendors

In-depth Interviews with Businesses (15 to 20)

InfoTrends will conduct a series of in-depth interviews with owners, marketing managers, and other decision makers across industries where there is a high propensity for photo-intensive business applications. The intent of the interviews will be to understand customer requirements and work processes, test product concepts, and provide insights for developing the market. Key industries will include:

- Church/religious
- Direct marketing
- Education
- Financial services
- Fundraising
- Funeral services
- Travel and tourism
- Real estate
- Retail
- Publishing

Structured Surveys (1,000)

InfoTrends will conduct 500 interviews with medium to large companies across key industries and 500 interviews with small/micro businesses business owners who have photo-intensive business applications. The survey will establish the penetration of photo-centric publishing applications, and will provide insights into end user attributes, purchase motivators and behavior, product awareness, and other factors influencing the growth of photo-intensive printing by businesses.

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Analysis and Project Deliverables

There will be extensive analysis of the desk research, in-depth interviews and structured survey to develop a comprehensive understanding of the opportunities and issues. Clients will receive a combination of summary report, presentation material, and research data. The material will include:

- Summary report addressing key issues, findings and overall recommendations
- Market forecast with supporting assumptions
- Presentation for internal communication of the research results
- Data book of the survey tabulations for additional analysis

Project Schedule

InfoTrends intends to start the project in June 2009, with material distributed by December 2009.

Participation Fee

The participation fee is \$13,995 (USD). A personal presentation is available for \$2,000 plus travel expenses.

For print service providers only, the participation fee is \$9,995 (USD).

Terms and Conditions

Liability for Advice

Although reasonable efforts will be made by InfoTrends to ensure the completeness and accuracy of the information contained in written and oral reports in connection with the proposed study, no liability can be accepted by InfoTrends for the results of any actions taken by the client in connection with such information, opinions, or advice.

Copyrights

InfoTrends retains all copyrights. The reproduction of any materials is prohibited without written consent from InfoTrends.

Confidentiality

InfoTrends will use its best efforts to ensure that any confidential information obtained about the client and its business during the course of the proposed study is not, unless agreed otherwise in advance, disclosed to any third party without the prior written permission of the client. InfoTrends retains the right to re-use any non-proprietary information as part of its ongoing analysis of the office automation and printing and publishing industries.

Timely Delivery

InfoTrends will take all reasonable steps to ensure that the time scales called for by the proposed study are met in accordance with the agreed-upon schedule, but no liability can be accepted for the consequences of delays, howsoever caused.

Terms

Invoiced upon report delivery.

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Authorization Form

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For more information on the study or how to order, please send an e-mail to sales@infotrends.com

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

Vendors

Subscriber (after April 13, 2009) \$13,995

Print Service Providers

Subscriber (after April 13, 2009) \$9,995

A Personal Presentation \$2,000 plus travel expenses

Purchase order number: _____

Signature _____

Name _____

Title _____

Company _____

Address _____

City, State, Zip _____

Country _____

Telephone _____

E-mail _____