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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.

Who Buys Wide Format? - Understanding End Use Markets & Demand Drivers of Wide Format Graphics Printing

Growing the wide format business requires next level marketing and business growth tools that more closely integrates print service providers and buyers

- Vertical markets & company sizes
- Gatekeepers & authorization levels
- Objectives & budgets
- Turnaround times, run lengths
- Applications
- Sizes & substrates

Prospectus

Who Should Subscribe?

- *Wide format printer manufacturers*
 - *Wide format supplies manufacturers*
 - *Wide format system and supplies distributors*
 - *Major print service providers*
-

Introduction

In today's wide format print market, print service providers face many challenges when it comes to developing an effective sales strategy and generating new business. Many small businesses are so focused on day-to-day operations that they have little time to dedicate to developing a sophisticated marketing approach. This lack of resources is compounded by the fact that print buyers span a broad range of vertical markets, each with different needs. While a tailored approach to selling into each of these markets is ideal, it is simply not a reality for many businesses.

Growing the wide format business requires next level marketing and business growth tools that more closely integrate print service providers and buyers. To gain the insight that is necessary to develop these tools, InfoTrends is conducting an in-depth study of the wide format print market. This study will help print service providers overcome the obstacles related to targeting various markets, achieving market differentiation, and coping with the price-based decision making that is characteristic of mature markets. In conducting this study, InfoTrends will leverage relevant knowledge obtained through its previously conducted studies on the print industry, which include *Wide Format in China* and *The Future of Commercial Printing in the United States: Digital Technology Driving Change*.

The results of this study will answer questions such as:

- What are the key business decisions that lead to wide format graphics print service demand?
- What is the outlook for wide format graphics print service budgets?
- Which industries will drive future growth for wide format digital graphics?
- Which industries & applications are threatened by digital signage?
- How receptive are print buyers to various sales methods?
- What additional tools and information can printing systems and supplies manufacturers provide to help PSPs grow their business?
- What are print buyers' selection criteria?

Objectives

Through a combination of interviews and structured surveys, InfoTrends will:

- Assess the market for wide format digital graphics for various customer size segments and vertical markets
- Understand selling levels from merchandising manager to print buyer
- Determine the outlook for wide format digital graphics print service budgets

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- Develop marketing tool kits for particular vertical segments
- Generate a definition of application eco-systems for key applications & markets according to:
 - Sizes & substrates
 - Selection criteria
 - Run lengths
 - Finishing requirements
 - Price points
 - “Green” sensitivity

Market Research

The research for this study will consist of:

In-Depth Interviews with Wide Format Print Buyers (20+)

InfoTrends will conduct in-depth interviews with wide format print buyers. These interviews will provide a candid view of the motivating factors and processes behind wide format print buyers' decisions.

Structured Survey with Print Buyers (~300)

InfoTrends will deploy a structured survey to print buyers from small (50-99), medium (100-999) and large (1,000-2,000) companies in key vertical markets. It will compare the tabulations of the various company sizes. The results of this survey will be critical in determining the differences that exist among the various vertical markets relative to their wide format printing needs. This survey will also delve into the purchasing activities of these companies, such as who at the company is actually driving the purchasing decisions and who is the actual specifier of wide format digital graphics print. Another objective of this element of the study is to determine the criteria these buyers use when they are selecting a wide format print provider.

Surveys with Consumers (~100)

The growing presence of wide format printing service providers at retail locations, such as quick print shops and office superstores means there is a need to try to measure the types of consumers who buy wide format print services. The goal of this element of the research would be to determine important elements of buying behavior such as frequency, sizes, occasions, and price tolerances, as well as key demographics.

Structured Survey with Print Service Providers (~300)

InfoTrends will conduct a structured survey with print service providers. The results of this survey will help determine which are the key vertical markets for wide format digital graphics print services, which are driving business growth, and the applications these industries require. Furthermore, this survey would provide valuable insights on what their requirements are in terms of turnaround times, finishing and installation services.

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Desk Research

InfoTrends will define and size the market through desk research that builds on its previous research as well as government, industry data sources, and our own sizing figures.

Analysis & Project Deliverables

Extensive analysis of the desk research, interviews, and results of the structured surveys will be used to develop a comprehensive understanding of the opportunities and issues for service providers in the wide format print market. Clients will receive:

- An Executive summary with key findings
- A PowerPoint style document with bullets
- A PowerPoint presentation with charts
- Vertical market tool sets
- Data tabulations

Project Schedule

Desk research will be conducted in December. The structured surveys will be deployed in January, and the interviews will be completed in January and February. InfoTrends will conduct analysis of the findings in February and March, with the presentation and report being completed in March.

<i>Milestone</i>	<i>Timeframe</i>
Desk research	December
Structured surveys	January
In-depth interviews	January/February
Analysis	February/March
Presentation & Report	March

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.

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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

One half of fee upon initiation and one half upon report delivery.

Authorization Form

Who Buys Wide Format?

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

- | | |
|---|------------------------------|
| <input type="checkbox"/> Early subscriber (before 11/28/08) | \$11,995 |
| <input type="checkbox"/> Subscriber (after 11/28/08) | \$13,995 |
| <input type="checkbox"/> Personal presentation | \$2,500 plus travel expenses |

Purchase order number: _____

Signature _____

Name _____

Title _____

Company _____

Address _____

City, State, Zip _____

Country _____

Telephone _____

Email _____