

## Who Buys Wide Format? A Multi-Client Report

### Report Fast Facts

**Published:** April 2009

**Pages:** 97

**Tables & Figures:** 84

**Price:** \$13,995

### Order Information

To place your order today, contact Scott Phinney 781.616.2100 or via e-mail at [scott\\_phinney@infotrends.com](mailto:scott_phinney@infotrends.com)

### About InfoTrends

InfoTrends, a Questex Company, is the leading worldwide market research and strategic consulting firm for the digital imaging and document solutions industries. We provide research, analysis, and advice to help clients understand market trends, identify opportunities, and develop strategies to grow their businesses. To learn more about our company, visit [www.infotrends.com](http://www.infotrends.com).

© 2009 InfoTrends, Inc.  
[www.infotrends.com](http://www.infotrends.com)

### Abstract

This study is designed to help PSPs target the multiple markets within the wide format printing industry, achieve market differentiation, and cope with the price-based decision-making that is characteristic of mature markets. Growing the wide format business today requires improved marketing and research tools to more closely integrate print service providers and buyers.

The ultimate objective of this study is to develop a marketing toolkit that will enable clients to better understand who buys wide format print services and why. In conducting this study, we hope to extend that understanding to the level of major vertical industries in the U.S., and even to achieve a similar understanding of U.S. consumers who buy wide format prints.

A final objective is to estimate and forecast the size of the U.S. market for wide format prints, and to provide related insights that will help clients understand the market, its prospects, as well as how to sell products and services to it.

### For More Information

*If you would like to order extra copies of this report, receive permission to use any part of the report, or be informed of upcoming market updates, reports, and related projects, please e-mail us at [info@infotrends.com](mailto:info@infotrends.com).*

**Headquarters:**  
97 Libbey Industrial Parkway  
Suite 300  
Weymouth, MA 02189  
United States  
+1 781 616 2100  
[info@infotrends.com](mailto:info@infotrends.com)

**Europe:**  
3<sup>rd</sup> Floor, Sceptre House  
7-9 Castle Street  
Luton, Bedfordshire  
United Kingdom, LU1 3AJ  
+44 1582 400120  
[euro.info@infotrends.com](mailto:euro.info@infotrends.com)

**Asia:**  
Hiroo Office Building  
1-3-18 Hiroo, Shibuya-ku  
Tokyo 150-0012  
Japan  
+81 3 5475 2663  
[info@infotrends.co.jp](mailto:info@infotrends.co.jp)

## Table of Contents

<b>Executive Summary .....</b>	<b>6</b>
Market Size .....	6
Corporate Wide Format Print Buyer Summary .....	6
Consumer Wide Format Print Buyer Summary .....	7
Wide Format Print Service Provider Summary .....	8
<b>Project Objectives .....</b>	<b>10</b>
<b>Methodology .....</b>	<b>10</b>
<b>The Retail Value of Wide Format Print .....</b>	<b>12</b>
<b>Survey Findings .....</b>	<b>13</b>
Print Buyers .....	13
<i>Primary Industry</i> .....	13
<i>Number of Employees</i> .....	14
<i>Wide Format Purchasing Volume</i> .....	16
<i>Purchasing Locations and Preferences</i> .....	20
<i>Supplier Selection Criteria</i> .....	23
<i>Wide Format Print Purchase Drivers</i> .....	26
<i>Effectiveness of Wide Format in Accomplishing Objectives</i> .....	27
<i>Types of Wide Format Prints Ordered</i> .....	28
<i>Indoor vs. Outdoor Use</i> .....	29
<i>Duration that Wide Format Graphics are Displayed</i> .....	30
<i>Turnaround Times</i> .....	31
<i>Digital Displays vs. Wide Format Printed Graphics</i> .....	33
<i>Effect of Electronic Displays on Wide Format Print Use</i> .....	34
<i>Company Rules for Buying Print Services</i> .....	35
<i>“Green” Initiatives</i> .....	37
<i>Expectations about Future Purchases</i> .....	39
<i>Application Outlook</i> .....	42
<i>Best Way to Reach Wide Format Print Buyers</i> .....	43
Consumers .....	44
<i>Wide Format Print Purchases</i> .....	44
<i>Purchasing Location</i> .....	46
<i>Type of Sign Shop</i> .....	47
<i>Number of Prints Purchased</i> .....	48
<i>Average Width of Prints Purchased</i> .....	49
<i>Types of Prints Purchased</i> .....	50
<i>Interest in Frames, Stands, or Other Displays</i> .....	51
<i>Turnaround Time for Prints</i> .....	52
<i>Amount Paid for Prints</i> .....	53
<i>Opinion about Wide Format Pricing</i> .....	54
<i>How Consumers Became Aware of Wide Format Print Services</i> .....	55
<i>Whether Last Purchase was Planned or Made on Impulse</i> .....	56
<i>Reasons for Choosing Specific Vendor</i> .....	57
<i>Other Suppliers that Were Considered</i> .....	58
<i>Reasons for Purchasing Wide Format Prints</i> .....	60
Print Service Providers .....	62
<i>Primary Industry</i> .....	62
<i>Number of Employees</i> .....	63
<i>Annual Revenues</i> .....	64
<i>Sales and Marketing</i> .....	66

<i>Customers and Key Client Contacts</i> .....	68
<i>Print Volume</i> .....	72
<i>Applications</i> .....	74
<i>Widths of Digital Wide Format Output</i> .....	76
<i>Types of Wide Format Printing Equipment</i> .....	77
<i>Rigid versus Flexible Print Media</i> .....	78
<i>Agreement with Statements</i> .....	81
<i>Anticipated Change in Various Trends</i> .....	82
<i>Key Customer Demand</i> .....	86
<i>Share of Wide Format Printing Jobs Handled for Consumers</i> .....	87
<i>Digital Wide Format Applications Produced for Consumers</i> .....	89
<b>Conclusions and Recommendations</b> .....	<b>91</b>
<b>The Answers</b> .....	<b>94</b>

## List of Figures

Figure 1: Retail Value of Wide Format Digital Print (\$Billions).....	12
Figure 2: Which of the following best describes your company's primary industry?.....	13
Figure 3: Approximately how many employees work at your specific location?.....	14
Figure 4: Approximately how many employees work at your entire company/organization?.....	15
Figure 5: How many times per year does your company purchase wide format graphics?.....	16
Figure 6: Number of Wide Format Graphics Purchases per Year by Industry.....	17
Figure 7: Approximately how many wide format graphics prints do you buy in an average order?.....	18
Figure 8: Average Order Size by Industry.....	19
Figure 9: From which of the following locations has your company purchased wide format prints? ...	20
Figure 10: Is your retail sign shop an independent store or part of a national franchise?.....	21
Figure 11: What type of company is the supplier that you MOST prefer to use for wide format digital print services?.....	22
Figure 12: What are the main reasons that you chose your top print providers? (Most Often Chosen #1).....	23
Figure 13: What are the main reasons that you chose your top print providers? (Most Chosen Responses Overall).....	24
Figure 14: From which of the following other suppliers would you consider purchasing wide format prints in the future?.....	25
Figure 15: What are the main objectives that you seek to address with wide format graphics?.....	26
Figure 16: How effective do you think wide format graphics are in terms of accomplishing these goals?.....	27
Figure 17: Which of the following types of wide format prints do you buy or specify?.....	28
Figure 18: What percentage of your wide format graphics purchases are for indoor vs. outdoor use?.....	29
Figure 19: For how long are your wide format graphics typically displayed? (Means).....	30
Figure 20: What are the most common turnaround times that you require for wide format graphics printing jobs? (Most Often Chosen #1).....	31
Figure 21: What are the most common turnaround times that you require for wide format graphics printing jobs? (Most Chosen Responses Overall).....	32
Figure 22: Have you considered using, or are you currently using, digital displays instead of wide format graphics?.....	33
Figure 23: How have digital displays affected your use of printed wide format graphics?.....	34
Figure 24: Does your company have set rules for buying print services?.....	35
Figure 25: Which of the following are true regarding your company's rules for buying print services?.....	36
Figure 26: Do your print purchases reflect a preference for "green" printing?.....	37
Figure 27: Which one of the following best describes your company's preference for "green" printing?.....	38

Figure 28: What is your company's outlook for purchasing wide format graphics over the next 12 months? .....	39
Figure 29: By about how much do you expect wide format graphics purchasing to increase over the next year in relation to the previous 12 months?.....	40
Figure 30: By about how much do you expect wide format graphics purchasing to decrease over the next year in relation to the previous 12 months?.....	41
Figure 31: For the types of prints that you buy or specify, do you expect your company's purchases of these to increase, decrease, or remain the same? (Means).....	42
Figure 32: Which of the following are the best ways for a printing company to market its services to you? .....	43
Figure 33: How many times in the past have you ordered wide format prints for your personal use? .....	44
Figure 34: When did you last buy wide format prints for personal use? .....	45
Figure 35: At which of the following locations have you purchased wide format prints for personal use? .....	46
Figure 36: Which of the following best describes the retail sign shop from which you purchased wide format prints? .....	47
Figure 37: In your last order, how many wide format prints did you buy?.....	48
Figure 38: What was the average width of the wide format prints you purchased in your last order? ..	49
Figure 39: Which of the following types of prints have you purchased? .....	50
Figure 40: Would you be interested in purchasing frames, stands, or other display accessories along with your wide format prints? .....	51
Figure 41: Which of the following best describes the turnaround time for your most recent order? ....	52
Figure 42: How much did you pay for your most recent wide format print order? .....	53
Figure 43: Which of the following best describes the price you paid for your most recent wide format print order? .....	54
Figure 44: How did you become aware of wide format printing services?.....	55
Figure 45: Was your most recent wide format print order planned or made on impulse? .....	56
Figure 46: During your most recent purchase of wide format prints, which of the following most strongly motivated your decision? .....	57
Figure 47: Which of the following other suppliers did you consider in the past for purchasing wide format prints? .....	58
Figure 48: Which of the following other suppliers will you consider in the future for purchasing wide format prints? .....	59
Figure 49: For which of the following reasons have you purchased wide format prints in the past? (Most Often Chosen #1) .....	60
Figure 50: For which of the following reasons have you purchased wide format prints in the past? (Most Chosen Responses Overall).....	61
Figure 51: Which of the following categories best represents your company's primary business? ....	62
Figure 52: Approximately how many employees work at your specific location? .....	63
Figure 53: What is your company's approximate annual revenue for printing and related services?..	64
Figure 54: What percentage of your company's annual revenue is related to wide format printing? ..	65
Figure 55: Which of the following tools do you use to market your business? .....	66
Figure 56: Which of these tools do you consider most effective for marketing to wide format print buyers? .....	67
Figure 57: In which of the following industries are your clients for wide format print services?.....	68
Figure 58: Of the industries that you sell wide format print services to, how do you think demand is changing? .....	69
Figure 59: What percentage of your key client contacts can be described as follows?.....	70
Figure 60: Approximately what percentage of the companies that you handle wide format print jobs for are of the following sizes? .....	71
Figure 61: Roughly how many square feet per month do you print on your digital wide format devices?.....	72
Figure 62: Monthly Wide Format Digital Print Volume by Segment .....	73
Figure 63: Which of the following applications do you regularly produce on your wide format printer?74	

Figure 64: How do you expect the applications that you regularly produce to change in the future?..	75
Figure 65: Roughly what percentage of your digital wide format output is in the following widths? ....	76
Figure 66: Which of the following types of print technologies do you have at your company for producing wide format prints? .....	77
Figure 67: What percentage of your digital wide format output is produced on rigid vs. flexible media? .....	78
Figure 68: Rigid versus Flexible Print Media by Vertical Industry .....	79
Figure 69: What percentage of your rigid digital wide format output is produced on the following substrates? .....	80
Figure 70: What percentage of your flexible digital wide format output is produced on the following substrates? .....	80
Figure 71: To what extent do you agree or disagree with the following statements? (Means) .....	81
Figure 72: How do you expect demand for the following types of jobs to change in the future? .....	83
Figure 73: What percentage of the wide format print jobs that you handle are expected to be completed in the following timeframes? .....	84
Figure 74: Turnaround Time Requirements by Vertical Industry .....	85
Figure 75: What would you consider to be the key aspect that your customers demand from you regarding wide format print jobs? .....	86
Figure 76: What percentage of your wide format printing jobs are done for consumers rather than companies or organizations? .....	87
Figure 77: Share of Wide Format Print Jobs Done for Consumers by Vertical Industry .....	88
Figure 78: Which of the following digital wide format applications do you regularly produce for consumers? .....	89
Figure 79: Are the wide format print applications that you produce for consumers growing, declining, or staying the same? .....	90
Figure 80: Buyers with green wide format preference willing to pay small premium for those prints ..	93
Figure 81: Most Effective Sales and Marketing Methods by Industry .....	94
Figure 82: Percentage of Print Buying Companies that Plan to Increase Spending on Wide Format Printing in the Next 12 Months by Industry .....	95
Figure 83: How effective do you think wide format graphics are in terms of accomplishing your goals? (Means) .....	96
Figure 84: Do you expect the following wide format applications to increase, decrease, or remain the same in the future? .....	97

## Objectives

This study answers questions including:

- What are the key motivations for buyers of wide format graphics printing services?
- What are print buyers' selection criteria when choosing wide format print vendors?
- What sales and marketing methods are most effective with print buyers in various industries?
- What are growth prospects for wide format graphics print service budgets by major industry vertical?
- How strong is the market for wide format digital graphics in various vertical markets?
- How much of a threat does digital signage pose to wide format printing?
- How influential are environmental concerns among buyers of wide format printing?
- What is the outlook for wide format digital graphics print purchases by major application?
- What are the roles and long-term prospects of online suppliers of wide format prints (e.g., Snapfish and other photo printing services)?

This material is prepared specifically for clients of InfoTrends, Inc. The opinions expressed represent our interpretation and analysis of information generally available to the public or released by responsible individuals in the subject companies. We believe that the sources of information on which our material is based are reliable and we have applied our best professional judgment to the data obtained.