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Multi-Client

## The Future of Mail 2006- Direct Mail, Transaction, and “Transpromotional” Documents

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### Project Objectives

Print and mail are closely linked. It is often claimed that about one-half of all that is printed ends up in the postal stream. In 2003 we published the *Future of Mail* that allowed us to better understand the impact of 9/11, the economic downturn, the rise of the web and attacks on the U.S. Postal service. In 1997 we had published *The Internet and the Future of Transaction Document*.

We found that consumers had a high preference for direct mail over other forms of direct marketing including e-mail. Despite more on-line transactions, printed transaction documents were not facing a precipitous decline. The decline in mail volume that followed 9/11 was a direct reaction to the combined events and did not constitute a fundamental change in how information was going to be communicated.

Much has changed since the publication of the last study. The use of the Internet continues to grow, with high-speed access most associated with a move toward on-line presentment and payment, and e-mail and Internet advertising gaining in adoption. The economy has done fairly well over this period and we have seen legislative action against telemarketing. We have witnessed continued advances in print technology that have spurred the growth of TransPromo documents, transaction documents that contain marketing messages. Perhaps of most importance, there have been no significant terrorist attacks on the postal service.

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*The Future of Direct Mail, Transaction and “Transpromotional” Documents* is designed to capture the current state and future prospects for direct mail, transaction documents and TransPromo. To gain this understanding we surveyed various constituencies that influence the market. As we did in our last study, we surveyed consumers, document owners and print service providers. Consumers receive the bulk of direct mail and most transaction documents, their behavior and preferences should influence those who generate the mail. Document owners, who make decisions about how information is communicated, provide us with a view of current beliefs and planned changes. Print providers who service this market in many ways gate adoption as the services they offer impact the document owners.

The study is designed to provide statistically significant data to print providers; companies that sell printing, finishing, and mailing equipment; software providers including postal service; and businesses that provide alternate services such as electronic bill presentment. The findings are of interest to providers of CRM (Customer Relationship Management) tools, providers of paper and pre-printed forms, and those who sell printers to the consumer market.

This study focuses on customer-facing applications such as direct marketing, billing, and related issues such as customer support and fulfillment. Examples of transaction documents include statements, invoices, evidence of coverage, contracts, proposals, trade confirmations, 401K or other retirement documents, brokerage account information, insurance policies, and checks. Direct mail is a type of advertising medium in which messages are sent to target customers through the mail to elicit some action, such as purchasing, a donation or to take some action such as voting.

### **Specific Objectives**

- Identify the current state and future prospects for transaction documents, transpromotional documents, and direct mail.
- Understand how key IT and organizational initiatives are affecting user requirements for document production and distribution technology and services.
- Determine customer requirements and the rate of adoption for document technologies and services in key industries.
- Assess customer awareness and vendor plans for supporting key technologies.
- Assess market opportunities for print technology.
- Assess market opportunities for print-related solutions.
- Assess market opportunities for feeding and finishing solutions in support of digital printing print-related solutions.
- Assess the changing requirements of consumers segmented by typical demographics, those with or without Internet access, as well as those with high-speed Internet access.
- Define key value-added document services and determine their market size and growth potential (2006 – 2010).
- Identify and profile the leading suppliers for enterprise document systems and services.

### **Methodology**

InfoTrends surveyed a number of industry participants, leveraged ongoing industry coverage and examined numerous secondary sources from government and the industry. We conducted a number of conversations with vendors and print providers.

We conducted consumer research with two groups, both of which had to be at least 18 years old and regularly paid bills. One group did not have Internet access at home and the other did. We surveyed 412 consumers without Internet access at home at shopping malls in the U.S. and in Canada in October of 2006. At the same time, we conducted a web survey with 438 consumers who had Internet access at home. The statistical validity of these studies is +/- 4.8% at 95% probability.

We define document owners as those who determine how information is to be communicated; they may or may not purchase print. In October 2006, we conducted a web survey of 212 document owners who were responsible for the purchase and/or development of direct mail programs in North America. At the same time we surveyed 224 document owners who were responsible for the purchase and/or development of transaction documents. Both studies have a statistical validity of +/- 6.7% at 95% probability. Respondents were offered a small monetary incentive to participate and an executive summary of the results.

To complete our understanding of the market we conducted a web survey of 397 Print Providers for whom direct mail or transaction documents were a significant percentage of total revenue in US & Canada. The web survey had common questions for all participants and specific questions about either direct mail or transaction documents. Eligible respondents could answer one or both sets of application questions. Respondents had to be a decision maker as it relates to equipment and software acquisitions or significantly involved in business planning. The survey is statistically valid +/- 4.8% at 95% probability. Surveys with print providers were conducted from October to December 2006.

InfoTrends thoroughly examined existing market information on key applications, market segments, competitors, and product categories. InfoTrends also reviewed research it has previously published as part of its Continuous Consulting Services and Multi-Client Studies.

## Executive Summary

Paper based communications continue to enjoy a high preference among recipients and generators of documents. Despite the increased use of the Internet, paper has an enduring quality and its use will continue to grow as it relates to direct mail and remain relatively stable for transaction documents. The prospects for growth are brighter than what we reported in 2003 due to an improved economy and safe and reliable postal delivery.

The emergence of new applications, such as TransPromo documents that combine transaction and marketing communications, and the desire for higher levels of personalization provide growth opportunities for print providers. When presented with examples of traditional statements and marketing inserts and then with a TransPromo document 63% of consumers favored the TransPromo document.

The study forecasts continued growth in the use of digital color, both full color and highlight, spot color. As many of the costs associated with both types of communications are beyond ink and toner on paper, the opportunity for print providers to offer a wide range of services including managing the entire process under what we define as document process outsourcing remains a clear opportunity for those with the expertise to manage the entire lifecycle of these documents.

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