

# WE Print Buyers Purchasing Trends

## Primary Research

**German Sacristan**

Principal Analyst – Production Print On-Demand

December 2023

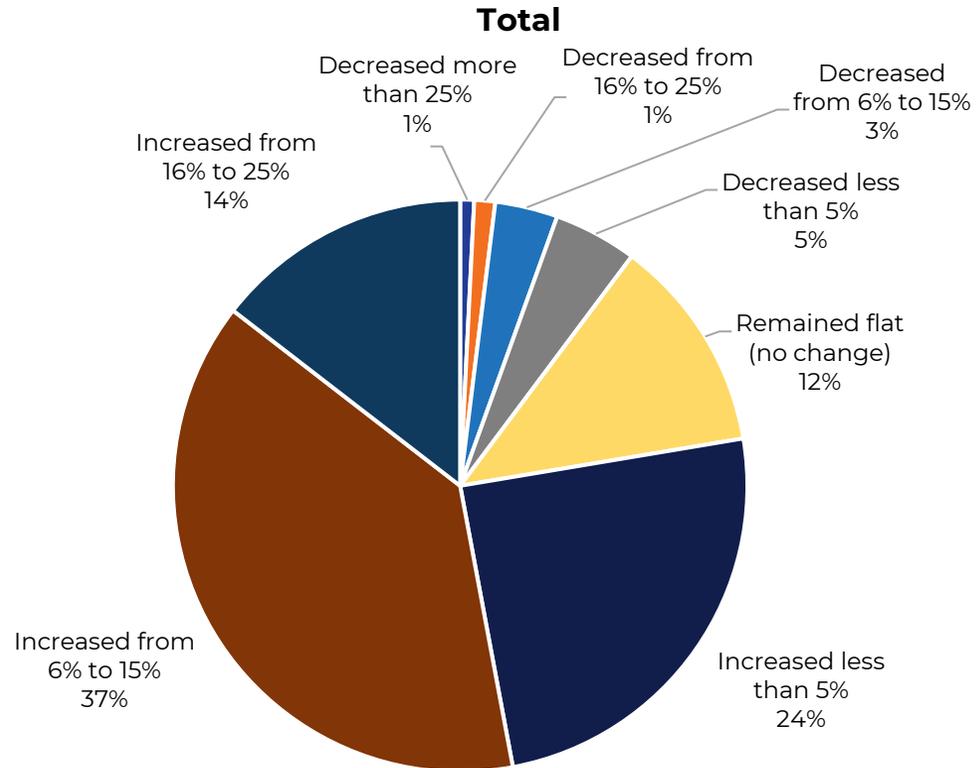


# Demographics

- ◆ Respondents are marketers from companies covering 8 vertical markets (largest vertical retail) that average 300 employees per company
- ◆ Most of the respondents have an online/digital marketing duty within their total marketing responsibility, which provides helpful insights on how marketers see print within their total marketing strategies
- ◆ Respondents' average marketing budgets are €500K

# Marketing Budgets Will Increase 8% in the Next 2 Years – Hospitality Will Increase Below The Average (6%)

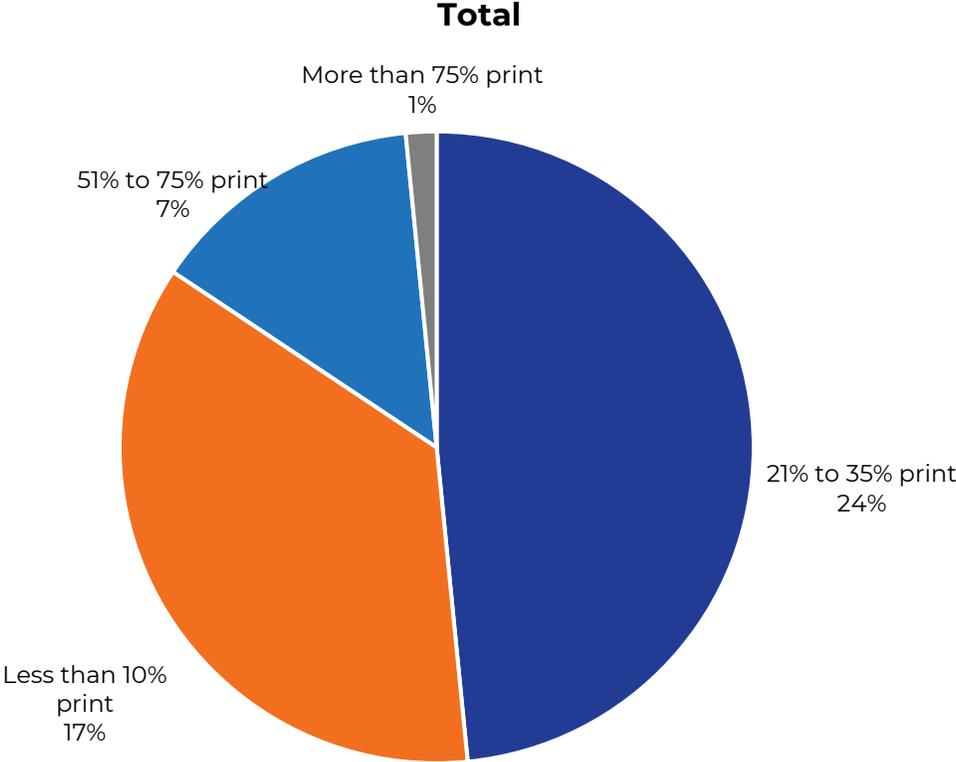
Q11: How do you expect your total marketing budgets to change in the next 2 years?



Base: 263 WE Respondents  
Source: Marketers Study 2022

# 28% of Marketing Budgets Are for Print

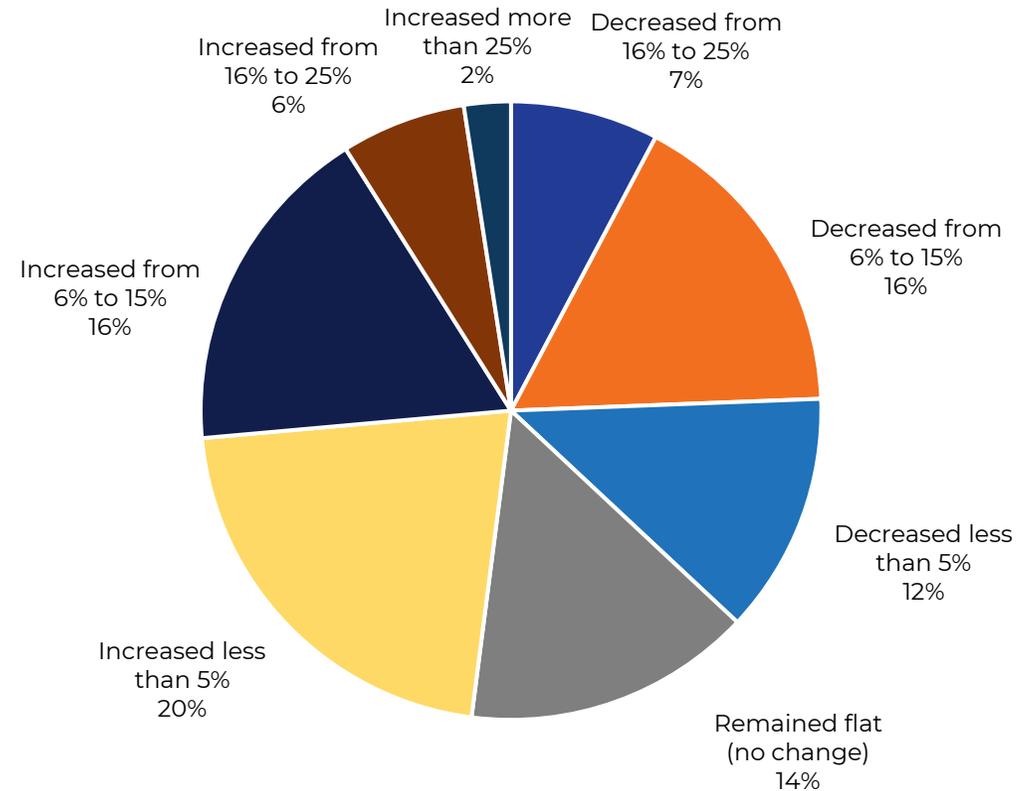
Q12: What percentage of your budget is attributed to PRINT MARKETING MATERIALS?



Base: 263 WE Respondents  
Source: Marketers Study 2022

# Print Budgets Will Be Flat as an Average in the Next 2 Years

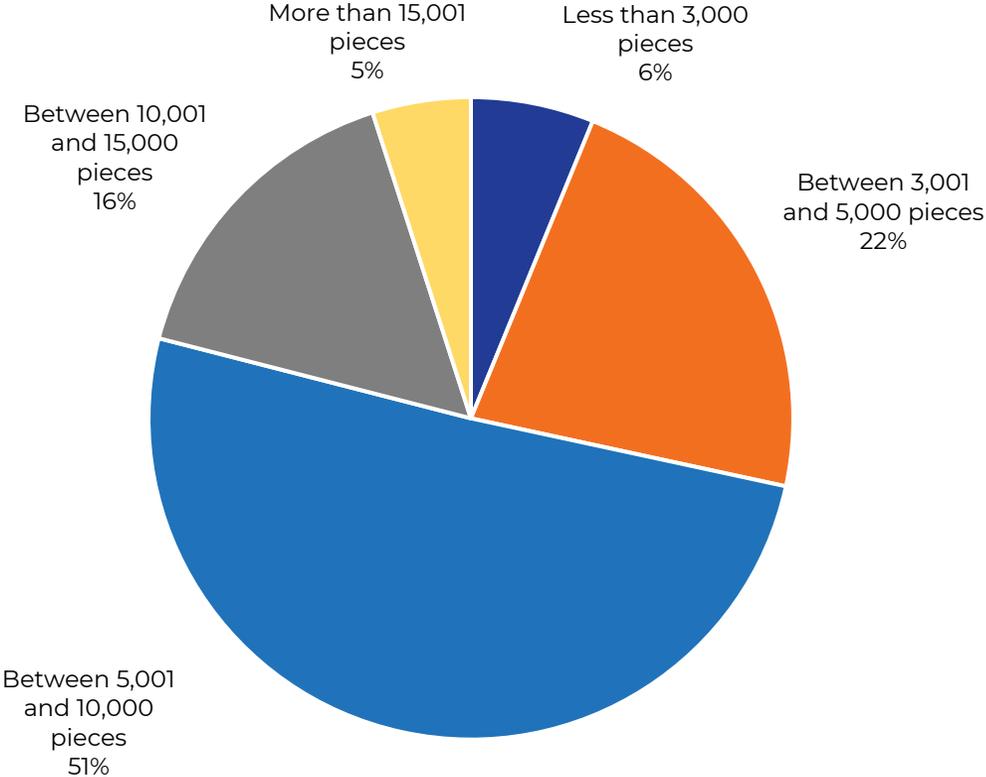
Q13: By how much do you expect the budget for your PRINT MARKETING MATERIALS to change in the next two years?



Base: 263 WE Respondents  
Source: Marketers Study 2022

# Average Direct Mail Run Lengths Are 7,000 Pieces

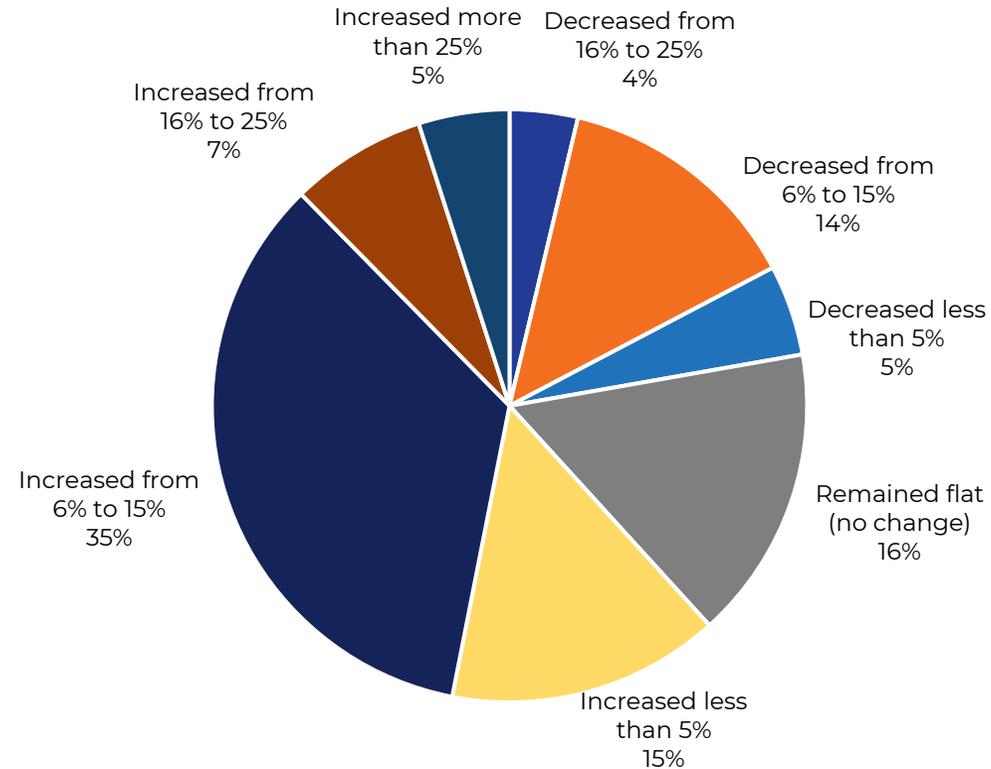
Q16: You've selected DIRECT MAIL. What were your most COMMON RUN LENGTHS PER JOB?



Base: 81 WE Respondents that expected to purchase Direct mail printing products in the next 2 years  
Source: Marketers Study 2022

# Direct Mail Print Volumes Will Grow 5% as an Average

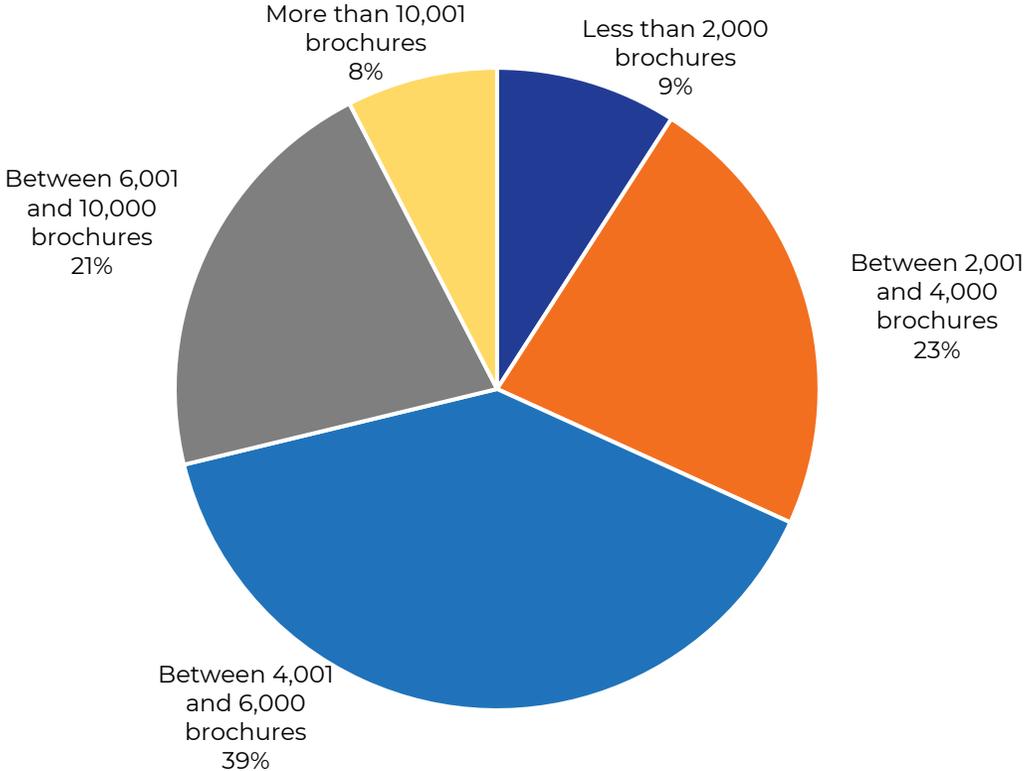
Q18: How much are you expecting your DIRECT MAIL PRINT VOLUMES to change in the next 2 years?



Base: 81 WE Respondents that expected to purchase Direct mail printing products in the next 2 years  
Source: Marketers Study 2022

# 5,000 Two-Sided Brochures Is the Average Run Length

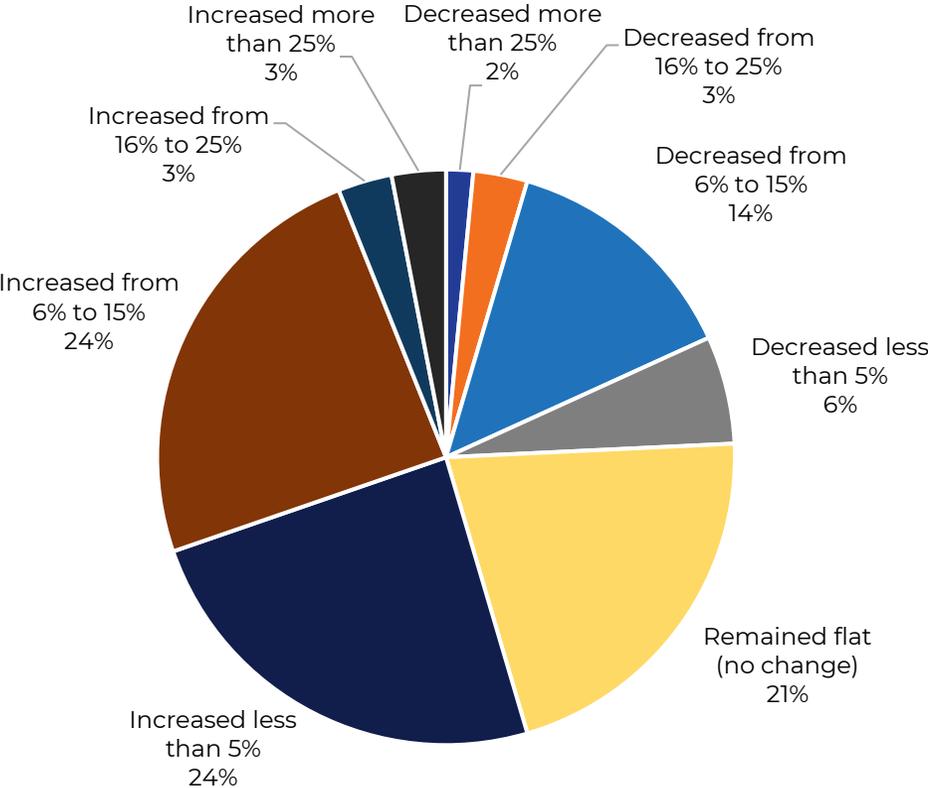
Q19: You selected BROCHURES (2-sided printed sheet of paper that can be produced folded in different number of pages or unfolded in 2 pages), what were your most COMMON RUN LENGTHS in 2639 (before the pandemic)?



Base: 66 WE Respondents that expected to purchase Brochures in the next 2 years  
Source: Marketers Study 2022

# Brochure Print Volumes as an Average Will Be Flat in the Next 2 Years – Hospitality and Retail Expected to Grow Low Single Digits

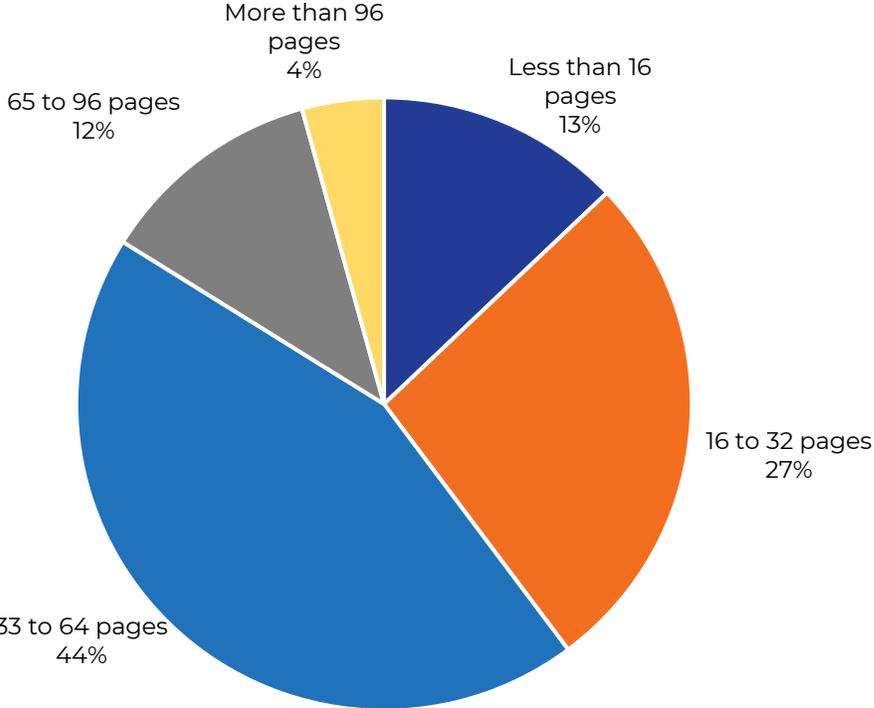
Q21: How much are you expecting your BROCHURES TOTAL PRINT VOLUMES to change in the next 2 years?



Base: 66 WE Respondents that expected to purchase Brochures in the next 2 years  
Source: Marketers Study 2022

# 44-Page Catalogue Average Is Good for Digital Print

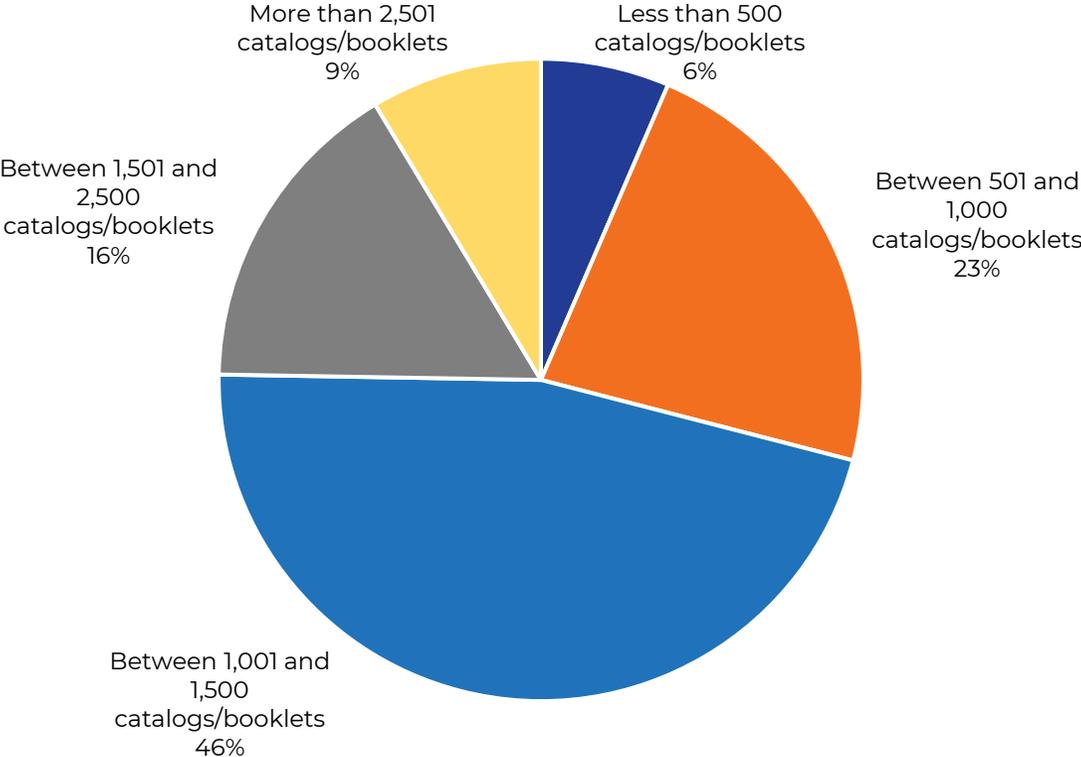
Q22: You selected PRINTED CATALOGUES/BOOKLETS, what are the most COMMON NUMBER OF PAGES PER CATALOGUE (before the pandemic)?



Base: 93 WE Respondents that expected to purchase Printed Catalogues/Booklets in the next 2 years  
Source: Marketers Study 2022

# 1,300 Pieces Is the Average Catalogue Run Length

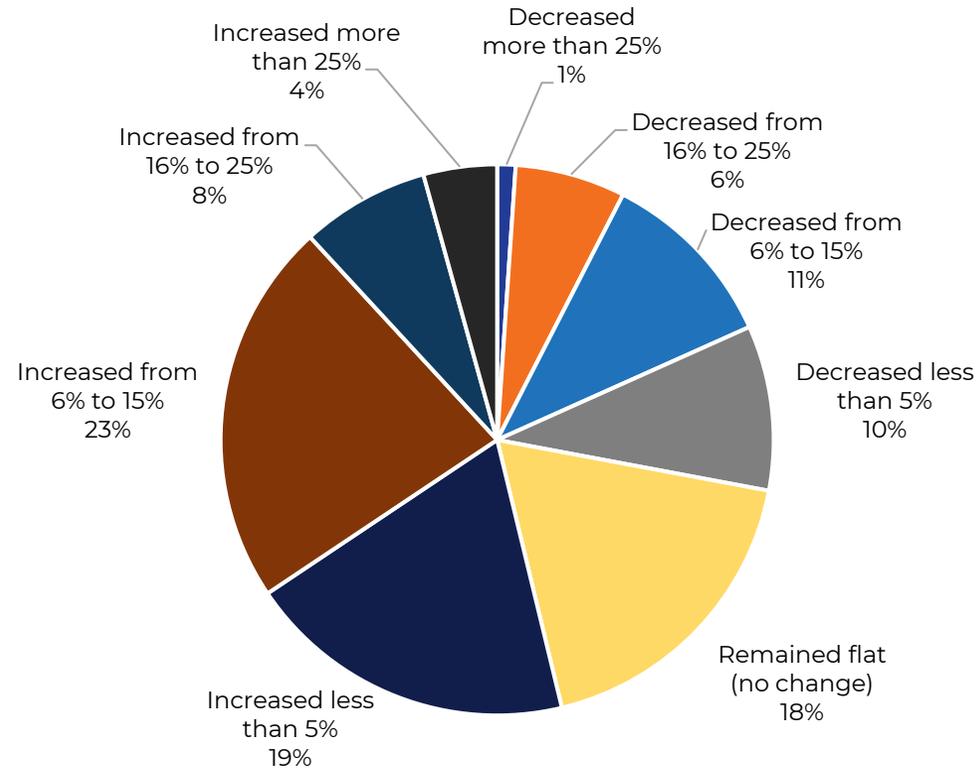
Q24: What are your most COMMON PRINTED CATALOGUE/BOOKLETS RUN LENGTHS PER JOB?



Base: 93 WE Respondents that expected to purchase Printed Catalogues/Booklets in the next 2 years  
Source: Marketers Study 2022

# Catalogue Print Volumes Are Growing 3% in the Next 2 Years

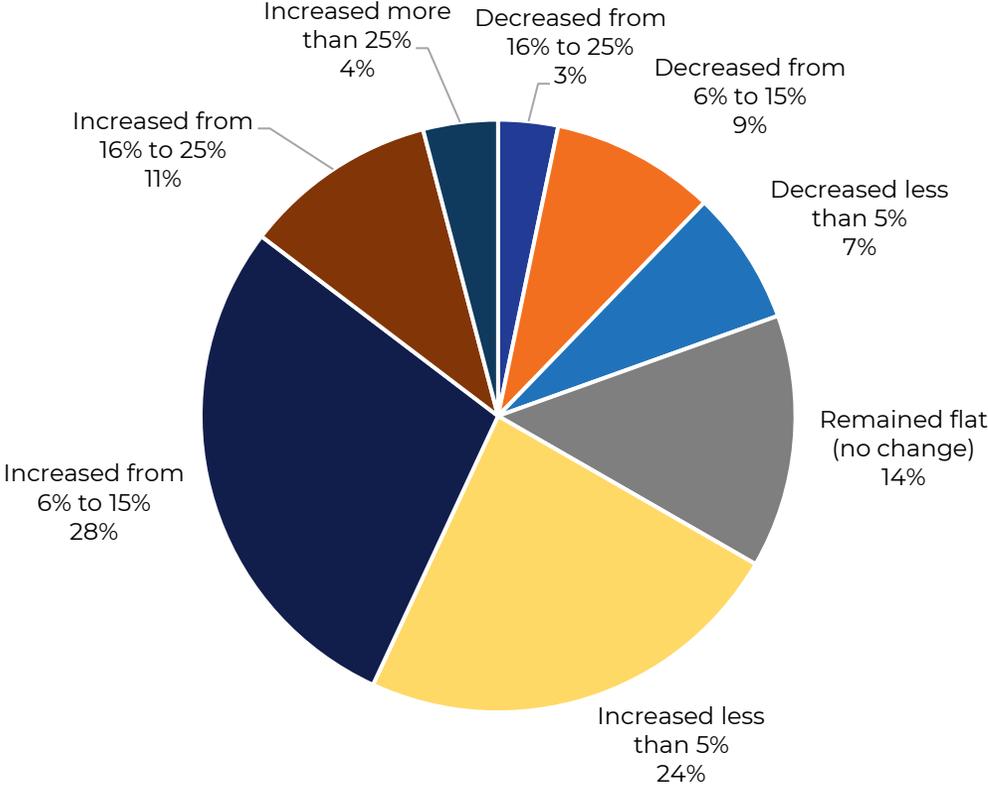
Q26: How much are you expecting your CATALOGUES/BOOKLETS TOTAL PRINT VOLUMES to change in the next 2 years?



Base: 93 WE Respondents that expected to purchase Printed Catalogues/Booklets in the next 2 years  
Source: Marketers Study 2022

# Training Materials Print Volumes Will Grow 5%, but Hospitality Will Stay Flat

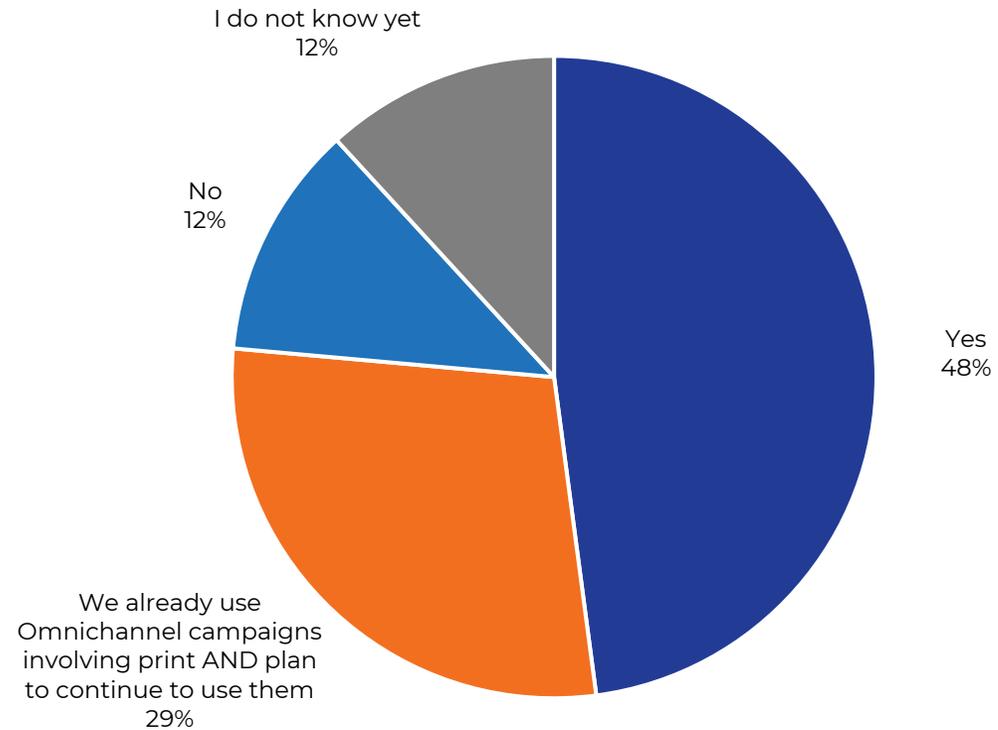
Q31: How much are you expecting your PRODUCT OR TRAINING MANUALS TOTAL PRINT VOLUMES to change in the next 2 years?



Base: 123 WE Respondents that expect to purchase product and training materials in the next 2 years  
Source: Marketers Study 2022

# Print Is Part of an Omnichannel Campaign

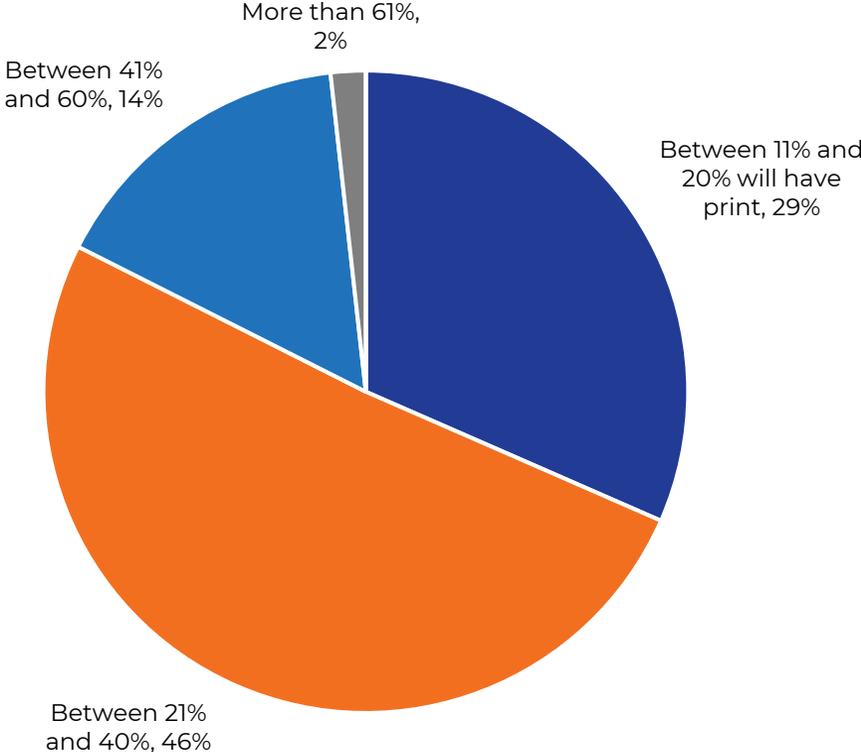
**Q33: Do you plan to implement any omnichannel campaigns that include print in the next 3 years?**



Base: 263 WE Respondents  
Source: Marketers Study 2022

# 27% of Omnichannel Campaigns Will Use Print

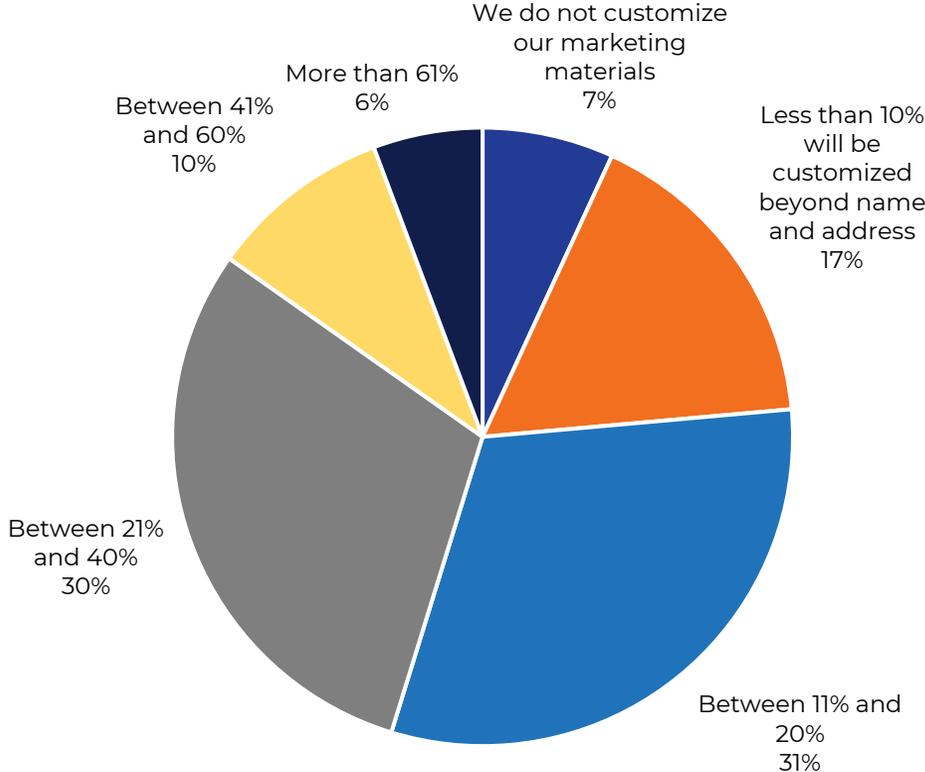
Q34: How much of your omnichannel campaigns are you expecting to use print in the next 3 years?



Base: 126 WE Respondents that expect to use print in the next three years on their omnichannel campaigns  
Source: Marketers Study 2022

# 25% of Print Communication Is Customized

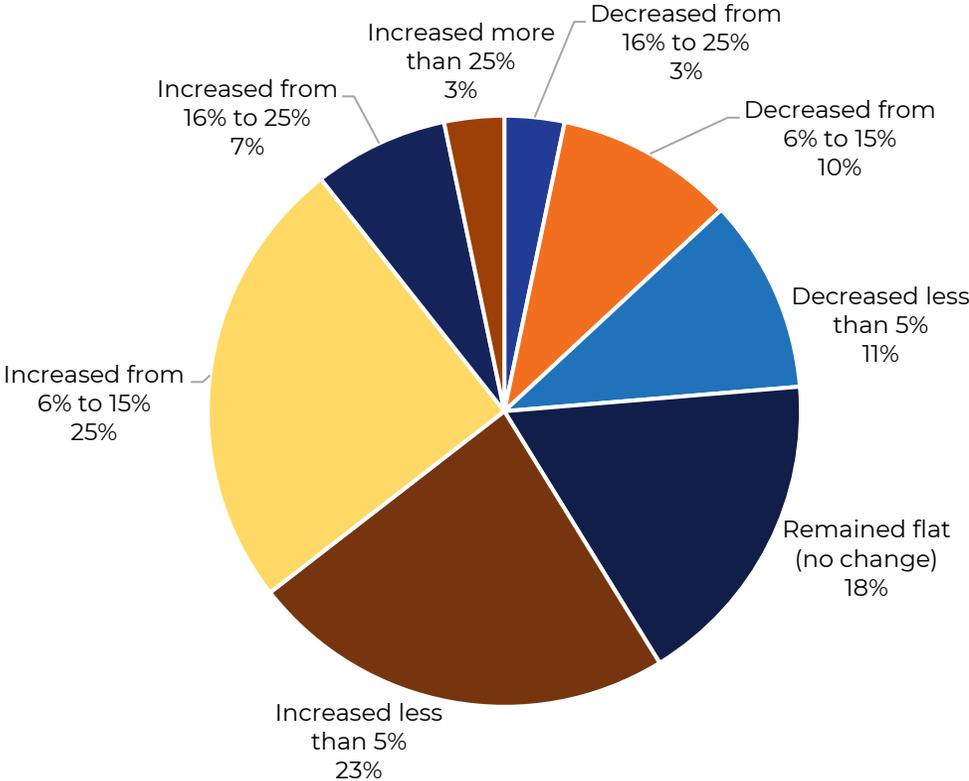
Q35: What percentage of your total print communications are customized beyond name and address?



Base: 263 WE Respondents  
Source: Marketers Study 2022

# 4% Growth for Print Customization in the Next 3 Years

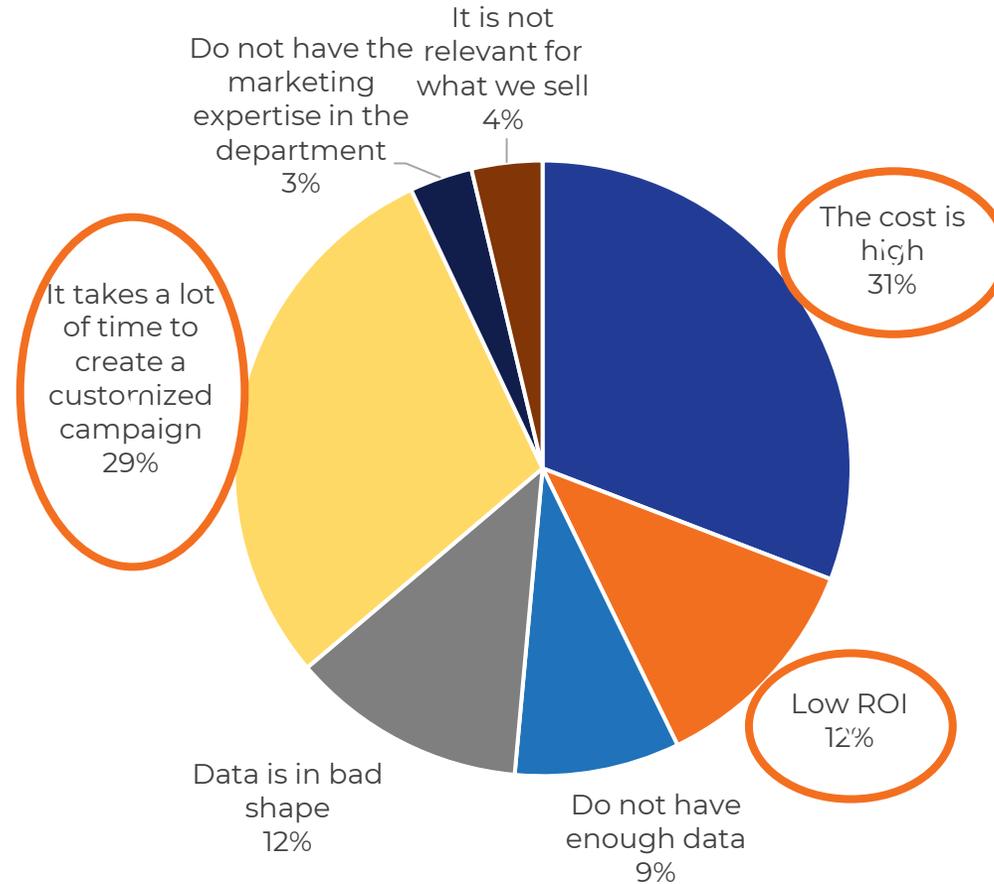
Q36: What percentage of your customized printing communications beyond name and address are expected to change in the next 3 years?



Base: 245 WE Respondents who's print communications are customized beyond name and address  
Source: Marketers Study 2022

# ROI Is the Customization Challenge!

Q37: What are your main challenges/obstacles when doing customized printing campaigns beyond name and address?



Base: 245 WE Respondents  
Source: Marketers Study 2022

## 2. Profiling

Drives **Campaign Tactics** through Personalization



## 4. Testing

Reduces the Risks of Failure and **Increases ROI**



## 1. Segmentation

Drives **Sales Strategy** Based on Purchasing Trends



## 3. Engagement

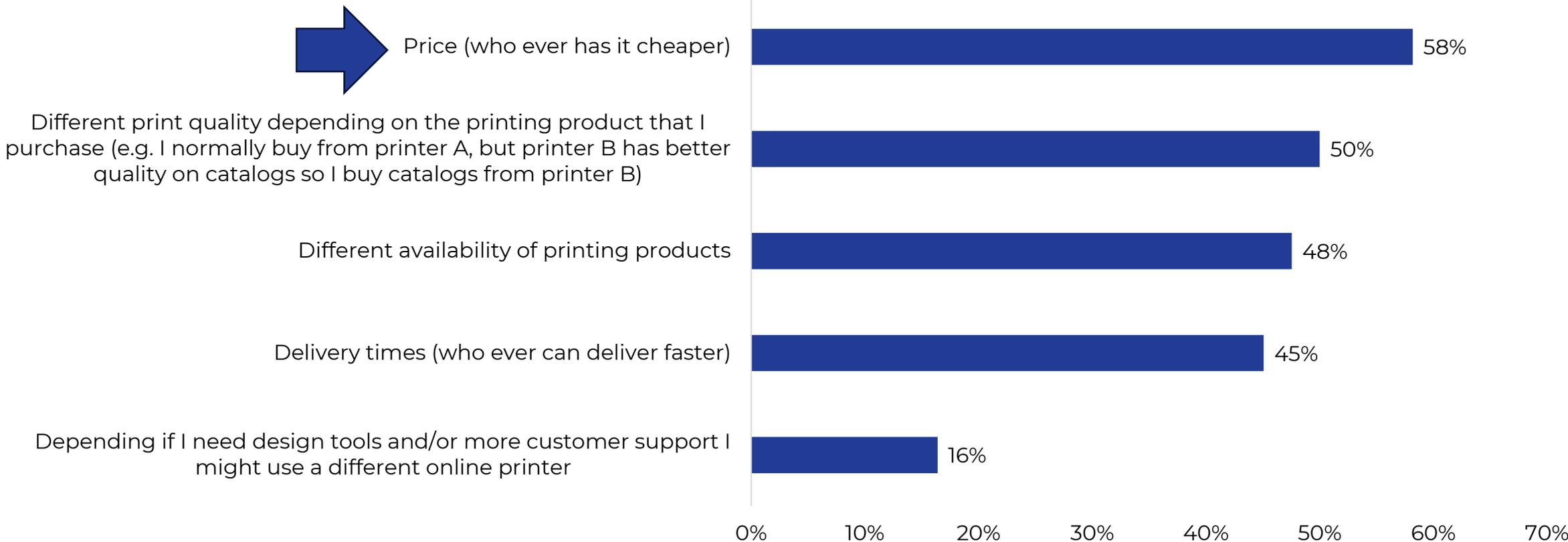
Capture **Attention** and Create Perception of **Value**, Be **Relevant**, and Enabling **Purchase**



## 5. Tracking & Analysis

# Traditional Buying Criteria (Price, Quality, Product Availability and Delivery Times)

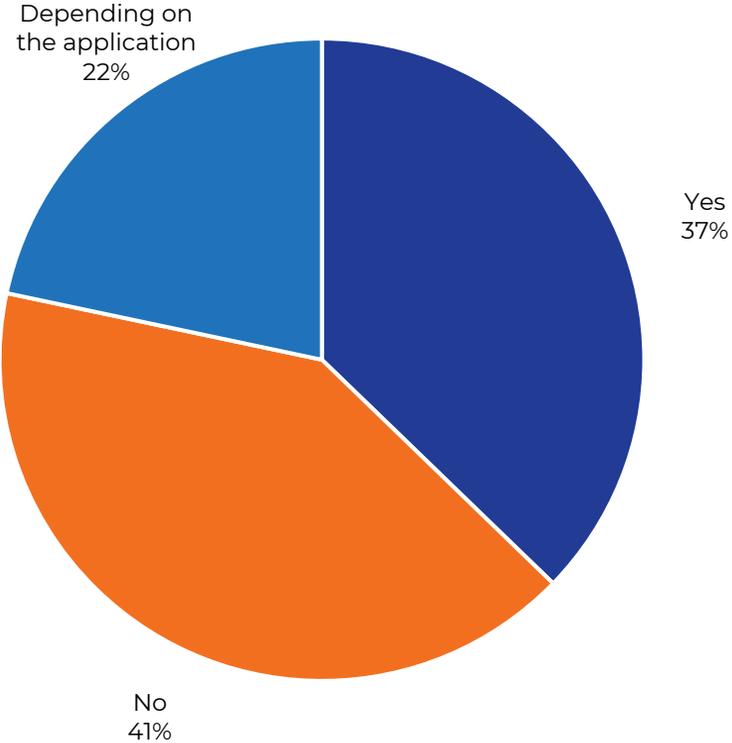
Q41: What are the reasons why you purchase print from more than one print service provider?



Base: 122 WE Respondents who purchase print from more than one print provider  
Source: Marketers Study 2022

# 59% Will Compromise on Quality for a Lower Price

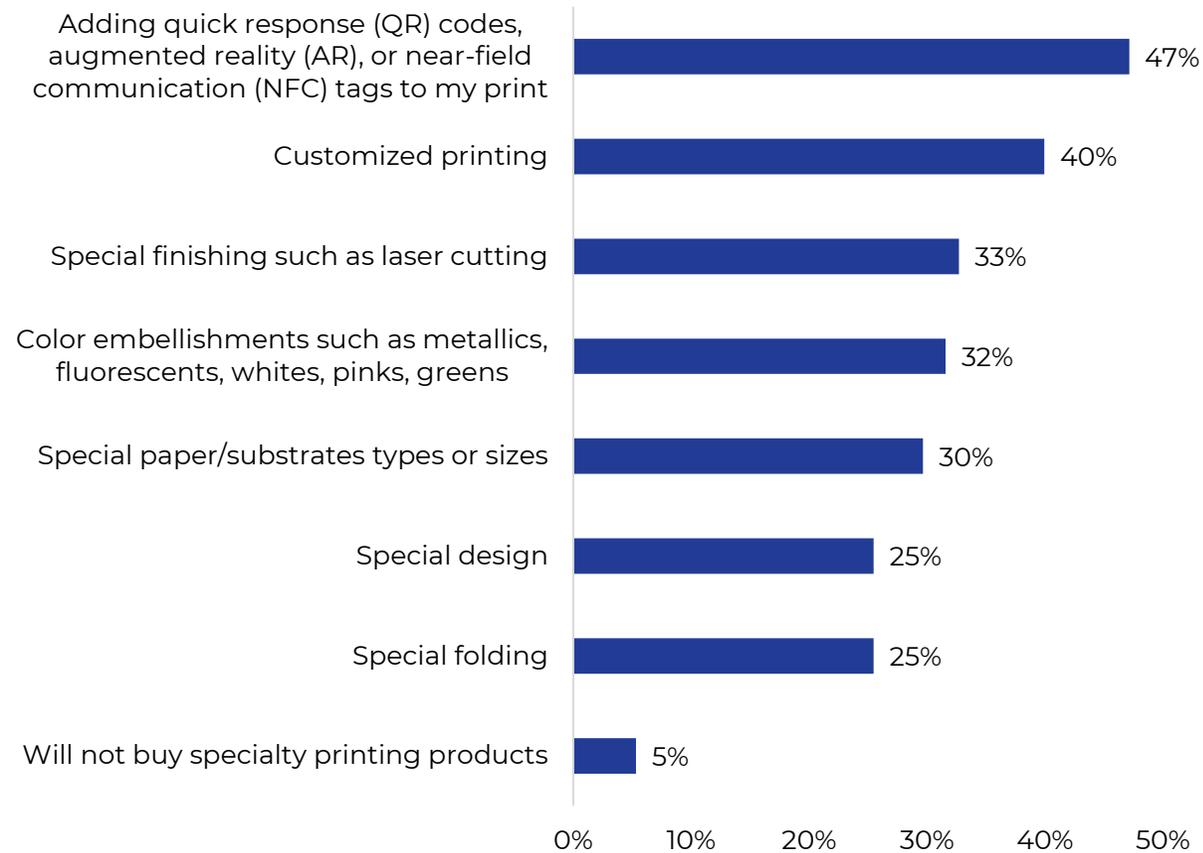
Q48: Will you be interested to compromise on lower print quality in exchange for a lower price?



Base: 263 WE Respondents  
Source: Marketers Study 2022

# Only 5% of Printer Buyers Aren't Interested in Specialty Print

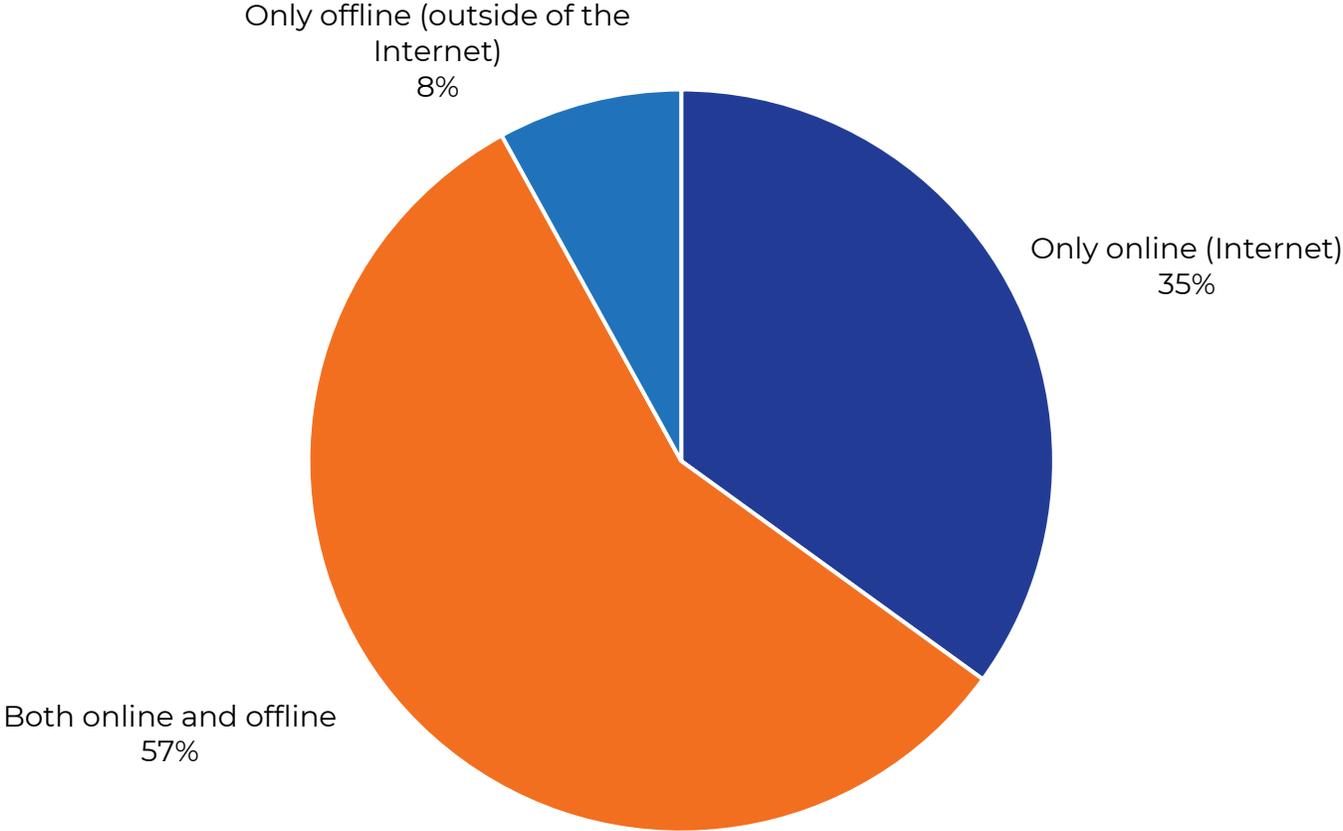
Q38: What are the top 3 specialty printing products that you will be interested in purchasing in the next 2 years?



Base: 263 WE Respondents  
Source: Marketers Study 2022

# 92% of Print Buyers Purchase Print Online

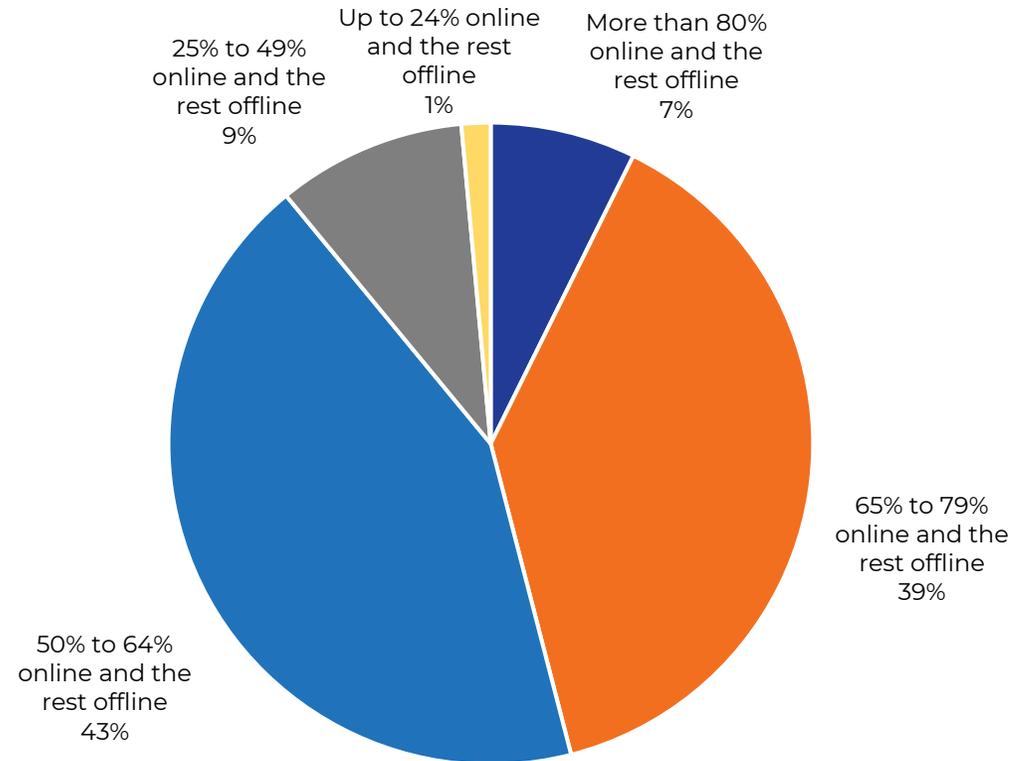
q39: Where do you purchase print?



Base: 263 WE Respondents that expect to use print in the next three years on their omnichannel campaigns  
Source: Marketers Study 2022

# 62% Online Purchases in Terms of Revenue Vs. Offline

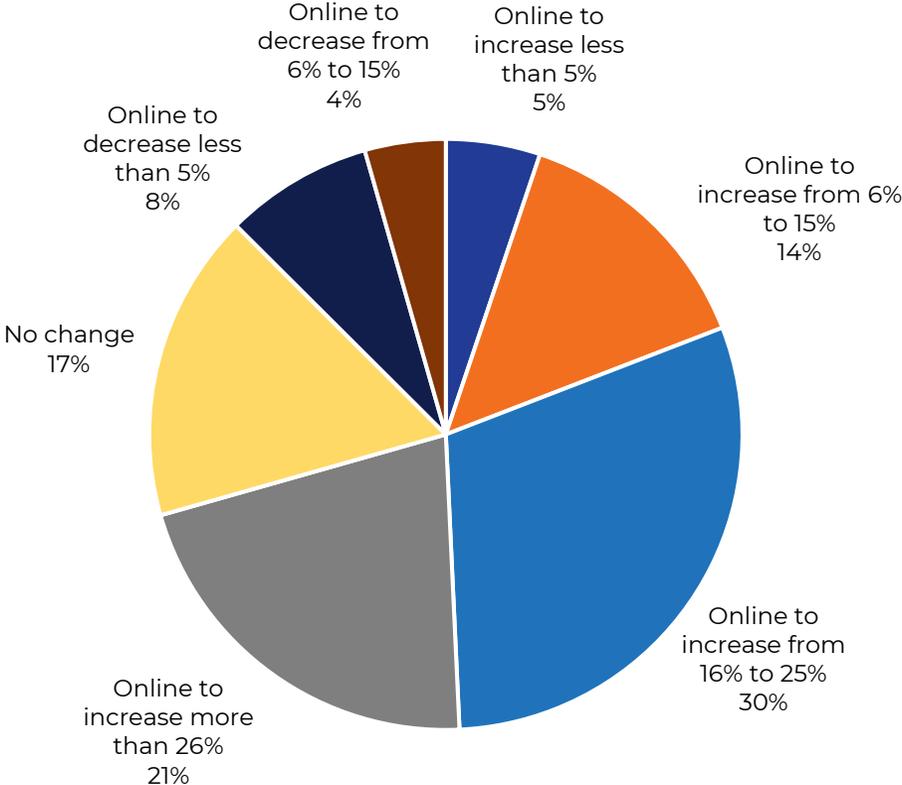
Q45: What is the estimated percentage of online purchases vs offline in terms of dollars spent?



Base: 137 WE Respondents that purchase print both online and offline  
Source: Marketers Study 2022

# 13% Increase in Online Purchasing in the Next 3 Years

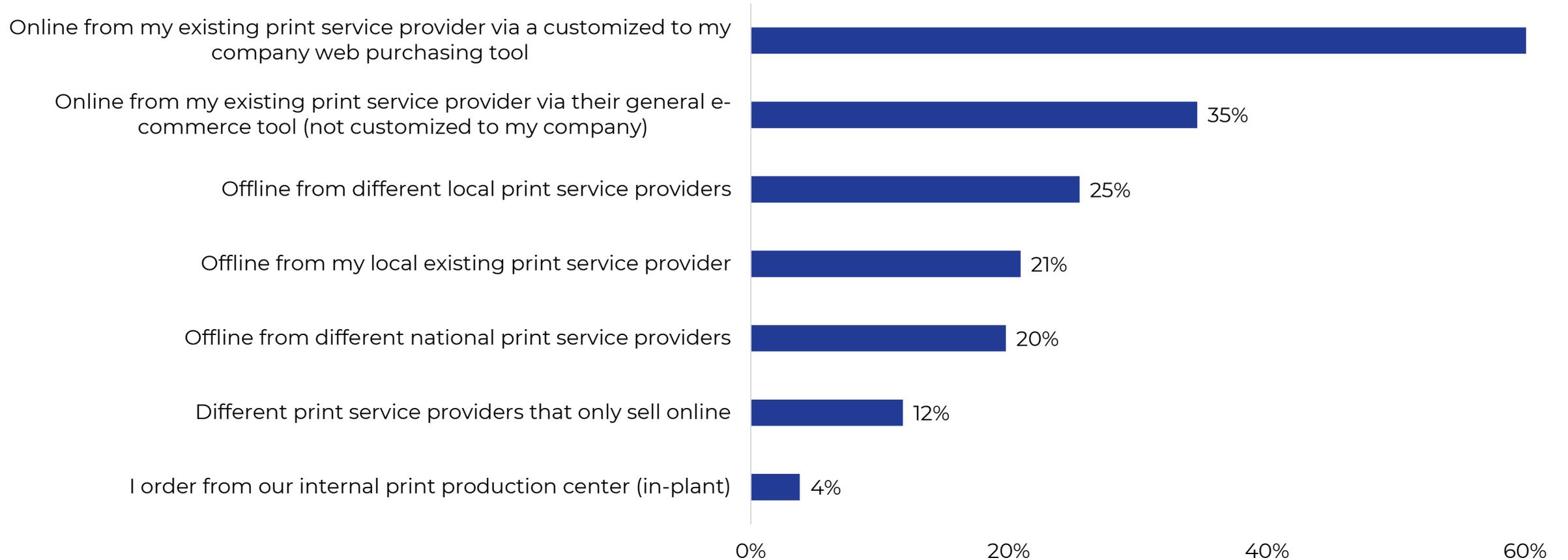
Q46: How do you expect the Budget spending share between online and offline to change in the next 3 years?



Base: 137 WE Respondents that purchase print both online and offline  
Source: Marketers Study 2022

# Print Buyers Are Loyal

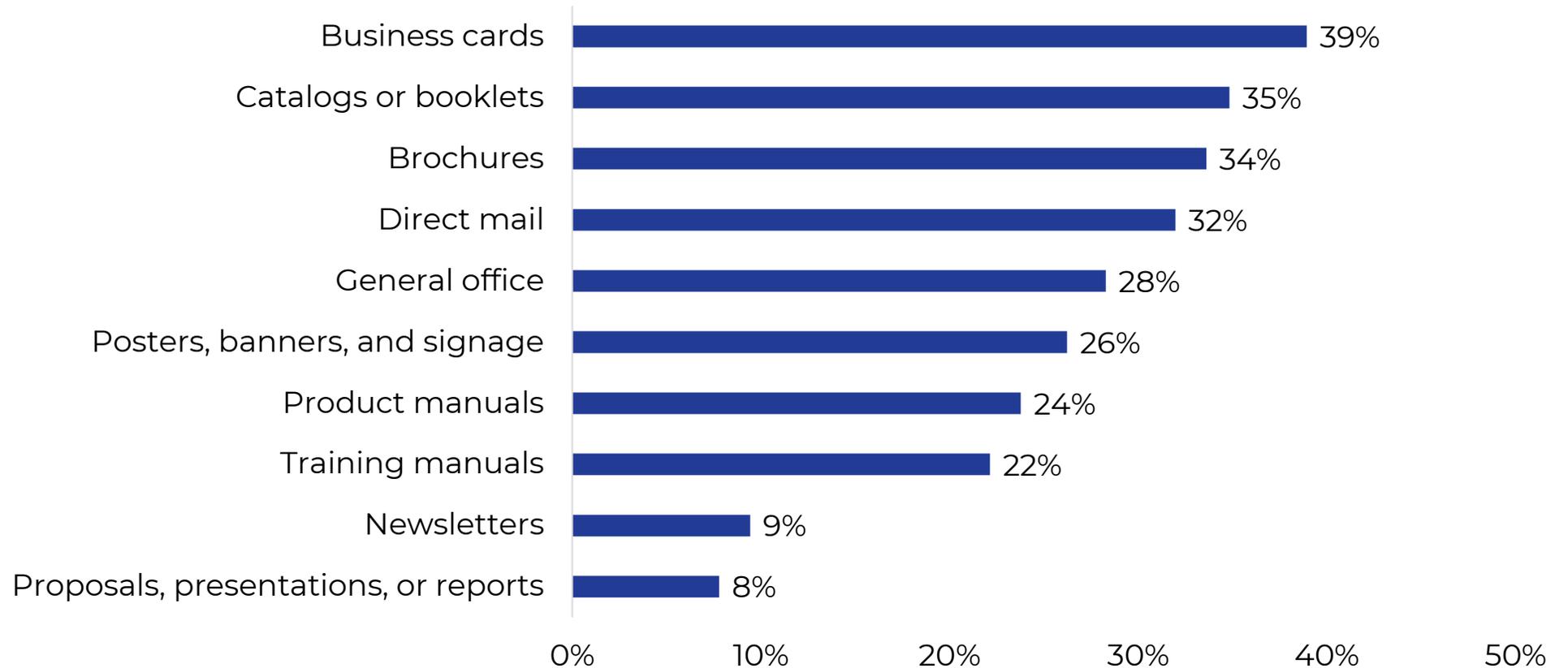
## Q40: Who do you buy print from?



Base: 263 WE Respondents  
Source: Marketers Study 2022

# Business Cards, Catalogues, and Brochures Are the Top Purchases Online

Q43: What are the 3 most popular printing products that you order online?



Base: 244 WE Respondents who purchase print online  
Source: Marketers Study 2022

# Summary

- ◆ Marketing budgets are expected to grow 7.5% in the next 2 years (on average)
  - ◆ Print is 28% of those budgets and expected to be flat in the next 3 years
- ◆ Most common job run lengths DM 7K, brochures 5K, and catalogues 1,300 pieces
  - ◆ DM expected to grow 5%, catalogs 3%, while brochures will be flat in the next 2 years
- ◆ A quarter of omnichannel campaigns are expected to use print
- ◆ 25% of printing campaigns are customized and expected to grow 4% (next 3 years)
  - ◆ ROI is the biggest challenge
- ◆ Even though price is the strongest buying criteria 95% are interesting in specialty print
- ◆ 92% of print buyers buy online, with many using online *and* offline channels
  - ◆ Most print buyers remaining loyal to their existing PSPs
    - ◆ Purchasing locally is favored over nationally
  - ◆ Online represents 62% of the revenue and it is expected to grow 13% in the next 3 years



# THANK YOU

✉ [german.sacristan@keypointintelligence.com](mailto:german.sacristan@keypointintelligence.com)

☎ +1-703-598-2690

## HEADQUARTERS

80 Little Falls Road  
Fairfield, NJ 07004  
973.797.2100  
[info@keypointintelligence.com](mailto:info@keypointintelligence.com)

## WEYMOUTH

97 Libbey Industrial Parkway  
Suite 300  
Weymouth, MA 02189  
781.616.2100  
[info@keypointintelligence.com](mailto:info@keypointintelligence.com)

## UK

Unit 11, The Business Centre  
Molly Millars Lane  
Wokingham, RG41 2QZ  
United Kingdom  
+44 (0) 118 977 2000  
[blieurope@keypointintelligence.com](mailto:blieurope@keypointintelligence.com)

## JAPAN

Ebisu Business Tower 10F  
1-19-19 Ebisu, Shibuya-ku,  
Tokyo 150-0013, Japan  
+81-3-4567-6222  
[info@keypointintelligence.jp](mailto:info@keypointintelligence.jp)

## HONG KONG

Room 303, 3rd Floor,  
St. George's Building,  
2 Ice House Street,  
Central, Hong Kong  
Tel: +852 8200 4503  
[asiansupport@keypointintelligence.com](mailto:asiansupport@keypointintelligence.com)

