

PRINT IN THE EYE OF THE BUYER IDENTIFYING PRINT'S ROLE IN THE NEW COMMUNICATION MIX



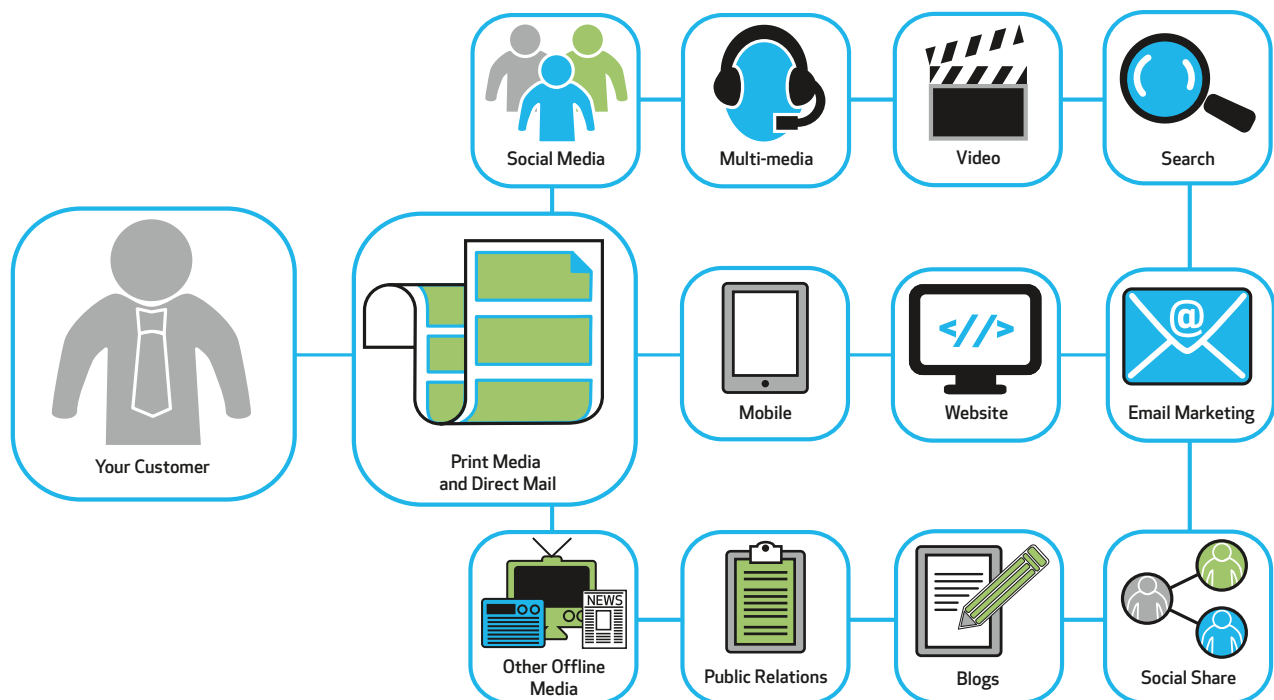
A NAPCO Research Study and White Paper
Sponsored by Canon U. S. A., Inc.

Identifying Print's Role in the New Communication Mix

Today's print buyers have many communication options beyond print to reach and engage with customers and prospects. Email, social media, video, and mobile all present marketers and brand owners with a wide variety of media channels. Despite an increase in communication options, print continues to play a fundamental role in supporting organizations in customer outreach and mission-critical business activities.

Integrated Marketing Communications

Integrated Marketing Strategy



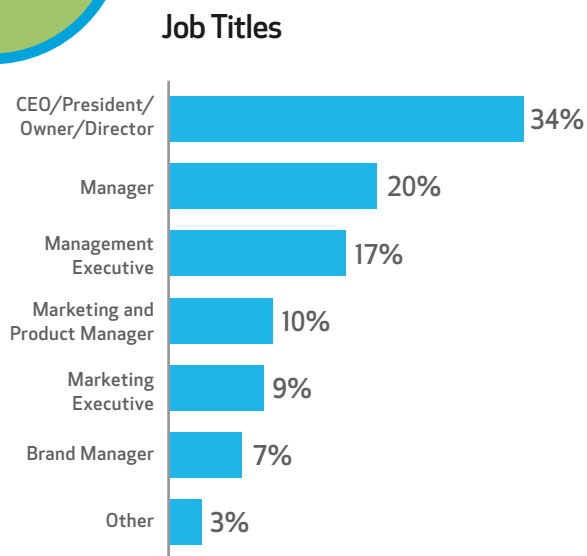
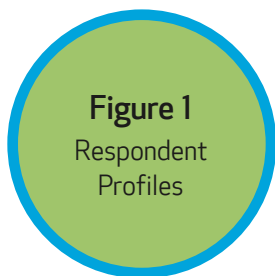
Printing processes, communication options, and print purchasing practices have all dramatically changed because of innovations in digital technologies, resulting in the emergence of a new class of print buyer. In an effort to gauge how buyers today are using print and how they define its role in their communication mix, this NAPCO Research* study and white paper series, sponsored by Canon U.S.A., Inc., surveyed over 200 print buyers and influencers.

A key focus of the research is how print buyers and influencers are using print to strengthen customer communications and combining it with other media types. Understanding how customers use print and how they view its effectiveness can help to guide print providers in their efforts to better engage customers, increase sales, and improve marketing results.

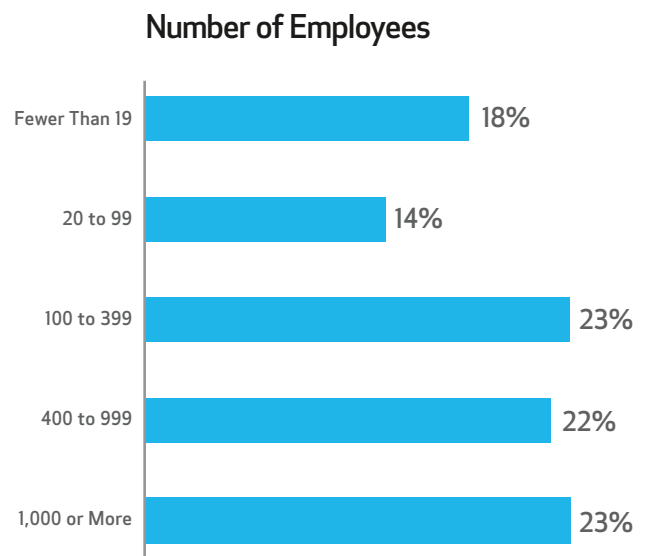
Over 200 Print Buyers and Influencers Surveyed

The research surveyed 240 print buyers and influencers in early 2020. Figures 1 and 2 describe the job titles, company size, and print experience of the participants. As shown in Figure 1, respondents represented various job titles (executives, brand owners, marketers, designers, and procurement staff), as many levels of an organization are involved in purchasing and specifying print and communication projects. This research report refers to all respondents in the survey group as “print buyers.”

More than two-thirds of respondents (69%) report having an in-house printing operation.



Q. Which of the following describes your role in the organization?
N = 240 Print Buyers and Influencers

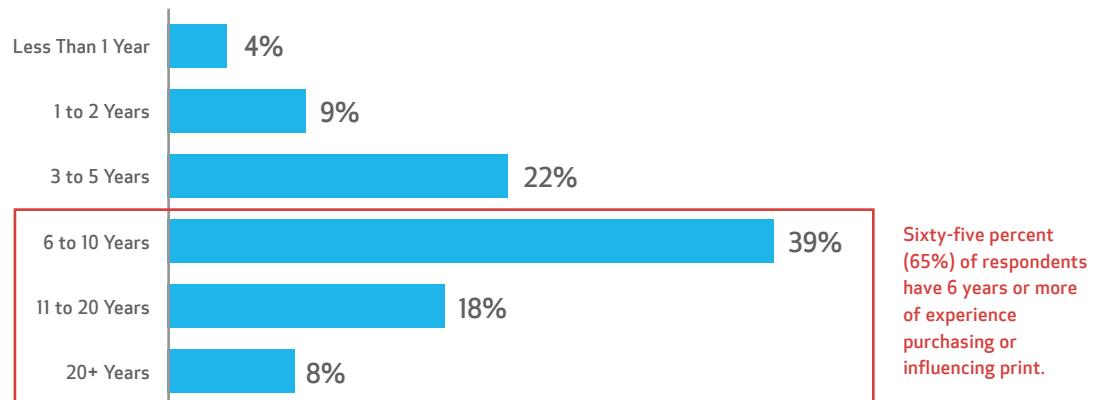


Q. In total, how many people does your organization employ?
N = 240 Print Buyers and Influencers

* A unit of NAPCO Media, the parent company of Printing Impressions and In-Plant Impressions.

To qualify to take the survey, respondents needed to either purchase or influence print buying. The majority of respondents has been involved in purchasing or influencing print for six years or more. Two-thirds of respondents (67%) report they're extremely familiar with printing processes used to produce their organizations' printing work, while 23% are moderately familiar and 10% somewhat/slightly familiar.

Figure 2
Respondents' Print Experience



Q. How long have you been involved in purchasing or influencing print?
N = 240 Print Buyers and Influencers

Source: *Print in the Eye of the Buyer*, NAPCO Research 2020

Print in the Multichannel Mix

Organizations have access to many communication formats and distribution channels to reach audiences. Despite the variety of communication options, print, one of the earliest forms of mass communication, is still a valuable tool for reaching audiences. In the early days of the digital communication formats (e.g., CD-ROMs, the Internet, personal digital assistants), many experts marked print as an endangered species likely set for extinction. While some communication products better suited for electronic content distribution did migrate to digital-only versions, many did not. As digital printing presses entered the scene and removed some of the previous barriers to organizations using print (e.g., costs, longer runs), the ability to print affordable, short-run work gave businesses and consumers with smaller communication budgets the opportunity to consider print communication. Eventually, organizations found that combining communication types and leveraging the unique strengths of each led to great results.

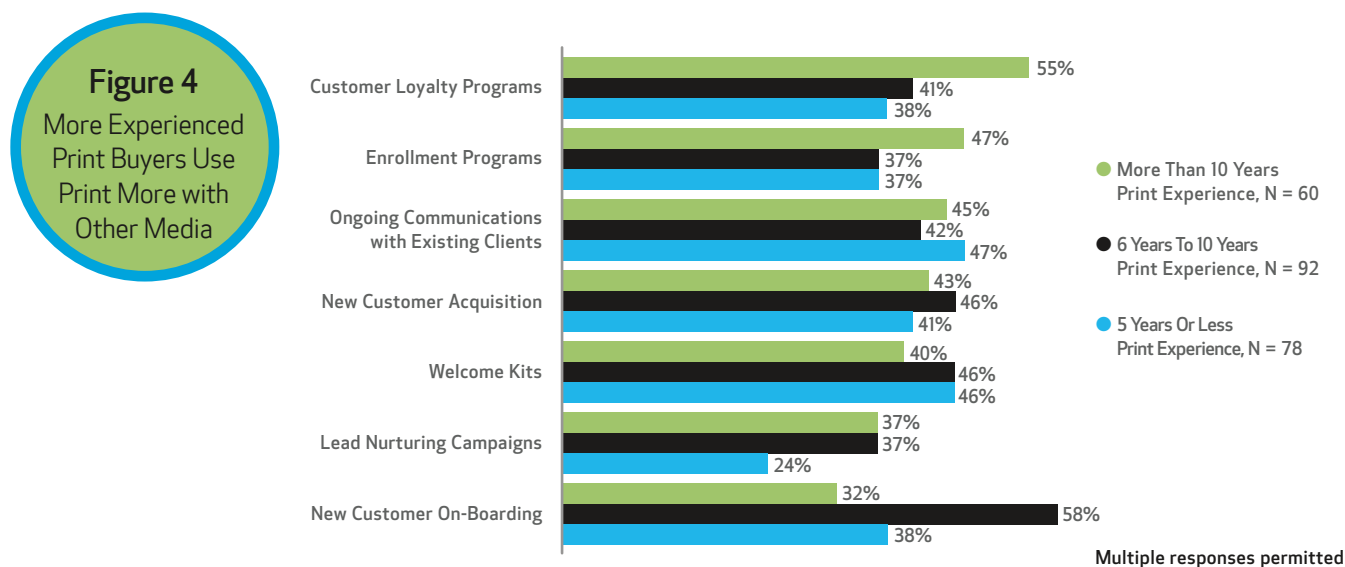
Today, marketers and brand owners communicate with customers across channels, and print is a core component of that mix. Survey respondents report print is an essential component of many types of multichannel communication campaigns, and it's most commonly used in communications with existing customers and the onboarding of new ones. Figure 3 shows the customer communication outreach/campaigns that survey respondents support with print.



Q. Which of the following customer communication outreach/campaigns do you support with multichannel communications that include print?
N = 230 Print Buyers and Influencers

Source: Print in the Eye of the Buyer, NAPCO Research 2020

The response to this question varied based on the years of experience respondents had with purchasing or influencing print. As shown in Figure 4, those with greater experience are more likely to use print in multichannel communications than those with less experience. In nearly all types of customer outreach programs offered by survey respondents, those with five or more years' experience report using print more in multichannel communication.

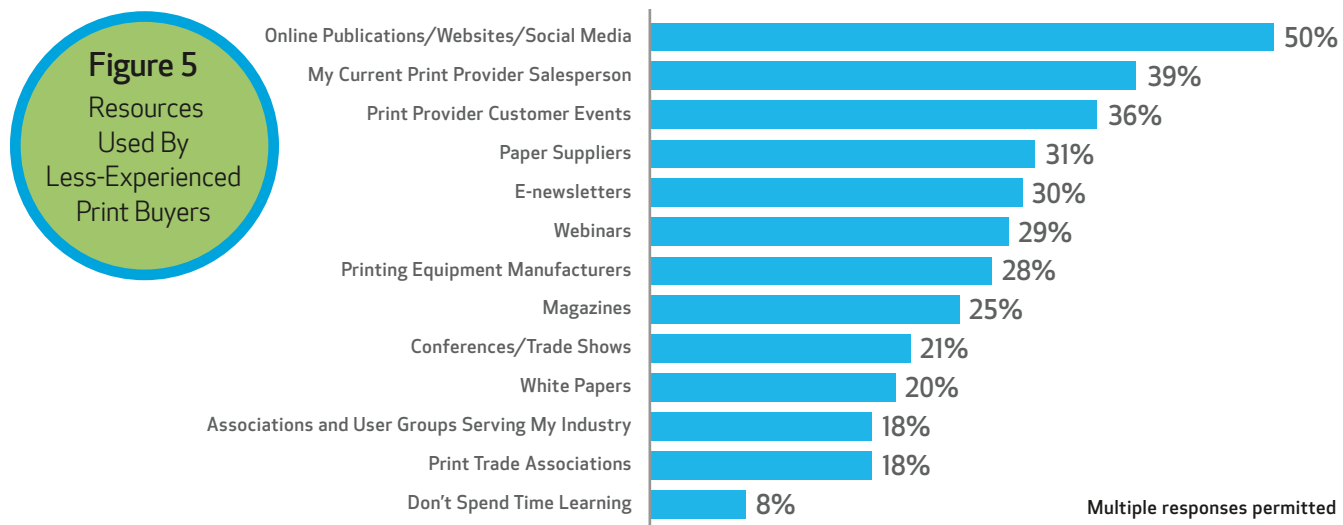


Q. Which of the following customer communication outreach/campaigns do you support with multichannel communications that include print?
N = 230 Print Buyers and Influencers

Source: Print in the Eye of the Buyer, NAPCO Research 2020

Educating Print Buyers is Key

This survey finding signals the importance of educating less-experienced communication buyers and influencers on the benefits and merits of print. A key question to answer is, what is the best way to educate these customers? According to the survey, the top resources used to learn about printing trends and technologies are online content, print salespeople, and print provider customer events (Figure 5). Each of these options is an accessible venue for educating customers. Print providers that include education content on their websites, participate in publication articles, and host customer events (either online or in person) can sway less-experienced buyers on the merits of print while potentially gaining new business.



Q. What resources do you use to learn about, and stay current on, trends and technologies?

N = 80 Print Buyers and Influencers with 5 years' or less print experience

Source: *Print in the Eye of the Buyer*, NAPCO Research 2020

Challenges in Multichannel Communication Efforts

Respondents report a number of diverse challenges in executing customer communications or marketing campaigns across multiple channels; Figure 6 highlights those challenges. Survey respondents report that the top challenge is tracking and analyzing the results of multichannel campaigns. Those print providers that can support customers by demonstrating campaign results and the value of print within the mix can help customers better understand their marketing return on investment. Offering print customers proof of campaign results and an understanding of what is—and isn't—working is an essential decision point for future investments in similar campaigns.

Another important challenge is creating and managing a campaign with the right messaging and channel combinations. Overcoming this obstacle relies heavily on the ability to track and measure campaign results—respondents' top challenge in executing multichannel campaigns.



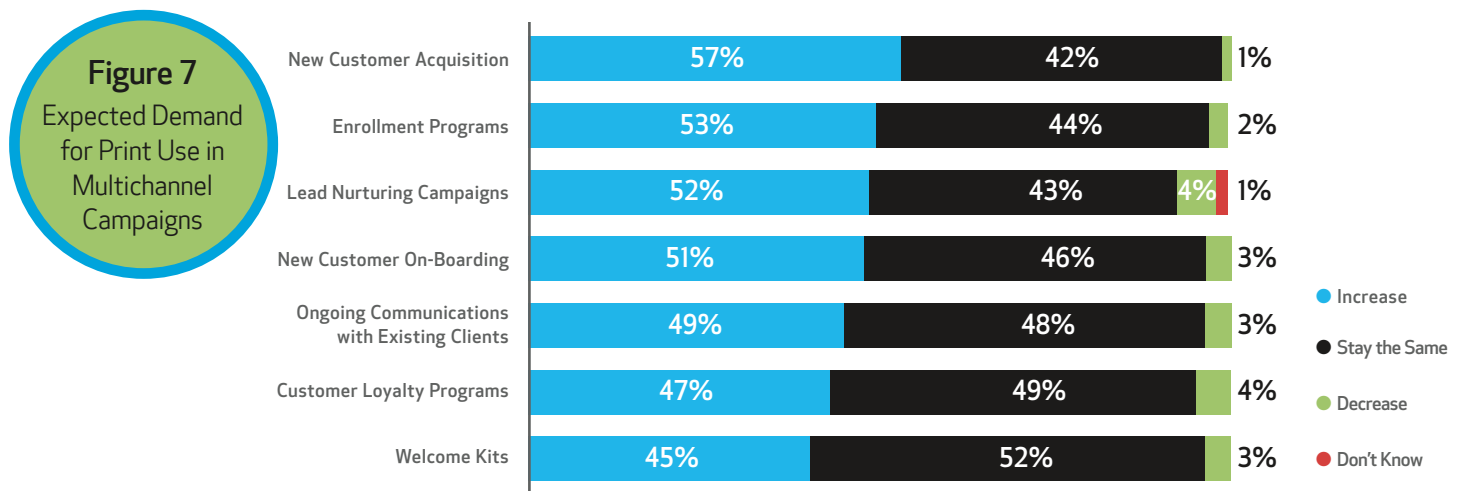
Q. What are the primary challenges that your company faces when executing customer communications or marketing campaigns across MULTIPLE CHANNELS?
N = 229 Print Buyers and Influencers

Source: *Print in the Eye of the Buyer*, NAPCO Research 2020

Print Demand is Growing or Holding Steady

Survey respondents were asked if they expect print usage in each type of multichannel campaign used by their organizations to increase, stay the same, or decrease (Figure 7). Over half of respondents say they expect the print component for new customer acquisition, enrollment programs, lead nurturing, and new-customer on-boarding to increase in the future. Overall, buyers expect their use of print in their multichannel campaigns to increase or hold steady, with only a few expecting decreases.

The key takeaway from this survey question is that print buyers value print and plan to continue its use in many types of customer engagements, provided they can find ways to overcome challenges.

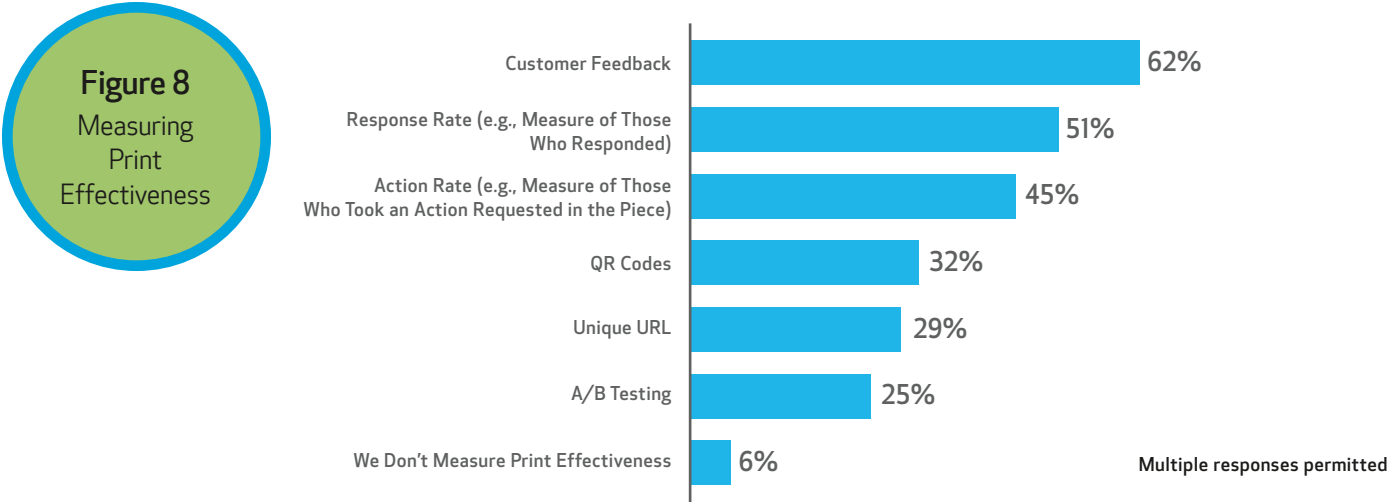


Q. Do you expect your use of PRINT in multichannel campaigns you currently execute to increase, stay the same, or decrease?
N = Varies, Base 217 Print Buyers and Influencers

Source: *Print in the Eye of the Buyer*, NAPCO Research 2020

Customers Need Support in Measuring Print's Effectiveness

Measuring print effectiveness is an essential metric for demonstrating the value of print. Survey respondents were asked how they measure/evaluate the effectiveness of print marketing communications, and the top response was customer feedback, a highly subjective metric that doesn't necessarily correlate to outcomes. Only half of survey respondents report measuring response rates, while 45% measure action rates (Figure 8). Other print measuring methods, such as bar codes and unique URLs, are also sparsely used.



Q. How do you measure/evaluate the effectiveness of your print marketing communications
N = 229 Print Buyers and Influencers

Source: *Print in the Eye of the Buyer*, NAPCO Research 2020

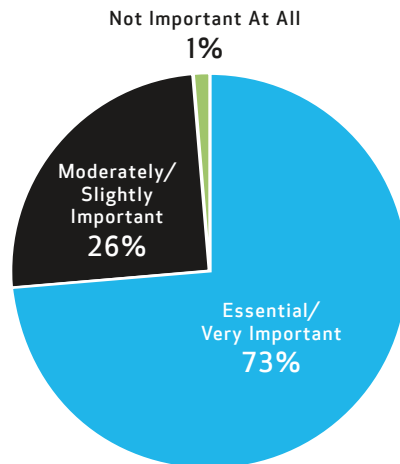
While more experienced buyers report a higher incidence of using tools to measure print's effectiveness, the top response across all experience levels was customer feedback. Given the importance of demonstrating print's success, it seems that print providers would be well-served to offer customers more options for measuring print's effectiveness as well as educating them on its value.

Elevate Print's Role with Buyer Education

There are many reasons organizations use print. Compared to digital media, print is tangible, so it stands out among the overwhelming volume of digital messages, and you can't delete it without touching it. In addition, printed direct mail offers higher levels of trust and credibility than email, as people can't get computer viruses or scammed as easily with printed mail. Print buyers value print, and close to 75% of respondents want their print sales reps to show them the best ways to use print to achieve desired results (Figure 9). This presents another opportunity to educate customers on the how they can maximize their use of print.

Figure 9

Essential to Show Best Way to Use Print



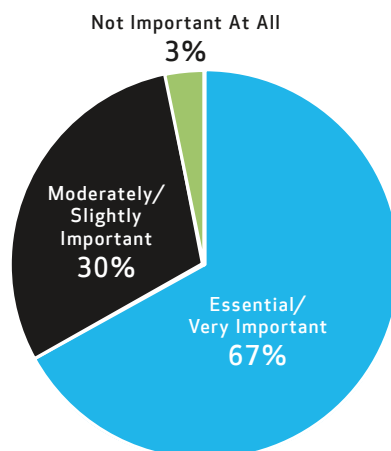
Q. How important is it for your rep to Show the Best Way to Utilize Print?
N = 230 Print Buyers and Influencers

Source: Print In The Eye Of The Buyer, NAPCO Research 2020

In addition, print buyer respondents also expect their providers to bring them new ideas. Close to two-thirds of survey respondents indicate it's essential/very important that their print sales rep brings them new ideas (Figure 10). This finding signals an opportunity to educate customers on how they can maximize their use of print and leverage new digital printing capabilities.

Figure 10

Bringing New Ideas on Using Print

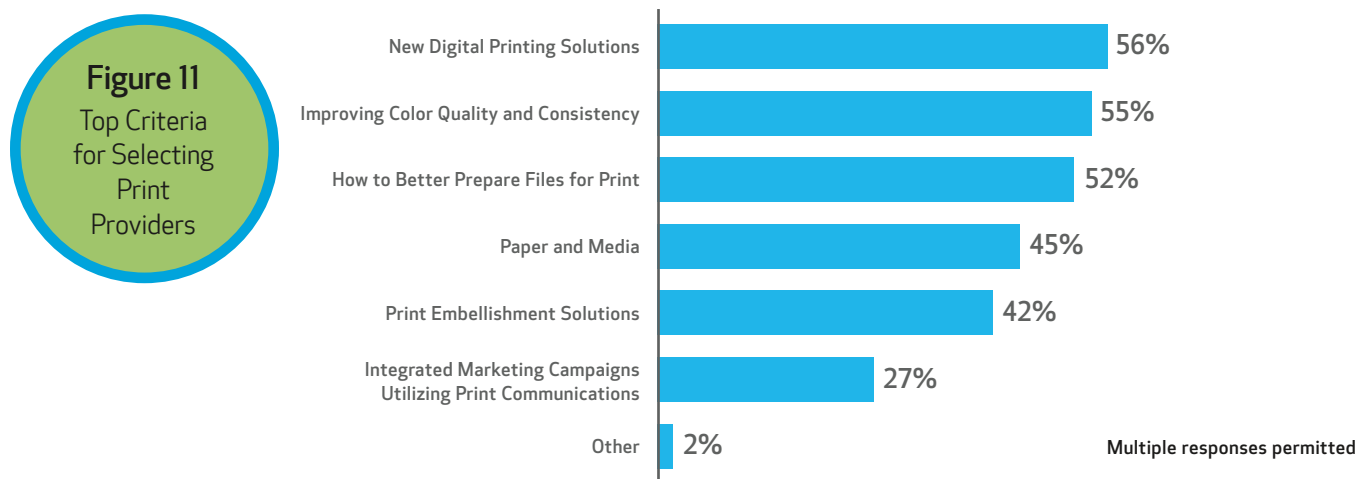


Q. How important is it for your rep to Bring New Ideas?
N = 230 Print Buyers and Influencers

Source: Print In The Eye Of The Buyer, NAPCO Research 2020

Buyers Value Print Education

Survey respondents report a willingness to learn more about print technologies, processes, and enhancement methods. Offering customers and prospects training and education on technology, process improvements, print enhancements, and multichannel communications can help build stronger customer relationships, improve production efficiency, and enhance the role of print. Over half of respondents expressed interest in learning more about new digital printing solutions, ways to improve color quality and consistency, and better methods of preparing print files (Figure 11).



Q. Which of the following would you like to know more about regarding print production?
N = 223 Print Buyers and Influencers

Source: *Print in the Eye of the Buyer*, NAPCO Research 2020

Conclusion

The expansion of communication options offers organizations more choices, but it hasn't diminished the value and use of print. Print buyers and influencers are using print in combination with other media types to leverage each communication channel's unique advantages. Maintaining the significance of print's contribution in the eye of the buyer calls for print service providers to educate customers, measure print results, and pursue strategies that can continue to cultivate value.

About Print in the Eye of the Buyer

Print in the Eye of the Buyer is a series of thought-leadership content pieces based on a NAPCO Research survey of print buyers and influencers that was sponsored by Canon.

1. Identifying and Meeting the Needs of Today's Customers
2. Identifying Print's Role in the New Communication Mix
3. Enhancing the In-Plant Customer Experience
4. Enhancing the Print Customer Experience
5. Navigating Customer Purchasing/Procurement Processes

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