

Printing Market Research Report

Regis702 Consulting Group

**Industry Research and Direct
Interview/Survey Findings**

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INTRODUCTION

According to IBISWorld, “companies in the printing industry are primarily engaged in printing on paper, textile products, metal, glass, plastic and other materials, with the exception of fabric” (“Printing in the,” 2013). Collectively, the printing industry covers a variety of different printing processes, including lithographic, screen, flexographic, digital and letterpress. While this industry comprises of most printing and graphic needs, members of this industry do not include publishers that print their own products or perform pre-press or post-press services without traditional printing. Throughout the commercial printing industry, revenue is driven by the advertisement and product needs of their business customers. Large companies continue to hold industry advantage with manipulation of sale prices, ability to serve regional and national contracts, and efficiently using expensive presses to quickly produce large orders. However, there has been a steady increase of competition through small, local-based companies, as they can offer better local service of a specific category to surrounding businesses.

According to YellowPages.com, the state of Texas currently consists of 4,691 printing companies to cater to the state’s printing needs. Of these companies, 307 are in the immediate Dallas/Fort Worth Metroplex. While most of these companies include major retailers such as Office Depot, OfficeMax, and Staples, there are a number of small, family-owned businesses that serve local companies’ printing needs. Recent data indicate that there has been an increase of these smaller printing businesses cutting employment or shutting down completely due to plummeting sales figures and profit margins. Figure 1.1 shows the printing industry as a whole has struggled over the past five years partly due to an increase of consumers favoring digital alternatives over printed materials. The pressure to be more environmentally friendly, overall decreasing sales volumes and the driving need for competitive pricing models have exacerbated the decline in profit margins. Over the next five years, the industry is projected to continue its decline, but at a slower pace, as the United States economy is slowly beginning to recover from the recent recession. During this economic rise, the country’s increased focus on online multimedia, e-books, and other commercial printing substitutes will continue to adversely affect industry activity. This volatility is clearly evident in major markets, as Office Depot, Staples, and OfficeMax have noted a steady decline in overall sales figures annually.

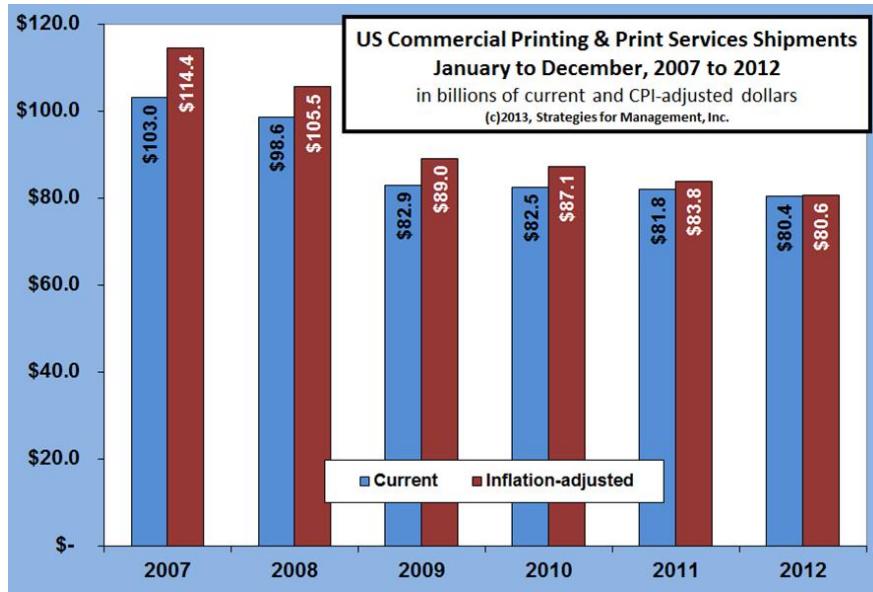


Figure 1.1. US Commercial Printing and Print Services Shipments January to December, 2007 to 2012.

To adjust for these declining sales figures, low performing stores have closed and there has been an increase of price promotion. Forbes mentions that “market and brand realities are that you can’t build your market on constant low-lower-lowest pricing strategies and coupons (traditional or electronic), and expect your offering to be seen as different of better or more highly-engaging than the competition—who is doing precisely the same thing” (Passikoff, 2013). The article continues, “if all a company stands for is cheap ‘copy paper’ or ‘paperclips’ you’re pretty much a placeholder—a name everyone knows but doesn’t know for anything in particular” (Passikoff, 2013). In the case of major competitors such as Office Max, Office Depot, and Staples, this translates into an occupation of shelf space, but absolutely no brand advantage in the marketplace. “It’s the contract side where the upside is,” says Gary Balter, a business analyst told Bloomberg (Lutz, 2013). “That’s where the real profits are in this business. That business is more protected, while retail is under pressure from Amazon, discounters, and over-storing” (Lutz, 2013).

THE MARKET

Most North American office supply and retail outlets now have copy centers to provide its customers with design and printing services. Currently estimated at a \$300 billion market, annual American sales have shown a decline of 5.2 percent from 2008 to 2013 due to the slowing economy and increase in home printing projects. Of the 23,938 printing companies included in this market, Staples and Office Max possess 11% of the American market and 10% of the world’s office and printing supply needs, while “small local and regional companies continue to account for the majority (75%) of total market revenue” (Woodhull, 2013).

Of the estimated 430,000 employees in the printing industry, “the number of employees per establishment tends to be highest in book printing and manifold business form printing”

("Printing in the," 2013). The major employing states of these segments are Pennsylvania, New York, and Texas. However, the largest share of these industry establishments continues to reside in the Southeast and Great Lakes region—representing 22.4 percent and 17.6 percent of industry establishments. This is due to the larger population of customers in these regions.

COMPETITORS

Staples. As the largest office product company and second largest internet retailer of the world, Staples serves the needs of business customers. Because of their dominating status in the United States, Staples currently holds a 35 percent market share of the office supply business.

Headquartered outside Boston for 26 years, Staples offers over 10,000 various types of office supplies, furniture, copy services, and printing needs through world-class retail, online, and delivery capabilities. With locations in the United States, Canada, South America, Europe, Asia, Australia, and New Zealand, Staples continues to strive to provide a simple way for businesses to satisfy their office supply and printing needs with its company motto of "That was Easy" ("Staples: About us," 2013). To cater to a more eco-conscious economy, Staples now offers an assortment of environmentally-friendly, Sustainable Earth brand products. Due to the rise in online competition and the weak consumer spending of the print industry, Staples is consistently losing annual revenue. In the second quarter of 2013 alone, "sales declined 2.2% (\$5.31 billion) annually due to reduced traffic paired with weakness in the international market" (Moskowitz, 2013). This downward trend has caused the company to close 54 stores across North America. However, since addition of Staples.com, the company's online store has increased sales by 3.5% annually for individual orders and 1.3% for corporate needs. Because of this, the company plans to increase its online presence to reach a goal of \$900 million in 2013 free cash flow.

Staples currently operates within three business segments: the North American Stores and Online, North American Commercial, and International Operations. North American Stores and Online consists of staff and online support to assist customers throughout their in-store and online purchases. Additionally, the North American Commercial segment adds to this through online and in-store orders that are delivered directly to the businesses throughout United States and Canada. Finally, International Operations "consists of businesses in 23 countries throughout Europe, Australia, South America, and Asia" ("Staples, inc.," 2013). According to Business Insider, "Staples focuses on government and business contracts, which makes up for \$10.1 billion of its annual sales, compared with an annual total of \$9.6 billion in stores" (Lutz, 2013).

Office Depot. As a global supplier of office products and printing services, Office Depot is one of the largest office and print supply companies in the United States. As the second largest office supply and printing company in the United States, Office Depot holds 26.1 percent of the American office supply and printing market. "In 2009 alone, the company accumulated over \$12.1 billion in office supplies" (Woodhull, 2013). However, due to rough economic conditions, this was a decline of 16% (\$599 million), which was minimal when compared to 2008's overall loss of \$1.48 billion in sales. Even today, annual sales continue to drop—with a drop to \$10.7

billion in annual sales. To combat this loss of sales throughout the years, Office Depot has worked to increase its profitability by offering copy and print services to their customers. Since implementation and integration of copy centers into storefronts, profits from these services are reaching margins twice as high as any other services offered by the company. Additionally, large commercial clients are further catered to with Office Depot's growing network of twelve regional centers to assist with larger orders.

Office Depot is currently divided into three corporate segments: the North American Retail, North American Business Solutions, and International divisions. The North American Retail Division "sells a broad assortment of merchandise through their chain of 1,000 office supply stores in the United States and Canada" ("Company facts at," 2013). Their current offerings include office and computer supplies, business machines, office furniture, printing, reproduction, mailing, shipping, and other printing-based services. The North American Business Solutions Division fulfills all orders regarding nationally branded and privately-branded office supplies, technology products and printing needs through catalog and online-based purchasing options ("Company facts at," 2013). This division also includes a sales force that services medium-sized to large companies throughout the United States. Through established partnerships, these businesses can enjoy lower prices, catered attention, and dedicated service. Finally, the International division currently sells to customers in 60 countries throughout North America, Europe, Asia, and Latin America ("Company facts at," 2013). These sales are facilitated through direct mail catalogs, internet sales, contract sales forces, and a mix of 400 foreign company-owned and franchised retail stores.

Vistaprint. Since its creation in 1994, Vistaprint strives to empower millions of small business owners with affordable marketing products. Developed at the INSEAD business school in France, Vistaprint now has "over 25 localized websites that serve various markets throughout the world with over 4,100 employees, three state-of-the-art manufacturing facilities, and 13 offices, including its headquarters in Venlo, the Netherlands" ("Vistaprint company story," 2013). When compared to other large printing companies throughout the United States and the world, Vistaprint remains focused on the 50 million small businesses throughout the world to ensure they can stand out with a professional marketing product without spending too much money. By 2007, "the company was listed in the annual Graphic Arts Monthly 101 listening and the 40th largest (by revenue) and the 4th fastest growing printing company in North America" (Hamilton, 2007). In FY12, sales revenue continued to grow, with annual sales exceeding \$1.02 million—a 25 percent increase over 2011 annual revenue. As of October 16th, 2013, this attributed to 3% of total market share throughout North America.

However, recent news highlights Vistaprint's increasing number of customer complaints. Using sites such as consumeraffairs.com, many current and previous customers state that the company often makes purchases without user permission, adds products to their order, and will delete phone records and e-mail correspondence to erase any trace of wrongdoing. Additionally, Vistaprint has faced many class action lawsuits for reasons including deceptive business

practices and excessive shipping fees to residents of California. Additionally, Vistaprint's member reward program has endured countless lawsuits due to the company enrolling customers without their consent.

FedEx/Kinkos. After purchasing Kinkos in 2003, FedEx provides customers and businesses worldwide with a broad portfolio of transportation, e-commerce and business services. They offer integrated business applications through operating companies competing collectively and managed collaboratively, under the respected FedEx brand. Consistently ranked among the world's most admired and trusted employers, FedEx inspires its more than 290,000 employees to remain absolutely, positively focused on safety, the highest ethical and professional standards and the needs of their customers and communities.

FedEx Kinkos has connected over 1,900 locations, 20,000 professionals and technology resources into a single, seamless network. Through their expertise in documents, and ability to share information across their locations, the company strives to help customers be more efficient and productive. FedEx Kinko's offers a complete line of business services relating to copying and digital printing. Additional options include binding and fulfillment services that make it easy for businesses to create, produce and distribute presentations, brochures, manuals and a multitude of other printed products.

Kinko's corporate headquarters was based in Ventura, California for many years, but in 2002, the company relocated to Galleria Tower in Dallas, Texas. In February 2004 Kinko's was bought by FedEx for \$2.4 billion and then became known as FedEx Kinko's Office and Print Centers. Prior to the acquisition by FedEx, most Kinko's stores were open 24 hours a day. After the acquisition, FedEx reduced the hours for many locations. On June 2, 2008, FedEx announced that they were rebranding FedEx Kinko's as FedEx Office, the retail branch of the FedEx Corporation. As of spring 2010, some stores and branding still showed FedEx Kinko's signage. To ease customer confusion during the transition period, many stores began to display a large purple sign in the window that said "Kinko's Inside."

The company's primary clientele consists of small business and home office clients. According to the company, there are nearly 2,000 operating facilities. With over \$2 billion in revenues, the company is the 7th largest printing company in North America. The company's primary competitors in the crowded North American market include The UPS Store, Office Depot, OfficeMax, Alpha Graphics, Staples, and Vistaprint ("Fedex office," 2013).

Office Max. Office Max touts itself as a leader in both business-to-business and retail office product distribution. As the third largest office supply and printing business in the United States, OfficeMax currently holds 15.6 percent of total market share. According to OfficeMax, the company is made up of two business segments: Workplace and Retail. OfficeMax Workplace, the company's largest segment, works to distribute an extensive line of items for the office,

including paper, technology, and furniture to large corporate and government offices as well as small and medium-sized offices in the United States, Canada, Australia, and New Zealand. To market their services, OfficeMax Workplace currently sells through field sales personnel, 47 outbound call centers, and 60 stores in Canada, Hawaii, Australia, and New Zealand. According to their website, OfficeMax Workplace sales “for 2008, 2007, and 2006 were \$4.3 billion, \$4.8 billion, and \$4.7 billion, respectively” (“Officemax company facts,” 2013). The second segment, OfficeMax Retail works to distribute their office supplies, print, and paper services in a retail setting throughout 1,000 stores in the United States, Puerto Rico, and the U.S. Virgin Islands. This retail segment also has offices throughout Mexico through a 51 percent owned joint venture. “OfficeMax Retail sales for 2008, 2007, and 2006 were \$4.0 billion, \$4.3 billion, and \$4.3 billion, respectively” (“Officemax company facts,” 2013). As noted in the annual decline in sales, the company has begun seeing increased competition due to a low economy and increase in internet-based activity.

According to a February Forbes article, there have been negotiations for Office Depot to purchase OfficeMax for \$976 million, therefore combining the second and third largest office supply and printing retailers in the industry (Passikoff, 2013). If this merge occurs, the companies combined would amount to \$18 billion in overall sales—still \$6 billion under overall sales of Staples. Additionally, this merge will result in a combined closure of over 600 stores throughout the United States. However, until this transaction closes, Office Max and Office Depot have both stated that they will continue to compete as two separate companies.

COMPANY

Started as Sir Speedy in 1982 by Keith and Marnie Scarborough, Masterpiece Printing and Graphics, Inc. is a small, family-owned printing business based out of Dallas, Texas. In addition to printing services, Masterpiece has expanded over the years to meet any customer’s catalog, stationary, binding, digital, and advertisement needs by the addition of various machines and business partnerships. Although Masterpiece is proud of their wide array of printing products, services, and technology, nothing matches the company’s pride in their staff. Instead of focusing on the orders themselves, the company maintains the mindset that a successful business cannot be made without maintaining solid business relationships with customers. For that reason, the company puts an emphasis on hiring only the most qualified individuals to serve on their team to ensure every one of their 5-10 staff members are committed to providing excellent service and producing high-quality products and services to both their statewide and nationwide customer base.

SALES

Over the past five years, Masterpiece has seen an annual reduction in sales of 40-50 percent partially due to a decrease of return customers and overall orders. Masterpiece annual sales reached \$1.1 million in 2012. In 2013, year-to-date annual sales have dropped significantly, with

overall sales totaling only \$600,000 as of November 1st. This is a 55 percent decrease compared to 2012 sales.

PROFIT MARGINS

In 2012, Masterpiece Printing and Graphics Inc. recorded net profit margins of 4.8 percent. The company exercised cost controls and took expense management measures, including a reduction of workforce, which has helped increase FY13 net profit margins to 6.5%--comparable to the industry net profit average of 6.74%.

KEY PUBLICS

Corporate (Business) Printing. Services used by the Corporate (Business) public include commercial lithographic printing, gravure printing, flexographic printing, screen printing, digital printing, business forms, books, loose-leaf binders, and devices manufacturing. According to the Printing Industries of America, In 2010, the “total employment in this sector of over 29,000 enterprises was over 495,000 people with total shipments of products to these customers generating over \$82.4 million” (“Industry statistics,” 2013). In a March 13, 2013 article, NAPL estimated that total commercial printing industry sales for all sources, not just ink and paper, rose 0.6% in 2012 to \$78.0 billion—the first increase since 2007 (as seen in Figure 1.2 below). However, despite the increase, these overall sales remain more than 20 percent below their level prior to the recent economic decline. Since then, sales have fallen more than 22 percent since peaking at \$101.1 billion in 2000. In 2013, NAPL projects sales to rise by 1.5 - 2.5 percent, at best--still leaving total sales significantly below their pre-recession levels.

Commercial Printing Industry History and Outlook				
Period	Sales		% Change Since ...	
	% Change (over previous yr.)	Volume (billions)	2007 (pre-recession)	2000 (mid-time peak)
2013	1.5% - 2.5%	\$79.2 - \$80.0	-19.1%	-20.8%
2012	0.6%	\$78.0	-20.6%	-22.7%
2011	-0.3%	\$77.6	-21.1%	-23.2%
2010	-1.7%	\$77.8	-20.9%	-23.0%
2009	-15.0%	\$79.2	-19.5%	-21.6%
2008	-5.3%	\$83.1	-5.3%	-7.8%
2007	2.5%	\$98.3	-----	-2.6%

Figure 1.2. Commercial Printing Industry History and Outlook

Of course, overall industry sales data does not tell the whole story. Many companies are growing significantly above the average, and others faring worse. More than half (55.1%) of the companies grew in 2012, according to a NAPL survey, with over one-third (34.2%) growing by 5 percent or more. Additionally, almost one in five (17.7%) of all businesses recorded sales

increases of 10.0% or more. Therefore, there are companies that are succeeding in this declining market. In fact, "more than one in four (27.4%) of NAPL's survey participants have surpassed their pre-recession sales levels" (Paparozzi & Vincenzino, 2013). The competitive landscape of commercial printers in attracting commercial customers begins with knowing that the current demand is driven by company and customer advertising and product needs. According to Hoover, "the profitability of these individual printing companies is closely linked to effective sales operations" ("Commercial printing industry," 2013).

According to Terry Richards, president of Victor Printing, Sharon, PA, the newest trends in commercial printing products are how they're ordered, how they're proofed and the variable data they contain. "We're seeing a lot more online ordering with the use of templates, as well as online proofing, which offers speed and ease to end-users," said Richards (Cole, 2004). "We're also seeing an increase in variable data printing, which is a marketing trend that brings end-users closer to customers" (Cole, 2004). Richards added that online ordering and proofing quickens the sales cycle and eliminates composition issues. "It lets end-users set their own variable areas without involving outside people who could easily make an error," he explained (Cole, 2004). Currently, Victor Printing works with banks that enter specific teller numbers for certain products via online ordering. "We also have a half-dozen companies promoting various specials that require different types of postcards, which they order via custom Web sites," added Richards (Cole, 2004).

As a result of this new technology, Dan Pocrnick, national/regional account representative at Denver-based Adams McClure, an Ennis subsidiary, said that he is seeing an increase in shorter run lengths and quicker deadlines. "On-demand printing or just-in-time printing is gaining momentum, and commercial printers are positioning themselves to compete against full-size and digital equipment," said Pocrnick (Cole, 2004). "The reason for this is that dollars can be reinvested into other areas instead of inventory. Also, these new techniques allow for customized products, which results in more effective marketing that can change directions quickly. Target-based marketing as a whole has grown in popularity due to better results and revenue" (Cole, 2004). Additionally, "digital technology is changing everything," he said. "Right now, we are using a combination of traditional and digital machines that distributors use to version or personalize end-users' pieces" (Cole, 2004). Unfortunately, it seems that many distributors have been avoiding a venture into the seemingly complex world of variable data since it involves a large learning curve. "Sales aren't exactly pouring in for this type of work because distributors aren't up to speed," said Richards (Cole, 2004).

Entertainment Industry. Printing for the Entertainment market segment will include a commitment to security, image, quality and service. Security would include the need to make items counterfeit-proof (such as tickets, back stage passes, etc.). Image would include the selection and display of the right image for the right job, and the proper display of the image for use in a variety of applications. Poor placement of an image could result in embarrassing

displays, and therefore cause the printing company and client to lose credibility and popularity. Additionally, the quality of the project is important to ensure that there are premium materials used, new technology such as 3-D graphics implemented, and zero defects. Service to this segment is an absolute imperative as the majority of projects are on strict guidelines and require several sign-offs before the projects can move forward.

No analysis of a business is worth its weight in print without recognition of the tremendously diverse range of activities that comprise “printing.” The result is that while, for example, newspaper printing may be losing revenue drastically, direct mail advertising continues to grow. In previously mentioned printing industry data, direct mail printing falls under the category of “general commercial printing,” which is by far the largest printing segment in total sales. The entertainment industry uses a variety of printing products from tickets to large banners and hotel sized vinyl. Discerning where a small printing company fits in the mix is totally dependent on the capacity available for that particular enterprise.

Meeting/Event Industry. Because of the recent recession, many companies throughout the United States were forced to react by cutting the amount of business meetings and travel to make up for the reduced revenue. In 2009 alone, this number dropped nine percent when compared to 2008 meeting and event numbers. However, due to the rising economy, the event industry is seeing improvement—slowly arriving to pre-recession levels. This is mostly due to a new business trend to decrease the occurrences of large events while increasing the amount of smaller, more localized meetings throughout businesses. As seen in Figure 1.3 below, 50 percent of total 2012 meetings contained 0-50 participants.

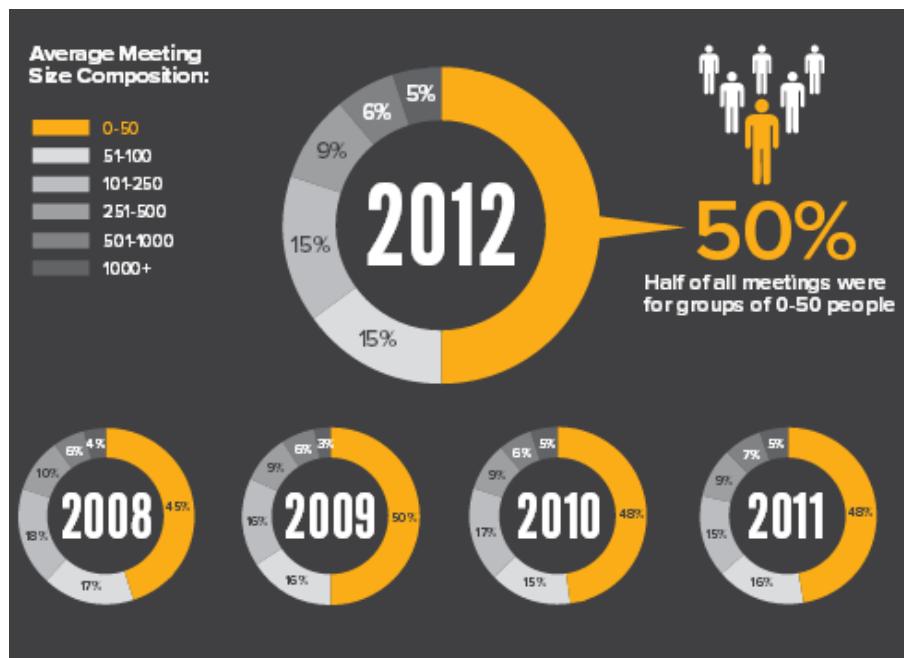


Figure 1.3. Event and Meeting Size by Population from 2008 to 2012.

The main reason for this is that adoption of localized events save the companies more money by negating any additional expenditure due to travel, hotel, and meal costs. Additionally, companies are beginning to shorten the length of events to save money and shorten employee time away from office. As of 2012, same day and one-day events are now representing more than 35 percent of yearly numbers. This is an increase of 14 percent from 2008, clearly showing company migration. Additionally, two and three day events have fallen by 6 percent from 2008, therefore allowing companies to spend more money on meeting collateral and other miscellaneous expenses. The majority of this trend is visible in the cities of Los Angeles, Las Vegas, Chicago, Orlando, and New York City—as there has been a significant drop in businesses reserving rooms, conference areas, and rental cars. Because of these trends and overall focus on price, it is imperative that local printing companies understand these business's needs by offering a quality product for an affordable price. Otherwise, these businesses will look elsewhere to fulfill their bulletin, banner, and various other event printing needs.

Publishing Industry. According to CreativeSkillSet.org, the publishing industry is made up of “a diverse group of industries including: Books, Directories and Mailing Lists, Journals, Magazines and Business Media, Newspapers, News Agencies and other Information Services” (“About the publishing,” 2013). The Publishing Industry is comprised of two subcategories, traditional print media and printing. Traditional print media, which is also known as publishing, mainly focuses on products for the consumer directly. These products include books, magazines, and newspapers that target a wide variety of genres and demographics. The second subcategory, printing, concentrates on solely the physical production of media. Printers serve publishing companies in fulfilling their orders, as well as assist firms involved in billboard advertising, promotional activity, financial statements, check printing and other miscellaneous media. In addition to strictly publishing companies, this industry has expanded to also include journalists, editors, designers, and advertising executives. Currently, there are 62,815 active publishers throughout the United States, and 46,800 of these saw overall revenues below \$50,000 each year. This is largely due to the increased popularity of eBooks and eReaders. Additionally, as seen in Figure 1.4 below, the majority of small publishing businesses continue to remain at an independent status with the majority of book types focusing on adult trade, professional, and scholarly products.

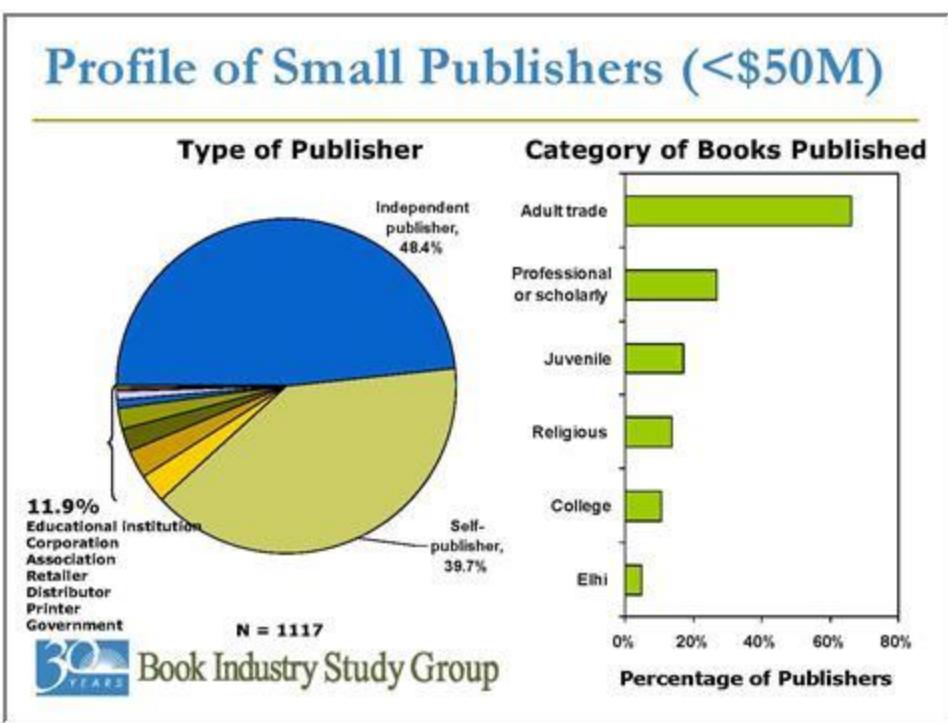


Figure 1.4. Profile of Small Publishers.

Combined, the United States book publishing industry reaches revenue of \$25 billion. The largest of these publishers remain at McGraw-Hill, Pearson PLC, John Wiley and Sons, and Scholastic. These, in addition to the remainder of the top 50 publishing companies, currently hold 80 percent of the total publishing market. However, the recent addition of eBooks to the publishing market has started to cause this number to decrease at a steady pace, as readers are beginning to prefer digital versions of their favorite books. This is mostly due to the fact that eBook versions of books and magazines are much cheaper than their hard copy counterparts. Plus, the recent shift of focus to the reduction of paper products has caused potential customers to purchase an online version of a book as an attempt to benefit their overall impact to the environment.

STATEMENT OF MISSION

The mission of Masterpiece is to perpetuate the highest standards in business ethics and corporate responsibility while striving to increase the confidence of our customers through innovative printing ideas and solutions.

STATEMENT OF VISION

Masterpiece's vision is to become the premier printing company of the Dallas/Fort Worth area by providing outstanding customer service and a wide variety of printing products for both individual and business needs. Our motto is working to save the environment while growing your bottom line.

SWOT ANALYSIS

Strengths <ul style="list-style-type: none">• Been in business over 30 years.• Large variety of printing capabilities.• Family-owned business.• Proven product quality• Customer satisfaction guarantee	Weaknesses <ul style="list-style-type: none">• Inability to prevent decrease in sales• Limited current marketing efforts.• No current system for monitoring sales metrics.• No current system for monitoring marketing efforts.• Small company size
Opportunities <ul style="list-style-type: none">• Expanded product line• Increase ability to attract online customers• Increase social media presence• Increase marketing efforts	Threats <ul style="list-style-type: none">• Competition from large printing companies.• Competition from online companies.• Increase in home printing capabilities.• Shrinking current customer base.

SITUATION ANALYSIS

Masterpiece Printing and Graphics is a small, family-owned business in Dallas, TX with a company culture of team member loyalty and 100% customer satisfaction. For over thirty years the company has continued to provide its customers with quality printing at affordable prices. Their current products range from simple flyers to digital printing and graphic design. The business has expanded its equipment as much as their current budget will allow and has stayed competitive by utilizing the technological advances within the industry. Their goal is to continue providing quality service to their existing customers, recapturing the business of customers who have stepped away, and to gain new market share by engaging new publics.

The company has several distributors, suppliers and key alliances on which they can capitalize. The longevity of their business is an advantage that can be used in negotiations for new plant and equipment needs, vendor contract adjustments, and the procurement of new revenue streams. Strategic partnerships can be forged to assist in the expansion of products and services. New market channels will be explored with the help of their distributors, suppliers and alliance partners.

The printing industry market has seen some swings since the introduction of web-based competitors and the market share for smaller independent printers has been somewhat strained. However, there has been growth in some segments and the opportunity for attracting new business is still readily available for those printers who take an aggressive sales approach. The buyers in the publishing, entertainment, event, and corporate industries are becoming much more

cost-conscious and loyalty is at a premium. Therefore, Masterpiece has to perform better by relying on differentiation, prioritizing revenue over reducing cost, and changing current operations to reflect current trends and shifts in the marketplace. Additionally, the President over the company has to be actively engaged in the transformational change process from sales to innovation.

The competition in the printing industry is varied and fierce. The large office supply retailers are aggressively pursuing corporate business and marketing through a variety of channels, including utilizing guerilla marketing tactics. There are niche competitors that are nimble enough to capture market share even though they may not be the first movers in any particular segment. The market positioning of the company needs to be such that it is able to be a "disruptive innovator" within the printing environment by creating new markets and reshaping existing ones. To achieve growth in a fast moving world the company must become a disrupter instead of being disrupted.

The overall macro-environmental factors affecting Masterpiece are mainly economic and technological. Economically, the industry as a whole is making a slow turn toward the positive after the recession. However, macroeconomic issues are still affecting the business cycle in that consumer confidence is still not strong enough to prevent them from making their decisions based solely on price. Technologically, the company is facing increasingly stiff competition from web based printing services that can satisfy a large portion of customer's needs and there is an imperative to update equipment to meet the quality standards that new technology is bringing to market. The political and regulatory environment, and the social/cultural environment is having an impact on the bottom line due to the implementation of the Affordable Health Care Act and the proposed tax on products and services sold over the internet.

PROBLEM STATEMENT

The 40-50% decrease in printing sales over the last five years can be attributed to a limited marketing effort in a highly competitive industry with an increasing emphasis on technological advances in equipment and the widespread use of products and services provided on the internet.

GOAL STATEMENT

Masterpiece will increase overall sales with an aggressive marketing campaign designed to capture former customers and penetrate new target market segments through utilization of both in-person and online channels.

OBJECTIVES

- Masterpiece will increase overall annual sales by 30% by the end of FY14. By the end of FY15, these numbers will be expected to increase to a total of 50% more than current numbers to regain previous position within the immediate market.
- Annual publisher sales will increase by 10% by the end of FY14 through developing target specific messaging to promote reliability, accuracy, and timely delivery of products.
- Corporate sales will increase by 20% by the end of FY14 through promotion of the company's competitive value, customization, and promptness.
- Initiate website and social media presence through Facebook, LinkedIn, Twitter, Instagram, and Pinterest by March 31, 2014 to increase awareness and expand publics to include online customers.
- Increase website popularity, relevance, and authority through first page listing on major search engines by the end of FY14.
- Increase market segments by developing first entertainment and event purchase by March 31, 2014.
- Initiate a customer relation management system to increase customer retention rate to 80% by the end of FY14.

SUMMARY OF KEY ELEMENTS OF RESEARCH PLAN FOR INTERVIEWS

Objective. To learn what factors determine customers' choice of printers, what makes them repeat customers, what is needed from the printer to get their job done, and what services are used most frequently.

Participants. Participants of the depth interview consisted of company decision-makers throughout large and small target market businesses throughout the Dallas/Fort Worth area. Target markets contacted included printers, event management, small businesses, large businesses, and universities. However, because of locations of some businesses' corporate offices, two of the seven participants were located in other states (Nevada and California).

Settings. The interviews were conducted over the phone on a one-on-one basis during normal business hours.

Procedures. Entering the phone conversation, the moderator explained that she was a graduate student that is obtaining primary research for a current class. The receptionist was then asked to transfer the moderator to the person in charge of all printing orders for the corporation. During the interview, the moderator used pre-determined, structured questions to guide each interview to further explore the underlying factors that affect each decision-maker's buying tendencies. Additionally, extra pause time was intentionally placed at the end of each answer to allow participants to expound on comments and answers for additional information. At the end of each

phone conversation, all participants were guaranteed anonymity, as many contributors stated that the answers provided were deemed proprietary information and could not be associated with the company in question for privacy purposes.

Questions. Each of the questions below was asked to company decision-makers to ensure direct comparability of data.

1. Please give me a brief description of your company's industry?
2. What is your job title?
3. What factors determine your organization's choice of printing companies? In your opinion, what is the most important factor?
4. Which printing companies have you used in the past? What was your experience with each of these?
5. Does your organization purchase their products online, in-store, or over the phone? What are the reasons for this option?
6. What products is your company most likely to purchase?
7. What is your average spend on a printing order? At what time of the year does your company spend the most on printing services?
8. What determines whether or not your company will purchase future services with a printing organization?
9. What services do printing companies need to provide to get the job done?
10. What challenges have you faced in dealing with previous printing companies? Were those challenges resolved? If so, how?

Means of Recording Answers. Phone interviews were conducted over speaker phone, with a tape recorder available to provide an accurate record of all answers to questions. After the interview was completed, moderator replayed tape and transcribed all answers into a computer dialogue for easy review.

Avoiding Moderator Bias. To avoid moderator bias, questions were asked in a general, direct format that was easy to understand by each participant. Additionally, during the interview, the moderator did not make comments, agree, disagree, or offer opinions to any participant's answer. Instead, moderator relied solely on questions to obtain information from the participant.

Analytical Methods. After completion of each interview, the moderator wrote out a script of every conversation in a Microsoft Word document for analytical reasons. To help with any recurring trends, researcher also made note of any recurring answers and comments from participants in order to formulate accurate data for the client.

SUMMARY OF INTERVIEW FINDINGS

Of the 40 companies contacted for the study, only 7 opted to discuss their company's printing preferences. The reasoning for this is that many did not feel comfortable providing the

information, as company policy did not allow the information to be discussed. Other companies were unable to participate, due to the decision-maker being out of the office on vacation or ill. It was also noted that there were quite a few companies that stated all printing was done in-house and no companies were used. For companies that opted to participate, each decision-maker was asked all interview questions to ensure answers could be directly comparable during analysis. While some decision-makers could not answer all questions due to company policy or lack of knowledge, most questions were answered in a thoughtful, complete fashion.

Participants in the direct questionnaire were first asked to give a brief description of their company's industry to see if any additional target markets should be explored or existing markets should be eliminated from the client's efforts. Because of the large amount of businesses in the surrounding area, the moderator chose industries such as printing companies, churches, museums, universities, wedding planners, event coordinators, consulting firms, and independent sales directors. While many of these individuals chose not to provide the information or did not use an outside printer, data was collected from businesses in direct sales cosmetics, education, event production, retail, business consulting, boutique hotel, and a non-profit museum. Additional responses were made from publishers and churches, but each explained that all printing for their business was done in-house or through a third party company.

The second question discussed the job title of the company decision-maker to assist the client in finding the correct point of contact for future business outreach. Throughout all industries, answers indicated that print decision-makers were middle to upper-management level employees. For the independent direct sale cosmetic, event coordinator, and consulting firm businesses, these contacts were the owner/president of the company. For the education, retail, hotel, and museum companies, these decision-makers were varied at middle-level management positions such as Marketing Manager, Manager, Sales Coordinator, and Operations Director.

After determining which industries were included in the data as well as the job title of the industry's printing decision-maker, questions became much more targeted to ensure the overall interview objective was met. The first of these questions asked company decision-makers to discuss the factors that determined their company's choice of printing companies and which were, in their opinion, the most important factor. Five of the seven companies interview stated that quality is an important factor in deciding which company to provide their printing products. As the Operations Director of the museum stated, "You want to make sure that the company you are using knows their stuff. It goes without saying that if you get a crap product, you won't go back." Three of the seven companies stated that price was a large factor when deciding which printer to choose—making the factor a large priority with company's choices in printing businesses. As stated by the Sales Coordinator of the hotel, "some places will charge you \$50 (or something) and others will charge you \$100 which is double the price." In addition to quality and price, other factors that were found important were customer service, printing capabilities, and speed.

The fourth question asked companies to discuss which printing companies have been used in the past and what their experience was with each of them. The results were varied, as each industry had different needs. Some, such as the direct sale cosmetics company, opted not to answer the question, as company policy did not allow discussion of this information. Both the retail company and museum have used the same companies throughout their company's existence due to great service and ability to get the job done correctly. The museum uses two different printing companies and has used them since its beginning. Both are local, small companies, but each are used for specific product needs. His experience with both companies has been positive, as both have a great quality product with a fast turnaround rate. Additionally, the retail company stated that they choose to remain with the same company due to the fact that they are accurate with providing a quality product. Both the university and event production company has used both large and small printing companies—dependent on the services needed. Since the school is responsible for all collateral and marketing production, each company needs to have the capabilities to meet the order in a timely fashion. Finally, both the hotel and consulting firm state that they prefer the larger printing companies such as FedEx and Office Depot, as they have proven to provide a quick, quality product.

Another important question discussed in each interview was the company's choice of ordering their printing needs—whether online, in-store, or over the phone. Some of the companies such as the direct sale cosmetics and retail company, do not have a choice in the matter, as the company itself partners with a third party organization that is responsible for fulfillment of all printing orders. Since the university works with so many companies in regards to their printing needs, all orders are handled either over the phone or through e-mail communication—as the school would like to establish a good relationship with each company to ensure prices remain competitive. Additionally, the event production company also prefers to complete all orders over the phone, as the printing company knows what he needs and he therefore does not need to mess with an online application. Other companies, such as the hotel and museum, complete all orders online, as the printing companies themselves do not allow for any other ordering methods. The only time in which these companies would need to speak over the phone is if any order requires additional clarification. The consulting firm, however, prefers to make any orders in-person, “to ensure communications and expectations are clear.”

The sixth question asked companies to discuss what products they were most likely to purchase through the printing company. The most important product requested by five of the seven companies was brochures to promote the organization and their services. Catalogs, business cards, and banners were also a frequent order—each being needed by three of the seven businesses. Other products requested include flags, flyers, digital copies, stationary, postcards, foam poster boards, and sandwich boards.

As a way to determine what the spending trends of various industries are, the seventh question asked participants to give their average spend on printing orders and what time of year they are most likely to spend the most on their printing orders. While many of the companies were unable

to discuss their printing spend due to company policy, the industries that answered had prices range from \$300 to \$4000, dependent on the items needed and the time of year. Four of the seven companies stated that their printing orders are made throughout the year, as different printing needs are required throughout the year. The consulting firm adds that they “try to take advantage of any printing specials and economies of scale,” further reinforcing that price is an important factor not only when choosing what companies to partner with, but also when to purchase their printing products. Additionally, the event production company and university stated that the majority of their printing orders are made throughout the fourth quarter—as the companies are preparing for the holidays and the new year.

Because many of these companies stated they have had relationships with many different companies, the moderator wanted to determine what decided whether or not the company would purchase future services with a printing organization. Just as with the third question, quality was a very important factor for four of the seven companies—further solidifying the importance of printing companies creating a quality product. However, a new trait that was mentioned from three of the seven companies is timeliness of turnaround. As the museum stated, “sometimes you need something printed quickly, and if you have someone who understands that—it is a tremendous help.” In addition, customer service and price were still stated as being important traits in choosing future services with a printing company for two of the seven companies. Finally, performance and response time were mentioned as important factors that contribute to repeat customers.

The ninth question was very similar, as the moderator wanted to verify the answers of questions three, eight, and nine showed a common trend in printer qualities. The moderator asked all company decision-makers to explain what services printing companies need to provide to get the job done. Unlike the previous questions, five of the seven companies stated that the company needed to provide timely delivery—showing a shift in preferences. Quality and capabilities came in second, as three of the seven companies deemed it an important trait of printing companies. Finally, customer service, price, and technology were mentioned as other important factors that contribute to a reliable printing company.

Finally, the last question asked all decision-makers to discuss any challenges faced with previous printing companies and if/how those challenges were resolved. The answers for each corporation were varied, as each had their own experiences. The event company stated he has “received pretty crappy printing before” and he “just doesn’t go back to using that printer again.” In his case, he needs his products in a timely manner for upcoming events, so he cannot afford to lose time with modifying an incorrect print job. The Sales Coordinator did not go into much detail as to the problem that was experienced, but she agreed that one mistake caused the company to choose a different printer. The museum company had a similar issue, as a printer accidentally printed a banner 10 inches too short and forgot to add grommets, so the banner could not be hung. After two modifications, the product was still incorrect, so the Operations Director was forced to send visual aids with exact dimensions to ensure the finished product was complete.

Although the ordeal was aggravating, he appreciated the company's service with handling the situation and accepting their error by modifying all mistakes for free. The university has also experienced quality control issues with previous printing companies, but the Marketing Manager stated that "they have worked to eradicate issues with that." Additionally, if a vendor was too expensive, they have "done competitive bartering for a better price. They then bent over backwards to make sure they remained in the top 10% of our bids." A different issue was experienced with the consulting firm, as the President stated he has experienced customer service issues when dealing with previous printing companies. In his case, if the company did not provide a quick and satisfactory resolution, he was forced to choose a different printing vendor. However, other individuals such as the retail and direct sale cosmetics decision-makers have not had any challenges with previous printing companies and have received quality products every time.

INTERVIEW CONCLUSIONS/RECOMMENDATIONS FOR FURTHER RESEARCH

The purpose for the previous research interviews was to learn what factors determine customers' choice of printers, what makes them repeat customers, what is needed from the printer to get their job done, and what services are used most frequently. After analysis of interviews conducted over 14 companies, it was discovered that only 7 were using third party printing companies to meet their needs. The other 50% chose to use in-house printing. This is a significant threat as it decreases the opportunity to gain market share. However, when determining overall factors that are most important when deciding what printing companies are used, quality remained one of the most important traits. Because of this, in order to remain competitive in the struggling printing industry, a company needs to ensure all orders are translated into the correct collateral or marketing piece correctly, the first time. Otherwise, repeat sales will be highly improbable. Additionally, this quality product must be timely, and printing companies need to ensure all orders are completed by the company's deadline. If these deadlines are not met, the company purchasing the printing products will not be able to obtain their documents in time, and any use for these brochures may be compromised, therefore costing the company their time, money, and reputation. Finally, the third most important traits focus on the printing company's price and customer service. Since preliminary research has shown organizations of target industries are also struggling due to the recent economic recession, it makes sense that these organizations want to save as much money whenever possible. Also, when placing orders with various printing companies, organizations have shown a mutual interest in doing business with companies that offer superior customer service. As discussed in the museum's challenge with a printing company, the addition of a wonderful customer service program saved the company from losing the museum's business after they repeatedly messed up their order.

When looking at timing for future marketing campaigns for the client, it is important to notice the slight increase of printing needs discussed in quarter four due to the holidays, updated catalogs, and other annual company information updates. While marketing should be spread to

involve monthly outreaches to local businesses, any sort of direct campaign promoting sales or discounts must be strategically placed during Q4, as many of these companies will be searching for a quality-focused company with the best deal to complete their printing orders. Also, since all companies required a variety of printing needs, it is important for the company to also include their printing capabilities—further increasing interest in companies searching for a printer partnership.

While insight into what factors contribute to customers' choice in printers and what makes them repeat customers is important to ensure a printing company is remaining competitive throughout the industry, further research will need to be completed to solidify additional questions brought up by interview findings. First, it was noticed that 50% of all companies that were interviewed did not use an outside printing company to make any of their products. Additional research will need to be conducted to find the reasoning for this, as two of the seven participants that used in-house printing were companies in the publishing industry—an important target market indicated by the client. If underlying reasoning for this choice can be determined, the client can then either create a creative approach to market to these companies, or modify their target markets to include other industries that would produce a stronger ROI.

A second area for further research is to determine the viability and operational requirements for establishing an online printing business in order to more readily compete in the online printing segment. Many of the participants stated that they have preferred an online format to help with any orders, modifications, or clarifications. Since the client does not have a user-friendly online ordering platform, it is important to research both local and corporate competitor online ordering procedures to ensure the introduction of an online format will remain competitive and easy to navigate. Otherwise, the addition of an online format will stifle ROI potential—as incoming customers will have difficulty navigating the site, and will therefore cause the printer to lose credibility for producing a quality printing product.

SURVEY INFORMATION

Because the participant size was small in the direct interviews, the researcher decided to include these conclusions from the interviews into the survey questions—therefore verifying or disproving the trend in most important factors desired within printing companies. Because many interview participants explained that they preferred e-mail and online communication over in-person and over-the-phone, the researcher chose to add factors such as social media presence and online ordering options to question one as well as a second question comparing large printing companies, online printing companies, and small, local printing companies. The purpose of these inclusions was to see if the online trend is due to the customer preferring a brick-and-mortar location with online printing options or whether the customers prefer the company to be completely online. Because the client is looking at expanding his marketing and business efforts to the online sector, this information is highly significant, as data will help decide placement and methods of future marketing campaigns.

SUMMARY OF KEY ELEMENTS OF RESEARCH PLAN FOR SURVEY

Objective 1. To reinforce findings from previous direct interviews regarding which factors determine customers' choice of printers while also determining which social media pages are used most frequently from printing customers, and what type of printing companies are preferred by both personal and corporate printing orders.

Objective 2. To strengthen recommendations provided to the client regarding possible strategies moving forward and providing appropriate data for decision-making regarding specific marketing and advertising media spend.

Participants. Participants of the survey were local individuals between the ages of 25-60 that had ordered a printing service within the past six months.

Settings. The survey was conducted online via SurveyMonkey.com to allow for participants to easily complete the questionnaire.

Procedures. The moderator created the questions via SurveyMonkey.com to strategically reinforce previous interview answers while also delving into other social media and store trends that will provide crucial data to guide the client's future marketing placement and campaigns. Before sending out the survey, friends and business associates were contacted through e-mail, Facebook, Twitter, and word-of-mouth to see which had made a printing order within the last six months. Applicable candidates were sent a link to the survey through e-mail and informed of the survey due date. Included in the e-mail was a guarantee that their answers will remain anonymous, as some participants could not openly discuss their business orders due to company policy.

Questions. Each of the questions below was asked to survey participants to ensure direct comparability of data. All questions must have been answered for participant to submit the survey.

- Please identify the most important factors that contribute to your choice in printing companies? Rate each factor on a scale of 1 – 5 (1-Unimportant, 2- Of Little Importance, 3- Moderately Important, 4-Important, 5-Very Important)
 - Factors included: Quality of Product, Friendliness of Staff, Customer Service, Price of Product, Timeliness of Turnaround, Location of Store, Discounts, Online Ordering Options, Social Media Presence, and Company Reputation.
 - An "Other" option was available for participants to add any other factors that may contribute to their choice in printers.
- Which Social Media sites do you utilize on a regular basis? (Check all that apply)
 - Social media sites included: Facebook, Instagram, Vine, Pinterest, Twitter, LinkedIn, YouTube, and MySpace.
 - An "Other" option was available for participants to add any other social media sites that he/she utilizes on a regular basis.

- The majority of your printing orders are for:
 - Participants chose between Personal Orders and Business Orders
- When making print orders, you prefer: (Check all that apply)
 - Choices included large, retail printing companies, online printing companies, and small, local printing companies
 - Participants were able to choose more than one, as previous research determined business orders often use more than one printing company.

Means of Recording Answers. Moderator used SurveyMonkey.com to create and monitor survey results from participants. After survey was completed, all individual and collective answers were transcribed into a Microsoft Word document for easy analysis. Additionally, for question one, all answers to each factor were added to show both moderator and client a ranking system of which factors are most important and which are least important to customers when choosing a printing company. Specific rankings are discussed in survey summary and appendix two.

Avoiding Moderator Bias. To avoid moderator bias, questions were asked in a general, direct format that was easy to understand by each participant. The survey was conducted anonymously over a third party software, so the moderator could not make comments, agree, disagree, or offer opinions to any participant's answer. Instead, moderator relied solely on survey questions to obtain information from the participant.

Analytical Methods. By using SurveyMonkey.com, moderator was able to view individual answers while also having access to view collective results, trends, and percentages of each answer's component.

SUMMARY OF SURVEY FINDINGS

Of the 30 surveys that were e-mailed out to potential participants, only thirteen opted to complete the survey by the due date. Reasons for non-completion varied, as many participants were experiencing difficulty accessing the survey, and others were unable to complete the survey due to work or family challenges. However, the thirteen that were able to complete the survey were required to answer all portions of all questions in order to submit the survey. This was mandatory, as the researcher needed all factors and questions weighted equally for sufficient analysis.

The first question of the survey was meant to challenge the noted trend throughout the direct interviews, as the moderator wanted to ensure the data was accurate and not misrepresented due to small sample size. During this question, participants were asked to rate each factor (Quality of Product, Friendliness of Staff, Customer Service, Price of Product, Timeliness of Turnaround, Location of Store, Discounts, Online Ordering Options, Social Media Presence, and Company Reputation) on a scale of 1 – 5, with 1 being “not important” and 5 being “very important”. The

researcher then added all numbers of each feature and placed them in a table to create a ranking scale of which factors are most important to these recent customers. Surprisingly, results from this question mimicked the responses from the direct interviews in regards to most important factors of printing companies. As with the direct interviews, Quality remained at the top of the chart—as 12 of 13 participants ranked this factor as “very important” when choosing a printing company. The survey then concluded that Timeliness of Turnaround was, again, placed as the second most important trait of a company’s features. As explained in the direct interviews, many printing orders are made for a certain event or production, so all collateral is expected to be available by the time the occasion begins. Failure to do so has caused customers to lose faith in the business and take their future orders elsewhere. Just as with the direct interviews, Price of Product remains at the third highest feature when choosing a printing company. Because both individuals and businesses are suffering to recover from the recent economic recession, it is important to be cost-conscious whenever possible. If a company can offer the same quality services of a previous printing company, but at a lower price, it makes sense for the customer to choose to do business with the cheaper company. Company Reputation ranked at number four, with 6 of 13 participants claiming the factor was “very important” when choosing their printing company. Two participants offered further insight, as they noted “referral from others” and “reputation of company” were additional factors that highly contributed to their overall printer choice.

At the bottom half of the ranking system, Customer Service and Friendliness of Staff ranked similarly as the fifth and sixth most important features of a printing company. In both of these factors, 5 of 13 participants rated the trait as “very important”. However, Friendliness of Staff ranked an overall three points lower, as 6 of 13 participants rated the trait as “moderately important”, compared to the 3 of 13 rating Customer Service received. Ranking at seventh was Online Ordering Options—which was unexpected due to the high response rate received during the direct interviews. While 5 of 13 participants ranked the trait as “very important”, an additional 5 of 13 rated the factor as only “moderately important” when choosing their printer. This could be, in part, due to the large presence of printing companies throughout the Dallas/Fort Worth Metroplex. This theory is further supported due to the Location of Store ranked as the eighth most important factor. Results from the research then showed that, while Price is highly important when choosing a printing company, the presence of Discounts do not seem to affect customer persuasion as much. For this trait, 6 of the 13 participants ranked the trait as only “moderately important”, while an additional 5 participants ranked the factor as “of little importance”. It is important that the client takes this into consideration with future marketing consideration, as the presence of a discount will cause the company to lose funding while also producing little interest and ROI potential. Lastly, the lowest ranked trait was noted as “Social Media Presence” as 4 of 13 participants ranked the feature as “moderately important” whereas an additional 3 noted the factor was “not important” when choosing their printer. In addition to the ten factors mentioned above, a participant also ranked “Carbon Footprint” as an important trait to consider when choosing their printing company. Although it was not mentioned by any other

participant in the survey, the increase of eco-conscious efforts makes this trait an important characteristic to discuss for inclusion in future messaging campaigns.

Because of the overall objective to set up a social media presence for the client's printing company, the second question asked recent printing customers to choose which social media sites are used on a frequent basis. This way, the client can make an educated decision when choosing which platforms to include in initial implementation. Unsurprisingly, Facebook ranked as the single most popular social media site, as 11 of 13 participants were noted as utilizing the site on a regular basis. This will place Facebook as the most important site to include in the initial social media setup for the company, as it will have the potential to reach the greatest amount of potential printing customers. Tied as the second most frequently utilized site was LinkedIn and YouTube, with 5 of 13 participants frequently visiting the sites. Twitter received a lower-than-expected rating at the third most popular social media site for potential printing customers. Since only 3 of the 13 participants are actively using Twitter, the client will need to determine whether inclusion of a profile on the site would produce a sufficient ROI. With only 2 of the 13 participants actively using Instagram and Pinterest, future marketing attention to this site should be discussed, as results show the company will receive minor attention. Finally, both MySpace and Vine received zero attention, as none of the participants stated that they utilized the site. It is highly recommended that both MySpace and Vine are not included in future marketing or advertisement campaigns, as the company's target markets will not be reached.

The third question asked participants to discuss whether the majority of their printing orders were for individual or business needs. Since it is important to distinguish personal and professional advertisements, this question was designed to see which of the two should be more prominent throughout the year. To help with a definitive answer, participants were only able to select one option. After the survey was completed, it was discovered that 53.8% of participants' orders were business-related, while 46.2% were personal orders. The client will need to keep this in mind when discussing annual market placement and spend.

The final question of the survey asked participants to state which method of printer they preferred—whether large retail printers, online printers, or small local printing companies. Participants were able to choose more than one selection, as previous interview results show that often, individuals will use more than one company for their different printing needs. Small, local printing companies were most popular—with 8 of the 13 participants stating that they prefer supporting their local businesses. Large printing companies were noted as the second most popular printer, as 7 of the 13 participants stated that they visit the local big box printers. Due to this close proximity, these results further confirm the close competition that is present between the large and small brick-and-mortar printing companies. Surprisingly, only 2 of the 13 survey participants stated that they prefer using online printing companies such as VistaPrint. While the client believed that the main threat of his printing company were online competitors, this number shows that this may not be the case.

SURVEY CONCLUSIONS/RECOMMENDATIONS FOR FURTHER RESEARCH

The purpose for the previous research interviews was to both reinforce the findings of the direct interviews while strengthening recommendations provided to the client regarding possible strategies moving forward and providing appropriate data for decision-making regarding specific marketing and advertising media spend. Because the top three factors were identical in both direct interview and survey participants, it is highly recommended that future marketing campaigns include some sort of focus on the quality of the client's printing services while also showing their competitive price and timeliness of turnaround. While discounts can certainly help during times of high printing spend, research results show that the majority of consumers do not solely rely on discounted prices when choosing their future printing company. The company will also need to keep into account that, while customer service is a major focus of the company's morals, consumers do not share the same mindset. Instead, future messaging will need to be altered to include several different components—not just the client's friendliness and customer service.

Although the client believed that online printing companies were the main reason for his sales decline, only 15.4% of customers that completed the survey stated that they would prefer doing business with online printing companies. Instead, the small, local printing companies were most popular—showing that his business has the potential to easily increase annual profits. Social media presence also showed a lower-than-expected ranking of most important factors, but 11 of 13 customers are actively using Facebook. During social media launch, it is highly recommended that the client first create a company Facebook page before expanding to other sites such as Twitter or LinkedIn. In addition to meeting the overall objective for online presence, it will guarantee the greatest ROI among potential customers.

Finally, because research shows that an equal number of customers are using printing orders for both corporate and personal use, future marketing messaging needs to target both segments. However, current research data only show the purchasing trends of corporate customers, so it is recommended that future research be conducted to determine the best times of the year to market to individual consumers. Otherwise, the poorly-timed advertisements will not receive as much attention from prospective customers and the company will, instead, waste valuable time and budget.

Since preliminary discussion included a strong social media presence during Q1 of FY14, it is also recommended that further research is first conducted to verify if this would be a smart business and marketing decision for the client. Survey research proved the trait was the lowest factor when choosing a printing company, so while addition of a company Facebook profile will help increase awareness throughout target markets, future research will need to prove a sufficient ROI before any PPC or sponsored advertisements should be considered. Instead, initial online marketing should remain in SEO and SEM advertisements, as both corporate and individual

consumers will rely on sites such as Google and Bing to search for potential printing companies to fulfill current and future orders.

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APPENDIX: INTERVIEW RAW DATA

Interview One: Event Production Company—Dallas, TX

Interview Date: 11-7-2013

Moderator: Please give me a brief description of your company's industry?

Participant: We are a destination management and full event production company. Some of my printing needs are internal, some are external for my clients.

Moderator: What is your job title?

Participant: I am the owner of the company.

Moderator: What factors determine your organization's choice of printing companies? In your opinion, what is the most important factor?

Participant: It is a family friend. We use them often...I would say for business cards, very few fliers and brochures, and I don't get the request as well for much in regards for events for my clients

Moderator: Which printing companies have you used in the past? What was your experience with each of these?

Participant: It all depends on what you are printing and what material you are printing on. If I am printing paper, if I'm printing small banners—I go to this one source. If I need large banners, repeat banners, or flags printed, I have other sources I would use for those particular items—so it would really depend on the need. Again, it needs to be a company with a high quality product.

Moderator: Does your organization purchase their products online, in-store, or over the phone? What are the reasons for this option?

Participant: I do everything over the phone with them. They know what product I am looking for. Then I can pick up the phone and make a phone call and not have to bug around with an online application, I think words or message will get messed up over the e-mail, so it's easier to just pick up the phone.

Moderator: What products is your company most likely to purchase?

Participant: Mostly brochures, flags, banners, and business cards.

Moderator: What is your average spend on a printing order? At what time of the year does your company spend the most on printing services?

Participant: Let's just say 4th quarter. Needing to get things ready for next year, as far as holiday printing is needed...Christmas cards. Let's just say 4th quarter. Typical spend is under \$1000

Moderator: What determines whether or not your company will purchase future services with a printing organization?

Participant: The quality that I am receiving

Moderator: What services do printing companies need to provide to get the job done?

Participant: I would have to say their timeliness to get me their product. I can call something in today and get it in tomorrow. Again, the quality is important

Moderator: What challenges have you faced in dealing with previous printing companies? Were those challenges resolved? If so, how?

Participant: What challenges have I faced? I have received pretty crappy printing before and I just don't go back to using that printer again.

Interview Two: Direct Sale Cosmetics Company—Dallas, TX

Interview Date: 11-8-2013

Moderator: Please give me a brief description of your company's industry?

Participant: Direct sale cosmetics

Moderator: What is your job title?

Participant: Independent Beauty Consultant

Moderator: What factors determine your organization's choice of printing companies? In your opinion, what is the most important factor?

Participant: I would say high volume would be the most important factor. Others of course would be quality...I guess speed—turnaround time would be the better term, mailing capabilities would probably be second.

Moderator: Which printing companies have you used in the past? What was your experience with each of these?

Participant: I have not used any other printing companies.

Moderator: Does your organization purchase their products online, in-store, or over the phone? What are the reasons for this option?

Participant: We are contracted with a company that provides brochures and mailing products.

Moderator: What products is your company most likely to purchase?

Participant: Product brochures, business cards, catalogs, and stationary, mostly.

Moderator: What is your average spend on a printing order? At what time of the year does your company spend the most on printing services?

Participant: All year. Not a seasonal order—we order monthly and as needed. Company policy states not to discuss budget.

Moderator: What determines whether or not your company will purchase future services with a printing organization?

Participant: Same as the previous question—quality and speed are important. Otherwise, my customers will not receive their information on time.

Moderator: What services do printing companies need to provide to get the job done?

Participant: Quality, speed, also mailing capabilities.

Moderator: What challenges have you faced in dealing with previous printing companies? Were those challenges resolved? If so, how?

Participant: I have not experienced any challenges with our current company.

Interview Three: University—Office in Dallas, TX. Based out of California.

Interview Date: 11-7-2013

Moderator: Please give me a brief description of your company's industry?

Participant: Education

Moderator: What is your job title?

Participant: Marketing Manager

Moderator: What factors determine your organization's choice of printing companies? In your opinion, what is the most important factor?

Participant: It's a Tie between Quality and Capabilities (i.e. Laser, Offset, Print on Demand, Multiple kinds of equipment for needs)

Moderator: Which printing companies have you used in the past? What was your experience with each of these?

Participant: We have used both large as medium sized printers. Usually that then a function of them having the capabilities that we need. Because for example, we may need a large project that needs capabilities such as offset printing for 20,000 brochures to be for a large company. But smaller cards for 5000 postcards can be done through a smaller company.

Moderator: Does your organization purchase their products online, in-store, or over the phone? What are the reasons for this option?

Participant: We prefer over the phone and email; we work with multiple vendors on an RFP per project basis, but we do like to establish long-term yet competitively priced relationships.

Moderator: What products is your company most likely to purchase?

Participant: Catalogs, brochures, flyers, direct mail, postcards

Moderator: What is your average spend on a printing order? At what time of the year does your company spend the most on printing services?

Participant: Unfortunately this is proprietary information, we do not "kiss and tell" related to our avg. spend. We spend the most on printing in August-November due to new fiscal year and catalog needs.

Moderator: What determines whether or not your company will purchase future services with a printing organization?

Participant: Quality control, price, time-turnaround/service, and test relationship working successfully for both parties.

Moderator: What services do printing companies need to provide to get the job done?

Participant: Service levels related to turnaround and price and customer service. Also dependent on specific services that they provide. Need to provide not only printing but mailing, processing, shipping, etc. Use printers to also do processing which is utilizing all of our lists and utilizing non-profit status to mail out materials for us.

Moderator: What challenges have you faced in dealing with previous printing companies? Were those challenges resolved? If so, how?

Participant: If we had quality control issues, we have worked to eradicate issues with that. Some vendors are too expensive—but have done competitive bartering for a better price. They then bent over backwards to make sure that they remained in the top 10% of our bids. However, that relationship may not bounce back, as our current President thought they were inflating prices for quite some time. They will need to over-deliver in order for us to overcome those challenges.

Interview Four: Non-profit Museum--Dallas, TX

Interview Date: 11-7-2013

Moderator: Please give me a brief description of your company's industry?

Participant: We are in the non-profit sector, but we strive to educate the community in Dallas history which is also a public service as well. The main goal is to help educate the community as well as outside visitors about the history of Dallas. In addition, we also host weddings and special events.

Moderator: What is your job title?

Participant: Operations Director/Creative Director

Moderator: What factors determine your organization's choice of printing companies? In your opinion, what is the most important factor?

Participant: Well, obviously quality is a very big contributing factor, you want to make sure that the company you are using knows their stuff. It goes without saying that if you get a crap product, you won't go back. Number two is price. A lot is about getting the best bang for your buck. If there is someone who can do a comparable job for a lower price, then the choice is obvious. Also, customer service is a big thing mostly because you want...sometimes it's hard to describe your needs, and you want the other person to make it as seamless a transition as possible from design to finished product. Being prompt with sending proofs and responses is important, as well as being very accessible.

Moderator: Which printing companies have you used in the past? What was your experience with each of these?

Participant: We have two main companies that we use on a frequent basis. One is for our brochures and rack cards—Business Printing. They are local—north Carrollton, so the beauty of that is that when a request is sent, their turnaround time is fairly quick and their time to get you a proof is very fast and easy. I like them for that kind of work. What we use for banners and things like that (trade shows and printing on lots of cloth and other materials) is Gigantic Color—also pretty local. They are off of 35 and Mockingbird. It is the same thing---very good product and fast turnaround.

Moderator: Does your organization purchase their products online, in-store, or over the phone? What are the reasons for this option?

Participant: It is mostly online, but sometimes, if a certain detail is left out and needing clarification—over the phone. Most is email correspondence. Submit designs online and order. It seems that that is what most printing companies are turning toward. Some do over the phone, but

it is quicker, easier, and painless to do it over the e-mail. Don't have to deal with much else—makes it easy on both ends.

Moderator: What products is your company most likely to purchase?

Participant: For our purposes, brochures are big because we use them as mailouts, so they are killing two birds with one stone. I will say we are turning away from printing out too much because many of them gets lost in the mail or bounced back—very low ROI, so we have other avenues—advertisements and online presence help quite a bit. Rack cards are also important for tourists and walk-ins to give easy information. Also, interior and exterior banners are very helpful as a friendly reminder of what we are—we need to spell it out visually for individuals. We also use sandwich boards for new exhibits, events, or functions.

Moderator: What is your average spend on a printing order? At what time of the year does your company spend the most on printing services?

Participant: We want to save as much money as possible. For the simple banners and rack cards, usually under \$1000. Brochures are usually about \$4000. We order our promotional products annually. Banners—since we rotate our temporary exhibit, can be bi-annually. Timing varies. Brochures and rack cards is done at the middle of the year (July and August) and the banners are ordered on an as-needed basis, so can be any time of the year.

Moderator: What determines whether or not your company will purchase future services with a printing organization?

Participant: Price first and foremost determines future business and, I think, customer service—you know, being available and ready to go at a moment's notice. Sometimes you need things printed quickly, and if you have someone who understands that—it is a tremendous help. And if they are willing to do that, it is invaluable. You want to keep relationships like that because you know you can count on them.

Moderator: What services do printing companies need to provide to get the job done?

Participant: Um, once again, being available—fast response time to emails or phone calls—either/or. Things can be time sensitive and we cannot get things last minute. Fast response time to any communication is key. But then, obviously, the final product needs to be right. It is all about the end result. The printing company and the person ordering the product—it needs to look how you want it to look and it needs to look right as far as format and content. If it is a printing error, it is incredibly irritating, as it slows everything down.

Moderator: What challenges have you faced in dealing with previous printing companies? Were those challenges resolved? If so, how?

Participant: We did have a recent one. We were printing banners and they...it was just virtue of working with a new person. They didn't understand what I meant as far as an exterior banner. They printed it too short. So when compared to the other banner, it was 10 inches too short, so it threw everything off. The first they sent did not have grommets to strap onto the poles, so it was unable to be hung. They printed it again, but fixed only two of the three issues, but was still too short. By the time I saw the second version, the person had left, so it had to be sent back again. Had to be more explicit with order by sending visual aids and exact dimensions. Having to get two reprints was ridiculous. Because I was ordering so much, they also messed up an interior banner that was cut wrong. That was, again, wrong, so I had to e-mail them again about their mistakes with that as well. Luckily, they saw the errors and reprinted for free.

Interview Five: Consulting Firm—Office in Dallas, TX. Based out of Nevada.

Interview Date: 11-7-2013

Moderator: Please give me a brief description of your company's industry?

Participant: We are a full service business consulting firm with our corporate offices in Las Vegas and doing business across the U.S.

Moderator: What is your job title?

Participant: I am the President/CEO

Moderator: What factors determine your organization's choice of printing companies? In your opinion, what is the most important factor?

Participant: Customer service and working with someone I know personally is key. I am confident that the quality, price and overall satisfaction will be there if the interpersonal relationship is strong.

Moderator: Which printing companies have you used in the past? What was your experience with each of these?

Participant: I have used several local printers such as American Printers, PDQ Printing, Creel Printing and branch stores such as FedEx/Kinko's and Office Depot.

Moderator: Does your organization purchase their products online, in-store, or over the phone? What are the reasons for this option?

Participant: I prefer meeting with the printer in person to ensure communications and expectations are clear. I have used online services and phone to verify proofs and edit projects but have not purchased printing products via these methods.

Moderator: What products is your company most likely to purchase?

Participant: Business cards, brochures, flyers, digital copies, banners and miscellaneous collateral. Promotional items are purchased through a separate vendor.

Moderator: What is your average spend on a printing order? At what time of the year does your company spend the most on printing services?

Participant: The cost varies from a \$300 business card order to \$1500 for banner-up displays. My current company and companies with which I have worked in the past order products throughout the year. We also try to take advantage of any pricing specials and economies of scale.

Moderator: What determines whether or not your company will purchase future services with a printing organization?

Participant: Performance is the key for continuation of services.

Moderator: What services do printing companies need to provide to get the job done?

Participant: Great customer service, quality product, on-time delivery of services and competitive pricing as well as up-to-date technology and equipment are all key factors for a printing to fulfill our needs as a customer.

Moderator: What challenges have you faced in dealing with previous printing companies? Were those challenges resolved? If so, how?

Participant: The biggest challenge has been poor customer service. If the product produced does not meet my standards I expect a quick and satisfactory resolution. There have been times when the challenge was not satisfactorily resolved which forced us to choose another printing vendor.

Interview Six: Retail Store—Dallas, TX

Moderator: Please give me a brief description of your company's industry?

Participant: We are a school supply store with a variety of school and teacher supplies

Moderator: What is your job title?

Participant: Manager

Moderator: What factors determine your organization's choice of printing companies? In your opinion, what is the most important factor?

Participant: I don't make the decision on which printer to use, the owner did...We have used the same printer for a very long time and quality and accuracy are important since we have thousands of items in our warehouse and anything in the catalog we can pull from there.

Moderator: Which printing companies have you used in the past? What was your experience with each of these?

Participant: We haven't used any other printers and if we don't really print anything else other than our catalog

Moderator: Does your organization purchase their products online, in-store, or over the phone? What are the reasons for this option?

Participant: No, just the catalog.

Moderator: What products is your company most likely to purchase?

Participant: The catalog which is printed once a year.

Moderator: What is your average spend on a printing order? At what time of the year does your company spend the most on printing services?

Participant: I don't know.

Moderator: What determines whether or not your company will purchase future services with a printing organization?

Participant: Question not asked

Moderator: What services do printing companies need to provide to get the job done?

Participant: Question not asked

Moderator: What challenges have you faced in dealing with previous printing companies?
Were those challenges resolved? If so, how?

Participant: There are no other printers that we use.

Interview Seven: Hotel—Dallas, TX.

Interview Date: 11-7-2013

Moderator: Please give me a brief description of your company's industry?

Participant: The Hotel is located in downtown Dallas and is a boutique hotel

Moderator: What is your job title?

Participant: I am the sales coordinator

Moderator: What factors determine your organization's choice of printing companies? In your opinion, what is the most important factor?

Participant: All of the different departments may use different printing companies for different products....and corporate, in Denver, may have things printed. Price and quality, honestly...there are times when we get something and it's not what we wanted and so after a while you go somewhere else. And the price is a big factor...some places will charge you \$50 (or something) and others will charge you \$100 which is double the price.

Moderator: Which printing companies have you used in the past? What was your experience with each of these?

Participant: FedEx, Alpha Graphics, UPS ... that's just what I've used, other departments have shops that they prefer. Some companies are quicker in responding and others you have to submit online and then wait for a response and then it can sometimes take a while...

Moderator: Does your organization purchase their products online, in-store, or over the phone? What are the reasons for this option?

Participant: ... yes, and it depends on the company and what we need. Honestly, it's usually their [the printing companies] protocol that we submit or order online, not necessarily our choice.

Moderator: What products is your company most likely to purchase?

Participant: We can do everything from foam poster board printing to flyers

Moderator: What is your average spend on a printing order? At what time of the year does your company spend the most on printing services?

Participant: Honestly couldn't say because there is no specific things that we have printed annually [the sales department]... sometimes it's poster boards, or stickers, or menus that go up to the room so there's no average price range.

Moderator: What determines whether or not your company will purchase future services with a printing organization?

Participant: Quality and timeliness and response to any issues or challenges

Moderator: What services do printing companies need to provide to get the job done?

Participant: The ability to print a variety of products

Moderator: What challenges have you faced in dealing with previous printing companies? Were those challenges resolved? If so, how?

Participant: There have been issues and if that weren't resolved so we just found another printer very quickly.

Notes of common industries in companies claiming to complete all printing needs in-house:

Printing Industry: Company A, Company B (2/3)

Church Industry: Company A (1/3)

Travel Agencies: Company A, Company B (2/3)

Hotel Industry: Company A, Company B (2/4)

APPENDIX TWO: SURVEY RAW DATA

Respondent 1

Q1: Please identify the most important factors that contribute to your choice in printing companies? Rate each factor on a scale of 1 – 5 (1-Unimportant, 2- Of Little Importance, 3- Moderately Important, 4-Important, 5-Very Important)

- Quality of Product 5
- Friendliness of Staff 4
- Customer Service 4
- Price of Product 5
- Timeliness of Turnaround 5
- Location of Store 3
- Discounts 3
- Online Ordering Options 2
- Social Media Presence 2
- Company Reputation 5
- **Other Important Factors (please specify)** Referral from others

Q2: Which Social Media sites do you utilize on a regular basis? (Check all that apply)

- LinkedIn

Q3: The majority of your printing orders are for:

- Business Orders

Q4: When making print orders, you prefer: (Check all that apply)

- Small, local printing companies

Respondent 2

Q1: Please identify the most important factors that contribute to your choice in printing companies? Rate each factor on a scale of 1 – 5 (1-Unimportant, 2- Of Little Importance, 3- Moderately Important, 4-Important, 5-Very Important)

- Quality of Product 5
- Friendliness of Staff 5
- Customer Service 5
- Price of Product 4
- Timeliness of Turnaround 5
- Location of Store 3
- Discounts 2
- Online Ordering Options 3
- Social Media Presence 1
- Company Reputation 4

Q2: Which Social Media sites do you utilize on a regular basis? (Check all that apply)

- Facebook

Q3: The majority of your printing orders are for:

- Personal Orders

Q4: When making print orders, you prefer: (Check all that apply)

- Small, local printing companies

Respondent 3

Q1: Please identify the most important factors that contribute to your choice in printing companies? Rate each factor on a scale of 1 – 5 (1-Unimportant, 2- Of Little Importance, 3- Moderately Important, 4-Important, 5-Very Important)

- Quality of Product 5
- Friendliness of Staff 5
- Customer Service 5
- Price of Product 5
- Timeliness of Turnaround 5
- Location of Store 3
- Discounts 3
- Online Ordering Options 5
- Social Media Presence 3
- Company Reputation 5

Q2: Which Social Media sites do you utilize on a regular basis? (Check all that apply)

- Facebook
- LinkedIn

Q3: The majority of your printing orders are for:

- Business Orders

Q4: When making print orders, you prefer: (Check all that apply)

- Online printing companies

Respondent 4

Q1: Please identify the most important factors that contribute to your choice in printing companies? Rate each factor on a scale of 1 – 5 (1-Unimportant, 2- Of Little Importance, 3- Moderately Important, 4-Important, 5-Very Important)

- Quality of Product 4
- Friendliness of Staff 3
- Customer Service 4
- Price of Product 5
- Timeliness of Turnaround 5
- Location of Store 4
- Discounts 3
- Online Ordering Options 2
- Social Media Presence 2
- Company Reputation 4
- **Other Important Factors (please specify)** Reputation of company

Q2: Which Social Media sites do you utilize on a regular basis? (Check all that apply)

- Facebook

Q3: The majority of your printing orders are for:

- Personal Orders

Q4: When making print orders, you prefer: (Check all that apply)

- Large, retail printing companies
- Small, local printing companies

Respondent 5

Q1: Please identify the most important factors that contribute to your choice in printing companies? Rate each factor on a scale of 1 – 5 (1-Unimportant, 2- Of Little Importance, 3- Moderately Important, 4-Important, 5-Very Important)

- Quality of Product 5
- Friendliness of Staff 5
- Customer Service 5
- Price of Product 4
- Timeliness of Turnaround 5
- Location of Store 3
- Discounts 3
- Online Ordering Options 3
- Social Media Presence 2
- Company Reputation 5
- **Other Important Factors (please specify)** Carbon foot print

Q2: Which Social Media sites do you utilize on a regular basis? (Check all that apply)

- LinkedIn

Q3: The majority of your printing orders are for:

- Business Orders

Q4: When making print orders, you prefer: (Check all that apply)

- Small, local printing companies

Respondent 6

Q1: Please identify the most important factors that contribute to your choice in printing companies? Rate each factor on a scale of 1 – 5 (1-Unimportant, 2- Of Little Importance, 3-Moderately Important, 4-Important, 5-Very Important)

- Quality of Product 5
- Friendliness of Staff 3
- Customer Service 4
- Price of Product 3
- Timeliness of Turnaround 4
- Location of Store 5
- Discounts 2
- Online Ordering Options 4
- Social Media Presence 3
- Company Reputation 4

Q2: Which Social Media sites do you utilize on a regular basis? (Check all that apply)

- Facebook
- YouTube

Q3: The majority of your printing orders are for:

- Business Orders

Q4: When making print orders, you prefer: (Check all that apply)

- Large, retail printing companies

Respondent 7

Q1: Please identify the most important factors that contribute to your choice in printing companies? Rate each factor on a scale of 1 – 5 (1-Unimportant, 2- Of Little Importance, 3- Moderately Important, 4-Important, 5-Very Important)

- Quality of Product 5
- Friendliness of Staff 3
- Customer Service 4
- Price of Product 5
- Timeliness of Turnaround 5
- Location of Store 1
- Discounts 2
- Online Ordering Options 5
- Social Media Presence 1
- Company Reputation 3

Q2: Which Social Media sites do you utilize on a regular basis? (Check all that apply)

- Facebook

Q3: The majority of your printing orders are for:

- Personal Orders

Q4: When making print orders, you prefer: (Check all that apply)

- Small, local printing companies

Respondent 8

Q1: Please identify the most important factors that contribute to your choice in printing companies? Rate each factor on a scale of 1 – 5 (1-Unimportant, 2- Of Little Importance, 3- Moderately Important, 4-Important, 5-Very Important)

- Quality of Product 5
- Friendliness of Staff 5
- Customer Service 5
- Price of Product 5
- Timeliness of Turnaround 5
- Location of Store 4
- Discounts 3
- Online Ordering Options 3
- Social Media Presence 1
- Company Reputation 4

Q2: Which Social Media sites do you utilize on a regular basis? (Check all that apply)

- Facebook

Q3: The majority of your printing orders are for:

- Personal Orders

Q4: When making print orders, you prefer: (Check all that apply)

- Large, retail printing companies

Respondent 9

Q1: Please identify the most important factors that contribute to your choice in printing companies? Rate each factor on a scale of 1 – 5 (1-Unimportant, 2- Of Little Importance, 3- Moderately Important, 4-Important, 5-Very Important)

- Quality of Product 5
- Friendliness of Staff 3
- Customer Service 3
- Price of Product 5
- Timeliness of Turnaround 5
- Location of Store 3
- Discounts 2
- Online Ordering Options 3
- Social Media Presence 1
- Company Reputation 4

Q2: Which Social Media sites do you utilize on a regular basis? (Check all that apply)

- Facebook
- Twitter

Q3: The majority of your printing orders are for:

- Personal Orders

Q4: When making print orders, you prefer: (Check all that apply)

- Large, retail printing companies

Respondent 10

Q1: Please identify the most important factors that contribute to your choice in printing companies? Rate each factor on a scale of 1 – 5 (1-Unimportant, 2- Of Little Importance, 3- Moderately Important, 4-Important, 5-Very Important)

- Quality of Product 5
- Friendliness of Staff 3
- Customer Service 3
- Price of Product 5
- Timeliness of Turnaround 4
- Location of Store 2
- Discounts 5
- Online Ordering Options 5
- Social Media Presence 3
- Company Reputation 5

Q2: Which Social Media sites do you utilize on a regular basis? (Check all that apply)

- Facebook
- Instagram
- Pinterest
- YouTube

Q3: The majority of your printing orders are for:

- Business Orders

Q4: When making print orders, you prefer: (Check all that apply)

- Online printing companies
- Small, local printing companies

Respondent 11

Q1: Please identify the most important factors that contribute to your choice in printing companies? Rate each factor on a scale of 1 – 5 (1-Unimportant, 2- Of Little Importance, 3- Moderately Important, 4-Important, 5-Very Important)

- Quality of Product 5
- Friendliness of Staff 3
- Customer Service 3
- Price of Product 4
- Timeliness of Turnaround 5
- Location of Store 4
- Discounts 2
- Online Ordering Options 3
- Social Media Presence 4
- Company Reputation 5

Q2: Which Social Media sites do you utilize on a regular basis? (Check all that apply)

- Facebook
- YouTube

Q3: The majority of your printing orders are for:

- Personal Orders

Q4: When making print orders, you prefer: (Check all that apply)

- Large, retail printing companies
- Small, local printing companies

Respondent 12

Q1: Please identify the most important factors that contribute to your choice in printing companies? Rate each factor on a scale of 1 – 5 (1-Unimportant, 2- Of Little Importance, 3- Moderately Important, 4-Important, 5-Very Important)

- Quality of Product 5
- Friendliness of Staff 5
- Customer Service 5
- Price of Product 5
- Timeliness of Turnaround 4
- Location of Store 1
- Discounts 3
- Online Ordering Options 5
- Social Media Presence 3
- Company Reputation 4

Q2: Which Social Media sites do you utilize on a regular basis? (Check all that apply)

- Facebook
- Twitter
- LinkedIn
- YouTube

Q3: The majority of your printing orders are for:

- Personal Orders

Q4: When making print orders, you prefer: (Check all that apply)

- Large, retail printing companies
- Small, local printing companies

Respondent 13

Q1: Please identify the most important factors that contribute to your choice in printing companies? Rate each factor on a scale of 1 – 5 (1-Unimportant, 2- Of Little Importance, 3- Moderately Important, 4-Important, 5-Very Important)

- Quality of Product 5
- Friendliness of Staff 4
- Customer Service 4
- Price of Product 4
- Timeliness of Turnaround 5
- Location of Store 2
- Discounts 4
- Online Ordering Options 5
- Social Media Presence 4
- Company Reputation 5

Q2: Which Social Media sites do you utilize on a regular basis? (Check all that apply)

- Facebook
- Instagram
- Pinterest
- Twitter
- LinkedIn
- YouTube

Q3: The majority of your printing orders are for:

- Business Orders

Q4: When making print orders, you prefer: (Check all that apply)

- Large, retail printing companies

SURVEY QUESTION SUMMARIES

Q1 Please identify the most important factors that contribute to your choice in printing companies? Rate each factor on a scale of 1 – 5 (1-Unimportant, 2- Of Little Importance, 3- Moderately Important, 4-Important, 5-Very Important)

- Answered: 13
- Skipped: 0

-	1 –	2 –	3 –	4 –	5 –	Total –	RANK
Quality of Product	0% 0	0% 0	0% 0	7.69% 1	92.31% 12	64	1
Friendliness of Staff	0% 0	0% 0	46.15% 6	15.38% 2	38.46% 5	51	6
Customer Service	0% 0	0% 0	23.08% 3	38.46% 5	38.46% 5	54	5
Price of Product	0% 0	0% 0	7.69% 1	30.77% 4	61.54% 8	59	3
Timeliness of Turnaround	0% 0	0% 0	0% 0	23.08% 3	76.92% 10	62	2
Location of Store	15.38% 2	15.38% 2	38.46% 5	23.08% 3	7.69% 1	38	8
Discounts	0% 0	38.46% 5	46.15% 6	7.69% 1	7.69% 1	37	9
Online Ordering Options	0% 0	15.38% 2	38.46% 5	7.69% 1	38.46% 5	48	7
Social Media Presence	30.77% 4	23.08% 3	30.77% 4	15.38% 2	0% 0	30	10
Company Reputation	0% 0	0% 0	7.69% 1	46.15% 6	46.15% 6	57	4
Other Important Factors (please specify)	0% 0	0% 0	0% 0	0% 0	0% 0	3	N/A

Q2 Which Social Media sites do you utilize on a regular basis? (Check all that apply)

- Answered: 13
- Skipped: 0

Answer Choices –	Responses –	RANK
Facebook	84.62% 11	1
Instagram	15.38% 2	4
Vine	0% 0	5
Pinterest	15.38% 2	4
Twitter	23.08% 3	3
LinkedIn	38.46% 5	2
YouTube	38.46% 5	2
MySpace	0% 0	5
Total Respondents: 13		
Comments(0)		

Q3 The majority of your printing orders are for:

- Answered: 13
- Skipped: 0

Answer Choices –	Responses –
Personal Orders	53.85% 7
Business Orders	46.15% 6
Total	13

Q4 When making print orders, you prefer: (Check all that apply)

- Answered: 13
- Skipped: 0

Answer Choices –	Responses –
Large, retail printing companies	53.85% 7
Online printing companies	15.38% 2
Small, local printing companies	61.54% 8
Total Respondents: 13	