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Jeanette Bredsten

Patricia A. Sorce

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Graduate Student,
School of Print Media
Rochester Institute of Technology

Patricia A. Sorce, Ph.D.

Fawcett Distinguished Professor,
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A Research Monograph of the
Printing Industry Center at RIT

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R·I·T Printing Industry Center
An Alfred P. Sloan Foundation Center

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Executive Summary

The study focused on the amount of personalized print produced by printing companies in Europe, the challenges these printers are facing when producing personalized jobs, and how the market for personalized printing in Europe differs from that in the US.

Personalization is a marketing tactic in which various media channels are used to send a personalized message to a consumer or client based on their interests. Personalization is not a new tactic. The use of personalization has been slowly increasing over the past few decades to become one of the key tactics used capture a customer's attention. Personalized print—one media channel that can be used in the marketing mix—is divided among different applications such as mail merge, transactional print, versioning, moderate personalized print and highly personalized print.

An online survey was distributed to printing companies across Europe via the International Confederation of Printing and Allied Industries (Intergraf). A total of 37 printing companies participated in this study.

Survey results revealed that, on average, 6.6% of participants' revenue came from personalized print in 2010. The level of personalization most companies (35%) listed as their major source of revenue was mail merge. The top five challenges that participants were facing related to personalization included:

- Communicating the value to our customers of the ROI (Return on Investment) benefits of personalization (45%).
- Poor data quality on the client side (30%).
- Ability to work with client's marketing decision makers (30%).
- Clients do not have retention or customer relationship strategy (30%).
- Merging the client's database with variable data software (15%).

Though the low response rate from the study restricted the ability to generalize results, an examination of the sample differences revealed that the average amount of revenue obtained from personalized print was over 50% lower in Europe (6.6%) than in the US (20.9%). Note that the data from the US was based solely on digital printers. In Europe, personalization was reported to average around 31.4% of printers' digital revenues, but this data point was from an even smaller sample and the authors question its reliability. The level of personalization that most printing companies indicated generated a major part of revenue was mail merge, both in Europe (35%) and in the US (61.4%).

Lastly, the top challenges were similar for both the US and Europe. These included:

- Communicating the value of personalization.
- Poor data quality on the client's side.

One explanation for the differences between the US and Europe is buyer behavior—in essence, the marketing culture. Coupons are not used as a marketing tool in most countries in Europe. This could be one of the reasons that Europe produces less personalized print than the US, where coupons are used on a large scale.

Introduction

The digital printing market in Europe is estimated to grow by 71% from 2008 to 2013. The electrophotography market alone is estimated to grow by 73% in the same period (PIRA, 2010). This indicates that there is growth potential for European printing companies in the digital printing market.

Research on personalization as a marketing tactic and the production of personalized print in the US have both been examined. Research in 2004 indicated that on average, 20.9% of digital printers revenue comes from personalized print jobs (Sorce & Pletka, 2004).

In Europe, there has been little focus on research and only minor investments in R&D in the graphic arts industry (Intergraf, 2007). There is a need for more research in the European printing industry. This research will investigate the amount of personalized print produced by European printing companies, thereby adding knowledge to the global field of research on personalized print.

Literature Review

Definition of Personalization

Leaders in the field have defined personalization in several different ways. The following is an overview of these different points of view (see Table 1 for exact wording).

Broudy and Romano (1999) defined personalization as a message "targeted to you and other information varies." In the article *Customer Learning Process, Strategy Selection, and Performance in Business-to-Business Service Firms*, Alba et al. (as cited in Zahay & Griffin, 2004) defined personalization as "the ability to individualize customer communications, includes both responding individually to customer-initiated communications and providing only the information desired about the firm and its products." Zahay & Griffin (2004) stated that personalization is about the "ability to address an individual in a way that takes into account his or her unique response" and therefore, personalization can therefore be seen as an interactive communication method from one part to another and vice versa with a "specialized flow."

Sorce (2009) defined personalization as a tactic used in marketing communication, where personalization is a "complex range of marketing materials that can be designed using descriptive and behavioral information about individual customers and then delivered through a variety of media channels" (p. 3).

Table 1. Definitions of personalization

Source	Definition
Broudy & Romano (1999, p. 2)	"We define customization as a printed unit targeted to a particular group of people and only your name and address vary. Personalization means that it is targeted to you and other information varies."
Zahay & Griffin (2004, p. 174)	"Personalization, the ability to individualize customer communications, includes both responding individually to customer-initiated communications and providing only the information desired about the firm and its products (Alba et al., 1997; Hoffman & Novak, 1996). It also has been referred to as interactive marketing, or "the use of information from the customer rather than about the customer" (Day, 1999) and the ability to address an individual "in a way that takes into account his or her unique response" (Deighton, 1996, 1997)."
Sorce (2009, p. 3)	"Personalization is defined as the complex range of marketing materials that can be designed using descriptive and behavioral information about individual customers and then delivered through a variety of media channels."

Henrikke Korhonen, Service Director for Fonecta (a company located in Finland), said in an interview with Hansaprint's magazine, "…[p]ersonalization is about talking to people in a target-group-oriented way, with messages varied according to recipient's characteristics" (Hansapress, 2010, p. 28).

A common theme among these definitions is that personalization is seen as a marketing tactic or communication tool where the goal is some sort of response from the receiver. Information about the customer or target group is analyzed and used to create a unique message, which is then delivered through various media channels. The channels can include print, the web, mobile devices or other media channels that support variable data.

Personalized print is one of the media channels used for personalization. It can be integrated with other media or stand on its own.

However, in order to be effective, the personalized message has to be relevant and include more than a name and address. According to Pellow et al. (2003), "[p]ersonalization only has value if the individual views it as relevant" (p. 5). Printed marketing material with the customer's name and/or address is no longer unique and personal, because everyone else is getting the same message (S. Scholl, personal communication, October 4, 2010).

Amount of Personalized Printing in the US

In 2010, the size of the printing market in the US was estimated at $131 billion. The digital printing market alone was estimated at $26.2 billion, which is a 6% increase from 2009 (Davis, 2011).

Sorce and Pletka published a monograph in 2004 entitled *Digital Printing Success Models: Validation Study*, where they surveyed 162 digital printers. On average, 20.9% of printers' revenues came from personalized print jobs (variable data print jobs). Eighty-five percent indicated that, in terms of the mix of personalization, mail merge was a major part of their revenue (Sorce & Pletka, 2004).

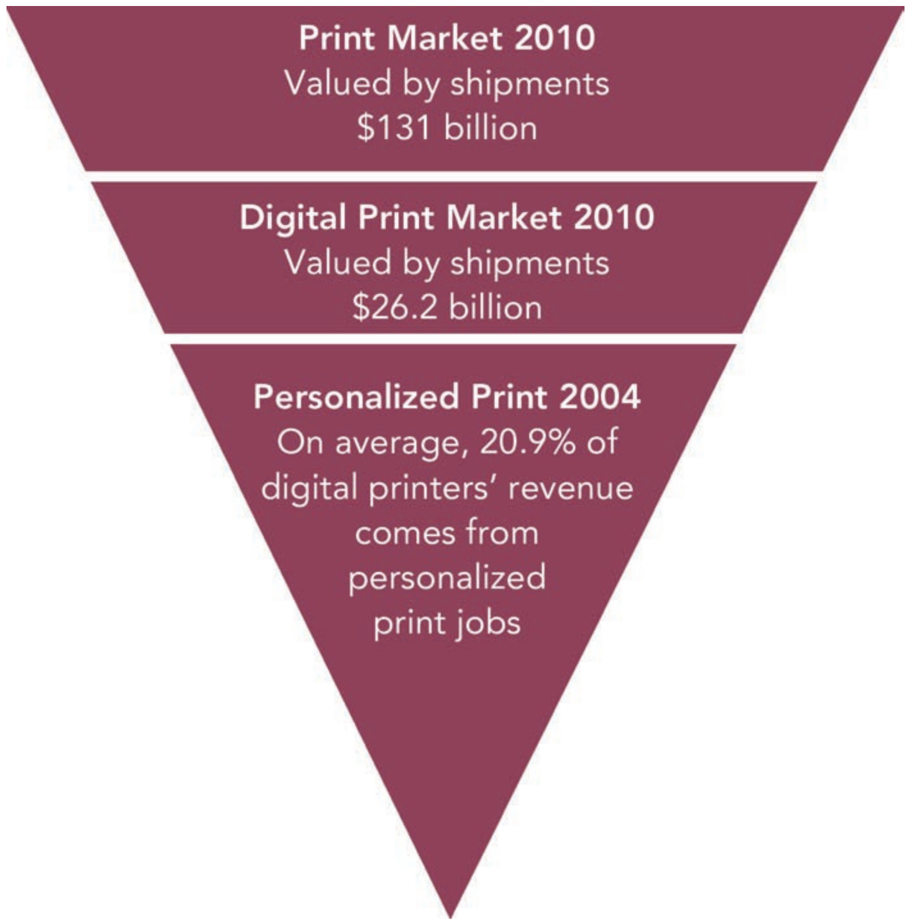

Figure 1. Printing and personalization in the US

The research in the US has focused on marketing executives, advertising agencies or both. Surveys have analyzed the use and demand for personalization within these industries. Table 2 lists the demand for and use of personalization by marketers in the US.

In 2007, marketers spent an estimated $58.4 billion on direct mail advertising (CMO, 2008). According to the Direct Marketing Association (DMA), spending on direct mail advertisements was over half (54.3%) of the total US advertisement spending in 2009 (Print in the Mix, 2010).

Table 2. Demand for and use of personalization by marketers in the US

Year	Source	Personalization
2002	Direct Marketing Association (DMA)	62% of DMA members use personalization for postal and e-mail marketing.
2003	Pellow & Sorce	33% average of campaigns used personalization. 18% was highly personalized.
2007	Direct Marketing Association (DMA)	71% of direct marketers indicated that personalization was the most frequent marketing tactic they used.
2008	InfoTrends	68% of marketers used personalization.
2009	Direct Marketing News (DMI)	40% of direct marketers said that 50%-100% of their activities are directed to personalized consumers vs. mass marketing.

The marketing industry is not the only industry that has been surveyed about personalization. According to *The Industry Measure*, 27% of creatives (such as graphic designers, etc.) worked with personalization in 2006. This was a decrease from 2004, when 38% indicated that they had worked with personalization. Magazine publishers also use personalized print. *The Industry Measure* survey in 2006 showed that personalized print was used by 15% of the magazine publishers surveyed, and 58% said that they had made use of customized covers (versioning) (as cited in Sorce, 2009).

When analyzing the usage of personalization by marketing and advertising agencies, there has been a steady increase in the use of personalization over the years. Data from a 2007 study gave no indication that personalization was an increasing trend in the US (Sorce, 2009, p. 43). Table 3 compares marketing executives' use of personalization in 2003 and 2008 from two different studies.

Table 3. Use of personalization by marketing executives (Sorce, 2009)

Printing Industry Center 2003 "Percentage of campaigns annually that involve personalization"		CMO 2008 "To what extend does your company currently use personalized communications in its customer acquisition and relationship development programs?"	
0-19% of campaigns	39%	Low	44%
20-59%	38%	Moderate	39%
60% or more	24%	High	17%

Complexity of Personalization

In previous research, leaders in the industry have defined different levels of personalization, with different definitions.

The research done by Broudy and Romano in 1999 identified three levels of personalization; variable:

- Text.
- Data.
- Image.

Research from the Printing Industry Center in 2003 divided personalization into five complexity levels (Pellow, Sorce, Frey, Olson, Moore, & Kirpichenko, 2003):

- Variable address and/or salutation.
- Variable address and/or numerical information in fixed fields.
- Variable address, text, and numerical information in dynamic fields.
- Variable text or numbers and graphics.
- Variable text or numbers and variable graphics.

Sorce and Pletka (2004) defined six levels of personalization in *Digital Printing Success Models: A Validation Study*:

- **Versioning:** Design not personalized for each customer, but rather for each group of customers.
- **Mail merge:** Only name and/or address is variable.
- **Personalized printing:** Stored data used to create a personalized design.
- **Transaction printing:** Business letters, for example a bank statement, created for each individual.
- **Internet on-demand:** Using a template where authors can personalize some core elements of design, such as photographs and event details.
- **Fully customized communications:** Each element is variable in newsletters, brochures and other documents. Stored data in a customer database is used to produce unique marketing materials.

InfoTrends (Corr, White, & Zarwan, 2007) conducted a study titled *The Future of Mail* and denoted three complexity levels of personalization:

- Not personalized at all (except for name and address),
- Limited, and
- Highly personalized.

In 2007, four complexity levels of personalization were used in *The Industry Measure* study, *Variable Data Printing/1:1 Personalization*:

- Simple mail merge,
- Full-color with variable images and text,
- Pre-printed offset shells, and
- Versioning.

Based on the previous research, five levels of personalized print were identified and were used in this thesis:

- **Versioning.** Not personalized for each individual, but variations for groups (i.e. different versions of a newspaper cover depending on geography).
- **Mail merge.** Only name and/or address is variable.
- **Transactional printing.** Includes "transpromo" (i.e. credit card statements personalized for each individual that possibly include other promotional information)
- **Moderate personalized print.** Variable text and images based on consumer information.
- **Highly personalized print.** Variable text, images, colors and data based on consumer information, (i.e. data based on previous purchases, likelihood of point of purchase, demographics and consumer preferences).

European Printing Industry

With 850,000 people employed in the printing industry and 134,000 companies spread over twenty-nine countries, the European printing industry had an estimated turnover[1] of around €100 billion in 2009. This industry consists of many small enterprises: 90% of the companies employ fewer than twenty people (Intergraf, 2010).

1 - Revenue from printing and service activities related to printing.

Table 4. Printing industry turnover (billion €) (Intergraf, 2010)

Country/Region	2005	2006	2007
European Union	101.3	105.9	106.8
Norway	1.4	1.4	1.5
Switzerland	4.1	4.1	-

In 2008, the printed trade advertising materials market (excluding commercial catalogues) was €15.7 billion for the European Union (EU), a slight decrease from 2007 when the market was €16.6 billion. In Norway, which is not a EU member, the size of the market was €118.7 million in 2008, a dramatic €32 million decrease from 2007 (Intergraf, 2010).

Size of Digital Printing Market in Europe

The digital printing market in 2008 was €15.8 billion. This is 10.6% of the total printing market in Europe. PIRA (2010) estimates that the digital market in Europe will grow to €27.1 billion in 2013, with a 17.6% market share.

The electrophotography market in 2008 was €11 billion, and is estimated to grow 73% to €19 billion in 2013 (PIRA, 2010).

Amount of Personalized Print in Europe

The International Confederation for Printing and Allied Industries (Intergraf) (2008) produced a white paper highlighting the advantages of working with the European printing industry. They concluded that the European printing industry is looking to the future, and one of the clearest examples of this is the introduction of personalization. This white paper did not mention how much personalized print is being printed in Europe.

Even though there is no record of the total amount of personalized print in Europe, there are companies that produce personalized print.

Pitney Bowes, a business-to-business (B2B) company that delivers "software, hardware and services that integrate physical and digital communications channels" (Pitney Bowes, n.d.), did a survey in March 2010 on the use of transactional promotions, which are one aspect of personalized print. They surveyed 1,000 B2B companies in North America, Germany, France and the UK. The survey revealed that 34% of the European companies had used personalized promotions on their transactional documents, while 31% of the US companies had also used "transpromo" (Pitney Bowes, 2010, p. 2). The results of this survey show that personalized print, at least on a transactional level, is being produced in both the US and in Europe, and therefore the markets might not be that different.

Companies such as the global printing company Elanders, which has printing plants in Norway, Germany, Hungary, Sweden, Italy, Poland and the United Kingdom, offer personalized printing in the forms of versioning, transactional printing and photo books (Elanders, n.d.). Hansaprint, a large printing, marketing and communication company that is mainly located in Finland, produces personalized print and also promotes personalization as a marketing tool to their new and current customers.

Opportunities and Threats for the European Printing Industry

According to the PIRA's 2010 forecast, the digital printing market in Europe will grow in the future. Printers in Europe are also positive towards the "value-added services" trend and are willing to change the way they do business by "modify[ing] their relationships with their customers by making more value-added services proposals" (Intergraf, 2007).

These two articles, along with the articles and case studies discussed above, indicate that there are opportunities for the use of personalization in the European market and that Europe has adopted this marketing tactic to a varying degree.

Challenges

One of the structural, strategic challenges the printing industry in Europe has to undergo is to "mutate from a commodity industry to an added-value industry" (Intergraf, 2007). Another one of the challenges in the market is to "be[come] closer to key clients and improv[e] customer relationships, management tools and personalization supports" (Intergraf, 2007).

The printing industry in Europe does not invest heavily in research and development (R&D), which could put structural innovations within the industry at risk (Intergraf, 2010).

Another threat in the European market is that there is no general data protection and marketing law in Europe that all the countries in Europe must follow. Each country has their own personal data protection laws and marketing laws, which makes the use of personal information in direct mail for a global European company difficult, confusing and time consuming. Each country's laws should be within the framework that the Data Protection Directive (95/46/EC) established for general conditions for the processing (collection and use) of personal data, but there are be national differences. However, all companies in the EU can use "personal information about their customers/clients to target messages to them, as long as such processing of data is in line with the general principles of 'fair and lawful processing. … The actual sending of the messages, however, is subject to a jungle of differing regulations" (G. Brandau, personal communication October 9, 2010).

The consumer also has to have the option to "opt out" in many of the European countries (Baines, 1999). For example, in Denmark companies also have to tell consumers why they want to use their personal data and for what purpose. The consumers also have to agree (opt-in) to let the company use their information (Prosa, 2000). A Danish company can therefore use personalization in their marketing, but they are not allowed to store data if it is not going to be used for a purpose, such as direct marketing.

Technology-driven personalization was the topic of *The Future of Marketing Virtual Conference Part II*, which took place in March 2011. Sixty marketing experts shared their thoughts and ideas regarding personalization. This conference is an indication that this is a current topic and that the demand for personalization is present in the market. However, the conference also revealed that marketers don't have the full knowledge of how to "capitalize on it fully," and they do not know how it will "evolve in the coming years" (Future of Marketing, 2011).

As discussed previously, Europe has intricate marketing legislations with laws to protect consumer data. Consumers in most EU countries have the choice to opt-in, which means that they can choose to receive messages from the company based on the data the company has about them. In the US, privacy is becoming a central legislative issue, and as a result there is a proposal for a new bill in the Congress: the Commercial Privacy Bill of Rights, proposed by Senator John Kerry:

> "The purpose of the legislation…is not to discourage information sharing, but to encourage it – but under a common code of conduct that respects the rights of both the people sharing their information and legitimate organizations collecting and using it on fair terms and conditions" (Kerry, 2011).

Senator Kerry is not the only one addressing this issue in the US. The Federal Trade Commission (FTC) and the U.S. Department of Commerce have both published white papers with recommendations for frameworks to help protect consumers while also making consumers more aware of their rights and options (Haase, 2011).

Conclusion

Personalization is a marketing tactic where the goal is an interactive two-way communication between the company and the customer. Information about the customer is analyzed and used to create a unique message, delivered through various media channels targeted to the consumer's usage habits. Personalized print is a marketing tactic where print is the media channel that delivers the message to the consumer. Research in the US states that 40% of direct marketers allocate 50% or more of their activities to personalization. The use of personalization has remained steady over the past years, but has been slowly increasing to become a more popular marketing tactic. Renowned marketers are discussing it as one of the key marketing tactics for the future.

Little research is being conducted on the amount of personalized print in Europe, although personalization has been introduced to the printing industry. The electrophotography market is estimated to grow in the future and, according to the PIRA forecast, direct mail will also continue to grow. This indicates a growth potential for personalized print in the future. The leads to the central question of this research: how much personalized print is currently being produced in Europe?

Research Objectives

The researchers will analyze the European printing market to determine the amount of personalized print currently in use in Europe, and will also examine the opportunities and threats for the use of personalized print as a marketing tactic in Europe. In addition, the researchers will compare the European personalized print market with U.S. research conducted several years ago (Sorce & Pletka, 2004).

Specific research questions include:

1. How much personalized print is being produced in Europe by print service providers?
2. What are the challenges the print service providers are facing regarding personalization?
3. What is the adoption of personalized print in Europe compared to the US?

Methodology

Sample

The sample was selected from the membership of Intergraf (International Confederation for Printing and Allied Industries). According to Intergraf, there are about 134,000 printing companies in Europe, and almost all of these (132,000) are members of Intergraf. These printing companies are represented in one of twenty-three national printing federations, divided over 20 countries. Intergraf does not have direct contact information for the individual companies, since they only represent the national printing federations.

Therefore, the sample for this research was 132,000 printing companies in twenty European countries. A list of the national member federations is given in Appendix 1. The response rate was 0.06% (n = 73).

Procedure

An online survey was distributed via Intergraf to the member federations. The member federations were encouraged to distribute the survey to their members via e-mail. The e-mail was sent to the member federations on March 25. Another e-mail was distributed via Intergraf to "young managers" in the graphic arts industry in Europe on April 7.

The survey was written in English and translated into Spanish, French, and German to ensure a higher response rate. Verbatim Solution translated the survey. Contacts of the researcher from the printing industry back-translated the survey and made necessary corrections to the different versions. To obtain accurate results, it was critical for the questions to have the same meaning independent of the language, although some cultural and industry term differences had to be accounted for.

Questionnaire

To determine the amount of personalized print in Europe, participants were asked about their location, number of employees, annual revenue, percentage of revenue that came from personalized printing jobs in 2010, and level of personalization used. (The complete survey in each language is given in Appendices B through E.) Five levels of personalization complexity were identified by the researcher:

- **Versioning.** Not personalized for each individual, but variations for groups (i.e. different versions of a newspaper cover depending on geography).
- **Mail merge.** Only name and/or address is variable.
- **Transactional printing.** Includes "transpromo" (i.e. credit card statements personalized for each individual that possibly include other promotional information)
- **Moderate personalized print.** Variable text and images based on consumer information.
- **Highly personalized print.** Variable text, images, colors and data based on consumer information, (i.e. data based on previous purchases, likelihood of point of purchase, demographics and consumer preferences).

Participants were asked to input annual revenues in their respective currency. The researcher then converted these amounts into US dollars, using the average currency exchange rates from 2010. This was done to eliminate fluctuations due to the use of different conversion rates. For a conversion exchange list, see Appendix F.

Comparing Europe to the US

The European results were compared to a validation study for digital printing success models conducted by Sorce and Pletka in 2004. Sorce and Pletka defined six types of personalization levels. In this study Internet on-demand was not included due to the objectives of the research. Instead, the researcher chose to use the term "moderate personalized print."

"Moderate personalized print" was defined in the survey as variable text and images based on consumer data. Sorce and Pletka (2004) defined "personalized printing " as "using data about the recipient, beyond name and address, to create a more relevant offer based on demographics, lifestyle or past buying history." (p. 4). The explanation and meaning of the terms are similar: only the wording used is different. Therefore, the researcher has chosen these terms as comparables.

The same reasoning has been used for “highly personalized print”—defined by the researchers as variable text, images, color and data based on consumer information—and “fully customized communications”—defined by Sorce and Pletka (2004, p. 4) as “[a] sophisticated publishing technique where all elements on each printed piece, from brochure to newsletters, are dynamic and variable. This enables organizations to create unique content for each person based on a database of information about the person.”

Statistics

Descriptive statistics were used to describe the data collected in this research.

A univariate analysis—calculating the mean, median, minimum, maximum, and the standard deviation—was done to infer how much personalized print is being produced in Europe. This analysis was done for all of the respondents and for each country when an adequate sample size was available.

Regarding the mix of personalization, the percentage was calculated for all of the rating options—major, minor, and not at all—within the five levels of personalization.

A rating of the challenges printing companies face when they are producing personalized printing jobs was created to obtain an overview of the most common challenges.

The data collected in this research was compared to the US data on personalized print (Sorce & Pletka, 2004) using descriptive tables.

Results

Results are based on responses collected by April 15, 2011.

Respondents

While 72 printing companies in Europe responded, only 37 companies completed the survey in full. The companies were from 11 different countries: Portugal (14 respondents), Malta (4), Turkey (2), Austria (3), United Kingdom (3), Sweden (3), Norway (2), Greece (1), Denmark (1), France (1) and The Netherlands (1). (One participant did not respond to this question, so their location is unknown). Almost all (81%) of these companies classified themselves as commercial printers.

To determine the size of the companies, participants were asked to provide their annual revenue and number of employees. The annual revenue was converted into US dollars using the average exchange rate from 2010 published by the U.S. Internal Revenue Service by the US Government.

Three of the revenue responses were outliers and were removed from the analysis. Participants’ average annual revenue in 2010 was $101.43 million ($n$ = 25). Over threequarters of respondents (76%, *n* = 34) had fewer than 101 employees. The distribution is shown in Table 5.

Table 5. Size of company based on number of employees (*n* = 34)

Number of employees	Percent
Less than 25	35%
26-100	41%
101-200	14%
More than 200	9%

Seventy-nine percent of participants (*n* = 29) produce digital printing, and therefore have the ability to produce personalized print. Table 6 presents the average for each process. Examining the medians revealed that 80% of revenue was obtained from offset printing for "typical" printers.

Table 6. Distribution of annual revenue by printing process (*n* = 29)

Process	Mean	Median	Max	Min	SD
Digital	15.5%	5.0%	80.0%	0.0%	24.16
Offset	65.4%	80.0%	100.0%	0.0%	33.36
Other services	19.21%	10.0%	95.0%	0.0%	25.61

Figure 2 presents the distribution of revenue from digital printing. On average, 15.5% of participants' annual revenues were from digital printing. Of the 29 companies, 65.5% indicated that 5% or less of their revenue came from digital printing. For 27.5% of the companies, digital printing counted for 16% or more of their annual revenue.

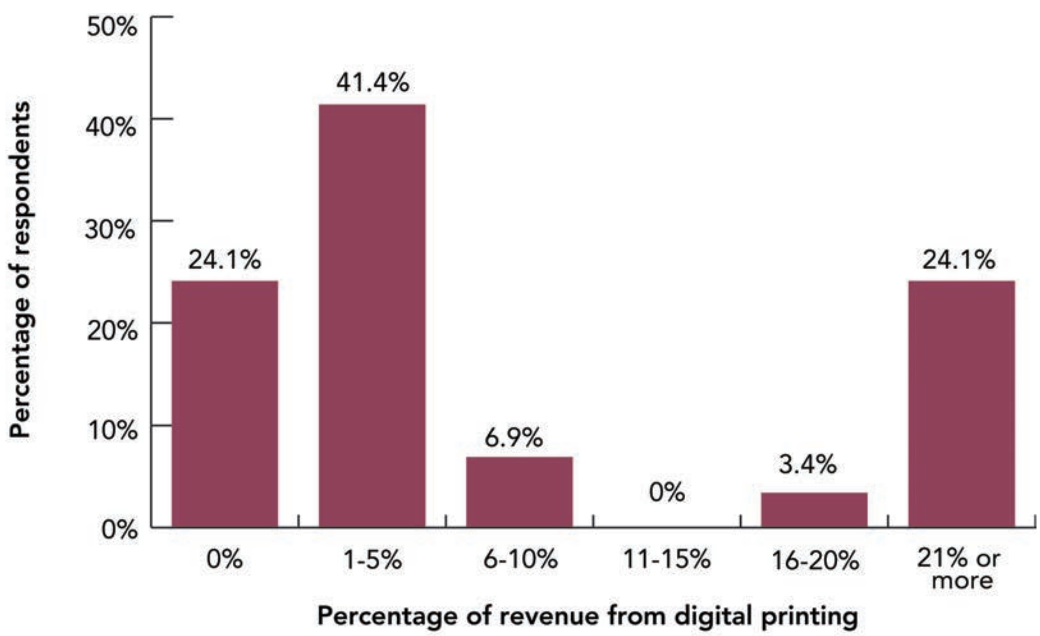

Figure 2. Distribution of digital revenue (*n* = 29)

Amount of Personalized Print

Of the 29 firms that produced digital print, 17 companies indicated that personalized print made up part of their revenue. Three of the 29 reported that they did not produce any personalized print. Four of the 29 companies did not indicate how much of their annual revenue came from personalized print. These were categorized as 0% personalization. Five companies did produce digital print, but did not answer the question regarding the amount of personalized print from annual revenue. These were also categorized as 0% personalized print for the calculations.

The researchers were not confident that the data on the amount of personalized print were reliable, due to possible different interpretations by respondents. Respondents were asked to indicate what percentage of their annual revenue was personalized. Four companies seemed provide what percentage of digital print came from personalization (in that the percent of personalization reported exceeded the percentage of digital print). The researchers therefore calculated both the percentage of personalization from total annual revenue and the percentage of personalized print from digital (see Appendix H for raw data and transformations).[2]

Percentage of Personalized Print in Terms of Total Annual Revenue

Table 7 reveals that an average of 6.6% (n = 28) of the companies' revenue came from personalized print in 2010. This includes the many firms with 0% in revenue from personalized print. The average of personalized print, from the companies that did produce at least some personalized print (n = 16), was 11.54%, a slightly higher number. For most companies (75% of the 28 that responded), personalization counted for less than 20% of their annual revenue. See Figure 3 for the distribution of revenue from personalized printed jobs.

Table 7. Annual revenue from personalized print jobs in 2010

Respondents	Mean	Median	Min	Max	SD
All companies (n = 28)	6.6%	1.4%	0.0%	70.0%	14.3
Only companies that produced personalized print (n =16)	11.54%	5.0%	0.4%	70.0%	17.5

2 - One of the respondents was considered an outlier: The respondent had indicated that 100% of their annual revenue came from personalized print, but the respondent also indicated that none of their annual revenue came from digital print. Therefore, the researchers were not confident that this number was correct and treated it as an outlier, deleting it from further analysis.

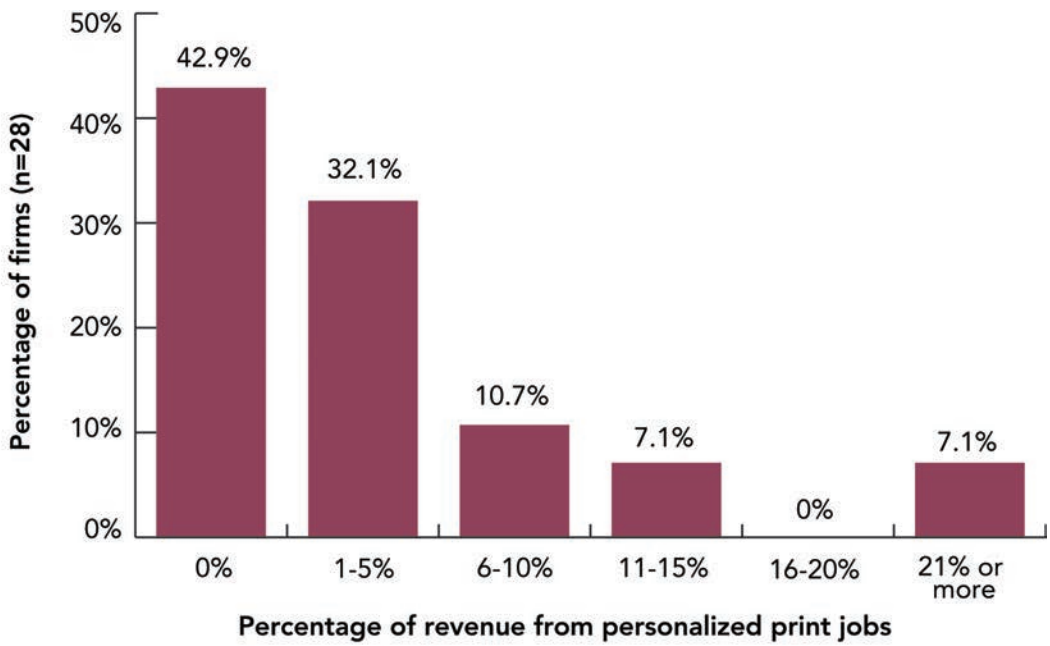

Figure 3. Percentage of revenue from personalized print jobs

Percentage of Personalized Print from Digital Revenue

Among all respondents, an average of 31.4% of the digital print being produced is personalized. (See Figure 4 for the distribution of personalization from digital print revenue.) When examining only the companies that indicated they produced personalized print, an average of 43.2% of their digital print revenue came from personalization.

Table 8. Personalized print from digital revenue

Respondents	Mean	Median	Min	Max	SD
All companies (*n* = 22)	31.4%	18.35%	0.0%	100.0%	34.2
Only companies that produced personalized print (*n* = 16)	43.2%	37.5%	0.4%	100.0%	33.12

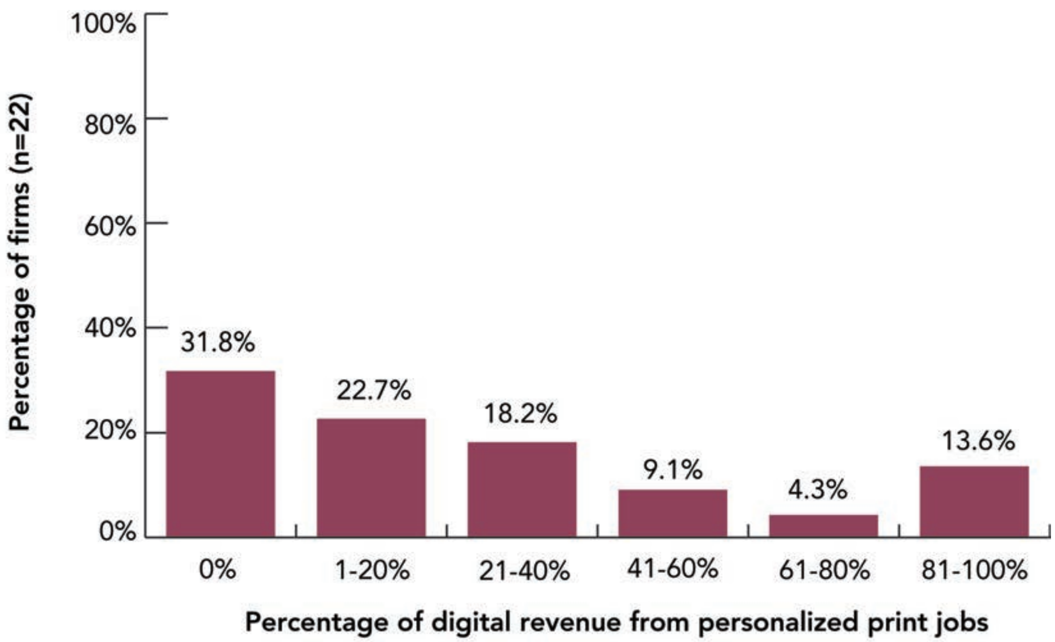

Figure 4. Percentage of personalized print from annual digital revenue

Level of Personalization

In terms of the different levels of personalization, respondents were asked to indicate what type of personalization was either a "major," "minor" or "not at all" part of their revenue.[3] Definitions of the different levels of personalization are listed in the Methodology section. Figure 5 shows the results.

3 - Non-respondents who indicated that one or more levels were their "major" source of revenue, were assumed to not produce other types of personalization and were categorized as "Not at all" for those levels.

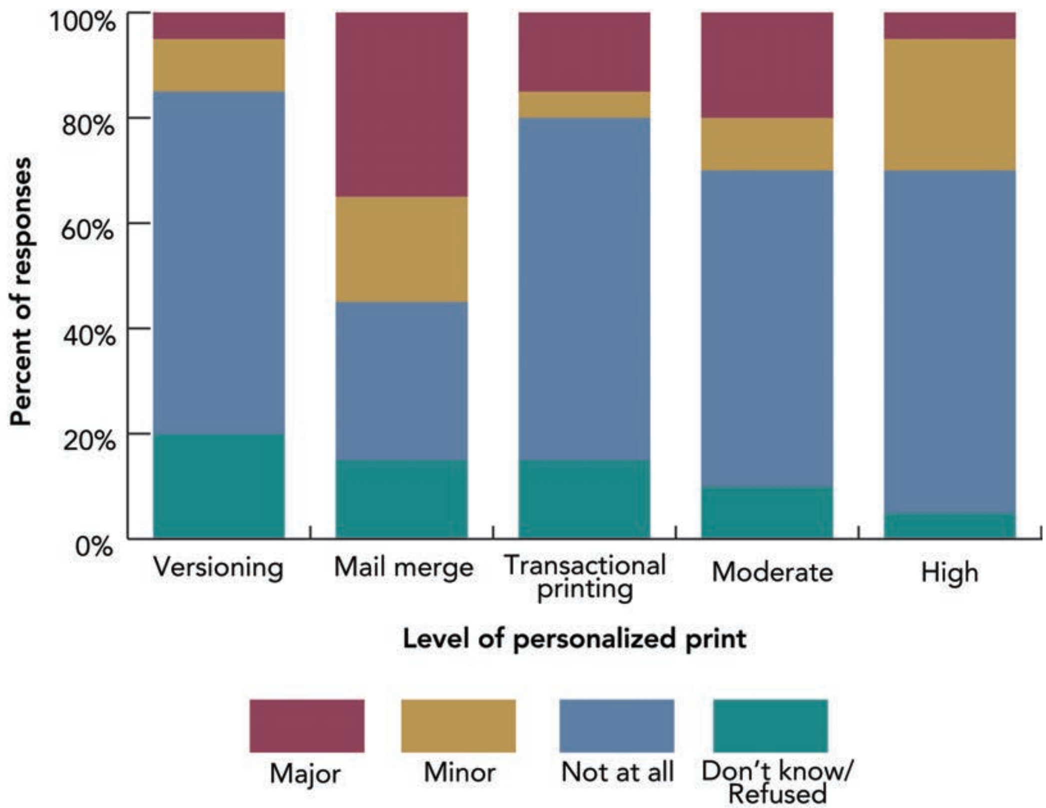

Figure 5. Impact on revenue by level of personalization

Mail merge was the level of personalization most companies (35%) listed as their major source of revenue, and 55% said that it was either a "major" or "minor" part of their revenue. Moderate personalized print was the second most popular level with 20% of the companies indicating it was a major part of their revenue (see Figure 6).

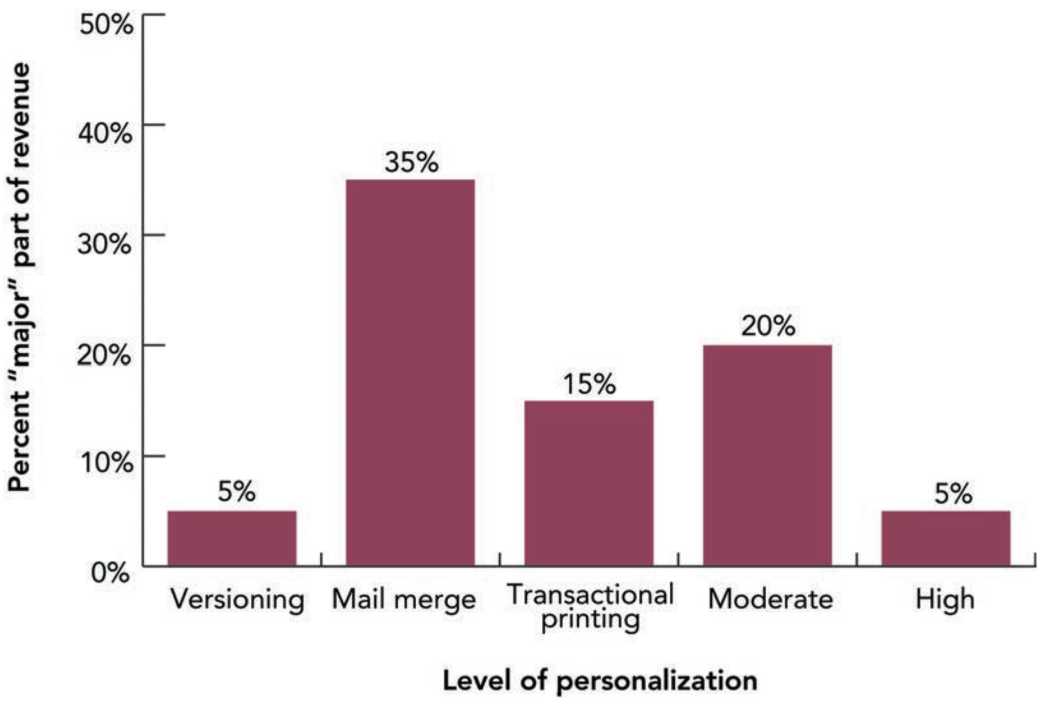

Figure 6. Percentage of respondents with personalization as a major part of revenue by level of personalization

On average, 53% (n = 18) of the personalized printed jobs the companies produced were recurring, while 47% reported they were one-time jobs.

Respondents promoted personalization to their clients mainly by showing examples of products and case studies on sales calls (61%) and/or by upselling current clients who would benefit from a personalization strategy (56%). Only 28% indicated that using personalized mailings and personalized URLs (PURLs) promoting their capabilities was a part of their promotion strategy. One company indicated that they also used advertising and promoted personalized print at events. One company did not promote personalization at all since it was not a part of their core business. (Only 4% of this business' revenue came from digital print. Of that, 2% was personalized).

Companies that offered personalized print also were likely to offer a personalized e-mail service (40%, n = 20).

A total of 60% of the printing companies (n = 20) usually did not track the response rates for the personalized campaigns, but their clients did. Twenty percent indicated that the decision on who would track the response rate, depended on the client. Only 15% of the printing companies did tracked the response rate for the personalized campaigns for their clients most of the time.

In terms of the future of personalization, 75% (n = 20) of the respondents predicted an increase of personalized printed jobs in the coming year, while 20% indicated that the volume of personalized printed jobs would stay the same. Only 5% felt it would decrease.

Challenges to Overcome

"Communicating the value to our customers of the return on investment (ROI) benefits of personalization" was one of the largest challenges, with 45% of respondents. Table 9 lists the top 5 challenges that respondents indicated they are facing regarding the production of personalized print.

Table 9. Top five challenges for producing personalized print

Challenge	Percent that indicated this was a major challenge (*n* = 20)
Communicating the value to our customer of ROI (Return on Investment) benefits of personalization	45%
Poor quality of data on the client side	30%
Ability to work with client's marketing decision makers	30%
Clients do not have retention or customer relationship strategy	30%
Merging the client's database with variable data software	15%

Comparing Europe to the US

Patricia Sorce and Michael Pletka surveyed 171 digital printers in the US in 2004 for their validation study on digital printing success models. The results from this research were compared with their findings for any differences or similarities. This section will compare the amount of personalization produced, the mix of personalization and the challenges printing companies are experiencing producing personalized print in Europe and in the US. All data from the US are generated from the report *Digital Printing Success Models: Validation Study* (Sorce & Pletka, 2004).

Personalized Print

For the purpose of comparison, the estimate of the percent of revenue from personalized print in Europe was 6.6%. Table 10 shows the U.S. data. The average amount of personalized print was over 50% lower in Europe (6.6%) when compared to the US (20.9%).[4] However, if compared to the percentage of digital print in the current sample, the mean was 31.4%, a much higher number.

4 - Sorce and Pletka's sample was of digital printers only.

Table 10. Amount of personalized print by region

Region and type of print revenue	Count	Mean	Min	Max	SD
Europe 2011 What percentage of *annual revenue* was from personalized printed jobs in 2010?	28	6.6%	0	100	14.3
Europe 2011 Percentage of *digital* revenue from personalized printed jobs in 2010.	22	31.4%	0	100	34.2
US 2004 What percent of revenue was from variable data print jobs?	162	20.9%	0	100	28.8

In comparing mix the personalization in printing companies, the US and Europe both had mail merge as a "major" part of revenue. Mail merge was the level of personalization most reported in both Europe (35%) and the U.S. (61.4%). The lowest amount of personalization for Europe was versioning (5%) and highly personalized print (5%), versus transactional (8.2%) and highly personalized print (28%) for the US.

Table 11. Mix of personalization by region

Europe 2011 (*n*=20)		US 2004 (*n*=171)	
Level	Percent	Percent	Level
Versioning			Versioning
Major	5.0%	44.4%	Major
Minor	10.0%	35.7%	Minor
Mail merge			Mail merge
Major	35.0%	61.4%	Major
Minor	20.0%	27.5%	Minor
Transactional printing			Transactional printing
Major	15.0%	8.2%	Major
Minor	5.0%	38.0%	Minor
Moderate personalized print			Personalized printing
Major	20.0%	57.3%	Major
Minor	10.0%	35.1%	Minor
Highly personalized print			Fully customized communications
Major	5.0%	28.7%	Major
Minor	25.0%	42.1%	Minor

Note: Non-responders were assumed to not produce that type of personalization and categorized as "Not at all."

Challenges

Table 12 compares the strongest challenges that printers in Europe and the US are facing. Communicating the value of personalization, poor data quality on the clients' side and the fact that printing clients do not have retention or customer relationship strategies are the largest challenges printers are facing in both regions. European respondents had the option to answer if the challenge was a large challenge, moderate or not a challenge at all. The results were combined across the moderate and large categories, to make the results comparable to the study by Sorce and Pletka (see Table 5.8). Overall, there were very similar results for both markets in terms of order of importance.

Table 12. Challenges printers face by region

Europe 2011 (*n* = 20)		U.S. 2004 (*n* = 170)	
Moderate and/or large challenge (combined)	Percent	Percent	Moderate to high challenge
Communicating the value to our customer of ROI (Return on Investment) benefits of personalization	75.0%	84.1%	Communicating the value to our customer of ROI (Return on Investment) benefits of personalization
Clients do not have retention or customer relationship strategy	65.0%	82.9%	Clients do not have retention or customer relationship strategy
Poor quality of data on the client side	75.0%	80.6%	Poor quality of data on the client side
Access to digital assets, such as graphics and photos	45.0%	38.2%	Access to digital assets, such as graphics and photos
Need for customized software to be written	25.0%	37.6%	Need for customized software to be written
Variable data software is too complicated	40.0%	31.8%	Variable data software is too complicated
Merging the client's database with variable data software	60.0%	31.2%	Merging the client's database with variable data software
Ability to work with client's marketing decision makers	70.0%		
Changes in workflow (firm's workflow process)	60.0%		
Training and recruiting of staff with appropriate skills	55.0%		
Intricate marketing and data protective legislations	45.0%		

Discussion

Summary of Results

Respondents

In total, 37 companies participated in the survey. Eighty-one percent of participants classified themselves as being commercial printers. Participants' average annual revenue in 2010 was $ 101.43 million. Seventy-six percent had 100 employees or fewer.

Personalized Print in Europe

- On average, 15.5% of revenue came from digital printing.
- The amount of personalized print from digital revenue averaged at 31.4%.
- Overall, personalized print was 6.6% of total revenue.
- Mail merge was the level of personalization most companies (35%) listed as their major source of personalization revenue.

Challenges

The top five challenges that European printing companies are facing related to personalization were:

- Communicating the value to our customer of ROI (Return on Investment) benefits of personalization (45%),
- Poor quality of data on the client side (30%),
- Ability to work with client's marketing decision makers (30%),
- Clients do not have retention or customer relationship strategy (30%), and
- Merging the client's database with variable data software (15%).

The US Compared to Europe

The average revenue generated by personalized print in Europe was lower (average of 6.6%) than the personalized print produced in 2004 by US digital printers (average of 20.9%). Secondly, 31.4% of digital print was personalized in Europe. Due to the small sample size, lack of representation and possible misinterpretations, the researcher cannot provide a firm conclusion about the differences between the US and Europe.

Mail merge was the level of personalization most printing companies indicated as a "major" revenue generator both in Europe (35%) and in the US (61.4%). Overall, the top challenges that the European and U.S. printing companies indicated that they are facing were similar:

- Communicating the value of personalization, and
- Poor data quality on the client's side.

Conclusions

As seen in the results, the mix of personalization levels and the challenges printers are facing when producing personalized print were similar in both Europe and the US.

It was surprising to see that the top challenge regarding personalized print was "communicating the value of personalization" to customers. Research on response rates and the value of personalization are both available, so why is this such a challenge? Is it that the printing companies do not have a proactive sales strategy? Or is it that the printers do not have enough knowledge and therefore do not feel confident enough to sell personalized print? Printing companies over the years have been used to getting jobs handed to them, and their job has been to put ink on paper. They have to change their mindset, which can take a long time. In order to produce personalized print, printers also must obtain a new skill set and the knowledge and capability to produce high-quality personalized jobs. Printing companies might not have these capabilities, or they might not want to grow their business in that direction.

Printers do not have to become marketers, but they have to have knowledge of the technology required to produce personalized print and how to utilize it to create value for the customer. They also need to change their way of thinking, be proactive, show their customers what they are capable of as well as the value of personalized print, and work together with their customers.

What is not surprising is that another highly ranked challenge in both the US and in Europe was "poor data quality from the clients' side." Companies have collected data haphazardly for years, with no understanding of how to use it. When a company collects data without a utilization strategy, the data management systems they are using (if they even have one) are often poorly managed. Updating addresses, names, etc., is time-consuming, and companies do not always want to spend their time and labor on it. Some companies are offering data clean-up for their customers to update their customer relationship management (CRM) systems, and have found business success doing so. Companies may invest in better data management systems if printers communicate the value of personalization and showed examples of how to use the data in direct marketing. After all, there is no point in collecting data if you are not using it. (In Denmark, a company is actually not allowed to store data, by law, if it is not going to be used for a purpose, such as direct marketing.)

In terms of the mix of personalization levels, it is not surprising that the most-used application was mail merge. Mail merge is the easiest type of personalization to produce.

An advanced CRM system is not needed for this type of personalization, and therefore it is easy for the client as well as the printer.

Transactional printing, also called "transpromo," has been marketed heavily from the business software side. In addition, there have been rapid developments in high-speed ink jet presses, which better enable this application. It is therefore surprising to see that it is not a larger part of printers' revenues. It could be that large B2B and B2C companies have in-house printing plants, or that, as in the US, statement printing is a niche market not often served by commercial printers. The trend towards paperless statements—where the customer can choose to receive their transactional documents via e-mail and as .PDF documents—may also impact the lack of revenue from this application. However, some consumers want to keep a printed copy of their financial records. If printers could communicate the value of personalized print, some companies might choose to change their distribution model for transactional documents and choose to print them instead.

Since the amount of digital printing has increased (PIRA, 2010) and the value of personalized print has been discussed in several articles in European trade magazines, the researcher expected the amount of personalized print to be higher in Europe than in the US. However, the researcher is not confident about the percentage of personalized print obtained in this study: is it 6.6% or 31.4%? If it is 6.6%, why is it so low? Reasons why the rate was so low in this study could be that there are significant differences in consumer behavior and in the marketing cultures between Europe and the US. In most European countries, coupons are not used, which is a great marketing tool where personalization can be utilized. Also, European consumers tend to shop locally on a daily basis, not weekly, whereas American consumers normally stock up on coupons, shop once or twice a week and spend more time planning their grocery shopping.

Another reasons the response rate was low in this study could be that companies in Europe do not have real numbers for the distribution of revenue and the percentage of personalization. Secondly, based on the researcher's personal conversations with printers, it seems they are not willing to share their information with others. A recent study conducted in Europe and supported by the European Union about the future of the printing industry received only 148 online responses.

According to PIRA's forecast, the amount of direct mail is going to increase. Moreover, there are also opportunities for personalization in the packaging industry. Companies such as LEGO, Heineken and Kraft Foods have already experimented with personalized packaging and had great success. Overall, there are great opportunities for personalized print and indications that personalized print should continue to grow.

Of the 37 companies that participated in this research, 14 of them where located in Portugal. One of the reasons for this high number of participants (compared to other countries) could be due to the distribution of the survey. Some member federations chose to include the invitation to the survey in their newsletter, where as the Portuguese federation, APIGRAF (ASS. Portuguesa Das Ind. Gráficas, De Communicão Visual E Transformadoras Do Papel), translated the English survey invitation from Intergraf to Portuguese and distributed it directly to all of their members.

Reflection

If printing companies were to share their information more openly and were interested in gaining knowledge from each other, some of the challenges they are facing might be lessened and the companies could benefit from each other's knowledge. As a result of the lack of knowledge sharing, the industry is creating clear "winners" with some countries benefitting at the expense of others. For example, German printing companies are taking market share from other printing industries in Europe, such as France and Spain. (E. Khoury, Gravure Day 2011, at Rochester Institute of Technology).

Limitations

The small sample size and the lack of representation limited the inferences about the European printing market. In addition, some respondents seemed to misinterpret the question "How much of your annual revenue came from personalized printed jobs in 2010?" and may have instead reported how much digital print was personalized. Therefore, the researcher is not confident about the amount of personalized print reported.

The fact that the data on personalization from print service provider perspectives in the US were from 2004 also created a limitation regarding the comparison between the US and Europe. However, research indicates that the demand for personalization has remained steady from 2003 to 2008 (Sorce, 2009). Therefore, the similarities between Europe and the US may be due to the fact that it takes a long time to move a whole industry forward towards a more technologically-driven environment.

Agenda for Further Research

Suggestions for further studies on personalized print include the following:

- Face-to-face interviews with companies,
- Case studies on commercial printers that market personalized print to their customers,
- Focus on one country, or one region, in Europe, and
- Update the research on personalized print in the US.

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Appendix A: List of Countries and Member Federations in Intergraf

Country	National Printing Federation
Austria	PPV Austria
	Verband Druck Und Medientechnik
Belgium	Federation Belge Des Industries Graphiques (FEBELGRA)
Bulgaria	Printing Industry Union of Bulgaria
Denmark	Grafisk Arbejdsgiverforening (G.A.)
Estonia	Eesti Trüktiööstuse Liit
Finland	Graafinen Teollisuus Ry
France	Union Nationale De L'Imprimerie Et De La Communication (UNIC)
Germany	Bundersverband Druck & Medien E.V. (BVDM)
Greece	Hellenic Federation of Printing Media Communication
Hungary	Federation of Hungarian Printers and Papermakers
Italy	Associazione Nazionale Italiana Industrie Grafiche Cartotechniche E Trasformatrici (ASSOGRAFICI)
Luxembourg	Association Des Maitres Imprimeurs Du Grand-Duche De Luxembourg
Malta	Malta Printing Industries Association
Norway	NHO Grafisk
Portgual	ASS. Portuguesa Das Ind. Gráficas, De Communicão Visual E Transforma-doras Do Papel (APIGRAF)
Sweden	Grafiska Företagens Förbund (GFF)
Spain	Dereacion Empresarial De Industrias Graficas De Espana (FEIGRAF)
Switzerland	Schweizerischer verband Fur Visuelle Kommunikation (VISCOM)
	Verband Der Schweizer Druckindustrie (VSD)
The Netherlands	Koninklijk Verbond Van Graphische Ondernemingen (KVGO)
United Kingdom	British Printing Industries Federation
	Graphic Enterprise Scotland
	International Hologram Manufacturers Association – IHMA
Ukraine	Consortium "EDAPS"
Turkey	Turkish Printing Federation – BASEV

Appendix B: English Survey

Welcome! This study is about personalized print in Europe of European printing companies, and is being conducted by Graduate candidate Jeanette Bredsten, School of Print Media at Rochester Institute of Technology, Rochester, NY, USA.

The study is expected to add to the field of knowledge regarding personalized print in Europe. The information collected will be used by Jeanette Bredsten to determine the amount and use of personalized print in Europe.

The survey should take between 10-15 minutes to complete. Please take time to read each question carefully, as your answers are important!

At the end of the survey you will have the chance to enter your contact information so that you will be able to receive an executive summary of the results. You will also be able to enter yourself into a drawing for the opportunity to win one of ten *Personalization* books by Dr. Patricia Sorce.

Please read the following information and answer the informed consent question at the bottom of the page:

I will ask you to answer a variety of questions regarding your firm and the use and amount of personalized print your company produces. During the survey you have the option to edit the information that you provide. You can navigate through the survey by clicking the “Previous” and “Next” buttons at the bottom of the screen.

The information collected in this survey is strictly for research purposes, but the results will be distributed to those who are interested in this research. The thesis will be available on Rochester Institute of Technology’s databases and distributed to third parties. No personally identifiable information (with the exception of IP address) is collected. You have the option to provide your email address at the end of the survey to receive the results. All information will remain strictly confidential: however, there is a limit to the confidentiality that can be guaranteed due to the technology itself.

Access to the data is restricted to the researcher and thesis advisor Dr. Patricia Sorce. Aggregate data from the study will be published. Your IP address and/or e-mail address (if you chose to provide them) will NOT be provided to any other party and will NOT be released in the survey results.

There are no foreseeable risks or discomfort that will be experienced as a result of taking the survey. Participation in this survey is entirely voluntary. At any time, you may exit this survey by clicking “Exit this survey” button, which is located at the top right on the screen. No penalty or loss of benefits (with the exception of receiving the results and entering in the prize drawing) will be experienced as a result of not taking the survey and/or exiting the survey prematurely.

If you have any questions or concerns about the survey, you may contact Jeanette Bredsten, principal investigator of the study, at +1 585 748-7614 or +47 95881714, e-mail: jxb2556@rit.edu. If you have any questions about your rights as a research subject, please contact RIT Human Subject Research Office at +1 585 475-7673.

Thank you for your participation.

***1. I have read the information above and attest that I am willing and able to take the survey:**

- ◯ Yes (This will allow you to start the survey)
- ◯ No (This will take you to a page where you can exit the survey)

If the company you represent has more than one plant in your country, please choose the largest printing plant for all questions in the survey. For financial data, please use your national currency.

2. Would you classify your company as a commercial printing company?

- ◯ Yes
- ◯ No, please describe how you would classify your company:

3. What is your title in the company?

4. Country where your headquarters is located:

5. The number of employees in your largest printing plant or location:

- ◯ Less than 25
- ◯ 26-100
- ◯ 101-200
- ◯ More than 200

6. What was your annual revenue for 2010? Input the annual revenue in the currency the company operates in and state the currency.

Annual Revenue for 2010:

Currency:

7. What percentage of your company's revenue (or largest plant revenue) comes from the following sources? Please enter numbers that add to 100%.

Digital Printing

Offset Printing

Other Services (mailing, fulfillment, etc)

If the company you represent has more than one plant in your country, please choose the largest printing plant or site for all questions in the survey.

8. What percentage of revenue was from personalized printed jobs in 2010?

Percentage:

9. Of all the personalized printed jobs your company does, what is the mix in terms of the following? Was it a major source of revenue, a minor source of revenue, or not at all a part of the revenue.

	Major	Minor	Not at all	Don't' know/no response
Versioning (Not personalized for each individual, but variations for groups. E.g. different version of cover for each town)	○	○	○	○
Mail merge (Only name and/or address is variable)	○	○	○	○
Transaction printing, including "transpromo". (Business letters, such as for example a bank statement of financial report, created for each individual and possibly including promotional information)	○	○	○	○
Moderate personalized print (variable text and images based on consumer info)	○	○	○	○
Highly personalized print (variable text, images, color and data based on consumer information (e.g. data based previous purchases, likelihood of point of purchase, demographics and consumer preferences)	○	○	○	○

10. Of all the personalized printed jobs that your firm produces, what percentage are recurring (e.g. once a month or week for full year), and what percentage are one-shot personalized printed jobs?

Percentage Recurring:

Percentage One-shot:

11. Do you predict an increase or decrease in number of personalized printed jobs produced by your company in the coming year?

○ Increase

○ Decrease

○ Stay the same

12. What are the challenges your company faces when producing personalized printed jobs?

	No Challenge	Moderate Challenge	Large Challenge	N/A
Poor quality of data on the client side	◯	◯	◯	◯
Variable data software is too complicated	◯	◯	◯	◯
Need for customized software to be written	◯	◯	◯	◯
Access to digital assets, such as graphics, and photos.	◯	◯	◯	◯
Clients do not have retention or customer relationship strategy	◯	◯	◯	◯
Communicating the value to our customer of ROI (Return of Investment) benefits of personalization	◯	◯	◯	◯
Merging the client's database with variable data software	◯	◯	◯	◯
Intricate marketing and data protective legislations	◯	◯	◯	◯
Training and recruiting of staff with appropriate skills	◯	◯	◯	◯
Changes in workflow (firm's work processes)	◯	◯	◯	◯
Ability to work with client's marketing decision makers	◯	◯	◯	◯

13. How does your company promote personalized printing services? (Check all that apply)

- ☐ Show sample of products and case studies on a sales call
- ☐ Use of personalized mailing and URLs promoting our capabilities
- ☐ Up-selling current clients who would benefit from a personalization strategy
- ☐ Other. (Please specify)

14. What other type of personalized advertising media does your company produce? Please check all that apply.

- ☐ Web
- ☐ E-mail
- ☐ Print
- ☐ Mobile devices
- ☐ Do not offer personalization

15. Who tracks the response rates for your clients' personalized campaigns?

- ☐ The client most of the time
- ☐ We do most of the time
- ☐ Sometimes the client does it and sometimes we do it. It depends on the client.

Appendix C: German Survey

Willkommen! Diese Umfrage befasst sich mit dem personalisierten Druckwesen in Europa und wird unter europäischen Druckereien von Jeanette Bredsten im Rahmen ihrer Diplomarbeit an der School of Print Media des Rochester Institute of Technology (Rochester, NY, USA) durchgeführt. Ziel dieser Umfrage ist, mehr über das personalisierte Druckwesen in Europa in Erfahrung zu bringen. Die dadurch gesammelten Informationen werden von Jeanette Bredsten verwendet, um die Mengen und die Verwendung personalisierter Drucksachen in Europa bestimmen zu können. Die Teilnahme an der Umfrage dauert ca. 10 – 15 Minuten. Nehmen Sie sich bitte die Zeit und lesen Sie sich jede Frage genau durch. Ihre Antworten sind wichtig! Am Ende der Umfrage haben Sie die Möglichkeit, Ihre Kontaktinformationen bekanntzugeben. Damit können wir Ihnen eine Zusammenfassung der Ergebnisse zusenden. Zudem können Sie auch an einer Verlosung teilnehmen und eines von zehn Büchern mit dem Titel *Personalization* von Dr. Patricia Sorce gewinnen.

Bitte lesen Sie sich die folgenden Informationen durch. Am Ende der Seite können Sie sich entscheiden ob Sie mit der Teilnahme einverstanden sind oder nicht.
In dieser Umfrage werde ich Ihnen einige Fragen zu Ihrem Unternehmen sowie der Verwendung und Menge von personalisierten Drucksachen, die Ihr Unternehmen produziert, stellen. Bitte beantworten Sie diese Fragen. Während der Umfrage haben Sie die Möglichkeit, Ihre Antworten nochmals zu ändern. Navigieren Sie dazu mittels der Schaltflächen „Zurück“ und „Weiter“ durch die Umfrage.

Die in dieser Umfrage gesammelten Informationen dienen ausschließlich Forschungszwecken. Die Ergebnisse daraus werden jedoch allen daran interessierten Personen zur Verfügung gestellt. Die Masterarbeit wird in der Datenbank des Rochester Institute of Technology gespeichert und Drittparteien zur Verfügung gestellt. Wenn Sie allerdings am Ende der Umfrage Ihre E-Mail-Adresse nicht angeben, werden keine personenbezogenen Informationen (mit Ausnahme der IP-Adresse) gesammelt. In diesem Fall erhalten Sie auch keine Ergebnisse der Studie zugesandt. Obwohl alle Informationen streng vertraulich behandelt werden, kann deren Geheimhaltung aufgrund der verwendeten Technologie nicht vollständig garantiert werden.

Zugang zu den Daten haben lediglich die Studierende selbst sowie die Betreuerin der Diplomarbeit, Dr. Patricia Sorce. Veröffentlicht werden ausschließlich die gesammelten Daten aus dieser Studie. Ihre IP-Adresse und/oder E-Mail-Adresse (falls angegeben) werden KEINER anderen Partei übermittelt und in den Umfrageergebnissen NICHT angeführt.

Die Teilnahme an dieser Umfrage birgt keine vorhersehbaren Risiken oder Unannehmlichkeiten in sich und erfolgt völlig freiwillig. Sie können diese Umfrage jederzeit verlassen. Klicken Sie dazu rechts oben am Bildschirm auf die Schaltfläche “Diese Umfrage verlassen”. Die Nichtteilnahme an der Umfrage und/oder der vorzeitige Abbruch führen weder zu einer Strafe noch dem Verlust von Vorteilen (mit Ausnahme der Zusendung der Ergebnisse und der Teilnahme an der Verlosung).

Falls Sie Fragen zur Umfrage oder diesbezügliche Bedenken haben, können Sie sich gerne unter der Telefonnummer +1 585 748-7614 oder der E-Mail-Adresse jxb2556@rit.edu mit der Hauptforscherin Jeanette Bredsten in Verbindung setzen. Bei Fragen zu Ihren Rechten als Forschungsobjekt kontaktieren Sie bitte das RIT Human Subject Research Office unter +1 585 475-7673.

Danke für Ihre Teilnahme.

***1. Ich habe die oben angeführten Informationen gelesen und erkläre hiermit, dass ich damit einverstanden bin und an der Umfrage teilnehme:**

○ Ja (Sie können nun mit der Umfrage beginnen)

○ Nein (Sie gelangen zu einer Seite, wo Sie die Umfrage verlassen können)

Falls das von Ihnen vertretene Unternehmen in Ihrem Land mehr als eine Niederlassung hat, wählen Sie den größten Druckereibetrieb aus. Für finanzielle Angaben verwenden Sie bitte Ihre nationale Währung.

2. Würden Sie sich als Druckdienstleistungsunternehmen klassifizieren (keine In-Haus Druckerei)?

- ◯ Ja
- ◯ Nein, bitte beschreiben Sie ihre Firma

3. Welche Position haben Sie im Unternehmen inne?

4. Land, in dem sich Ihre Hauptniederlassung befindet:

5. Mitarbeiteranzahl in Ihrer größten Druckerei:

- ◯ Weniger als 25
- ◯ 26 - 100
- ◯ 101 - 200
- ◯ Mehr als 200

6. Wie hoch ist Ihr Jahresumsatz für das Jahr 2010? Geben sie den jährlichen Ertrag in Ihrer lokalen Währung ein. Bitte nennen Sie die Währung.

Jahresumsatz im Jahr 2010:

Währung:

7. Wie viele Prozent Ihres Firmenumsatzes (oder des Umsatzes der größten Druckerei) sind auf folgende Bereiche zurückzuführen? Bitte geben Sie Zahlen ein, deren Summe letztendlich 100 % beträgt.

Digitaldruck

Offsetdruck

Andere Dienstleistungen

Falls das von Ihnen vertretene Unternehmen in Ihrem Land mehr als eine Niederlassung hat, wählen Sie den größten Druckereibetrieb aus.

8. Wie viele Prozent des Umsatzes sind im Jahr 2010 auf personalisierte, gedruckte Aufträge zurückzuführen?

Prozent:

9. Aus welchen der folgenden Produkte setzen sich die personalisierten Druckaufträge, die Ihr Unternehmen herstellt, zusammen? Was hat eine <u>große Beduetung</u>, eine <u>geringe Bedeutung</u> oder <u>überhaupt keine Bedeutung</u> auf den Ertrag ihrer Firma.

	Große Bedeutung	Geringe Bedeutung	Überhaupt keine Bedeutung	Weiß ich nicht/möchte nicht antworten
Versioning (nicht personalisiert für einzelne Personen sondern Varianten für Gruppen, z. B. unterschiedliche Umschläge für einzelne Städte)	○	○	○	○
Seriendruck (nur Name und/oder Adresse ist variabel)	○	○	○	○
Transaktionsdruck, einschließlich Transpromo (Geschäftsbriefe wie Kontoauszüge, die für einzelne Personen erstellt und möglicherweise für Werbebotschaften verwendet werden)	○	○	○	○
Teilweise personalisierte Druckaufträge (variabler Text und variable Bilder je nach Informationen des Konsumenten)	○	○	○	○
Hoch personalisierte Druckaufträge (Text, Bilder, Farben und Daten sind je nach Konsumenteninformationen variabel, d. h. Daten basierend auf früheren Käufen, Wahrscheinlichkeit einer bestimmten Verkaufsstelle, Demografie und Vorlieben der Konsumenten)	○	○	○	○

10. Denken Sie an alle personalisierten Druckaufträge, die Ihr Unternehmen abwickelt. Wie viele Prozent davon sind regelmäßige Aufträge (z. B. ein ganzes Jahr lang einmal pro Monat oder Woche) und wie viele Prozent davon sind einmalige personalisierte Aufträge?

Prozent regelmäßige Aufträge:

Prozent einmalige Aufträg:

11. Werden Ihrer Ansicht nach in Ihrem Unternehmen die personalisierten, gedruckten Aufträge im kommenden Jahr mehr oder weniger werden?

- ○ Mehr
- ○ Weniger
- ○ Werden gleich bleiben

12. Mit welchen Herausforderungen hat Ihr Unternehmen bei der Herstellung von personalisierten Druckaufträgen zu kämpfen?

	Keine Herausforderung	mittlere Herausforderung	Große Herausforderung	N/A
Schlechte Datenqualität von Seiten des Kunden	◯	◯	◯	◯
Variable Datendruck-Software ist zu kompliziert	◯	◯	◯	◯
Bedarf an kundenspezifischer Software	◯	◯	◯	◯
Zugang zu digitalen Inhalten, z.B. Grafiken und Fotos	◯	◯	◯	◯
Kunden haben keine Strategie für Kundenbindung oder -beziehungen	◯	◯	◯	◯
Die Kunden über den ROI Mehrwert einer Personalisierung zu informieren	◯	◯	◯	◯
Datenübernahme von Kundendatenbank zur Software für den Variablen-Datendruck	◯	◯	◯	◯
Komplizierte Gesetzgebung in Bezug auf Marketing und Datenschutz	◯	◯	◯	◯
Schulung und Rekrutierung von Mitarbeitern mit entsprechenden Fähigkeiten	◯	◯	◯	◯
Veränderungen im Workflow (Arbeitsprozesse des Unternehmens)	◯	◯	◯	◯
Möglichkeit der Zusammenarbeit mit den marketingspezifischen Entscheidungsträgern des Kunden	◯	◯	◯	◯

13. Wie wirbt Ihr Unternehmen für personalisierte Druck-Dienstleistungen? (Bitte alle zutreffenden Aussagen ankreuzen)

- ☐ Vorstellung von Mustern und Beispielen bei einem Kundenbesuch
- ☐ Werbung für unsere Dienstleistungen durch personalisierte Mailings und URLs
- ☐ Upselling bei aktuellen Kunden, die von einer Personalisierungsstrategie profitieren würden
- ☐ Anderes. (Bitte angeben)

14. Welche anderen Arten von personalisierten Werbemedien wird von Ihrem Unternehmen produziert?
Bitte alle Zutreffenden ankreuzen.

- [ ] Internet
- [ ] E-Mails
- [ ] Drucksachen
- [ ] Mobile Geräte
- [ ] Wir bieten keine Personalisierung

15. Wer verfolgt bei den personalisierten Kampagnen Ihrer Kunden die Rücklaufquote?

- [ ] Meistens der Kunde
- [ ] Meistens wir
- [ ] Manchmal der Kunde und manchmal wir. Das hängt vom Kunden ab.

Appendix D: Spanish Survey

¡Bienvenido! Este estudio trata sobre el análisis de la impresión personalizada en Europa por parte de imprentas europeas, y es realizado por la candidata al grado de maestría en ciencias, Jeanette Bredsten, estudiante de la Escuela de Print Media del Rochester Institute of Technology, Rochester, Nueva York, EE.UU.

El estudio pretende ampliar los conocimientos sobre la impresión personalizada en Europa. La información recopilada será utilizada por Jeanette Bredsten para determinar la extensión y la utilización de la imprenta personalizada en Europa.

El tiempo de realización de la encuesta es entre 10 y 15 minutos. Por favor, lea cada una de las preguntas atentamente, ya que sus respuestas son muy importantes.

Al finalizar la encuesta podrá introducir su información de contacto para recibir un resumen de los resultados. También podrá participar en el sorteo de uno de los diez libros *Personalization* de la Dra. Patricia Sorce.

Por favor, lea la información siguiente y responda a la pregunta sobre el consentimiento informado de la parte inferior de la página:
Le pediremos que responda a varias preguntas sobre su empresa y sobre la utilización y la cantidad de impresiones personalizadas que ésta produce. Durante la encuesta podrá modificar la información proporcionada. Puede avanzar por la encuesta haciendo clic en los botones “Anterior” y “Siguiente” de la parte inferior de la pantalla.

La información recopilada en esta encuesta tiene únicamente fines de investigación, pero los resultados serán distribuidos a aquellas personas interesadas en la misma. La tesis estará disponible en las bases de datos del Rochester Institute of Technology y será distribuida a terceros. No se recopilará ninguna información que pueda identificarle personalmente (a excepción de la dirección IP) si decide no proporcionar su dirección de correo electrónico al finalizar la encuesta para recibir los resultados. Toda la información proporcionada se considerará confidencial, pero la confidencialidad que podemos garantizar está limitada debido a la propia tecnología.

Sólo pueden acceder a los datos la investigadora y la directora de la tesis, la Dra. Patricia Sorce. Se publicarán los datos globales del estudio. Su dirección IP o dirección de correo electrónico (en caso de proporcionarlas) NO serán facilitadas a terceros y NO serán publicadas con los resultados de la encuesta.

No se prevé ningún riesgo o molestia causado por la realización de la encuesta. La participación en esta encuesta es totalmente voluntaria. Puede salir de la encuesta en cualquier momento haciendo clic en el botón “Salir de la encuesta” situado en la parte superior derecha de la pantalla. Si no responde a la encuesta o sale de la misma antes de tiempo no se le impondrá ninguna penalización o pérdida de beneficios (exceptuando la recepción de los resultados y la participación en el sorteo).

Si tiene alguna pregunta o inquietud relacionada con la encuesta, puede ponerse en contacto con Jeanette Bredsten, investigadora principal del estudio, llamando a los teléfonos +1 585 748-7614 o +47 95881714, o enviando un correo electrónico a jxb2556@rit.edu. Si tiene alguna pregunta sobre sus derechos como participante en una encuesta, póngase en contacto con el Rochester Institute of Technology, Human Subject Research Office al +1 585 475-7673.

Gracias por su participación.

***1. He leído la información anterior y doy fe de que estoy dispuesto a realizar la encuesta y en condiciones para ello:**

- ◯ Sí (Le permitirá empezar a responder la encuesta)
- ◯ No (Será enviado a una página desde la que podrá salir de la encuesta)

Por favor, si la empresa a la que representa cuenta con más de un centro en su país, elija al centro de impresión de mayor tamaño para responder a todas las preguntas de la encuesta. Por favor, para los datos financieros utilice la moneda de su país.

2. Clasificaría usted su compañía como una empresa de impresión comercial?

- ◯ Sí
- ◯ No, Por favor describba como clasificaría usted su empresa

3. ¿Cuál es su puesto dentro de la empresa?

4. País donde se encuentran sus oficinas centrales:

5. Cantidad de empleados de su mayor centro de impresión:

- ◯ Menos de 25
- ◯ 26-100
- ◯ 101-200
- ◯ Más de 200

6. ¿Cuáles fueron sus ingresos anuales del 2010? Mencione la entrada del ingreso anual en la moneda en que opera la empresa; especifique la moneda.

Ingreso anual para el año 2010:

Moneda:

7. ¿Qué porcentaje de los ingresos de su empresa (o de los ingresos del mayor centro de su empresa) en el 2010 provenía de las fuentes siguientes? Por favor, la suma de los números introducidos debe constituir el 100%.

Impresión digital

Impresión offset

Otros servicios (envíos postales, distribución, etc.)

Por favor, si la empresa a la que representa cuenta con más de un centro en su país, elija al centro de impresión de mayor tamaño para responder a todas las preguntas de la encuesta.

8. ¿Qué porcentaje de los ingresos de su empresa en el 2010 provenía de los trabajos de impresión personalizada?

Porcentaje:

9. De todos los trabajos de impresión personalizada que realiza su empresa, ¿qué proporción existe de los siguientes tipos de impresión?? ¿Fueron estos tipos de impresión su mayor fuente de ingreso, menor fuente de ingreso o ningún tipo de ingreso?

	Mayor	Menor	Ningún tipo	No sabe/No contesta
Creación de versiones (No son trabajos personalizados para cada individuo, sino variaciones para grupos. Por ejemplo, una versión distinta de la portada para cada ciudad)	○	○	○	○
Combinación de correspondencia (Sólo cambia el nombre y/o la dirección)	○	○	○	○
Impresión de transacciones, incluyendo "Transpromo". (Cartas comerciales, como por ejemplo un extracto de cuenta dentro de un informe financiero, creadas para cada individuo y que pueden incluir información promocional)	○	○	○	○
Impresión personalizada moderada (texto e imágenes variables en base a la información sobre el consumidor)	○	○	○	○
Impresión muy personalizada (texto, imágenes, colores y datos variables en base a la información sobre el consumidor, como por ejemplo datos sobre adquisiciones anteriores, punto de venta más probable, información demográfica y preferencias del consumidor)	○	○	○	○

10. De todos los trabajos de impresión personalizados que produce su empresa, ¿qué porcentaje son recurrentes (por ejemplo, se producen una vez al mes o a la semana durante todo el año) y qué porcentaje son trabajos personalizados realizados de forma excepcional?

% Recurrente:

% Excepcionales:

11. ¿Para el próximo año prevé un aumento o una disminución de los trabajos de impresión personalizada de comunicación de mercadotecnia producidos por su empresa?

- ○ Aumento
- ○ Disminución
- ○ Igual cantidad

12. ¿A qué retos se enfrenta su empresa a la hora de producir trabajos de impresión personalizada?

	Ningún reto	Un reto moderado	Un gran reto	N/A
Calidad pobre de los datos aportados por el cliente	◯	◯	◯	◯
El software para datos variables es demasiado complicado	◯	◯	◯	◯
Necesidad de crear un software personalizado	◯	◯	◯	◯
Acceso a medios digitales, como gráficos y fotografías	◯	◯	◯	◯
Los clientes no cuentan con una estrategia de relación con sus clientes	◯	◯	◯	◯
Comunicar al cliente el valor del beneficio de la inversión que tienen los personalizados	◯	◯	◯	◯
Combinar la base de datos del cliente con software de datos variables	◯	◯	◯	◯
Complicadas legislaciones sobre mercadotecnia y protección de datos	◯	◯	◯	◯
Formación y contratación de personal con los conocimientos adecuados	◯	◯	◯	◯
Cambios en el “workflow” del trabajo (workflow: procesos de trabajo de la empresa)	◯	◯	◯	◯
Capacidad de colaborar con los encargados de la mercadotecnia de la empresa en cuestión	◯	◯	◯	◯

13. ¿Cómo fomenta su empresa los servicios de creación de impresión personalizada? (Marque todas las opciones que correspondan)

- ☐ Presentando muestras de productos y resultados previos en las visitas comerciales
- ☐ Utilizando correos personalizados y URL de cómo promocionan nuestras posibilidades
- ☐ Intentando persuadir a clientes actuales que podrían beneficiarse de una estrategia de personalización
- ☐ Otras opciones, por favor, especifíquelas

14. ¿Qué otro tipo de soporte publicitario personalizado produce su empresa? Por favor, marque todos los que correspondan.

- ☐ Web
- ☐ Correo electrónico
- ☐ Impresos
- ☐ Dispositivos móviles
- ☐ No se ofrece personalización

15. ¿Quién estudia los índices de respuesta a las campañas personalizadas de sus clientes?

- ☐ La mayor parte de las veces, el cliente.
- ☐ La mayor parte de las veces, nosotros.
- ☐ En ocasiones el cliente y en ocasiones nosotros. Dependiendo del cliente.

Appendix E: French Survey

Bienvenue ! Cette étude concerne le secteur de l'impression personnalisée en Europe et est dirigée par Jeanette Bredsten, étudiante à l'École des Médias Imprimés au Rochester Institute of Technology, aux Etats-Unis. Son objectif est de faire progresser les connaissances liées à l'impression personnalisée en Europe. Les informations collectées seront utilisées par Jeanette Bredsten afin de déterminer le volume et l'usage de l'impression personnalisée en Europe. 10 à 15 minutes sont nécessaires pour mener à bien ce questionnaire. Veuillez prendre le temps de lire attentivement chaque question, vos réponses sont importantes ! A la fin de l'étude, vous pourrez indiquer vos coordonnées qui vous permettront de recevoir un résumé des résultats de l'étude. Vous pourrez également participer au tirage au sort et tenter de gagner l'un des dix livres *"Personalization"*, du Dr. Patricia Sorce.

Veuillez lire les informations suivantes et répondre à la question située en bas de la page :
Je vais vous demander de répondre à plusieurs questions concernant votre entreprise et les quantités – et utilisations – d'impressions personnalisées qu'elle produit. Durant cette étude, vous pourrez modifier si nécessaire les informations que vous donnez. Vous pouvez naviguer librement dans l'étude à l'aide des boutons « Précédent » et « Suivant » situés en bas de l'écran.

Les informations collectées dans cette étude ne seront traitées que dans un strict but de recherche, mais les résultats seront communiqués à toute personne intéressée. La thèse sera disponible à partir de la base de données du Rochester Institute of Technology, et distribuée à des personnes extérieures. Aucune information permettant une identification personnelle (à l'exception de l'adresse IP) ne sera collectée si vous choisissez de ne pas soumettre votre adresse email à la fin de l'étude, pour recevoir les résultats. Toutes les informations resteront strictement confidentielles, mais la confidentialité est limitée du fait de la technologie employée.

L'accès aux données est limité à la chercheuse et à son conseiller de thèse le Dr. Patricia Sorce. Les données agrégées de l'étude seront publiées. Votre adresse IP et/ou adresse email (si vous choisissez de la donner) ne seront PAS fournies à qui que ce soit et ne seront PAS publiées avec les résultats de l'étude.

Aucun risque ou aucune expérience négative ne peut être attendus concernant la participation à cette étude. Cette dernière est entièrement volontaire. A tout moment, vous avez la possibilité de terminer en cliquant sur le bouton « quitter l'étude » situé en haut à droite de l'écran. Aucune perte de bénéfice (à l'exception de la réception des résultats et de la participation au tirage au sort) n'est liée à la non participation à l'étude et/ou à son arrêt prématuré.

Pour toute question concernant cette étude, vous pouvez contacter Jeanette Bredsten, principale responsable de l'étude, au +1 585 748-7614 ou au +47 95881714 ou par e-mail: jxb2556@rit.edu. Pour toute question concernant vos droits en tant que sujet d'étude, contactez le bureau des sujets humains d'études du RIT au +1 585 475-7673.

Merci pour votre participation

***1. J'ai lu les informations ci-dessus et j'atteste que je souhaite et suis en mesure de participer à cette étude**

- ◯ Oui (Vous pourrez commencer l'étude)
- ◯ Non (Vous serez redirigé vers une page vous permettant de quitter l'étude)

Si l'entreprise que vous représentez possède plus d'une usine dans votre pays, veuillez baser vos réponses sur la plus importante d'entre elles. Pour les données financières, veuillez utiliser votre devise locale.

2. Classeriez-vous votre entreprise comme une imprimerie commerciale?

- ◯ Oui
- ◯ Non, merci de d'indiquer comment vous classeriez votre entreprise:

3. Quel poste occupez-vous au sein de votre entreprise?

4. Pays où est situé le siège de votre entreprise:

5. Nombre d'employé dans votre plus grande site d'impression:

- ◯ Moins de 25
- ◯ 26-100
- ◯ 101-200
- ◯ Plus de 200

6. Chiffre d'affaires annuel pour 2010? Entrez le chiffre d'affaires annuel dans la devise dans laquelle l'entreprise opère et indiquez cette dernière.

Chiffre d'affaires pour 2010:

Devise:

7. Quel pourcentage du chiffre d'affaires de votre entreprise (ou de votre imprimerie principale) provient des sources suivantes ? Le total des pourcentages saisis doit être égal à 100.

Impression numérique

Impression Offset

Autres services (routage, etc.)

Si l'entreprise que vous représentez possède plus d'une usine dans votre pays, veuillez baser vos réponses sur la plus importante d'entre elles.

8. Quel pourcentage de votre chiffre d'affaires provenait de travaux d'impression personnalisés en 2010?

Pourcentage:

9. De tous les travaux d'impression personnalisés que votre entreprise propose, quel est le rapport d'importance concernant les éléments suivants ? Etait-ce une source de revenu majeure, minime ou intexistante?

	Majeure	Minime	Inexistant	Ne sait pas / Ne souhaite pas répondre
Mise en version (Pas de personnalisation pour une personne unique mais variations pour des groupes, ex. : différentes versions d'une couverture pour différentes villes)	◯	◯	◯	◯
Adresse postale (Seuls le nom et/ou l'adresse change)	◯	◯	◯	◯
Impression transactionnelle, comprenant "transpromo". (Lettres commerciales comme un relevé bancaire ou un rapport financier, différentes pour chaque personne et pouvant inclure des informations promotionnelles)	◯	◯	◯	◯
Impression personnalisée modérée (texte et images variant en fonction des informations client)	◯	◯	◯	◯
Impression hautement personnalisées (texte, images, couleurs et données variables en fonction des informations client, par ex. données basées sur des achats précédents, sur les points d'achats possibles, les données démographiques et les préférences client)	◯	◯	◯	◯

10. De tous les travaux d'impression personnalisés que votre entreprise propose, quel pourcentage sont récurrents (ex. chaque mois, chaque semaine ou chaque année) et quel pourcentage concerne des travaux unique?

Pourcentage Récurrent:

Pourcentage Unique:

11. Prédisez-vous une augmentation ou une diminution du nombre de travaux d'impression personnalisés produits par votre entreprise au cours de l'année à venir ?

- ◯ Augmentation
- ◯ Diminution
- ◯ Ni l'une ni l'autre

12. Quels sont les défis auxquels votre entreprise doit faire face dans les travaux d'impression personnalisés ?

	Pas de défi	Défi modéré	Défi important	N/A
Pauvre qualité des données coté client	◯	◯	◯	◯
Logiciel de gestion des données variables trop complexe	◯	◯	◯	◯
Besoin de logiciel personnalisé	◯	◯	◯	◯
Accès aux données numériques, telles que les graphiques ou les photographies	◯	◯	◯	◯
Le client n'a pas un bon taux de rétention ou pas de stratégie de relation clients	◯	◯	◯	◯
Communication de la valeur du retour sur investissement lié à la personnalisation	◯	◯	◯	◯
Intégrer la base de données du client au logiciel de gestion des données variables	◯	◯	◯	◯
Législations de protection des données complexes	◯	◯	◯	◯
Formation et recrutement de personnel aux qualifications appropriées	◯	◯	◯	◯
Changements dans le flux de travail	◯	◯	◯	◯
Capacité à travailler avec les personnes en charge des prises de décisions commerciales chez le client	◯	◯	◯	◯

13. Comment votre entreprise assure-t-elle la promotion de ses services d'impression personnalisée ? (Cochez toutes les réponses qui s'appliquent)

- ☐ Présentations d'échantillons et d'études de cas lors d'appels commerciaux
- ☐ Courriers personnalisés et promotion en ligne de nos capacités
- ☐ Mise en avant des clients qui bénéficieraient d'une stratégie de personnalisation
- ☐ Autre, veuillez préciser:

14. Quels autres types de médias de promotion personnalisés votre entreprise prend-elle en charge ?
Veuillez cocher toutes les réponses possibles.

- ☐ Site internet
- ☐ Email
- ☐ Impression
- ☐ Périphériques mobiles
- ☐ Ne propose pas de personnalisation

15. Qui assure le suivi des réponses pour les campagnes personnalisées de vos clients ?

- ☐ Le client, la plupart du temps
- ☐ Nous, la plupart du temps
- ☐ Parfois le client, parfois nous, cela dépend du client.

Appendix F: Currency Exchange Rates

Table F-1. Yearly average exchange rates for converting foreign currencies into U.S. dollars (Internal Revenue Service)

Country	Currency	2010 Average
Denmark	Krone	5.622
Euro	Zone Euro	0.755
Hungary	Forint	208.253
Iceland	Krona	124.857
Norway	Kroner	6.049
Sweden	Krona	7.209
Switzerland	Franc	1.043
Turkey	New Lira	1.508
United Kingdom	Pound	0.647

Appendix G: Mix of Personalization in Europe and the US

Table G-1. Mix of personalization by region

Europe 2011 (*n*=20)			The US 2004 (*n*=171)		
Level	Count	Percent	Count	Percent	Level
Versioning					Versioning
Major	1	5	76	44.4	Major
Minor	2	10	61	35.7	Minor
Not at all	13	65	33	19.3	Not at all
Don't know	4	20	1	0.6	Don't know
Mail merge					Mail merge
Major	7	35	105	61.4	Major
Minor	4	20	47	27.5	Minor
Not at all	6	30	19	11.1	Not at all
Don't know	3	15	-	-	Don't know
Transactional printing					Transactional printing
Major	3	15	14	8.2	Major
Minor	1	5	65	38.0	Minor
Not at all	13	65	92	53.8	Not at all
Don't know	3	15	-	-	Don't know
Moderate personalized print					Personalized printing
Major	4	20	98	57.3	Major
Minor	2	10	60	35.1	Minor
Not at all	12	60	13	7.6	Not at all
Don't know	2	10	-	-	Don't know
Highly personalized print					Fully customized communications
Major	1	5	49	28.7	Major
Minor	5	25	72	42.1	Minor
Not at all	13	65	50	29.2	Not at all
Don't know	1	5	-	-	Don't know

Note: Non-respondents were assumed to not produce that type of personalization and categorized as "Not at all."

Appendix H: Raw Data—Amount of Personalized Print

Table H-1. Personalized print by respondent

Printing Company	Calculated data		Raw data from survey			
	Percentage personalized print from ANNUAL revenue	Percentage personalized print from DIGITAL revenue	Personalization percentage	Digital printing percentage	Offset printing percentage	Other services (mailing, fulfillment, etc.)
1	1.75	35	35	5	0	95
2	15	75	15	20	60	20
3	10	40	10	25	50	25
4	3	30	30	10	80	10
5	0	0	0	1	30	69
6	10	16.7	10	60	35	5
7	2	40	2	5	90	5
8	0	0	0	0	100	0
9	--	--	--	1	90	9
10	2	50	2	4	90	6
11	0.4	20	20	2	98	0
12	0	0	0	0	85	15
13	5	16.7	5	30	60	10
14	5	5	5	70	20	10
15	1	100	1	1	98	1
16	31.5	90	90	35	40	25
17	--	--	--	5	80	15
18	0	0	0	0	100	0
19	--	--	--	5	92	3
20	--	--	--	10	80	10
21	0	0	0	1	99	0
22	70	100	70	70	0	30
23	15	0	15	0	80	20
24	0	0	0	0	70	30
25	3	60	3	5	0	95
26	--	--	--	5	95	0
27	10	12.5	10	80	18	2
28	100	0	100	0	90	10
29	0	0	0	0	66	34

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Printing Industry Center

An Alfred P. Sloan Foundation Center

Rochester Institute of Technology
College of Imaging Arts and Sciences
55 Lomb Memorial Drive
Rochester, NY 14623
Phone: (585) 475-2733
http://print.rit.edu