

Vertical Market Kit

INSIGHTS IN THE HEALTHCARE MARKET

Based on reports by:



Canon

think.





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Introduction

About this Document

This vertical market kit is designed to help print service providers capture more business within the healthcare industry. It offers an analysis of trends, opportunities, key strategies, tips, and tools to target customers of varying types and sizes across a dynamic range of organizations. Successfully targeting a vertical industry involves developing strategies that align internal resources with market needs, educating and training staff, and allocating resources for ongoing market monitoring.

This vertical market kit can be used to:

- Gain a solid understanding of the industry.
- Uncover industry trends.
- Pinpoint sales opportunities.
- Identify key print applications.
- Develop new sales strategies.
- Identify decisionmakers.
- Develop solutions and applications that are aligned with industry needs.

Key Highlights

- According to Keypoint Intelligence's research, overall spend is shifting to digital. Even so, healthcare respondents to our most recent study still allocated 38% of their spending to print (compared to 44% for digital).
- Because not all print is produced internally, there is an opportunity for print service providers to get in the door and sell print to healthcare firms.
- Customization/personalization is a proven method for improving response rates for digital as well as printed media.
- Like those in other industries, healthcare firms are improving their print campaigns with specialized printing (e.g., metallic/fluorescent colors, augmented reality, or specialty papers).
- Many printed documents are being enhanced with digital components for increased efficacy and to stand apart from the competition.



Defining the Industry

The healthcare industry is a vital force in treating, diagnosing, curing, and preventing illnesses. Its success on all these fronts depends on efficient operations, cost control, and solid communication channels to educate customers, drive new business and fund operations. Digital printing plays an important role in accommodating these needs as it offers the ability to address the operations and marketing sides of the organization. The healthcare industry encompasses a broad mix of players, but all can take advantage of the benefits of digital printing— short run, high quality, personalization, fast turnaround, justintime, efficient production—to treat patients, prevent illness, and generate profits.

The healthcare industry includes broad services offered by hospitals, physicians, nursing homes, diagnostic laboratories, and pharmacies. These services are delivered by trained practitioners in medicine, chiropractic, dentistry, nursing, pharmacy, allied health, and other fields. The industry is a wideranging and complex mix of providers and services dedicated to learning about, treating, and preserving an individual's health.

The healthcare industry is highly regulated. Professional healthcare givers and institutions are regulated by national or state/province authorities for quality assurance. The major types of healthcare organizations are outlined in the Figure below.

Figure 1: Types of Healthcare Organizations

Healthcare Services and Products	The healthcare industry incorporates several sectors that are dedicated to providing health services and products under the supervision of licensed professionals. Examples of these services include optometry, music therapy, occupational/physical therapy, speech therapy, homeopathy, chiropractic, and acupuncture.
Healthcare Practitioners	Healthcare professionals diagnose, treat, and prevent illnesses. They include a broad mix of practitioners like medical doctors, medical specialists, dentists, chiropractors, and optometrists.
Outpatient/Ambulatory Care Centers	These centers provide a range of medical services and procedures that are conducted on an outpatient basis. Care can be given at a hospital, doctor's office, or ambulatory surgery center (ASC). Procedures conducted at these facilities include blood tests, xrays, endoscopy, some biopsies, catheterizations, minor surgery, childbirth, plastic surgery, eye care, and much more.
Outpatient/Ambulatory Care Surgical Centers	Also known as ambulatory surgical centers (ASCs), these facilities are used by doctors to perform a variety of surgical procedures that don't require a patient to stay overnight in a hospital. Surgeons and anesthesiologists typically arrange to meet patients at the center, and the patient will leave after the medical procedure has been performed.
Hospitals	Hospitals provide outpatient services using specialized equipment. They provide an efficient way for doctors to use facilities, equipment, and services that are too expensive to purchase for a private practice.
Home Healthcare Services	These companies treat patients who have a shortterm need for care after leaving a hospital or nursing home, as well as patients who require longterm treatment for such conditions as heart disease, diabetes, and vascular disease. They provide medical and skilled nursing services, medical equipment, supplies and medication services, personal care (bathing and transportation), therapeutic services (physical and respiratory therapy), and psychosocial services (counseling and spiritual care). Services can also include traditional home care, home hospice care, and home nursing care.
LongTerm Care Facilities	These facilities provide skilled nursing services for recovery from chronic or acute medical conditions. Mental health, substance abuse, and other facilities focus on various types of independent living, community care, and assisted living arrangements.



Ongoing Industry Trends

Like many others, the healthcare vertical is undergoing a series of changes due to ongoing technological advancements, changing patient preferences, and shifts in healthcare delivery and financing models.

Telemedicine Takes Off

The adoption of telemedicine and virtual care has surged, driven by the need for remote consultations during the height of the COVID19 pandemic. Even now that the pandemic has subsided, today's patients are demanding more convenient and accessible healthcare options. Improved telehealth platforms, remote monitoring technologies, and virtual collaboration tools are also enabling healthcare professionals to perform some of their responsibilities remotely. Meanwhile, remote patient monitoring (RPM) technologies are enabling healthcare providers to monitor patients regardless of physical location. This is especially beneficial for managing chronic conditions and reducing the need for hospital readmissions.

A Focus on Patients and Value-Based Preventative Care

Today's patientcentric care models prioritize individual patient preferences, needs, lifestyles, and experiences to improve satisfaction and outcome. In addition, quality is taking precedence over quantity when it comes to patient care. To help facilitate valuebased care, healthcare providers are placing a greater emphasis on preventative care and health management.

Preventative care is one of the top business opportunities in the healthcare market. Physicians are doing their part, but it is also up to consumers to take action to manage their health. Educational campaigns and tools to prevent illness are becoming more widespread and yielding results.

Medical treatments are gradually shifting from a "onesizefitsall" approach to a more personalized one so patients can be matched to the best therapy based on their genetic makeup and other predictive factors. In its most sophisticated form, personalized drug therapy uses biological indicators, or "biomarkers"—such as variants of DNA sequences, the levels of certain enzymes or the presence or absence of drug receptors— as an indicator of how patients should be treated and to estimate the likelihood that the intervention will be effective or elicit dangerous side effects. This concept is not new, but its application is growing along with scientific innovations.

Delivering Care to an Aging Population

As the global lifespan continues to increase, the proportion of elderly individuals in communities is increasing. According to the Population Reference Bureau (PRB), the number of Americans aged 65 and older is projected to rise from 58 million in 2022 to 82 million by 2050—a 47% increase. In addition, the 65+ age group's share of the total population is expected to rise from 17% to 23% during that same timeframe.



Aging populations will lead to increases in the number of people suffering from chronic, expensive-to-treat diseases and disabilities, straining health care systems. This phenomenon also creates a greater need for nursing homes and long-term care facilities. Aging populations will also accelerate the growth of home healthcare services. Numerous studies have concluded that offering services in the home can be less stressful and more convenient for patients. Ongoing technological advancements are making it easier to deliver quality care at home.

Mobile Apps and Wearable Technologies are Advancing Care

Healthcare providers are using smartphones and tablets to their advantage by creating mobile health apps. These apps help patients manage their health by allowing them to monitor conditions and track progress or changes. Most apps allow a patient to enter his or her medical history including weight, blood pressure, and activity level. The apps then either help the patient to track a symptom (e.g., headache, weight loss/gain, calories burned during a workout). There are also diagnostic health apps that enable patients to perform self-screenings or dig deeper into a concern before seeing a healthcare provider. Mobile health apps are enabling patients to be more engaged in tracking their health. The storing of data within the apps enables both patients and healthcare providers to track health progress.

Unlike mobile apps, wearable devices (e.g., smartwatches, fitness trackers) and other smart technologies don't require patients to actively enter information—instead, health stats are passively gathered by a sensor. Users can track various health metrics like heart rate, sleep patterns, and physical activity. These systems are often referred to as Microelectromechanical Systems (MEMS) or smart textiles. Other types of smart technology include pressure or motion sensors that can be placed into a cane or shoe to measure a patient's gait. A motion sensor can also be used to alert a caregiver if a patient falls or has stopped moving for an extended period of time.

Survey Findings

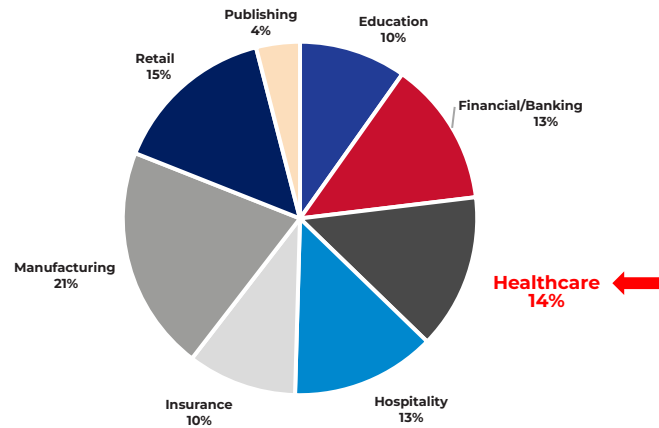
In late 2023, Keypoint Intelligence completed a comprehensive multiclient study to gain a better understanding of how print demand is changing in key vertical industries. This survey serves as an update to similar vertical market research that was conducted in 2020. The vertical industries that we covered in depth include higher education, finance/banking, healthcare, hospitality, insurance, retail, and healthcare.

Over 1,200 total respondents from businesses with 200+ employees participated in this study. Of these respondents, 173 (about 14% of the total) were from the healthcare industry. This document will focus specifically on these healthcare respondents.



Figure 2: Vertical Industry

Which of the following best describes the vertical industry that your company serves?



N = 1,215 Total Respondents
Source: United States Vertical Visions Multi-Client Study; Keypoint Intelligence 2023

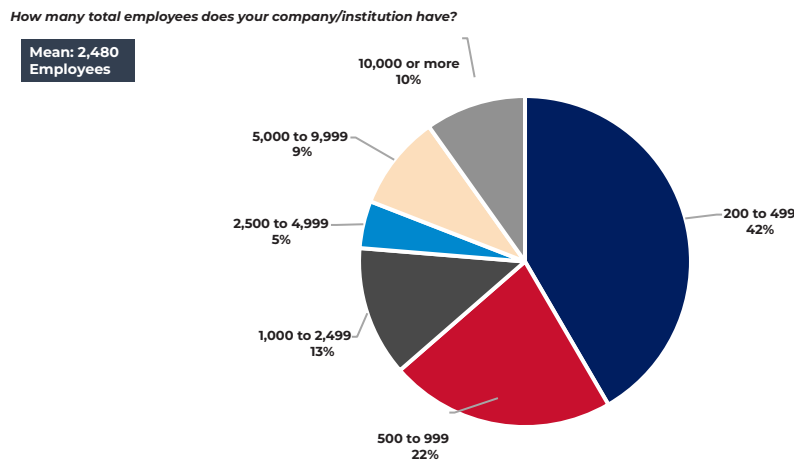
Please note, there are times when questions are posed to a subset of healthcare respondents. Please refer to the N values at the bottom of each chart. A value of 30 (N=30) or lower should not be considered statistically significant and is only intended for anecdotal evidence. Some of our healthcare charts discuss data where the sample sizes are quite small. Keypoint Intelligence still considers this data to be accurate and will provide supporting data from outside sources as appropriate, but it should be remembered that a small sample size can sometimes skew the data.



General Demographics

As noted earlier, this survey was open to respondents with at least 200 employees. Healthcare respondents reported working for institutions with an average of 2,480 employees. This average was quite close to the mean for respondents across all industries (2,184).

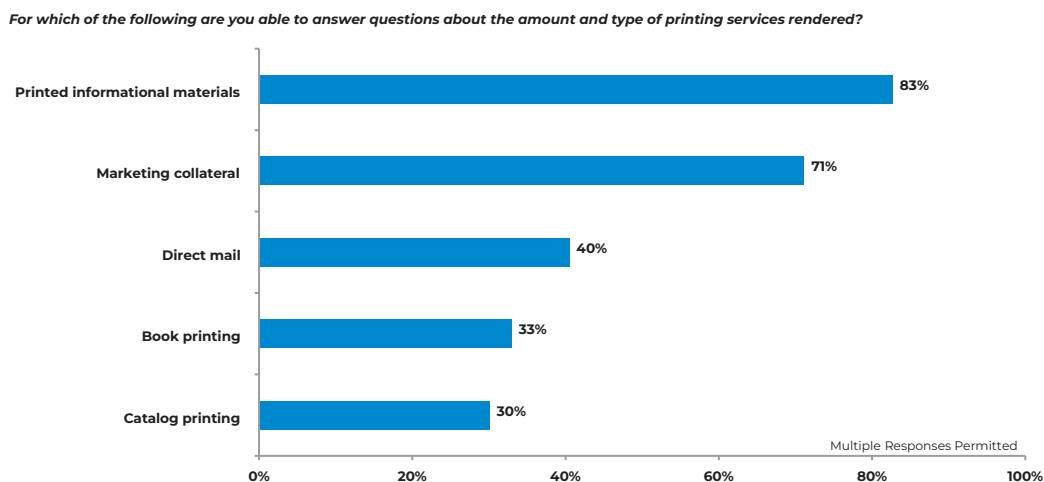
Figure 3: Number of Employees



N = 173 Total Healthcare Respondents
Source: United States Vertical Visions Multi-Client Study; Keypoint Intelligence 2023

To qualify for participation in this survey, respondents were required to be able to answer questions about their companies' printing services. Within the healthcare sector, the highest share of respondents were able to answer questions about printed informational materials (e.g., booklets, manuals, training materials) and marketing collateral.

Figure 4: Knowledge of Printing Services

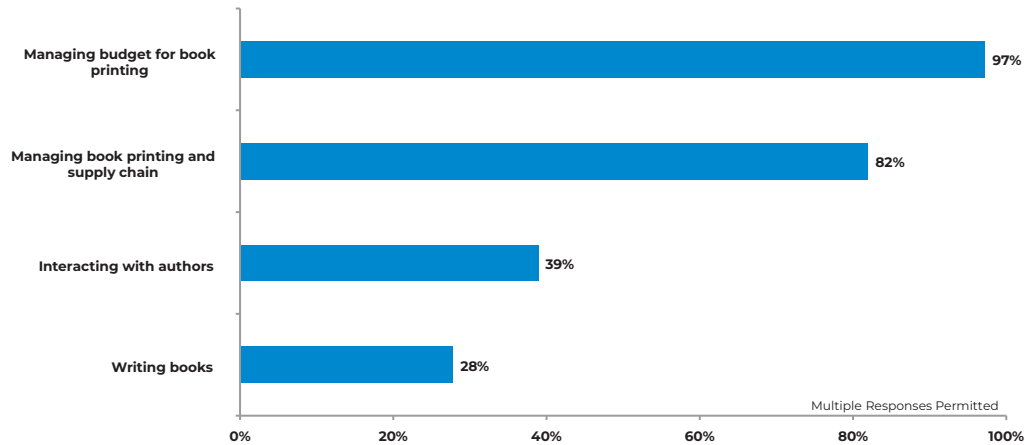


N = 173 Total Healthcare Respondents
Source: United States Vertical Visions Multi-Client Study; Keypoint Intelligence 2023

About 42% of total healthcare respondents were involved in book printing. Of these, respondents were most commonly responsible for managing the budget for book printing and managing book printing and the supply chain.

Figure 5: Book Printing Responsibility

When it comes to book printing, which of the following best describes your responsibility?



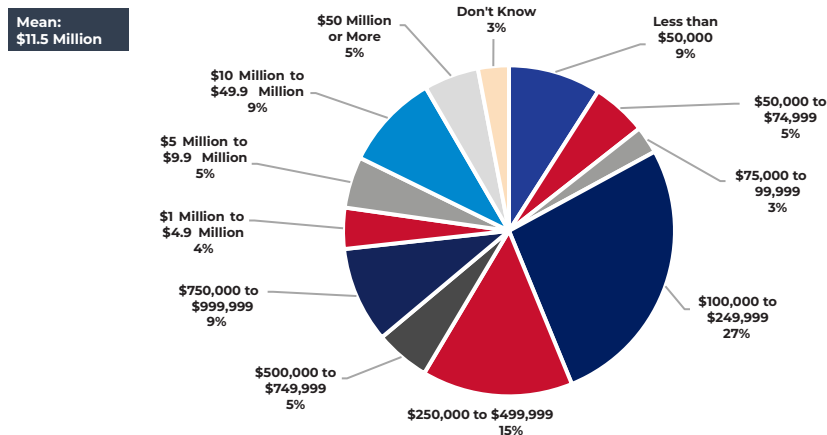
N = 72 Healthcare Respondents that are involved in book printing
Source: United States Vertical Visions Multi-Client Study; Keypoint Intelligence 2023

Spending and Media Split

On average, healthcare firms reported spending about \$11.5 million on marketing and advertising in 2022. This is substantially below the \$24.3 million average for total respondents across all verticals.

Figure 6: Marketing and Advertising Spend

Approximately what was your company's total marketing and advertising spend in 2022?

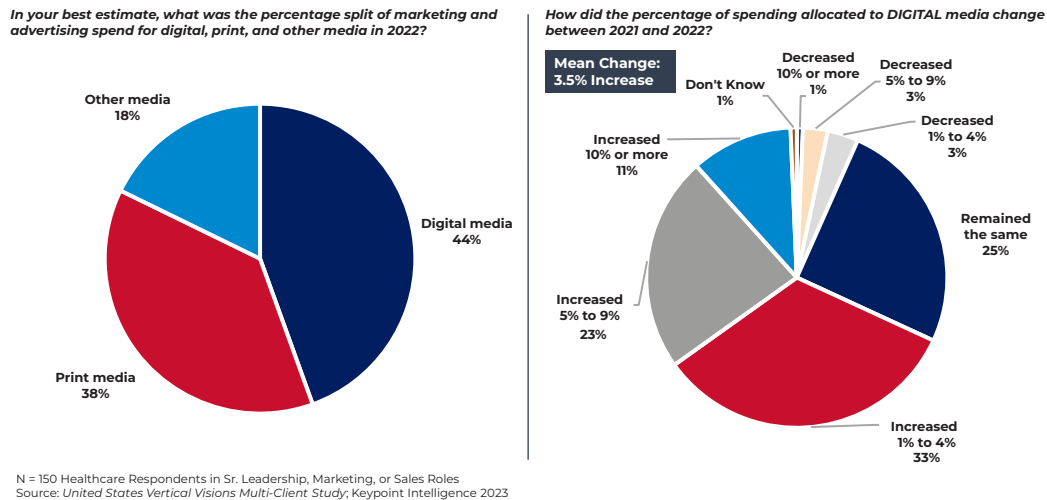


N = 75 Healthcare Respondents in Sr. Leadership, Marketing, or Sales Roles
Source: United States Vertical Visions Multi-Client Study; Keypoint Intelligence 2023



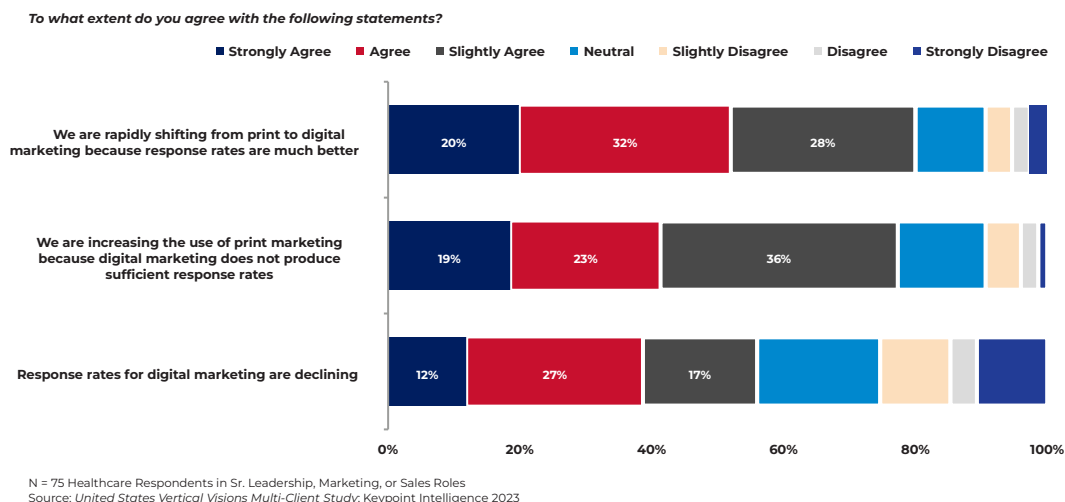
When healthcare respondents were asked about the media split for marketing and advertising spend, digital media accounted for 44% whereas print represented 38%. These respondents indicated that the share of spending allocated to digital increased by an average of 3.5% between 2021 and 2022.

Figure 7: Media Split



It should come as little surprise that investments are shifting from print to digital channels, with over half of healthcare respondents agreeing or strongly agreeing with this statement. At the same time, however, 42% of these same respondents agreed that they were increasing the use of printed marketing collateral because digital did not deliver sufficient response rates. In addition, nearly 40% agreed that the response rates for digital marketing were declining.

Figure 8: Agreement with Statements about Media Split



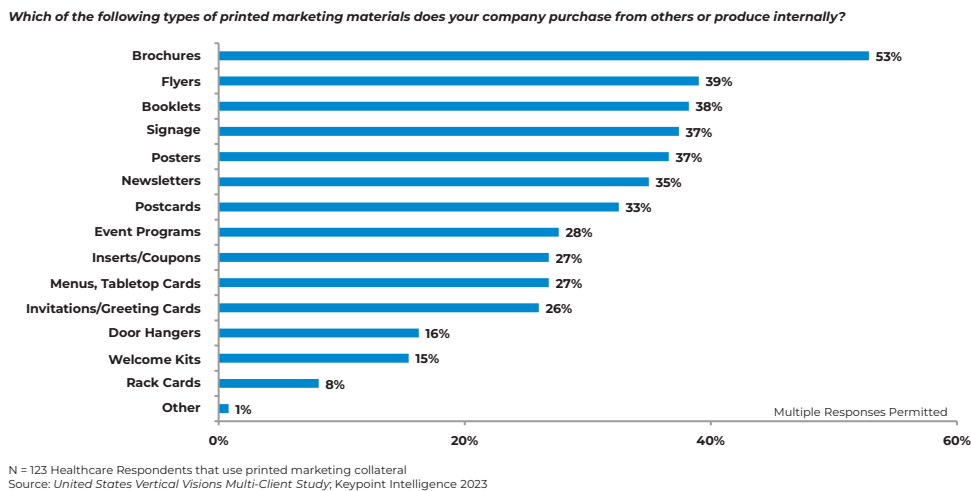
The shift toward digital is undeniable, but print remains a core area of investment.



Printed Marketing Collateral

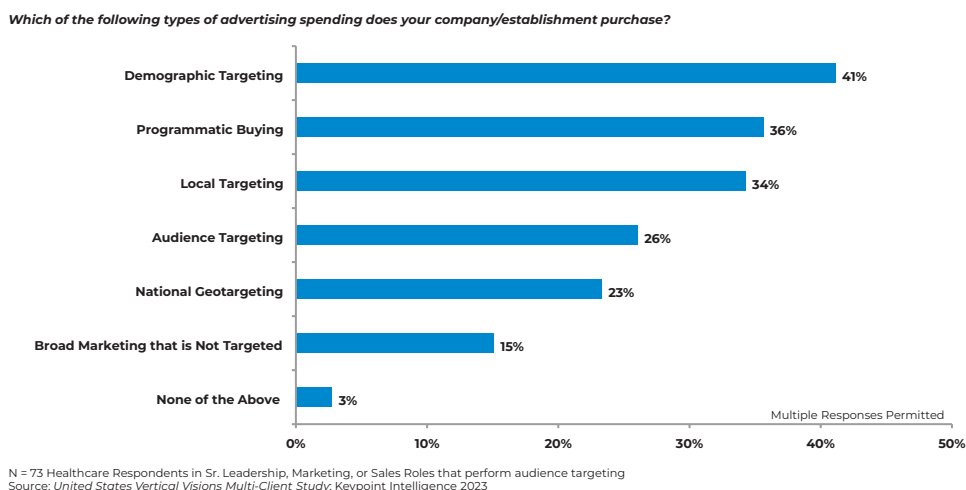
71% of healthcare respondents use marketing collateral to reach their customers and prospects. The most popular types of materials that were produced internally or purchased from others include brochures, flyers, and booklets.

Figure 9: Types of Printed Marketing Materials



Personalization has become an important staple within many industries, and healthcare is no exception. About 43% of healthcare respondents target their printed marketing collateral. Of these, the most common methods for personalization include demographic targeting (targeting audiences in subsegments of specific demographics) and programmatic buying (i.e., automatic audience optimization and purchasing of digital ads).

Figure 10: Types of Advertising Spending

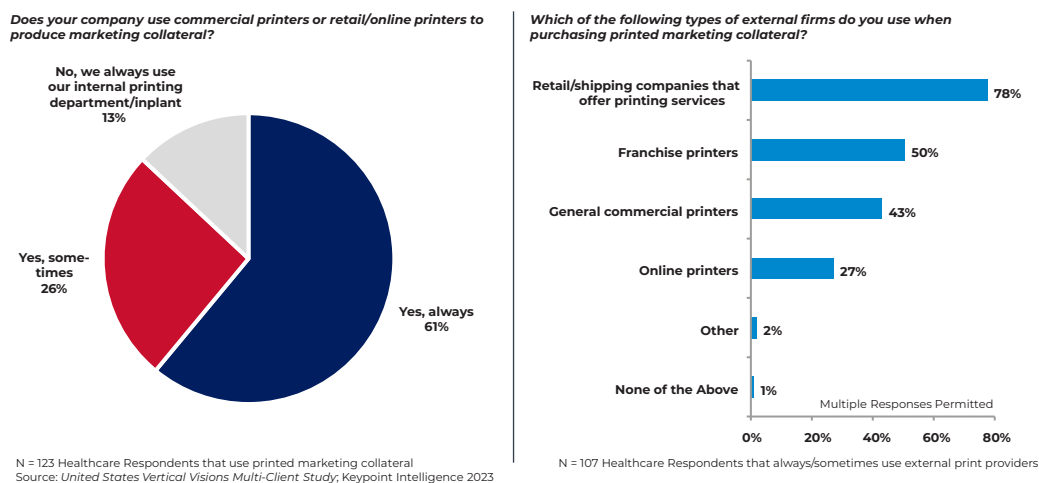




Customization/personalization is a proven method for improving response rates for digital as well as printed media, so it is unsurprising that targeting is popular.

Our research on the healthcare industry found that most print is purchased externally rather than being produced internally by an inplant. Because only about a quarter of respondents are only printing internally, there is an opportunity for print service providers (PSPs) to get in the door and sell print. The most popular types of external printing companies included retail/shipping firms (e.g., Staples, FedEx Office) and franchise printers (e.g., Alphagraphics, MinuteMan Press).

Figure 11: Internal vs. External Printing (Marketing Collateral)



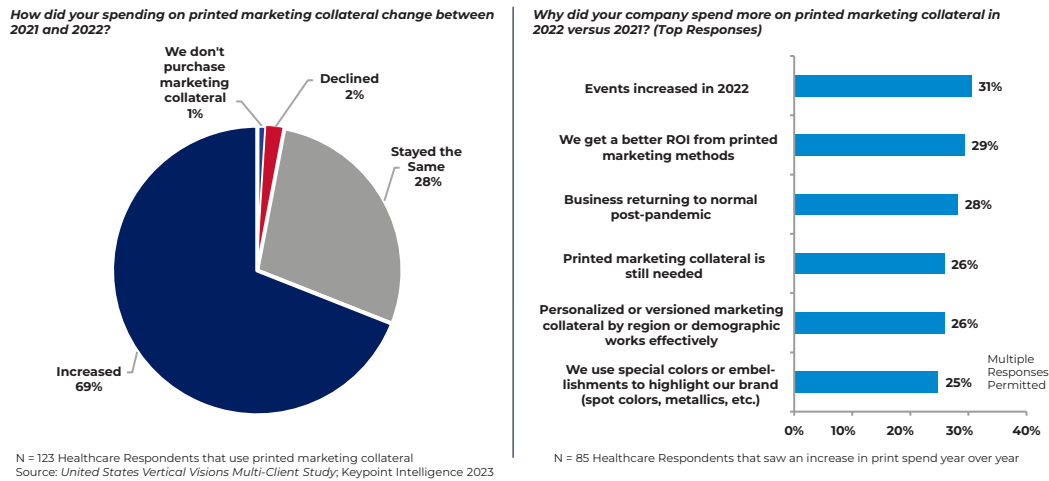
Competition can be stiff when it comes to the purchase of marketing collateral within the healthcare industry. Consider the following statistics:

- The vast majority of healthcare firms (92%) always or sometimes shop around for sales/promotions when they need to purchase printed marketing collateral.
- About 84% of these firms frequently or sometimes compare prices for services before selecting a print provider.
- 88% of respondents agreed that a sale would influence them to purchase printed marketing collateral from a particular provider.

Even though print is viewed as a declining channel, nearly 70% of healthcare respondents reported that their spending on printed marketing materials increased between 2021 and 2022. Among those respondents whose spending increased year over year, the most common reasons for this increase in spending included more events and a better return on investment (ROI) from printed marketing methods.



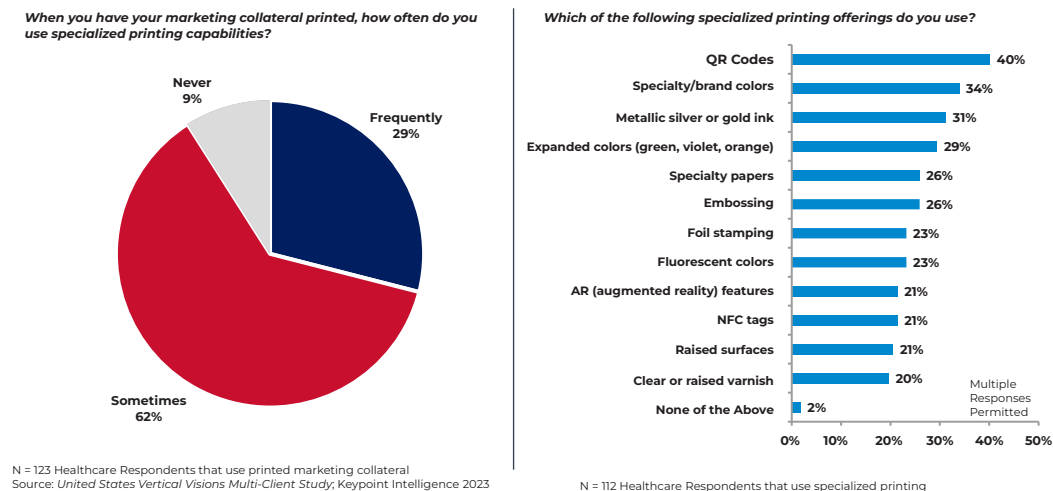
Figure 12: Spending on Printed Marketing Collateral



This increase in print spend is expected to continue too. The share of healthcare respondents that expected their spending on printed marketing collateral to increase between 2022 and 2023 exceeded those that expected a decrease in nearly all categories.

Like customization/personalization, the use of specialized printing capabilities (e.g., metallics, embellishments, QR codes, NFC tags, augmented reality) is common with printed marketing collateral. In fact, 91% of the healthcare respondents that we surveyed reported frequently or sometimes using specialized capabilities with their printed marketing materials. The most commonly used capabilities included QR codes and specialty/brand colors.

Figure 13: Use of Specialized Printing Techniques (Marketing Collateral)



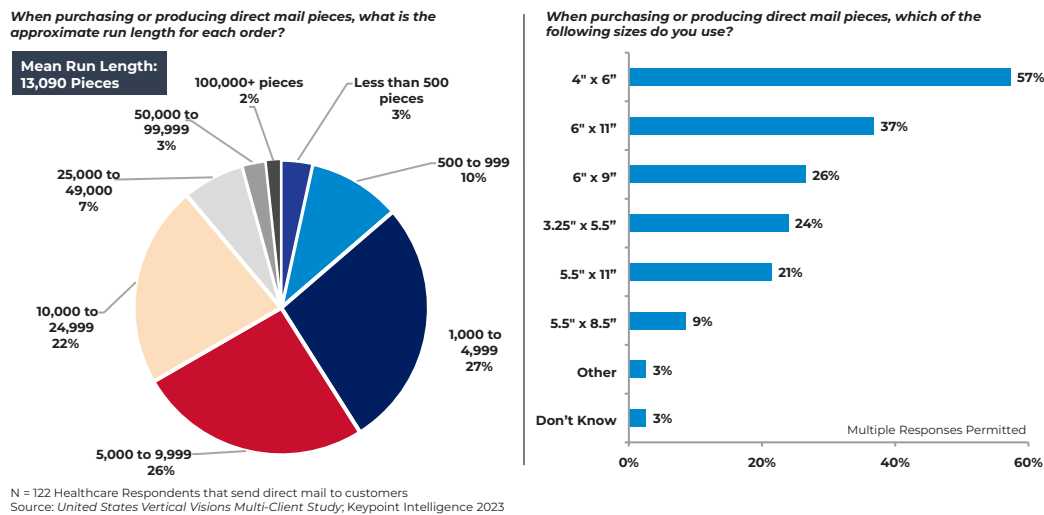


Direct Mail

Of our 173 total healthcare respondents, nearly 68% were sending direct mail to their customers. As might be expected, larger firms sent more direct mail pieces than their smaller counterparts. Whereas firms with under 500 employees sent an average of 12,625 direct mail pieces in a typical month, the mean was 67,454 for firms with 500+ employees.

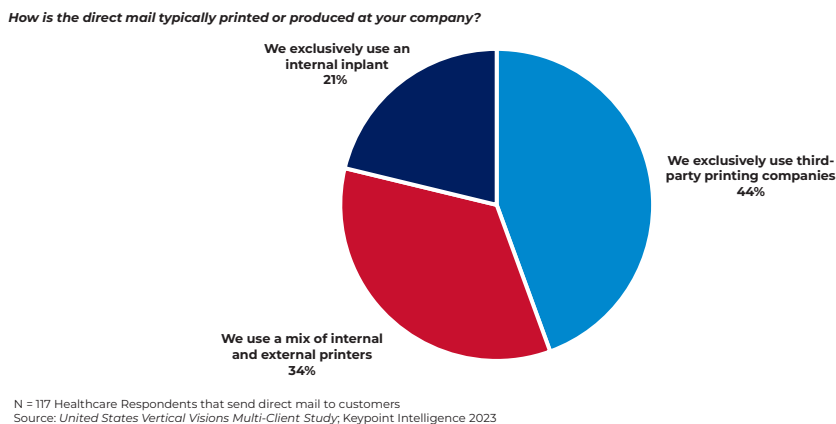
Among all healthcare respondents that sent direct mail to their customers, the average run length per order was 13,090 pieces. The most popular sizes for direct mail items were 4" x 6" and 6" x 11".

Figure 14: Run Length and Size



As was the case with printed marketing collateral, most healthcare firms are using external printers at least some of the time.

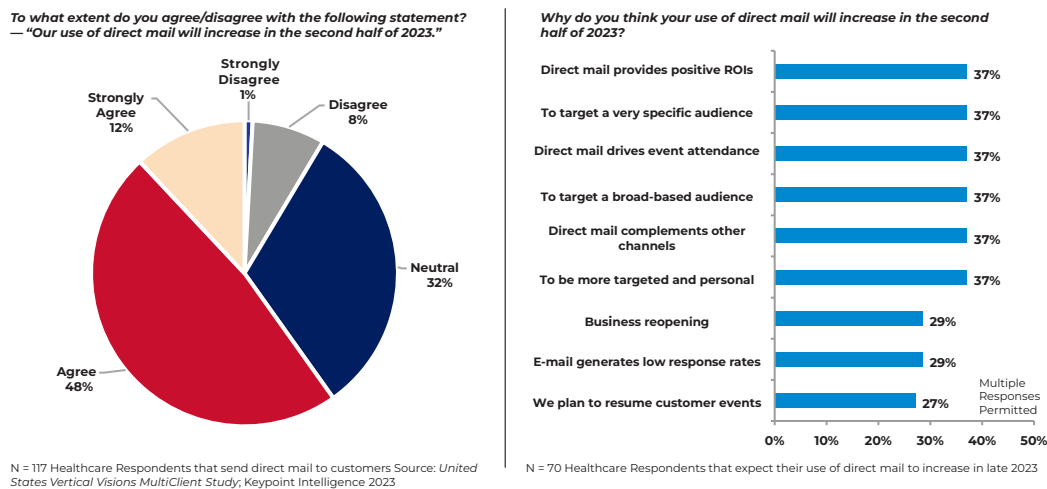
Figure 15: Internal vs. External Printing (Direct Mail)



Regardless of vertical market, PSPs understand that printed direct mail remains relevant to many consumers— even in a digital first world. One important benefit of direct mail is that it plays well with digital media types. This might take the form of a QR code on a postcard or a digital link to additional information on a piece of direct mail. Of those healthcare respondents that sent direct mail to their customers, 94% were sometimes or frequently coordinating their direct mail and digital media campaigns.

Further underscoring the continued importance of traditional direct mail, 60% of respondents agreed that their use of direct mail would increase in the second half of 2023 in comparison to the first half.

Figure 16: Increased Use of Direct Mail

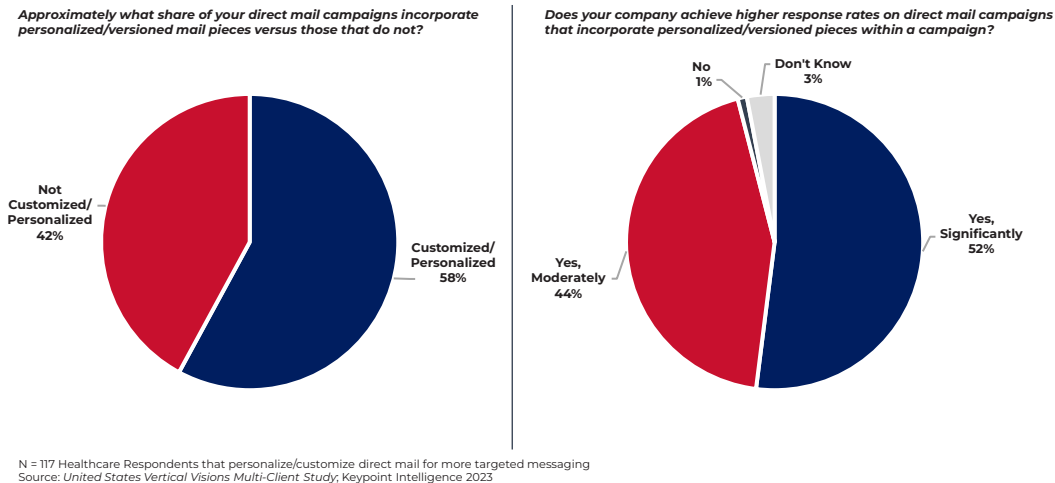


Another means of improving the efficacy of direct mail is personalizing or customizing the content to deliver more targeted messages. This customization might involve changing images or modifying text based on recipients’ interests.



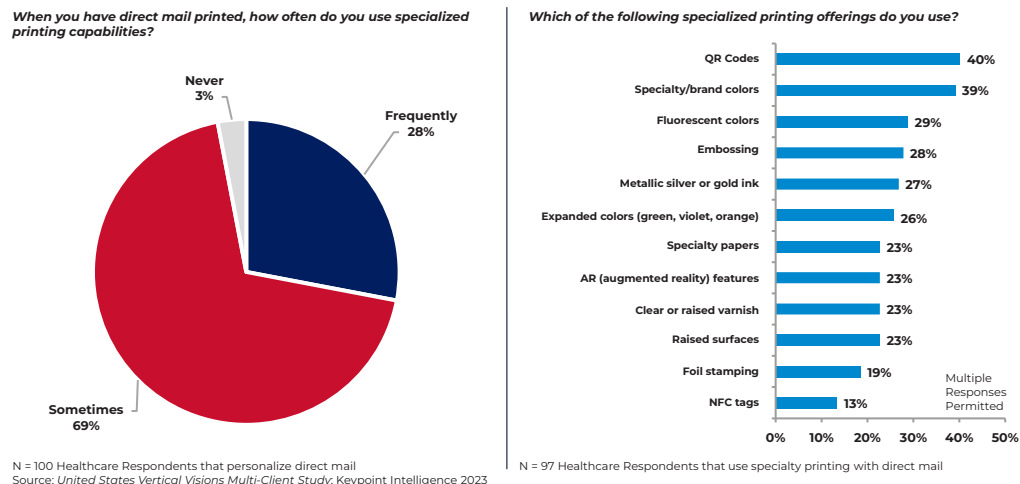
Healthcare respondents reported that on average, 58% of their direct mail campaigns were customized. This compares to 42% of campaigns that were not. In addition, the vast majority of campaigns that were personalized achieved significantly or moderately higher response rates.

Figure 17: Personalization versus NonPersonalization



Like other industries, healthcare firms are improving their direct mail campaigns with specialized printing (e.g., metallic/fluorescent colors, augmented reality, or specialty papers). 97% of healthcare respondents that were personalizing/customizing their direct mail were using specialized printing at least occasionally. The most commonly used techniques included the addition of QR codes and specialty/brand colors.

Figure 18: Use of Specialized Printing Techniques (Direct Mail)



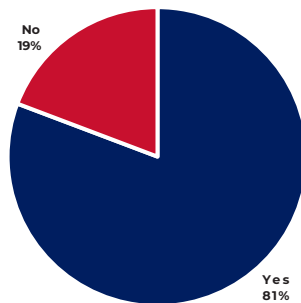


Catalogs

This section of the report focuses on respondents' catalog printing habits. Of those healthcare respondents that were able to answer questions about catalog printing, over 80% sent or mailed catalogs to their customers. On average, annual spending on catalog marketing was about \$2.6 million. This compares to an average of \$3.8 million for the total vertical markets surveyed.

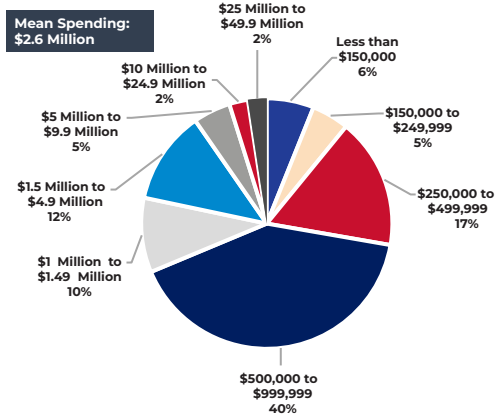
Figure 19: Catalog Use and Annual Spending

Does your company send or mail catalogs to customers when selling products or services?



N = 52 Healthcare Respondents that can answer questions about catalog printing
Source: United States Vertical Visions Multi-Client Study; Keypoint Intelligence 2023

Approximately what was your company's total spending on catalog marketing in 2022?

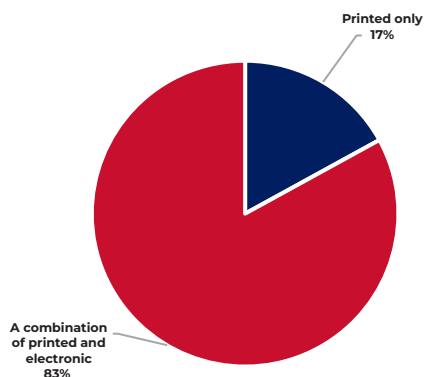


N = 42 Healthcare Respondents that send catalogs to customers to sell products/services

Whereas direct mail by its very nature is physical, catalogs can be printed or electronic. As shown in the Figure below, most healthcare firms were producing both printed and electronic catalogs. Meanwhile, none were exclusively producing electronic catalogs. Regardless of format, the most common types were general market and niche catalogs.

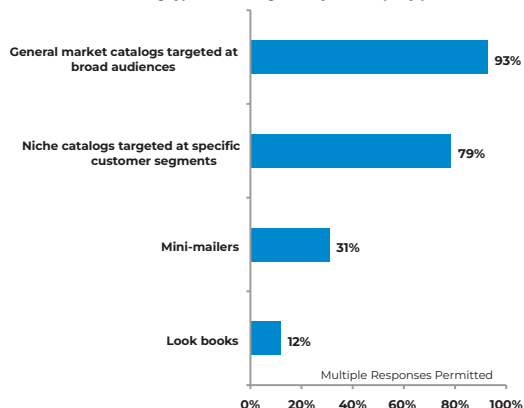
Figure 20: Format and Types of Catalogs

Does your company produce printed or electronic catalogs?



N = 42 Healthcare Respondents that send catalogs to customers
Source: United States Vertical Visions Multi-Client Study; Keypoint Intelligence 2023

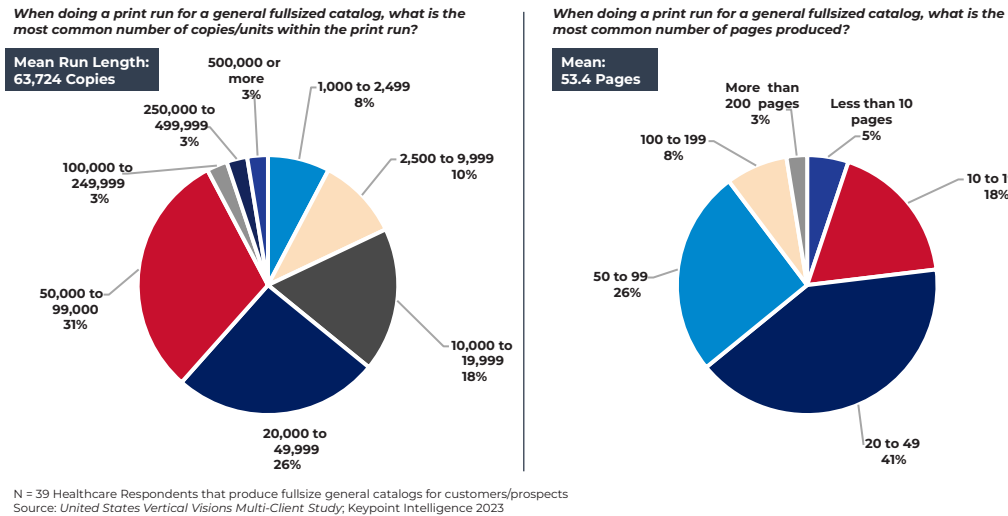
Which of the following types of catalogs does your company produce?





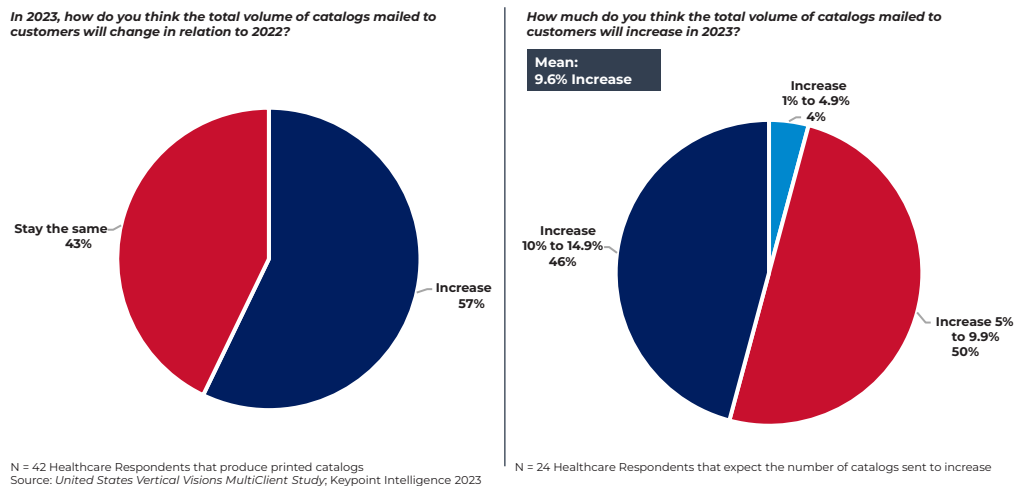
The average run length for catalogs was 63,724 copies. A typical catalog had an average of 53.4 pages.

Figure 21: Run Length and Page Count (Catalogs)



During the entirety of 2022, healthcare respondents reported sending a mean of 595,833 catalogs to customers. In relation to 2022, 57% of these respondents expect the number of catalogs sent to customers to increase during 2023. Of those who expected an increase, the average anticipated growth was 9.6%.

Figure 22: Change in Printed Catalog Volumes

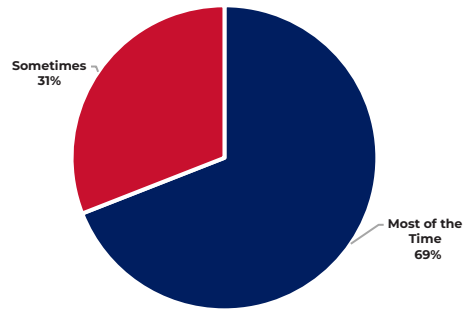




All healthcare firms are incorporating digital technologies with their printed catalogs at least occasionally. The most common reasons for doing so include a desire to create varying cover pages and targeted inserts/coupons.

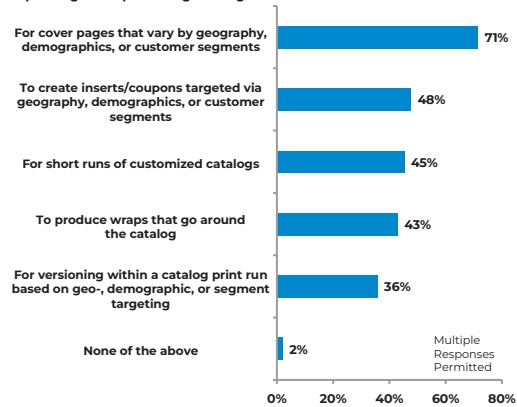
Figure 23: Use of Digital with Printed Catalogs

How often does your company use digital printing techniques within your catalog print runs?



N = 42 Healthcare Respondents that produce printed catalogs
Source: United States Vertical Visions Multi-Client Study; Keypoint Intelligence 2023

For which of the following reasons does your organization use digital printing when producing catalogs?

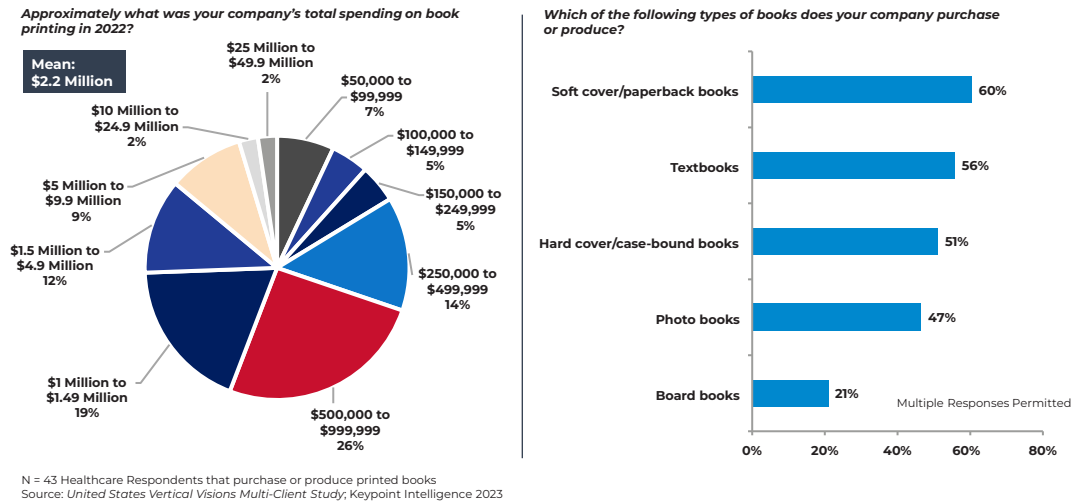


N = 42 Healthcare Respondents that usually/sometimes use digital with printed catalogs

Books

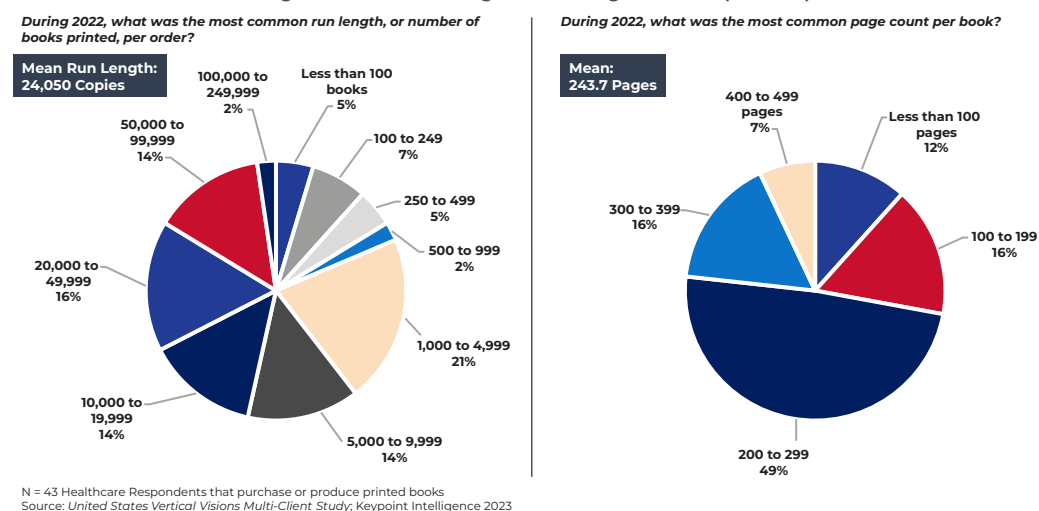
Out of the 173 healthcare respondents that we surveyed, 43 (about 25%) produced printed books. On average, these respondents reported spending \$2.2 million on book printing in 2022. The most popular types of books produced included paperbacks and textbooks.

Figure 24: Spending on Book Printing



Healthcare respondents reported purchasing an average of 1,108,379 books during 2022. The most common run length (i.e., number of books printed per order) was 1,000 to 4,999, but the overall average run length was 24,050 books. The average page count was about 244 per book.

Figure 25: Run Length and Page Count (Books)



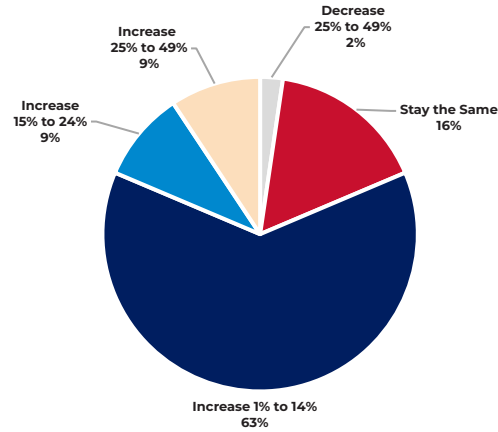
When respondents were asked how they expected their book volumes to change between 2022 and 2023, very few expected these volumes to decline. Meanwhile, a strong majority expected an increase, and the average predicted increase was 9.1%.



Figure 26: Expected Change in Book Volumes

In 2023, how do you expect the volume of books that your company produces or purchases to change in relation to 2022?

Mean: 9.1% Increase

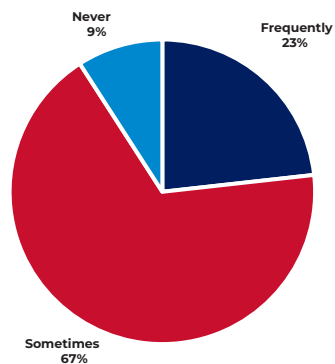


N = 43 Healthcare Respondents that purchase or produce printed books
Source: United States Vertical Visions Multi-Client Study; Keypoint Intelligence 2023

When it comes to specialty printing, 91% of healthcare respondents were sometimes or frequently using these capabilities to produce their books. The most common techniques included metallics and expanded gamut colors.

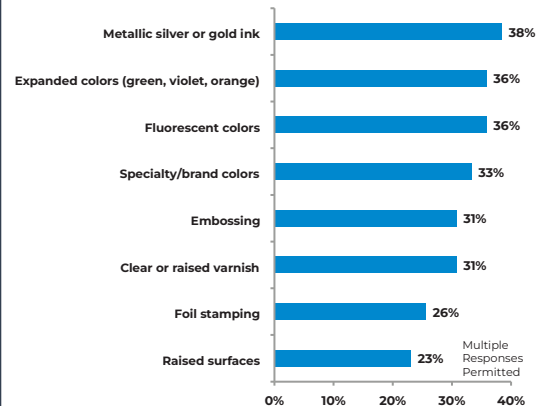
Figure 27: Use of Specialized Printing Techniques (Books)

When you have books printed, how frequently do you use specialized printing capabilities?



N = 43 Healthcare Respondents that purchase or produce printed books
Source: United States Vertical Visions Multi-Client Study; Keypoint Intelligence 2023

Which of the following specialized printing offerings do you use?



N = 39 Healthcare Respondents that use specialized printing when producing books

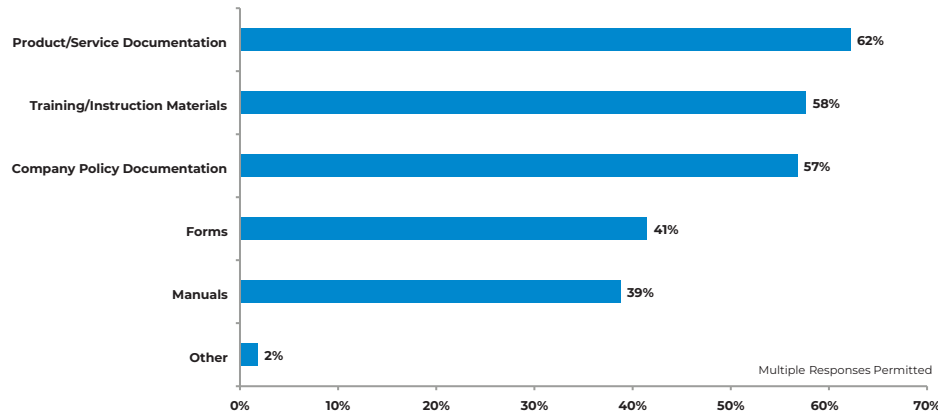


Informational Materials

About 64% of total healthcare respondents were purchasing or producing informational materials (e.g., booklets, manuals, training materials) for their offerings. Of these, the most common types included product/service documentation and training/instruction materials.

Figure 28: Types of Informational Materials Purchased/Produced

Which of the following types of printed informational materials does your company produce or purchase?

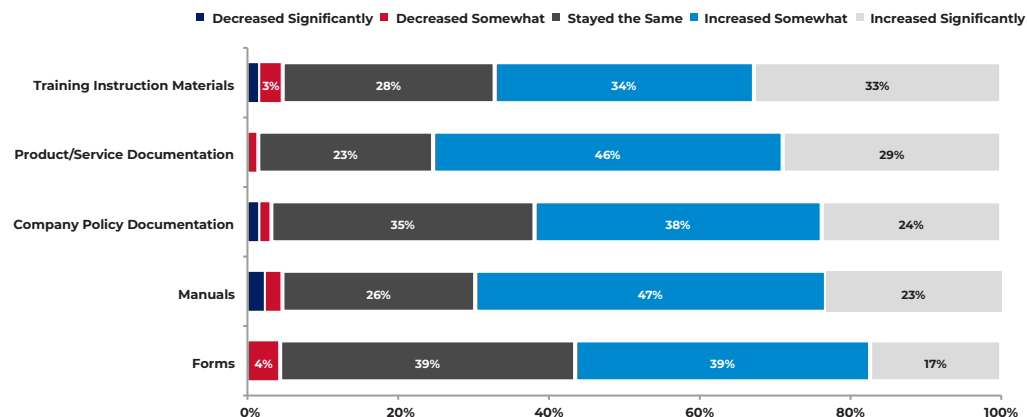


N = 111 Healthcare Respondents that purchase or produce printed informational materials
Source: United States Vertical Visions Multi-Client Study; Keypoint Intelligence 2023

When healthcare respondents were asked how print volumes for various types of informational materials had changed in the first half of 2023, very few reported a decrease. Some expected these volumes to stay the same, but the majority expected a moderate or significant increase.

Figure 29: Change in Volumes of Informational Materials

How have print volumes for the following types of materials changed in the first half of 2023?



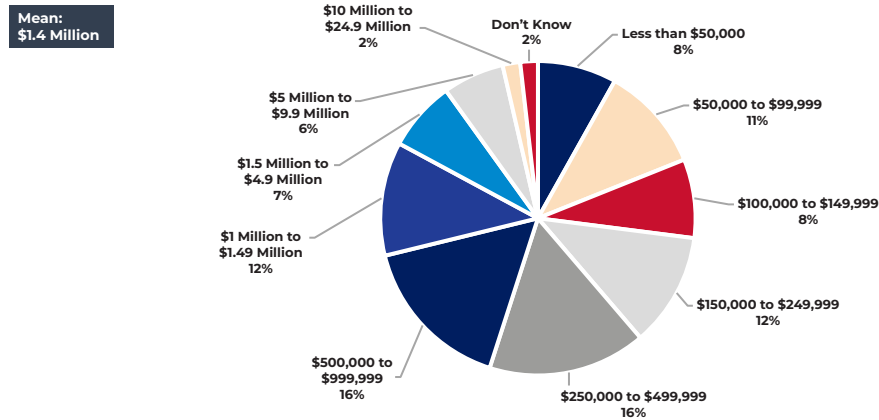
N = Varies; Base: 111 Healthcare Respondents that purchase or produce printed informational materials
Source: United States Vertical Visions Multi-Client Study; Keypoint Intelligence 2023



Healthcare firms reported spending an average of \$1.4 million on printed informational materials in 2022. This compares to \$2.5 million for businesses across all verticals.

Figure 30: Spending on Informational Materials

Approximately what was your company's total spending on printed informational materials in 2022?

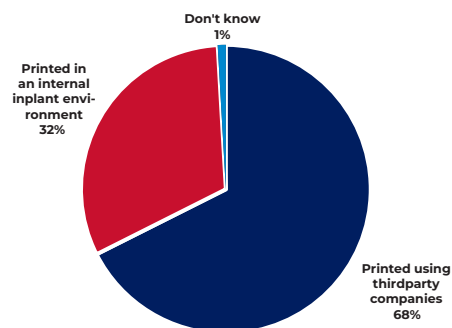


N = 111 Healthcare Respondents that purchase or produce printed informational materials
Source: United States Vertical Visions Multi-Client Study; Keypoint Intelligence 2023

Over twothirds of healthcare respondents used thirdparty companies for producing informational materials. The most common types of companies used included retail/shipping firms (e.g., Staples, FedEx Office) and general commercial printers.

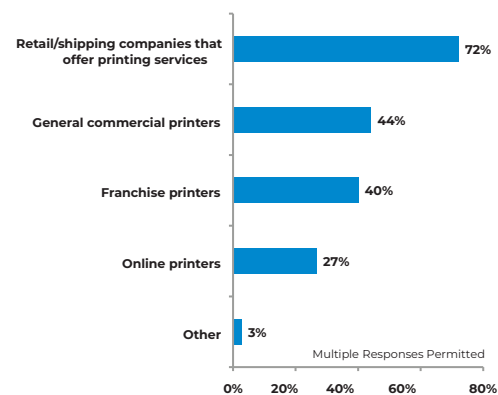
Figure 31: Internal vs. External Printing (Informational Materials)

How are informational materials such as booklets, manuals, and training materials typically printed/produced at your company?



N = 111 Healthcare Respondents that use printed informational materials
Source: United States Vertical Visions Multi-Client Study; Keypoint Intelligence 2023

Which of the following types of companies do you use when purchasing informational materials?

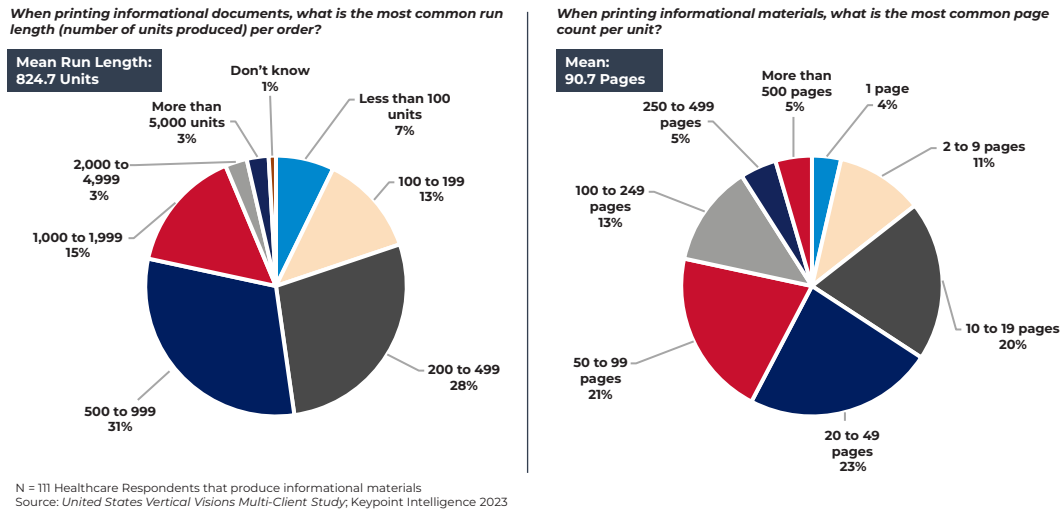


N = 75 Healthcare Respondents that use external providers for informational materials



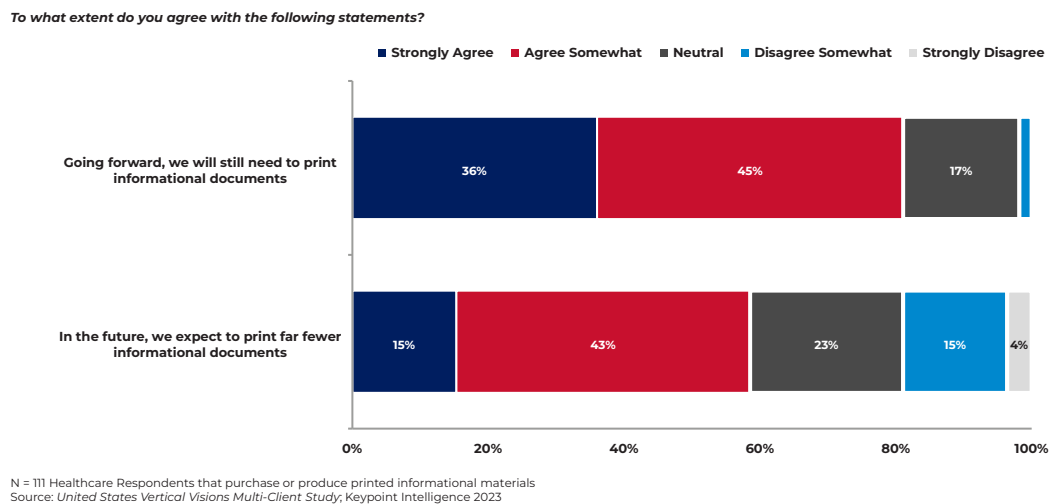
Healthcare respondents reported an average run length of nearly 825 units per order for informational materials. Meanwhile, the average page count was 90.7 pages.

Figure 32: Run Length and Page Count (Informational Materials)



When healthcare respondents were asked to specify their agreement with statements about their printing habits for informational materials, nearly 60% agreed that they would be printing fewer of these materials in the future. At the same time, however, the need to print at least some of these documents is expected to persist; over 80% of respondents expected to continue printing informational documents going forward.

Figure 33: Agreement with Statements about Informational Materials





Opinion

Print is playing a supportive role in today's multichannel world, but so are all media channels. Printed communications offer a unique advantage in that they play well with digital channels as businesses strive to create compelling campaigns across all channels. Adding ancillary services to offset declines in print revenues and better service to customers is the new equation for success in the healthcare market.

The healthcare industry offers solid opportunities for PSPs to grow business and offer improved digital printing capabilities for customization and personalization. Communication buyers in this vertical want providers that can recommend products and services aligned with their unique needs today and in the future. They are seeking providers that truly understand their market and can leverage this knowledge to deliver the best possible offerings.



About CFC Print & Mail

CFC Print & Mail is a wholesale provider of printed documents and services catering to small businesses through large distributor channels. CFC separates itself from its competition by providing superior customer service, fast production, best pricing and quick turn times. We pride ourselves on being a resource for our loyal customers, fostering both our successes.

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