

Who Buys Wide-Format: How, from Whom, and Why



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Research

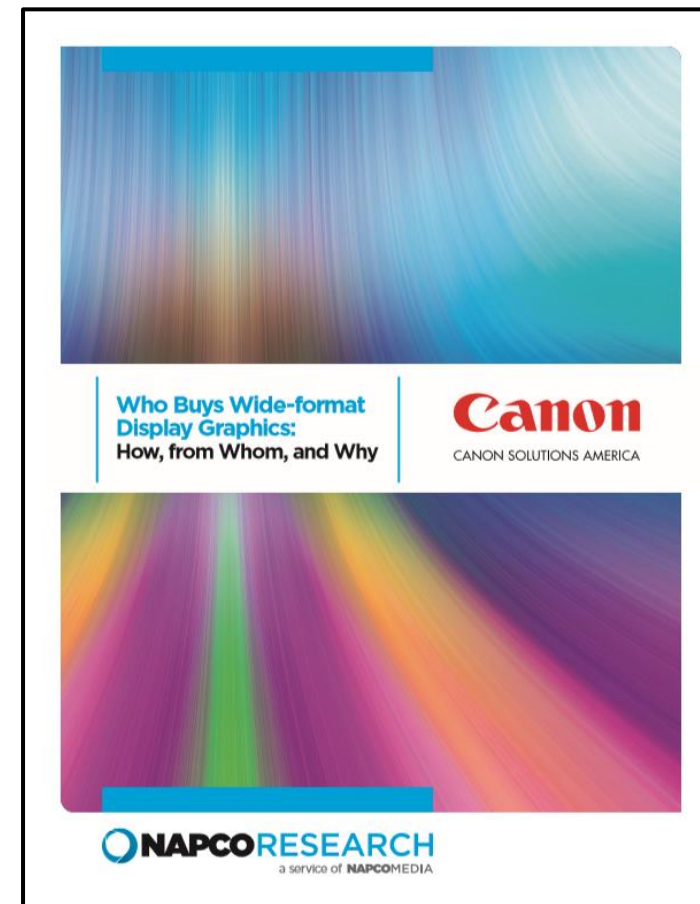
@WF_Impressions
#WFSummit2022

wide-format
SUMMIT

RESEARCH STUDY

- NAPCO Research designed and deployed 2 surveys:
 - Buyers and influencers of sign and display graphics
 - Providers of sign and display graphics
- Goals:
 - Identify trends influencing demand
 - Define buyers' purchasing needs and preferences
 - Understand providers' challenges, opportunities, and investment plans

Segment	Response
Sign and Display Graphic Purchasers or Influencers	71
Sign and Display Graphic Providers	115



To Download Report:
https://wideformatimpressions.tradepub.com/free/w_defa2434/

#WIDEFORMATSUMMIT

AGENDA

- The Opportunity
- Who is the Buyer?
- Why the Buy?
- What the Buy?
- Where they Buy?
- What they Look for in Providers?

SIGN AND DISPLAY APPLICATIONS ARE HIGH VALUE

- Powerful Communication Tools
- Compelling Marketing Vehicles
- Build Brand Equity and Recognition
- Creates Long-Term Awareness
- Wayfinding
- Effective Décor Enhancers
- Banners, Posters, Billboards, Soft Signs, Window Graphics, Wall Coverings, Floor Graphics (the list goes on) Deliver Results



Image Source: Image Options



Image Source: CGS Imaging



Image Source: Vomela

SIGN AND DISPLAY GRAPHIC DEMAND DRIVERS

Return to In-person Gathering

Every Surface is a Canvas

Demand for Experiential Marketing

Marketers Mixing Media

Availability of Embellishment/Enhancements



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GRAPHICS IS AN ATTRACTIVE MARKET TO ENTER

2021 – Market Segments Considering Entering

Looking to Enter Graphics
(Graphic/Sign and Graphic Installation)

49%

57%

55%

Current Market

Commercial n=233

Packaging, n=90

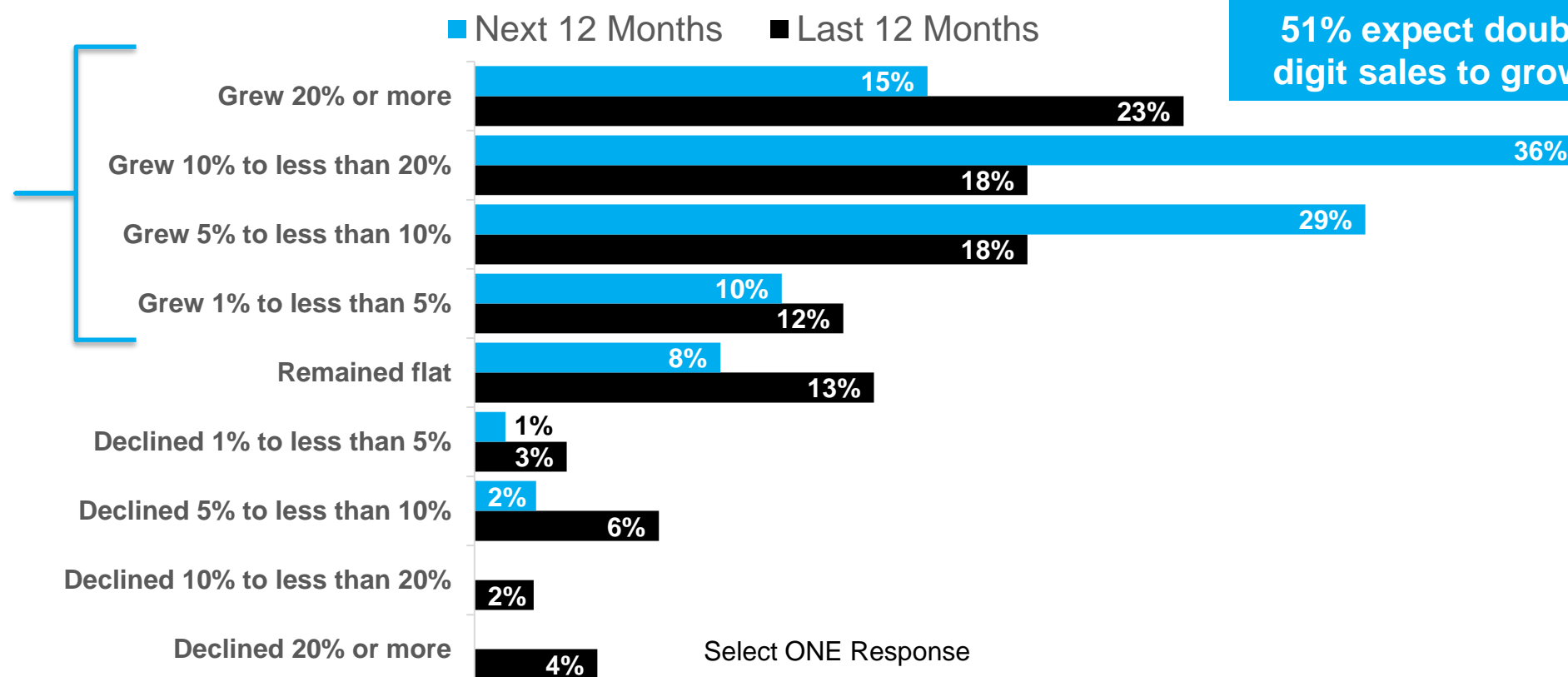
In-Plant, n=59

PROVIDERS EXPECT GROWTH

Q. What was/do you expect your organization's rate of sales growth in the last 12 months/next 12 months?

91% expect sales to grow in next 12 months

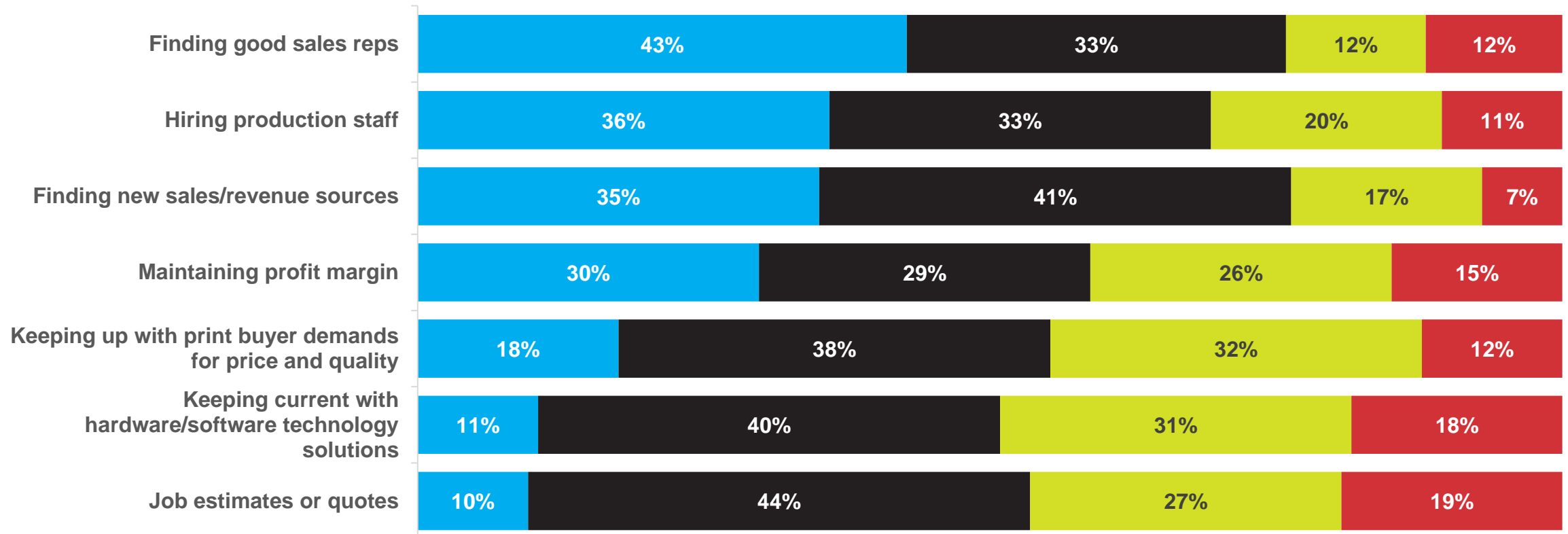
51% expect double-digit sales to grow



GRAPHIC PROVIDERS KEY CHALLENGES

Q. Rate the level of challenge each of the following factors presents to your business.

■ Critical Challenge ■ Moderate Challenge ■ Slight Challenge ■ No Challenge



n=114 Sign and display graphic providers

Source: *Who Buys Wide-format?*, NAPCO Research 2022

WHO IS THE BUYER?

WHO BUYS? PURCHASING DECISION MAKERS

Which of the following describes your role in your organization?

1. Marketing Executive: 27%
2. CEO/President/Owner: 27%
3. Marketing Manager: 24%
4. Management Executive: 11%
5. Brand Manager: 4%



KEY JOB TITLES

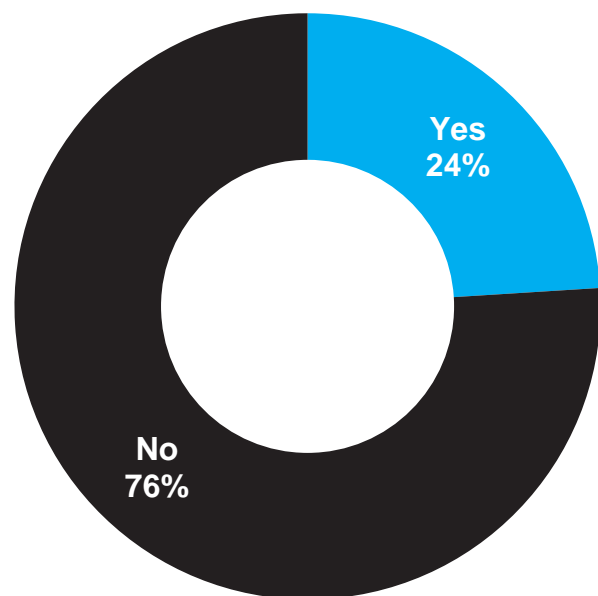
- Merchandisers
- Visual Merchandisers
- Designers
- Purchasing Director
- Purchasing Manager
- Business Manager
- Marketing Director
- Chief Experience Officer
- Event Manager
- Marketing Coordinator
- Marketing Manager
- Store Manager
- Chief Marketing Officer
- Customer Relationship/
Loyalty Manager
- Communications Director
- Office Manager
- Facilities Manager



VENDOR LISTS

Required to Buy from a Vendor List

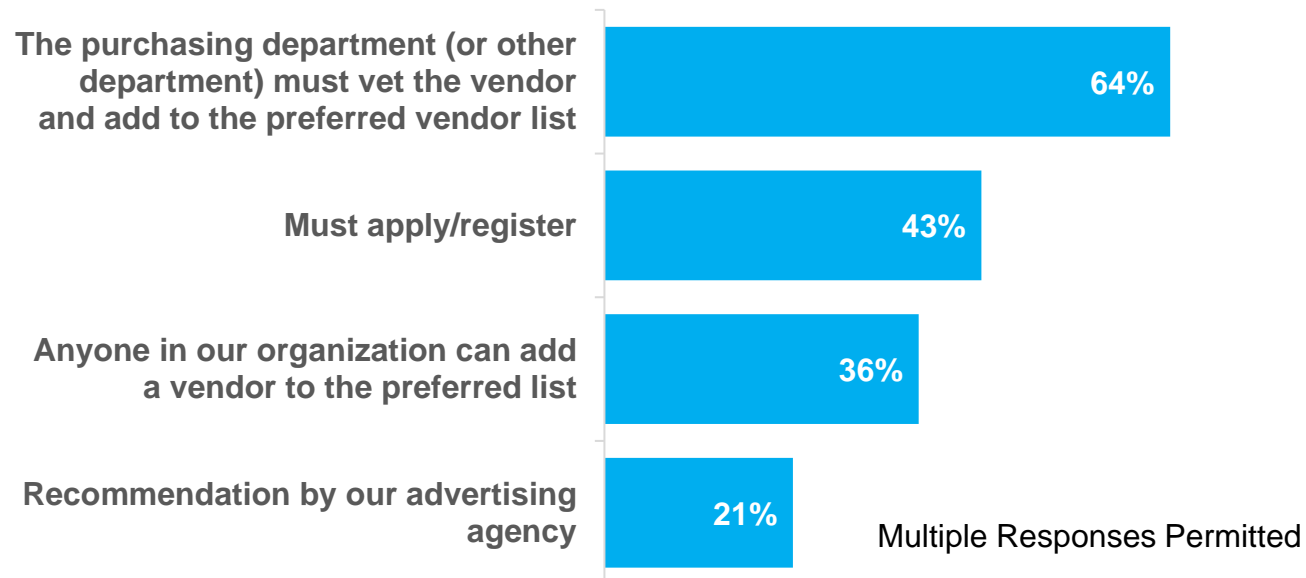
Q. Are you required to buy sign and display graphics from an approved vendor list?



n= 71 Purchasers or purchase influencers of sign and display graphics

Getting on a Vendor Lists

Q. How do sign and display graphic suppliers get on your organization's preferred vendor list?



n=14 Buyers or purchase influencers of sign and display graphics that are required to buy sign and display graphics from an approved vendor list

WHY THEY BUY?

THREE R's OF GRAPHICS POWER!

Reach

Audiences

- Highly visible
- Builds brand equity and recognition

Reliability

Channel

- Ever-present—doesn't need to be turned on, tuned into, clicked through
- Hard to ignore

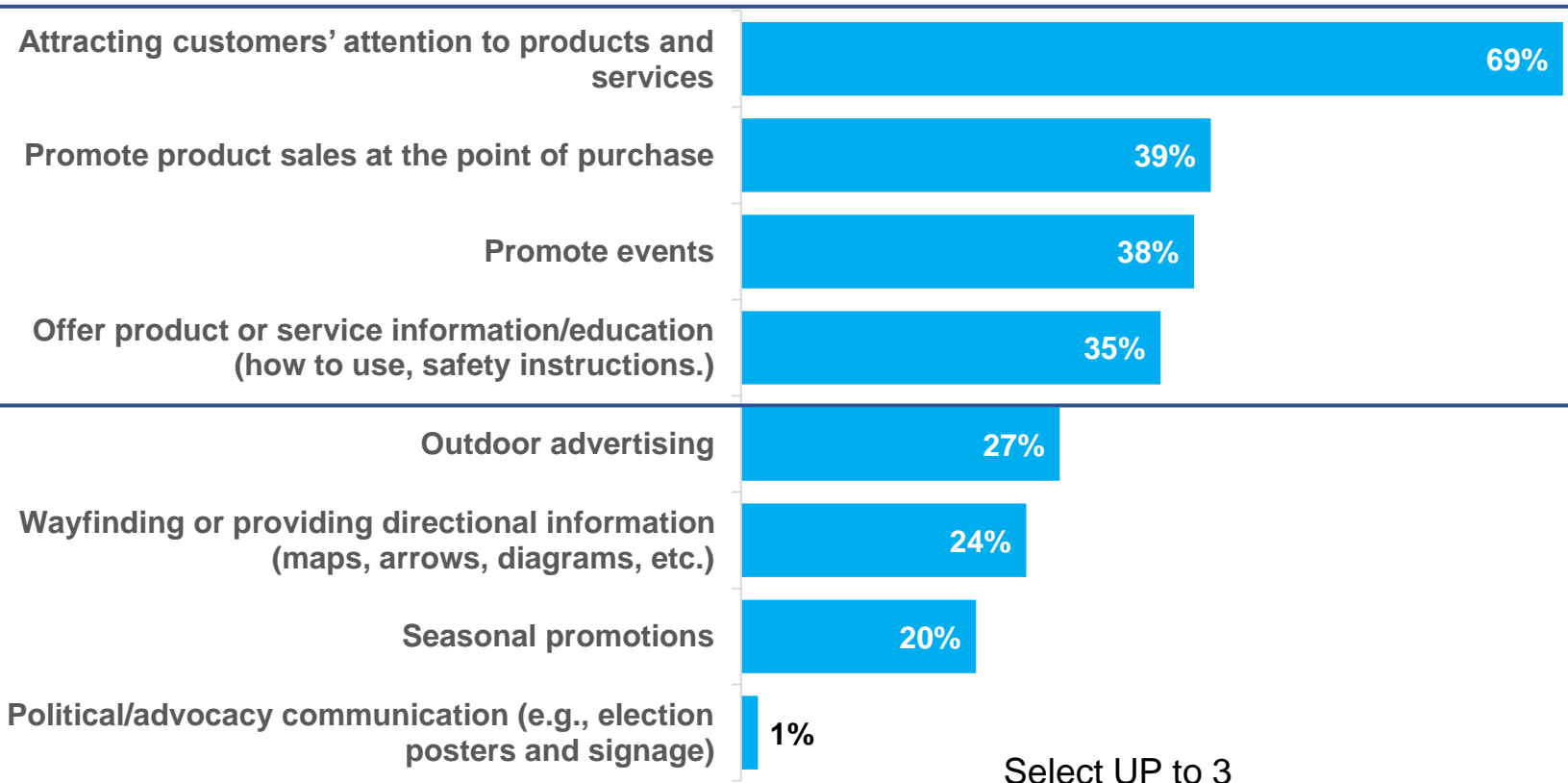
Recall

High

- OOH generates up to 67% ad recall, a figure higher than most other channels
- Creates long-term awareness

WHY THEY BUY? ATTRACTION, PROMOTION, EDUCATION

Q. What are your organization's TOP 3 objectives for using sign and display graphics?



Key Findings

The top reasons for purchasing sign and display graphics are:

- Attracting customer attention
- Supporting sales at the at the point of purchase
- Generating awareness and promoting events
- Offering product or service education and information

ATTRACTION AND PROMOTION EXAMPLES



Source: Image Options



Source: Olympus Group



Source: www.drytac.com



Source: Infinity Images

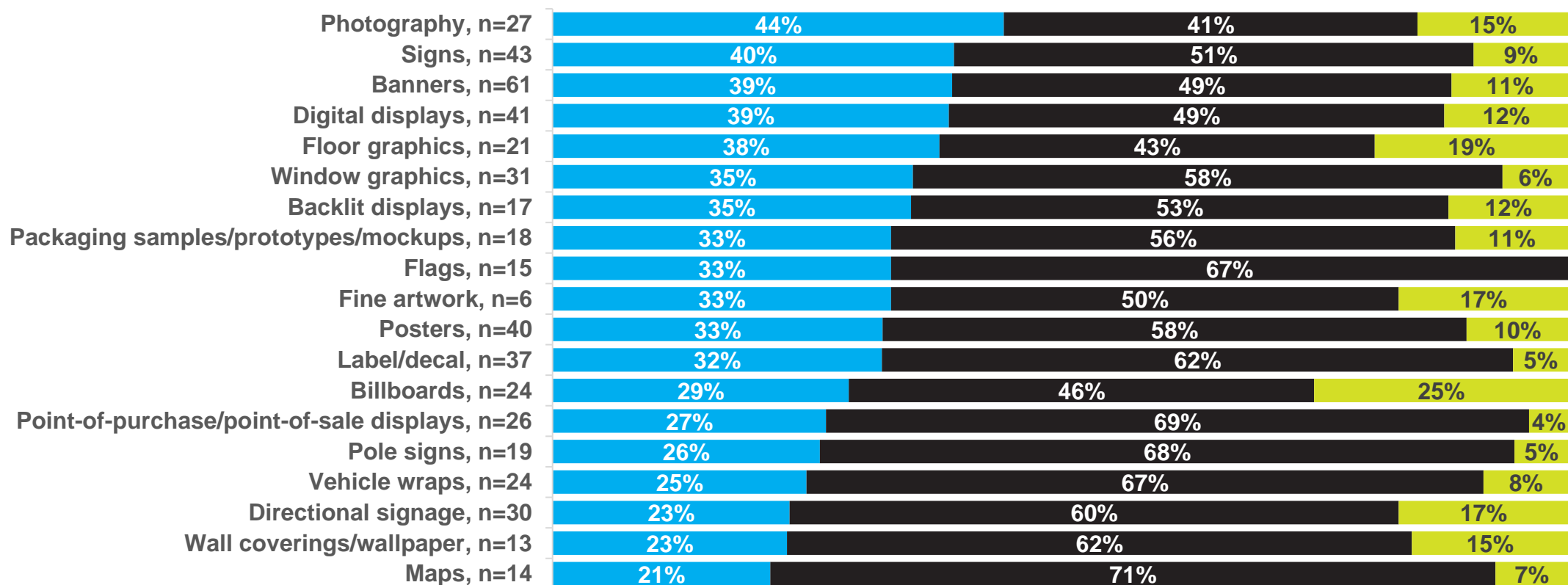
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WHAT DO THEY BUY?

BUYER APPLICATION SPENDING TRENDS

Q. What is the current spending trend for the sign and display graphics you purchase?

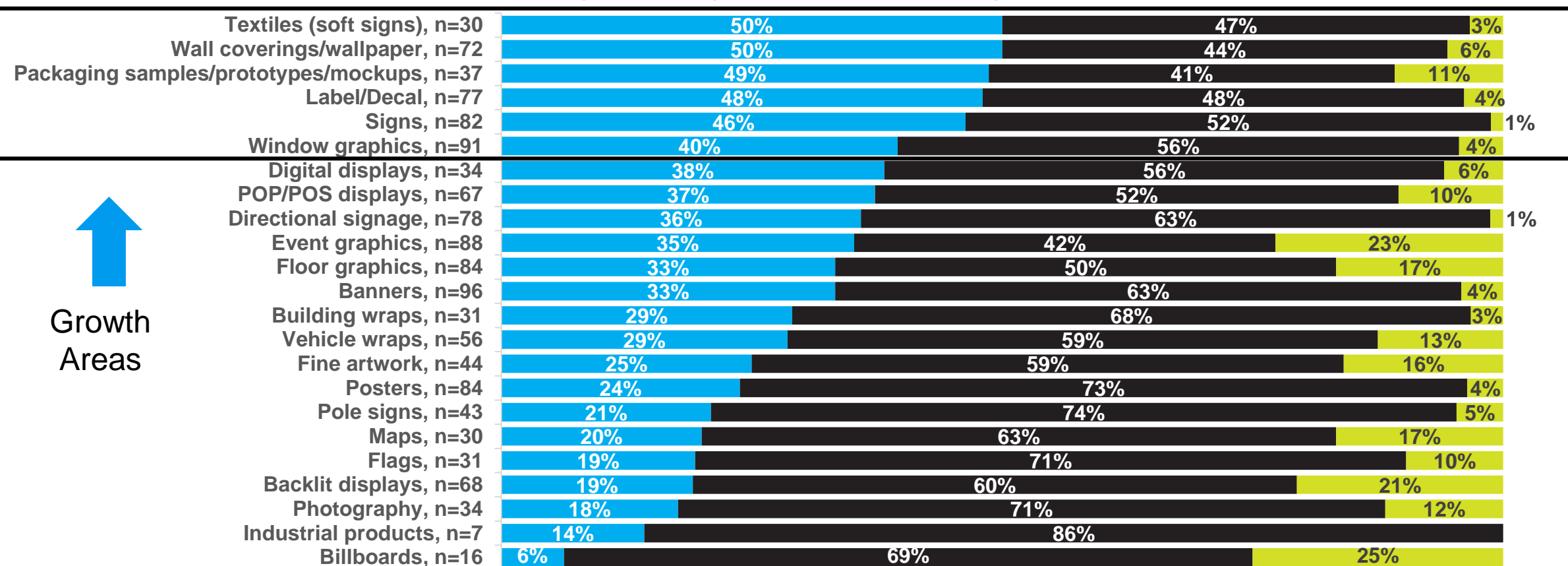
■ Increasing ■ No Change ■ Decreasing



DEMAND FOR WIDE-FORMAT APPLICATIONS

Q. How is demand for the following wide-format applications changing, if at all?

■ Growing ■ Staying the same ■ Decreasing

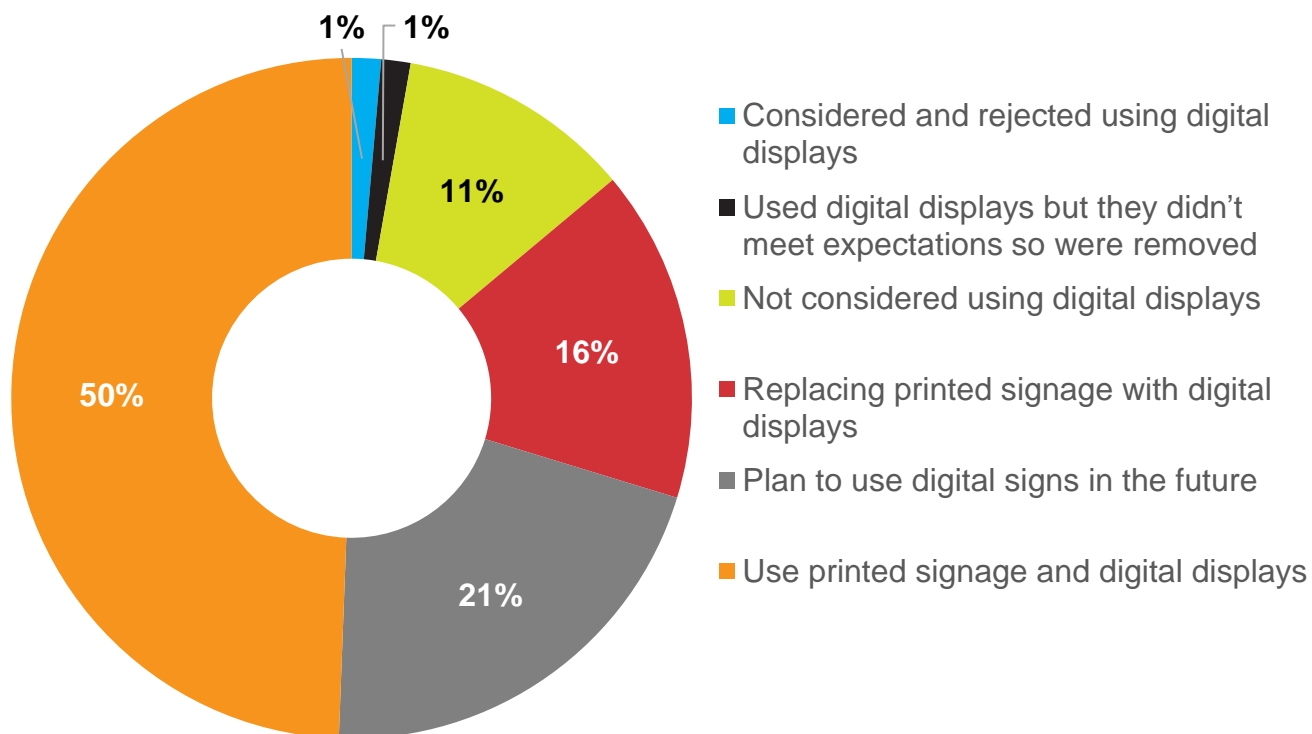


↑
Growth
Areas

USE OF DIGITAL SIGNAGE

Customers

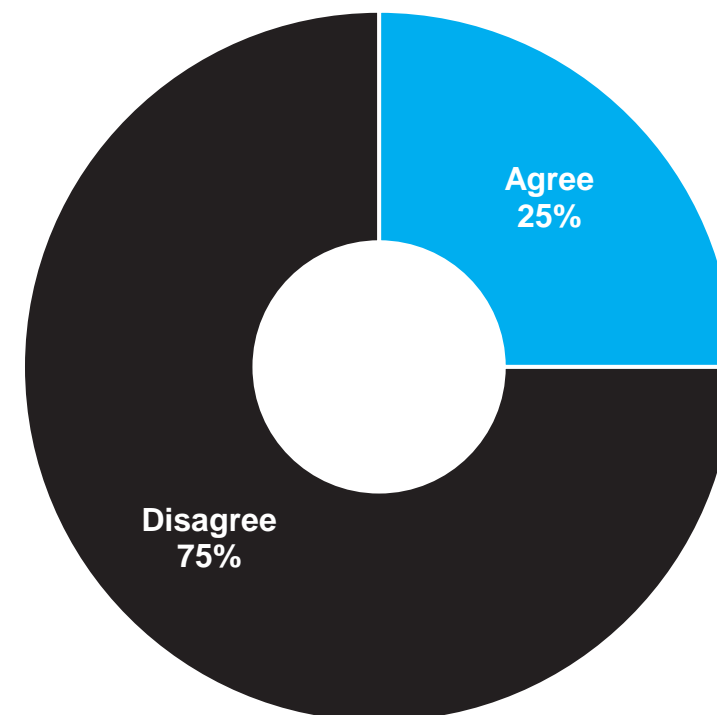
Q. Which of the following statements best aligns with your company's use of digital signs/displays?



n=71 Purchasers or purchase influencers of sign and display graphics
Source: *Who Buys Wide-format?*, NAPCO Research 2022

Providers

Q. What is your level agreement with: Our sign and display graphics business is losing volume to digital displays?

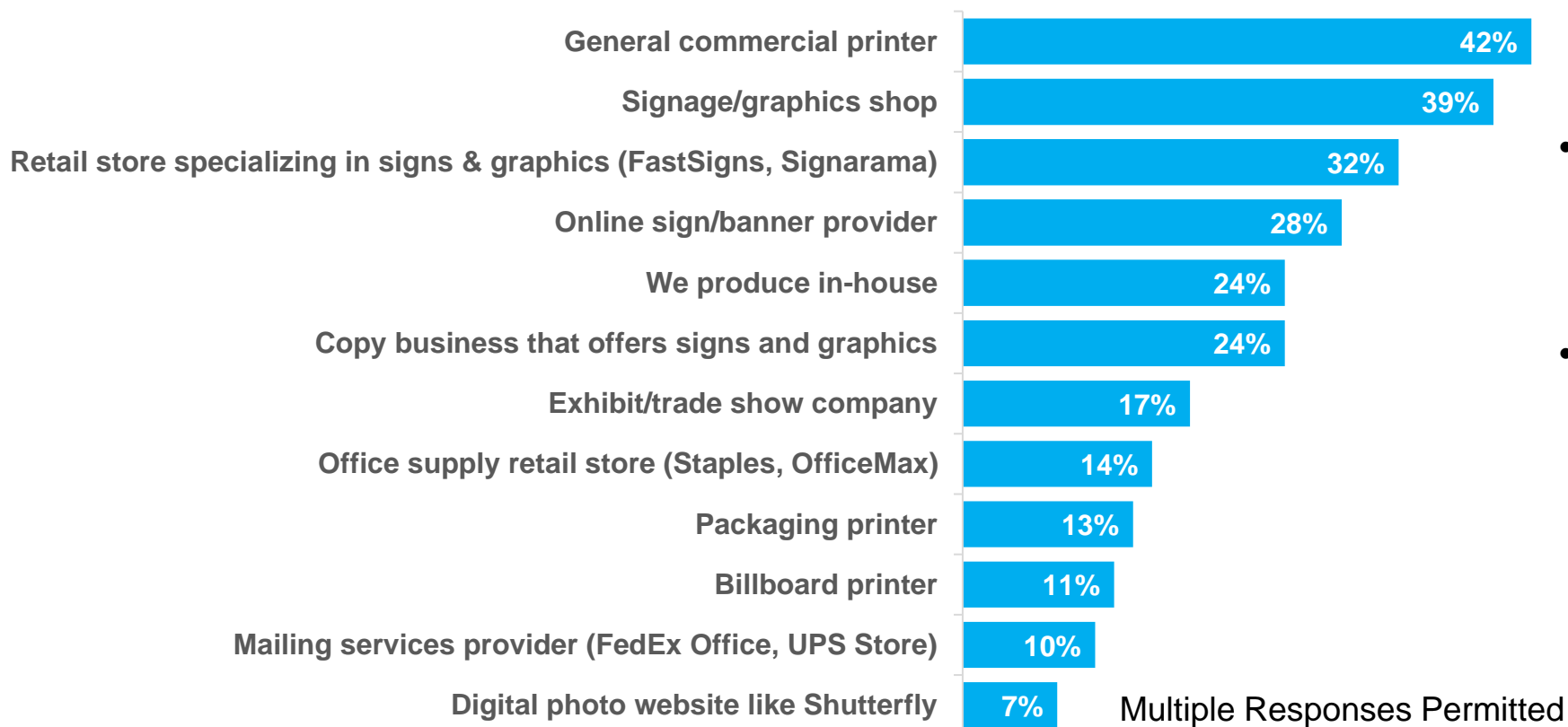


n=113 Sign and display graphic providers

WHERE THEY BUY?

WHERE THEY BUY?

Q. Where does your organization purchase its sign and display graphics?



Key Finding

- Sign and display graphic buyers purchase from a variety of providers.
- Respondents top three sources for purchasing sign and display graphics are general commercial printers, sign shops, and retail stores specializing in signage.

WIDE-FORMAT IMPRESSIONS 100 – First 50

THE 2021 WIDE-FORMAT IMPRESSIONS

100

Wide-format Impressions

WIDE-FORMAT IMPRESSIONS 100

2020 Ranking	2019 Ranking	Company	Principal Officer	WF Sales (\$mil)	WF Sales %	Overall Sales (\$mil)	Primary Specs	In-House Printing Technologies	# Locations	Employees	URL
1	1	HEINKE, Minneapolis, MN	Chris Cavanaugh	\$275.40	70.0%	\$322.00	DWF 70%, FIN 10%, COM 10%, DM 5%, PHS 5%	DCS, DCW, DWF, FLX, LTR, OFS, OFW, SCR	4	1,242	heiningroup.com
2	—	Orora North America (Orora Visual and Color Packaging Solutions), Mesquite, TX	Bob Fiesche	\$163.60	8.0%	\$2,020.00	PHS 85%, DMF 8%, SPEC 6% (Point-of-purchase POS/POP), PUB 1%	DCS, DCW, DWF, FLX, LTR, OFS, OFW, SCR	15	3,124	ororainc.com
3	3	Weneta Specialty, St. Paul, MN	Mark Auth	\$105.48	40.0%	\$268.70	SPEC 45% (Screen printing, Small-format digital, Dye sublimation), DMF 40%, COM 10%, DM 5%, PHS 2%	DSC, DWF, OFD, OFS, SCR	21	1,350	weneta.com
4	2	Showdown Displays, Brooklyn Center, MN	Kevin Mutch	\$102.80	100.0%	\$102.80	DWF 100%	DWF	3	450	showdowndisplays.com
5	4	Miller Zeit, Atlanta, GA	Chip Miller	\$55.49	31.0%	\$175.00	SPEC 34% (POP), DMF 31%, COM 22%, INS 10%	DWF, SCR	2	300	mlrzeit.com
6	5	Transcontinental Inc., Montreal, QC, Canada	Peter Brees	\$40.30	2.0%	\$2,015.00	PHS 53%, INS 17%, SPEC 13% (Promotional, distribution & IT Media), NEWS 5%, COM 4%, PUB 3%, BKS 3%, DMF 2%	DCS, DCW, DWF, FLX, OFS, OFW	39	8,000	t.c
7	8	Lithographic Inc., Hawthorne, CA	Heidi Zehack	\$38.00	40.0%	\$95.00	SPEC 40% (DCH, dye sublimation), COM 20%, CAT 10%, DM 10%, INS 10%, PHS 10%	DCS, DWF, OFD, OFS, SCR	1	250	lithographic.com
8	9	Duggal Visual Solutions, New York, NY	Michael Duggal	\$32.97	42.0%	\$78.50	SPEC 44% (Custom displays, retouching, multimedia, and production work), DMF 42%, COM 10%, CAT 2%, BKS 2%	DCS, DWF	9	361	duggal.com
9	6	Image Options, Foothill Ranch, CA	Brian Hill	\$27.23	96.0%	\$27.50	DWF 99% (Large format digital and fabrication), PHS 1%	DWF	2	190	imageoptions.net
10	10	Olypsys Group, Milwaukee, WI	Brian Adams	\$24.00	100.0%	\$24.00	DWF 100%	DWF	4	200	olypsysgroup.com
11	14	Primary Color, Cypress, CA	Dan Hill	\$20.80	40.0%	\$52.00	DWF 40%, COM 20%, DM 10%, SPEC 10% (Publication, installation), PHS 10%, CAT 5%	DCS, DWF, OFS	2	265	primarycolor.com
12	7	Amvise (Formerly Vision Integrated Graphics Group (VIG Group)), Indianapolis, IN	Brad Moore	\$20.50	10.0%	\$205.00		DCS, DCW, DWF, OFD, OFS, SCR	5	750	amvise.com
13	13	DADA Communications Management, Houston, TX, Canada	Richard Kolben	\$20.37	10.0%	\$203.70	COM 45%, DM 20%, SPEC 20% (Labels, resales, warehousing & logistics, tech-enabled workflow solutions), DMF 10%, PHS 5%	DCS, DCW, DWF, FLX, OFD, OFS, SCR	10	1,300	dadacm.com
14	—	ICOM Digital Productions Inc., Waltham, MA	Alex Christopoulos	\$18.00	60.0%	\$30.00	DWF 60%, COM 15%, PHS 10%, INS 10%, DM 5%	DCS, DCW, DWF, OFD, OFS, OFW	2	190	icomdigital.com
15	16	Handy Associates, Inc., Clifton, NJ	Michael Gault	\$16.80	16.0%	\$105.50	COM 30%, DM 23%, DMF 10%, CAT 10%, FIN 5%, INS 5%, SPEC 4% (Retail displays)	DCS, DCW, DWF, OFD, OFS, OFW	4	350	handyinc.com
16	17	Conoco Enterprises, Stamford, CT	Robert G. Barba Jr.	\$16.62	2.0%	\$833.00	SPEC 48% (Labels, envelopes), DM 34%, PUB 1%, COM 10%, DMF 2%	DCS, DCW, DWF, FLX, OFS, OFW	25	5,000	conoco.com
17	21	Tuttle Images, Subi, Georgia, GA, Canada	Charles Willmet	\$14.62	100.0%	\$14.62	DWF 100%	DWF	5	135	tuttle-images.com
18	22	Cosmo Graphics Inc., Edmonton, AB, Canada	Bruce MacMillan	\$14.00	60.0%	\$23.50	DWF 60%, SPEC 40% (Point Graphics, Screen Print)	DCS, DWF, SCR	3	945	cosmo.ca
19	37	Big Mountain Imaging, Philadelphia, PA	Joan Cardeski	\$14.00	100.0%	\$14.00	DWF 100%	DWF	2	42	printingbigmountain.com
20	53	Visual Marketing Systems, Teaneck, NJ	Duff Cook	\$13.90	100.0%	\$13.90	DWF 100%	DCW, DCS, DWF, OFD, OFS	2	124	vmks.com
21	34	Lewisburg Printing, Lewisburg, PA	Thomas Hule Howden, Jr.	\$13.20	15.0%	\$88.00	PHS 75%, DMF 10%, COM 5%, SPEC 5% (Misc.)	DCS, DCW, DWF, OFD, OFS, SCR	7	230	lpn.com
22	20	Willora Group, Des Moines, IA	Ann Trean	\$12.83	5.0%	\$256.50	DM 50%, CAT 10%, PUB 10%, INS 10%, PHS 10%, SPEC 10% (Custom technology solutions, data & analytics, and content creation), COM 5%, DMF 5%, DM 5%, S/T 5%	DCS, DCW, OFW, DWF, OFD, OFS	10	1,200	willora.com
23	32	A2Z Printing, Jackson, MS	Alvin Tabor	\$12.78	30.0%	\$42.60	DM 50%, DWF 30%, COM 20%	DCS, DWF, OFS	4	223	a2zprinting.net
24	36	O'Donnell Visual Communications, Cypress, CA	David O'Donnell	\$11.70	65.0%	\$18.00	DWF 65% (Screen format printing, custom fabrication, installation), PHS 10%, CAT 10%, DM 10%	DCS, DWF, OFS	2	80	odonnellvisual.com
25	31	LCP, Washington, IL	Thomas Johnson	\$11.63	25.0%	\$46.50	COM 40%, DMF 25%, DM 20%, SPEC 10%	DCS, DWF, LTR, OFS	2	180	lcccentralpress.com
26	18	Horsman Group, Hilliard, OH	Bob Horsman	\$11.60	40.0%	\$29.00	DM 40%, DMF 40% (Retail point-of-purchase), COM 20%	DCS, DCW, DWF, OFS	2	130	horsman.com
27	19	Thomas Printworks, Richardson, TX	Bryan Thomas	\$11.41	25.0%	\$45.63	COM 32%, DMF 25%, S/T 17%, DM 5%, INS 5%	DCS, DWF, LTR, OFD, OFS	25	335	thomaspriworks.com

Primary Specialties: BKS – Book Manufacturing; CAT – Catalogs; COM – General Commercial Printing; DM – Direct Mail; DWF – Wide-Grand Format Printing; FIN – Financial Printing; GAR – Garments; IND – Industrial Printing; INS – Inserts/Preprints; NEWS – Newspapers; PHS – Packaging; PUB – Publications/Periodicals; SPEC – Specialty Printing; S/T – Statements/Transactional; N/A – Not Available.

Printing Processes/Capabilities: DCW – Digital Continuous Web; DCS – Digital Cat Sheet; DWF – Digital Wide- & Grand Format; FLX – Flexography; GRV – Gravure; LTR – Letterpress; OFS – Offset Sheetfed; OFW – Offset Web; OFD – Offset/Digital Hybrid; SCR – Screen

2020 Ranking	2019 Ranking	Company	Principal Officer	WF Sales (\$mil)	WF Sales %	Overall Sales (\$mil)	Primary Specs	In-House Printing Technologies	# Locations	Employees	URL
28	—	Proton Graphics, Phoenix, AZ	Robert Anderson	\$11.40	25.0%	\$57.00	COM 25%, DM 20%, DMF 20%, PHS 10%, BKS 5%, CAT 5%, PUB 5%, SPEC 5% (Digital on-demand shortruns)	DCS, DCW, DWF, OFD, OFS, OFW	2	300	www.protongraphic.com
29	30	MATTERS, Tinton Falls, NJ	BRI Deerr	\$11.00	20.0%	\$55.00	COM 45%, DM 20%, DMF 20%, PHS 15%	DCS, DWF, OFS	2	330	matters.us
29	28	PHI Group, Kirkland, QC, Canada	Justin Balthier	\$11.00	20.0%	\$55.00	COM 40%, DMF 20%, SPEC 20% (Media and graphic services), PHS 10%, BKS 5%, DM 5%	DCS, DWF, OFS, OFW	4	300	phigroup.com
30	27	Drammond, Jacksonville, FL	John Falcauski	\$10.94	25.0%	\$43.70	COM 50%, DMF 20%, DM 20%, CAT 5%, PUB 5%	DCS, DWF, OFS, OFW	5	245	drammond.com
31	15	Envis Inc., Midlothian, TX	Kathie Walters	\$10.74	3.0%	\$357.97	SPEC 45% (Plasma & labels, tags, envelopes), COM 20%, S/T 10%, FIN 10%, PHS 5%, DM 5%, DMF 3%, CAT 1%	DCS, DCW, DWF, FLX, OFS, OFW, SCR	54	2,084	envis.com
32	24	DGI Innovations, North Hills, CA	Glen Finkbein	\$10.00	100.0%	\$10.00	DWF 100%	DWF	1	140	dgi-innov.com
33	—	Phase 7 Marketing and Communications, Atlanta, GA	Ron Holcomb	\$9.99	36.0%	\$27.3%	SPEC 43% (Agency services, fabrication, warehousing, distribution), DWF 30%, COM 10%, DM 5%	DCS, DWF	3	200	phase7inc.com
34	—	CataloDynamics, Allen, TX	Matt Colbaugh	\$9.30	30.0%	\$31.00	DWF 30%, COM 30%, DM 20%, CAT 5%, PUB 5%, BKS 5%	DCS, DWF, OFW, OFS	1	170	catalodynamics.com
35	29	Source One Digital, North Shores, MI	Randy Crow	\$9.27	80.0%	\$9.30	DWF 100%, PHS 10%, COM 5%	DWF, SCR	1	60	sourceonedigital.com
36	33	CaledoniaMedia, Houston, TX	Alan Rhodes	\$9.15	100.0%	\$9.15	DWF 100%	DWF	1	55	caledonamedia.com
37	43	MSI Printing, Elgin, IL	Eric Landwehr	\$7.80	65.0%	\$12.00	DWF 65%, SPEC 35% (Screen Printing)	DCS, DWF, SCR	1	45	msiprint.com
38	—	Enhance a Color, Danbury, CT	Kevia Connors	\$7.65	85.0%	\$9.00	DWF 85%, INS 15%	DCS, DWF	1	32	enccp.com
39	—	JAMP Printing, Dublin, CA	Kathy Main	\$7.50	25.0%	\$30.00	COM 30%, DMF 25%, PHS 20%, CAT 10%, DM 10%, INS 5%	DCS, DWF, LTR, OFD, OFS	2	125	ampprinting.com
40	16	Postal Center International (PCI), Irvine, FL	Ismael Diaz	\$7.25	5.0%	\$145.00	BKS 25%, DM 20%, CAT 10%, COM 10%, S/T 10%, FIN 5%, PHS 5%, INS 5%, DMF 5%	DCS, DCW, DWF, LTR, OFD, OFS	2	250	pcibrands.com
41	42	DCG One, Seattle, WA	Brad Clarke	\$6.50	10.0%	\$64.97	DM 50%, COM 20%, SPEC 10% (Agency), DMF 10%, PHS 5%, CAT 5%, S/T 5%, BKS 2%, PUB 1%	DCS, DWF, LTR, OFD, OFW	3	327	dsgm.com
42	41	Paragon Inc., Montreal, QC, Canada	Marlene Lyette	\$6.20	20.0%	\$31.00	COM 40%, PHS 30%, DMF 20%, INS 5%	DCS, DWF, OFS	2	180	paragoninc.ca
43	41	Sattle-Stones Inc., Waukegan, IL	Ted Stoss	\$6.07	20.0%	\$30.35	DM 40%, DMF 20%, COM 20%, S/T 10%, CAT 5%, INS 5%	DCS, DWF, OFD, OFS, OFW	1	190	sattle-stones.com
44	—	Proseer Press, Portland, OR	Julie Corbi	\$5.91	20.0%	\$29.55	COM 30%, DMF 20%, COM 20%, DM 10%, SPEC 10% (Color labels, envelopes, and design), BKS 10%, CAT 5%	DCS, DCW, DWF, LTR, OFD, OFS	1	150	proseerpress.com
45	46	Sharpe Co., Wixom, MI	Chad Sauty	\$5.85	45.0%	\$13.00	DWF 45%, COM 20%, SPEC 10% (Signage and construction materials), CAT 5%, DM 5%	DCS, DWF	8	80	sharpeco.net
46	—	Acme Press of the Calhoun, Concord, CA	Marilyn Tabor	\$5.75	23.0%	\$25.00	PHS 30%, COM 30%, DMF 23%, INS 12%, CAT 5%	DCS, DWF, LTR, OFD, OFS, SCR	2	135	calhoun.com
47	52	Color Ink, Surrey, BC	David Weisner	\$5.60	40.0%	\$14.00	PHS 45%, DMF 40%, INS 10%, FIN 5%	DWF	1	52	colorink.com
47	51	Robin-Michelson Corp., Milwaukee, WI	Michael Brees	\$5.60	40.0%	\$14.00	COM 60%, DMF 40% (Dot of paper, online, and brand specialization)	DWF, OFS	2	62	robin.com
47	40	332 Image Group, Haverhill, MA	Gary Schellner	\$5.60	70.0%	\$8.00	DWF 70%, SPEC 30% (Publication services, design, etc.)	DCS, DWF	1	24	ezimage.com
48	40	Vivid Impact, Louisville, KY	Gary Beckwith	\$5.25	25.0%	\$21.00	COM 40%, DMF 25%, SPEC 20% (On-demand, full-service), PHS 15%	DCS, DWF, OFS	1	155	vividimpact.com
49	67	Chicago Print Group Inc., Calver Park, IL	Paul Dorst	\$5.12	80.0%	\$6.40	DWF 80%, BKS 5%, PHS 5%, CAT 5%, DM 5%	DWF	1	30	chicagoprintgroup.com
50	—	Multimedia Inc., Stillwater, MN	James Schuler	\$4.85	32.0%	\$15.17	INS 32%, DMF 32%, SPEC 10% (Screen POPs), COM 4%	DCS, DWF, LTR, OFS	1	190	multimedia.com
51	44	Big World Group, Antioch, TN	Scott Snyder	\$4.76	70.0%	\$6.80	DWF 70%, SPEC 30% (Architectural signage), design, etc.)	DCS, DWF	1	54	bigworldgroup.com
52	—	Graphic Trends Inc., Paramount, CA	Rene Tran	\$4.50	45.0%	\$10.00	SPEC 55% (Retail printing), DMF 45%	DCS, DCW, DWF, LTR, OFD, OFS, OFW, SCR	1	65	graphic-trends.net
52	71	Candied Little/Candied Worldwide, Farmington, NY	Howard Weisbach	\$4.50	10.0%	\$45.00	DM 40%, DMF 10%, BKS 10%, FIN 10%, PHS 10%, COM 10%, CAT 10%	DCS, DCW, DWF, LTR, OFD, OFS, OFW, SCR	2	150	candied.com

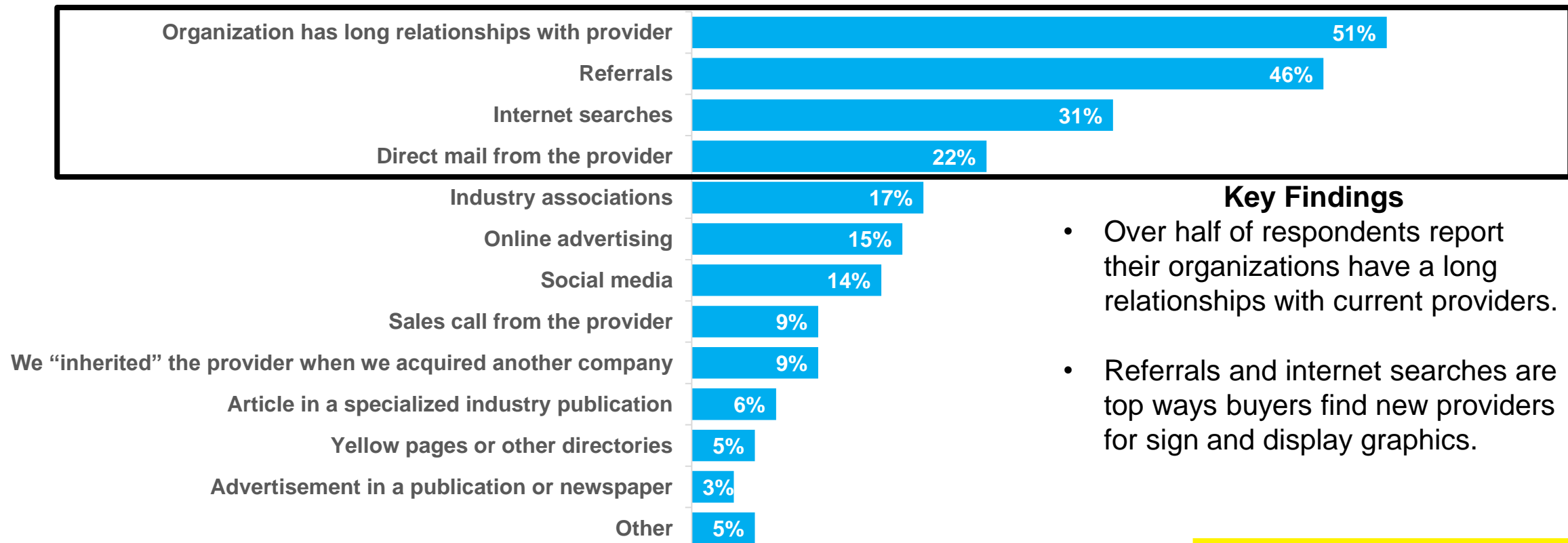
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Printing Processes/Capabilities: DCW – Digital Continuous Web; DCS – Digital Cat Sheet; DWF – Digital Wide- & Grand Format; FLX – Flexography; GRV – Gravure; LTR – Letterpress; OFS – Offset Sheetfed; OFW – Offset Web; OFD – Offset/Digital Hybrid; SCR – Screen

HOW THEY FIND PROVIDERS?

WAYS BUYERS FIND PROVIDERS

Q. How did you find your current sign and display graphics providers?



Key Findings

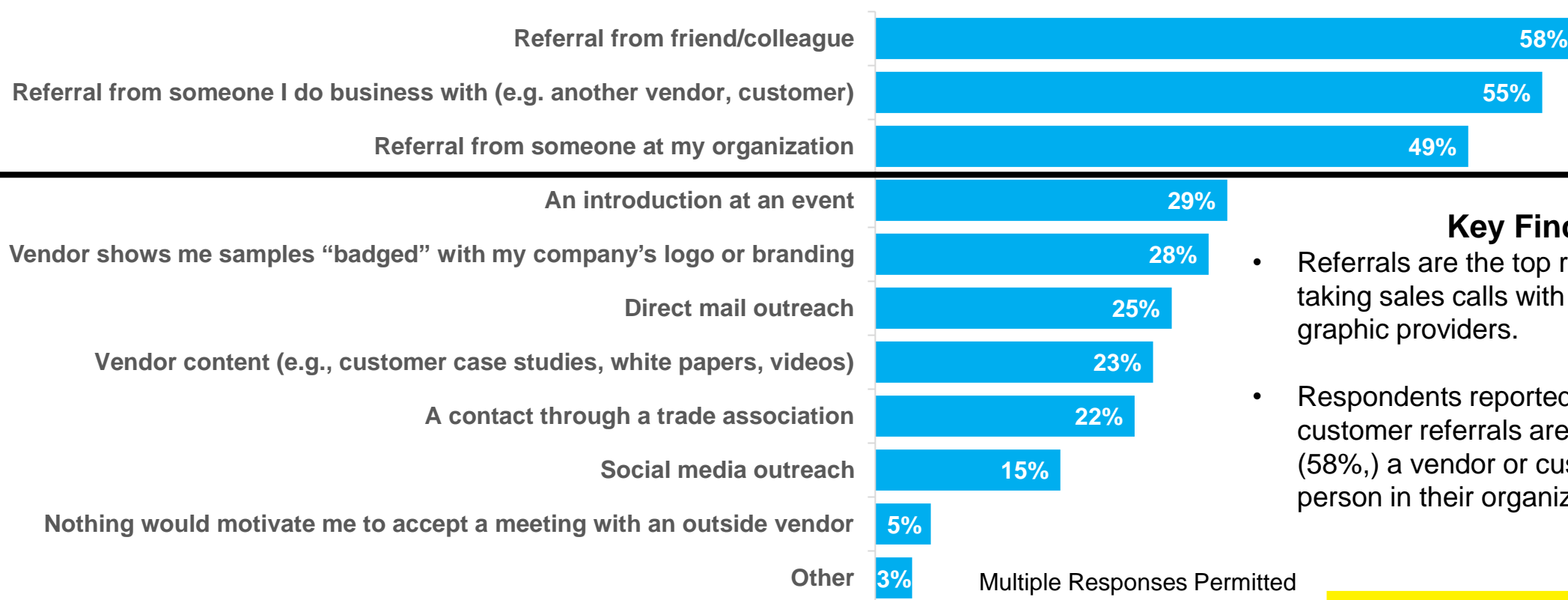
- Over half of respondents report their organizations have a long relationships with current providers.
- Referrals and internet searches are top ways buyers find new providers for sign and display graphics.

Multiple Responses Permitted

#WIDEFORMATSUMMIT

SALES MEETING MOTIVATORS

Q. What would motivate you to accept a meeting with a sign and display graphics provider you had not previously done business with?




Key Findings

- Referrals are the top reason buyers report taking sales calls with sign and display graphic providers.
- Respondents reported the top sources of customer referrals are a friend or colleague (58%), a vendor or customers (55%), or a person in their organization (49%).

TESTIMONIALS ARE A FORM OF REFFERAL

Miller Zell
9 hrs · 🌐

Said Walmart's Senior Director, Visual Merchandising, "It takes a large collaborative team to make these in-store initiatives come to life, and I could not be more honored to be a part of the visual merchandising team with Miller Zell." #brandedenvironments #endtoendservices
<https://hubs.ly/Q01hdYmf0>



MILLERZELL.COM

Retail Localization: Walmart
Walmart needed a partner to design, procure, produce, print, kit pa...

👍 Like 💬 Comment ➦ Share



MILLER ZELL Services Industries About Resources Contact 🔍 Request Consultation

Walmart

Variable print, "College Prepped"

Walmart wanted to execute a national in-store signage program during the Back-to-School/College season that celebrated the major universities nearest each store location. The signage needed to adhere to the school's licensing agreement requirements, and Walmart wanted the program executed in just 10 weeks. Across the U.S., Miller Zell created, tracked and printed 1,974 different designs to bring the "College Prepped" program to life.

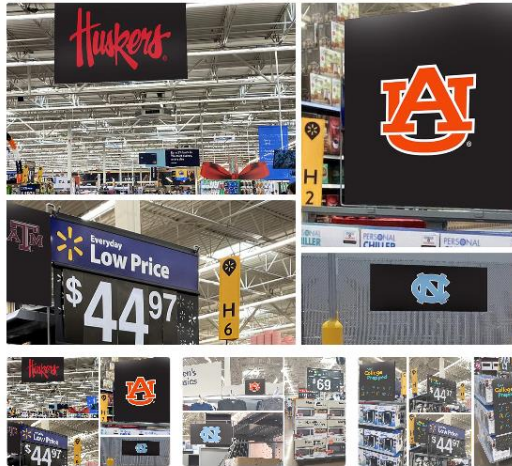
THE SOLUTION

As noted by the Harvard Business Review, "Successful localization hinges on getting the balance right." It also hinges on the precise execution of complex variable print and signage programs, which is right in the middle of Miller Zell's Retail Marketing Solutions sweet spot. From Alabama to Wyoming, UNC Pembroke to UCLA to Yale, the program was executed in 3,965 stores, and 64 percent of the kits included variable print components.

THE RESULT

Miller Zell's Retail Marketing Solutions team led the way in managing over 20,000 different variable data points over a 10-week time frame. We designed, procured, produced, printed, kit packed and precisely delivered the entire program, with 100 percent on-time delivery.

"It takes a large collaborative team to make these in-store initiatives come to life, and I could not be more honored to be a part of the visual merchandising team with Miller Zell,"
-Walmart Senior Director, Visual Merchandising.



CUSTOMER RECOMMENDATIONS



Cushing

December 10, 2021 · 🌐

#FeedbackFriday time featuring our friends over at the [Andersonville Chamber of Commerce](#) and the work our design [Sepia Studio](#) completed! Next week we will share a website spotlight on the project completed together in September!



"Sepia Studio's team was fantastic to work with and evolve a side note comment into an incredible art installation. A joy to work with, they exceeded expectations and we look forward to working with them and Cushing in the future."

DAVID OAKES
DIRECTOR OF BUSINESS SERVICES & DISTRICT MANAGER
ANDERSONVILLE CHAMBER OF COMMERCE



Cushing

July 30, 2021 · 🌐

Double #FeedbackFriday with an awesome testimonial for the Cushing and [Sepia Studio](#) teams!

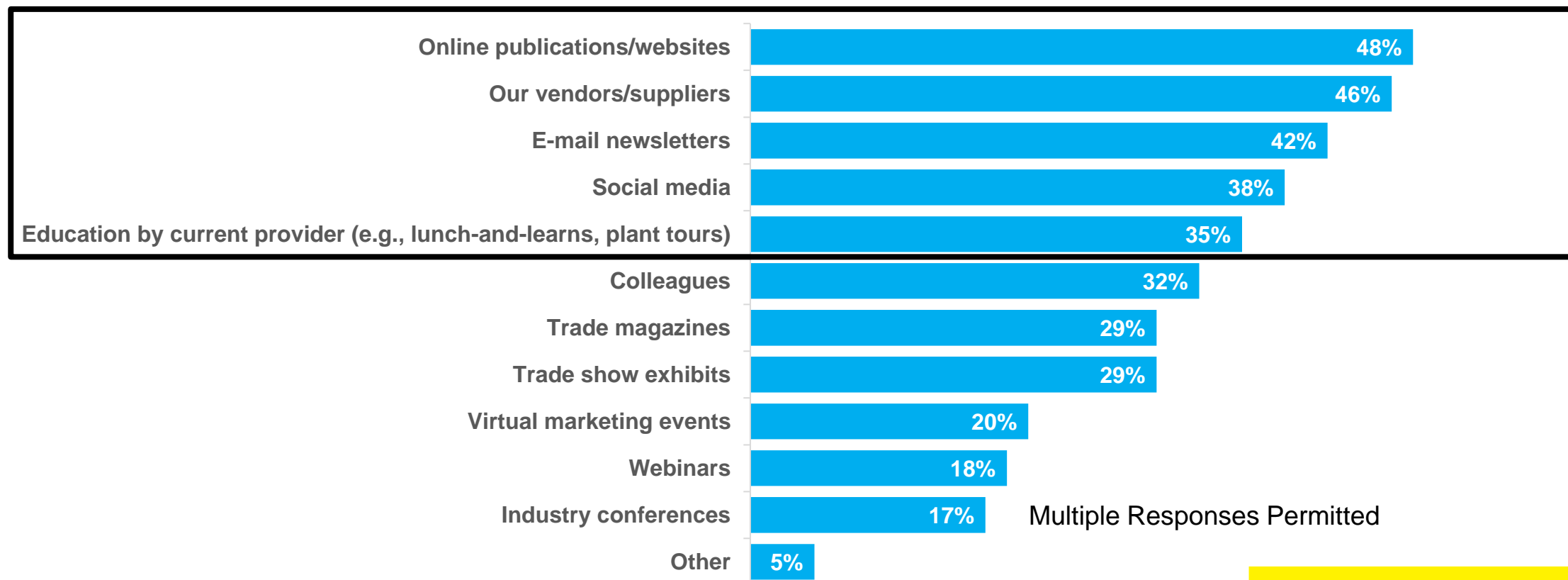
"We had a great experience working with the Cushing and Sepia Studio team, from design to installation. Their team was very thorough, timely, and flexible. We had a LOT of changes and the designers were very patient and understanding with our team and client's direction. I would 100% recommend them for wall graphics and design projects."



LAUREN TAVEL
CBRE
LEED GA, ASSOCIATE REAL ESTATE MANAGER

HOW BUYERS LEARN ABOUT TRENDS AND PROVIDERS

Q. How do you learn about new trends and advances in sign and display graphics printing technologies?



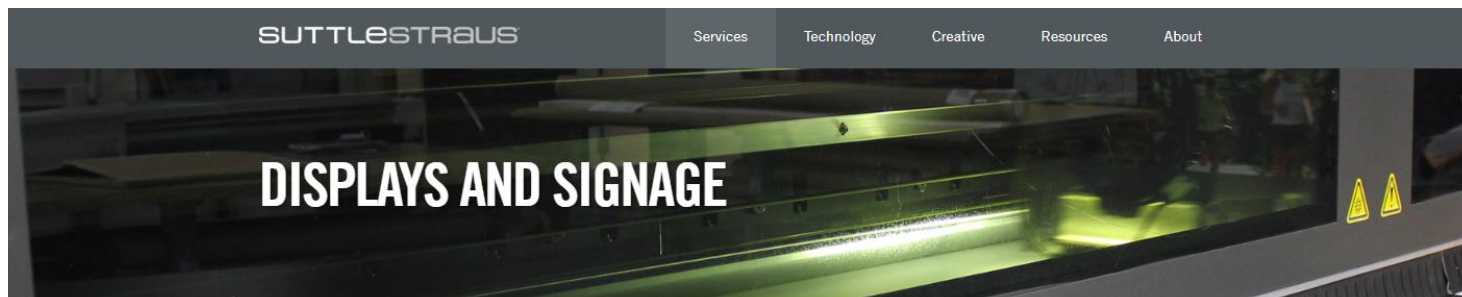
n=65 Purchasers or purchase influencers of sign and display graphics

Source: *Who Buys Wide-format?*, NAPCO Research 2022

#WIDEFORMATSUMMIT

CONTENT MARKETING

Download Content



Our wide format production features sheet and continuous-feed presses capable of printing up to 126 inches wide and on substrates up to two inches thick. With substrates ranging from vinyl to ceramic, plastic to carpet and wood to canvas, the possibilities are endless.

The variety of print options and the work of our dedicated engineering team, allows us to also produce captivating environmental graphics for commercial, retail, or hospitality spaces. Through color, imagery, form, and typography, we help create striking environments that communicate and engage with visitors.

[Download the Case Study: UW Kohl Center Signage](#)

ON DEMAND WEBINAR



IDEAS FOR BRANDING YOUR WINDOWS, WALLS & FLOORS

Learn best practices for creating inspiring and welcoming workspaces, including cost-saving tips and important restrictions to consider.

[Watch now](#)

Sign Up for Content



Miller Zell

July 19 at 8:02 AM · 🌐

Looking for a newsletter to bring you all the QSR, trends and tips? Or maybe you just want to see what Miller Zell is up to! Subscribe to get the latest in your inbox here. <https://hubs.ly/Q01h2GJb0>

MILLER ZELL

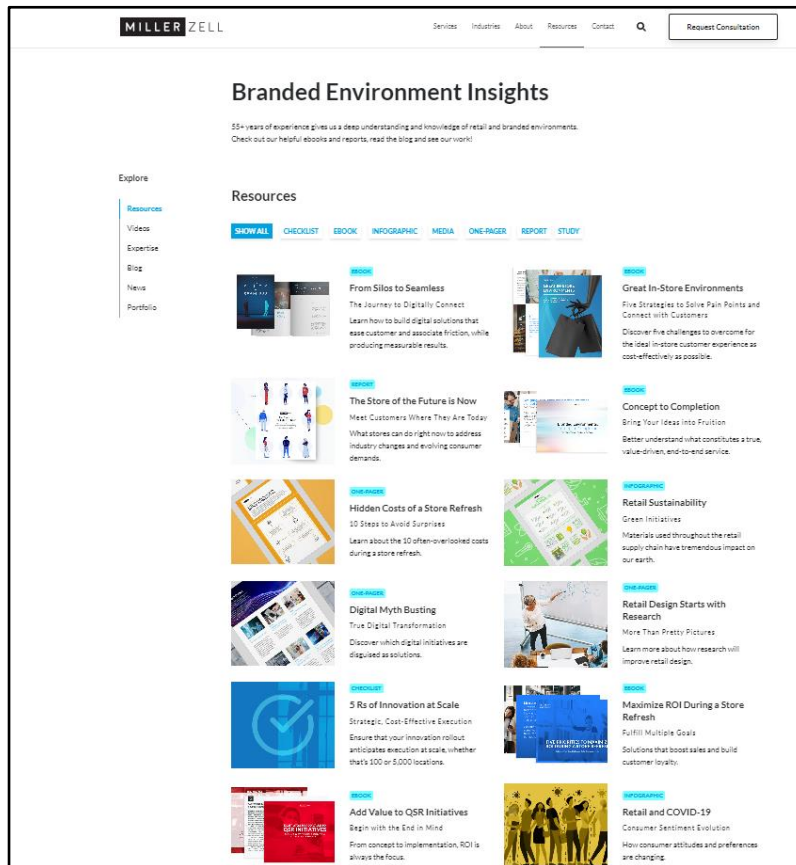
Stay Informed. Be Inspired.

The best retail resources for you and your team! Enjoy a sneak peek of a few of our favorite articles now...

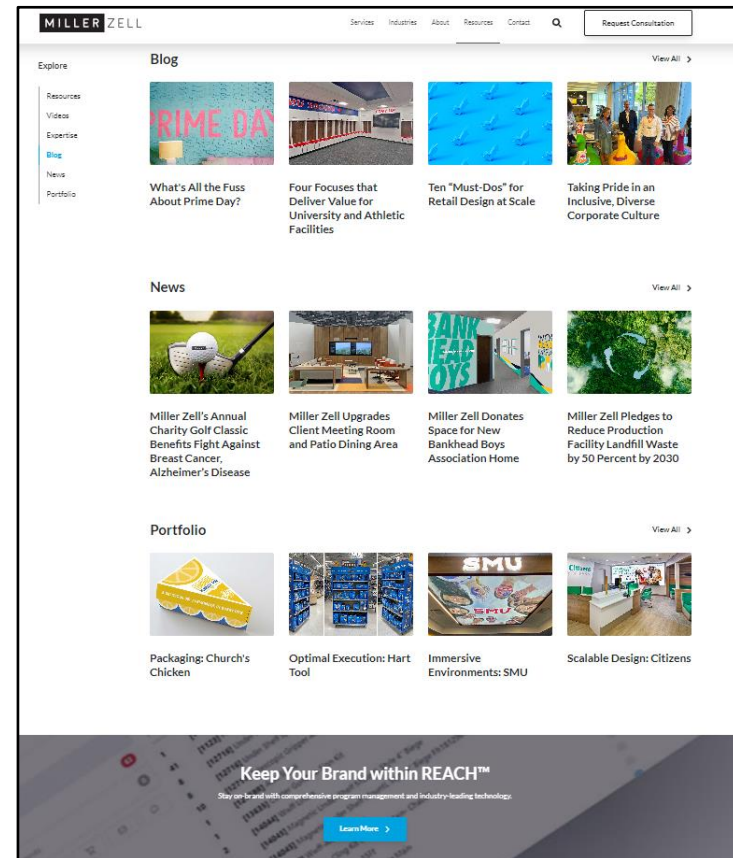
[JOIN THE LIST](#)

WEBSITE CONTENT

Resources



Blog



PROVIDE CUSTOMERS WITH USEFUL TOOLS

Your Infographic: Wide Format Substrates



Maeghan Nicholson <maeghan.nicholson@suttle-straus.com>
To: Lisa Cross

in f p @

HI LISA,

Thank you for downloading our infographic. You can access it at any time here:

[Open "Wide Format Substrates Infographic"](#)

Interested in learning more about Suttle-Straus' wide format capabilities?

Click [here](#) to view our portfolio or [contact us](#) to discuss your next project.

All the best,
Maeghan Nicholson
Marketing Manager

ABOUT US | CONTACT | PRIVACY POLICY

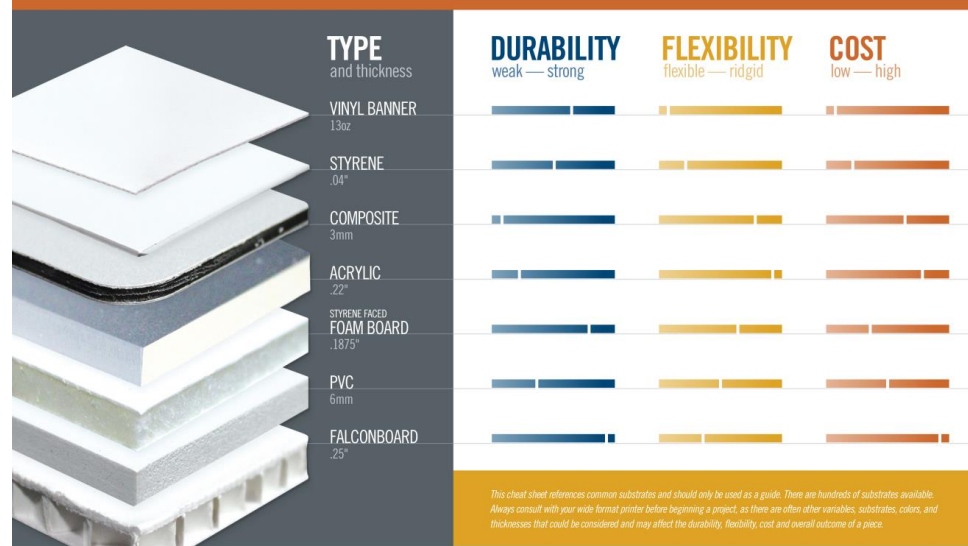
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WIDE FORMAT SUBSTRATES CHEAT SHEET



#WIDEFORMATSUMMIT

OFFER CUSTOMERS INSIGHT



PLACE AN ORDER

SUBLET OFFICE SPACE

REQUEST A QUOTE

Printing ServicesManaged Print ServicesSolutions by IndustryPortfolio and Case StudiesAbout Cushing


HIRING MANAGERS & HR PROFESSIONALS, READ THIS AND SEE IF YOU AGREE.


HAVE THE LAST SEVERAL MONTHS BROUGHT NEW MEANING TO THE PHRASE "EMPLOYEE DISENGAGEMENT"?

This appears to be a universal challenge, along with a higher than normal turnover rate; the reference to "The Great Resignation" is one that HR professionals of our time will remember for decades. No matter the industry, it seems more and more employers are struggling to retain and recruit top talent. Why? **Employees are disengaged.**

SO HOW CAN AN EMPLOYER KEEP EMPLOYEES ENGAGED AND ATTRACT QUALITY CANDIDATES?

START WITH YOUR WORKSPACE!





PLACE AN ORDER


SUBLET OFFICE SPACE

REQUEST A QUOTE

Printing ServicesManaged Print ServicesSolutions by IndustryPortfolio and Case StudiesAbout Cushing

ATTRACTING NEW TALENT

YOUGov's SURVEY FOUND THAT ALMOST HALF OF RESPONDENTS AGREE THAT THE ROOM WHERE THEY WERE INTERVIEWED WOULD INFLUENCE THEIR OPINION OF WHETHER OR NOT TO ACCEPT A JOB OFFER. THIS WAS PARTICULARLY HIGH IN MEDICAL & HEALTH SERVICES AT 69%, SALES & MARKETING AT 57%, AND FINANCE & ACCOUNTING AT 53%.

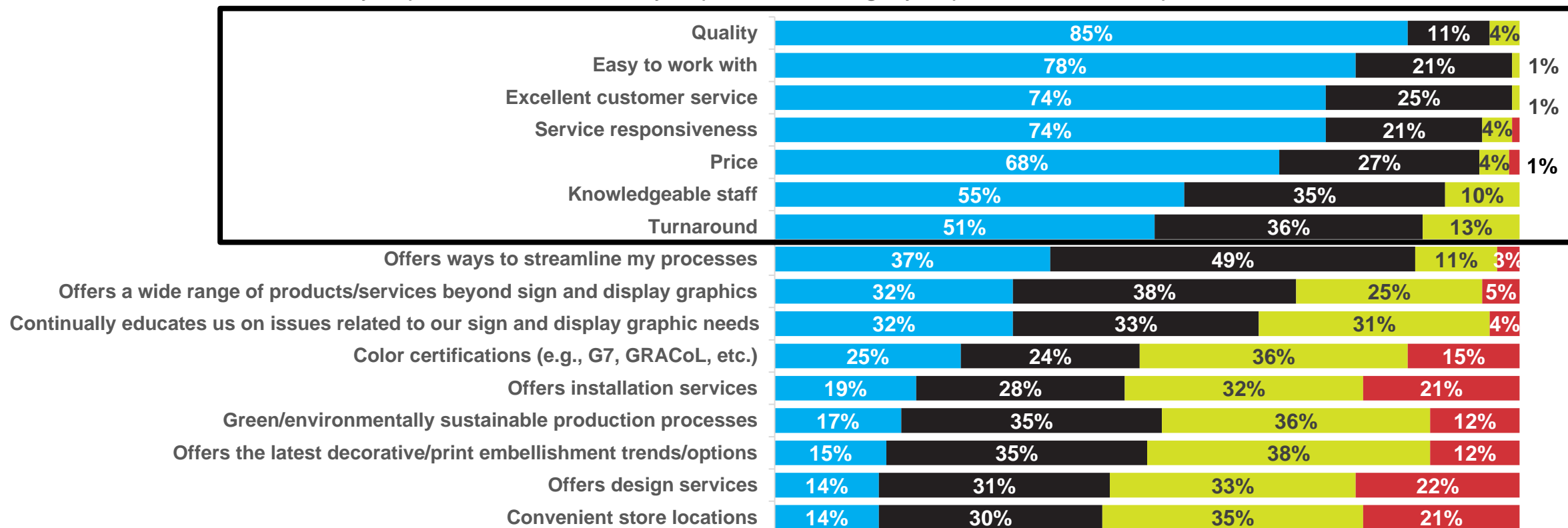


WHAT THEY LOOK FOR IN PROVIDERS?

CONSIDERATIONS IN PROVIDER SELECTIONS

Q. Rate the importance of the following considerations when selecting a sign and display graphics provider.

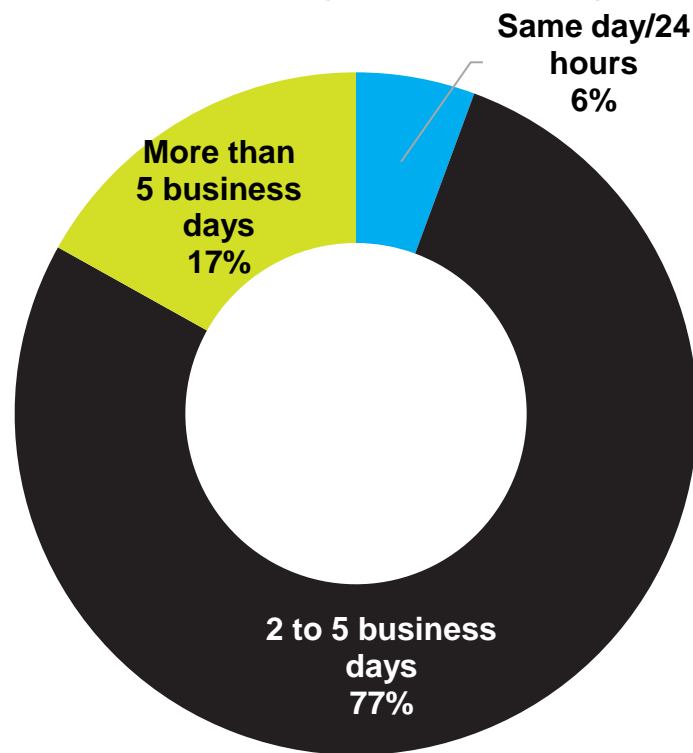
■ Very Important ■ Moderately Important ■ Slightly Important ■ Not Important



TURNAROUND TIMES IN 5 DAYS OR LESS

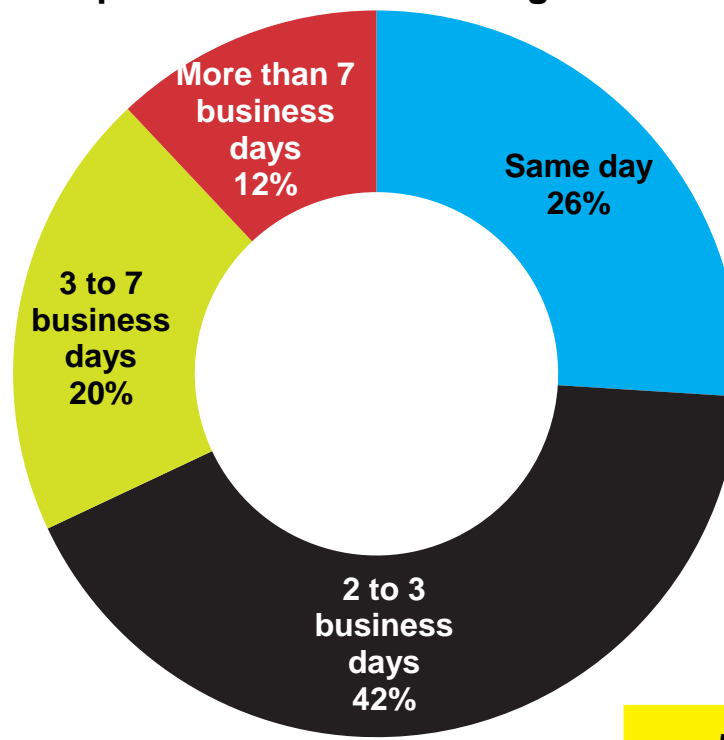
Customers

Q. What is the most common turnaround time you demand for your sign and display graphics?



Providers

Q. What percentage of your wide-format work needs to be produced in the following time frames?



n=71 Purchasers or purchase influencers of sign and display graphics

Source: *Who Buys Wide-format?*, NAPCO Research 2022

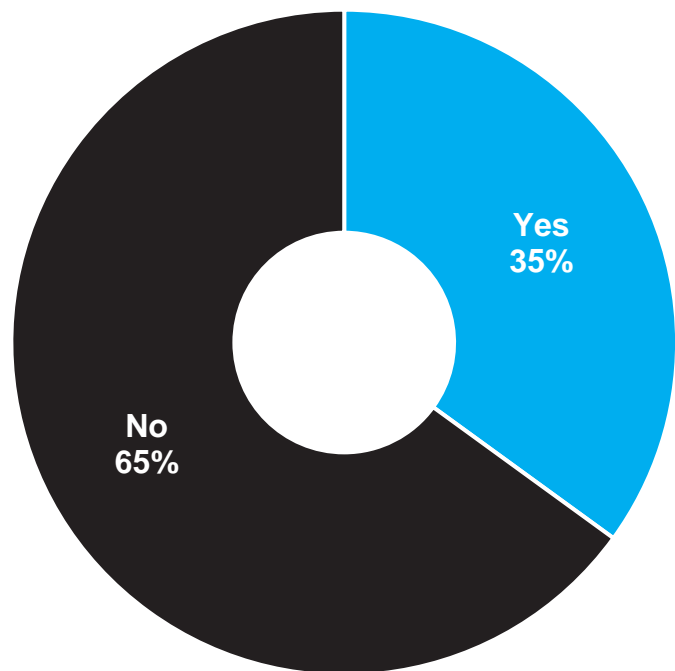
n=115 Sign and display graphic providers

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COLOR CERTIFICATIONS FOR WIDE-FORMAT

Providers

Q. Does your company have G7 or some other level of color certification for its wide-format printing?

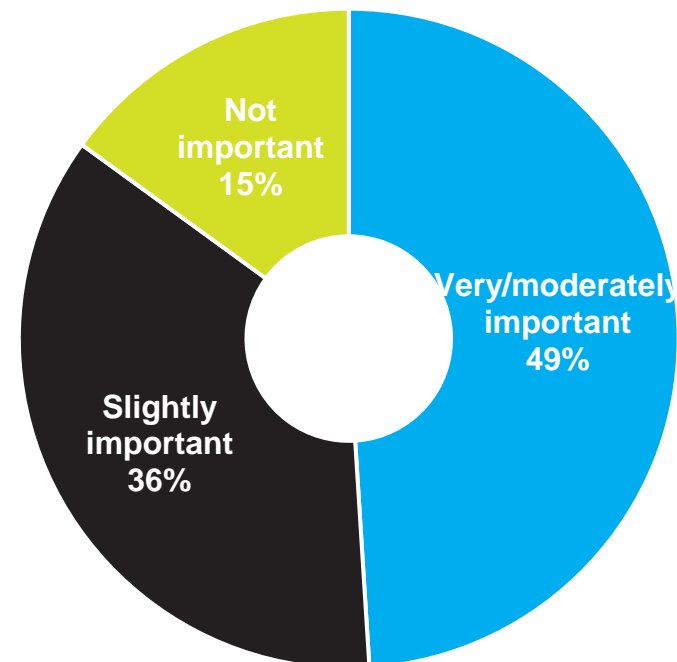


12% of sign and display graphic providers report customers require color certifications, like G7

n=114 Sign and display graphic providers
Source: *Who Buys Wide-format?*, NAPCO Research 2022

Customers

Q. Rate the importance Color Certifications (e.g. , G7, GRACoL, etc.) when selecting a sign and display graphics provider.



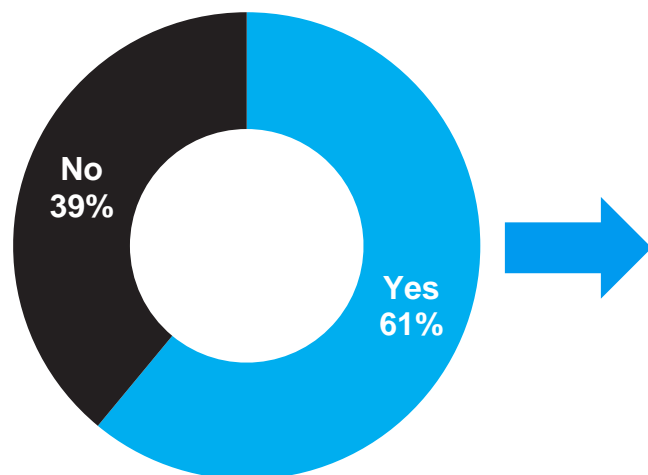
n=71 Purchasers or purchase influencers of sign and display graphics

#WIDEFORMATSUMMIT

OFFER ECO-FRIENDLY WIDE-FORMAT PRINTING

Providers Offering “Green”/Eco-Friendly Wide-Format Printing

Q. Do you offer “green”/eco-friendly wide-format printing, such as printing recyclable/biodegradable substrates or using more environmentally friendly inks?



Percent of Green Work

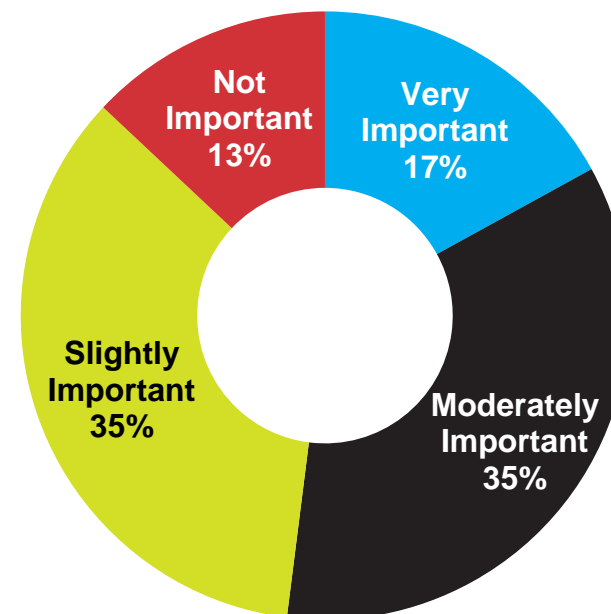
Less than 10%	49%
10% to 24%	20%
25% to 49%	12%
50% to 74%	6%
75% to 99%	10%
100%	3%

Q19. What percentage of the wide-format work you produce is “green”/eco-friendly?

n=114 Sign and display graphic providers

Importance of Eco-Friendly Processes to Buyers

Q. Rate the importance of green/environmentally sustainable production processes when selecting a sign and display graphics provider?



n=71 Purchasers or purchase influencers of sign and display graphics

#WIDEFORMATSUMMIT

IN THEIR WORDS

When asked to state how their sign and display providers could serve them better, buyer respondents offered the following:

- “Expand education offerings to help us learn about new opportunities and product offerings.”
- “Offer more ideas and/or update us on technology trends within the industry.”
- “Suggest products that would complement previous orders.”
- “E-mail us sales offers that include items that we frequently purchase, along with new products to consider.”
- “Send more updates on the progress of our work when it is in production.”
- “Use a consultative selling approach rather than transactional.”
- “Be more proactive and attentive.”
- “Better collaboration with our team.”

RESEARCH TAKEAWAYS

- Spending on wide-format printed applications is mostly growing or staying the same.
- Sign and display graphic buyers purchase from a variety of providers.
- Referrals and the internet are top ways buyers find new providers for sign and display graphics.
- Buyers look to a variety of sources to learn about trends and advances in technologies for printing sign and display graphics.
- Top reasons buyers accept sales meetings with a sign and display graphics provider center on referrals: from friends or colleagues, from someone the buyer does business with, or from someone within the buyer's organization.
- Buyer respondents report print quality and customer care are the most important considerations — higher than price — when selecting providers of sign and display graphics.



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Research Panel and gain **exclusive access**
to survey research, trend analysis, and reports.

Participation requires completing a 3-5 minute
web-based survey approximately once a month.

Follow the link below
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research.net/r/PrintPanel

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