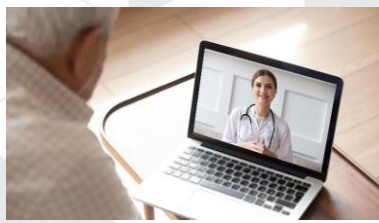




VERTICAL MARKET KIT

HEALTHCARE

OCTOBER 2021





contents

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Introduction

The healthcare industry is a vital force in treating, diagnosing, curing, and preventing illness for people of all ages. Its success on all four of these fronts depends on efficient operations, cost control, and solid communication channels that educate customers and fund operations. Digital printing plays an important role in accommodating these needs as it facilitates 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, just-in-time, efficient production—to treat patients, prevent illness, and generate profits.

Healthcare is one of the world's fastest growing industries, absorbing over 10% of the gross domestic product for most developed nations. According to the most recent tally of spending by the World Health Organization, total healthcare expenditures across the world were about \$7.8 trillion in 2019. Although high-income countries represent only 16% of the world's population, they account for 81% of global healthcare spending. Since 2000, lower middle and upper middle income countries have consistently increased their share of global spending, representing 19% of the total in 2017. Although health spending as a share of GDP grew consistently in lower middle and upper middle income countries, large inequalities across countries remain. In addition, high-income countries devote a greater share of their income to health than lower income countries. North America, Western Europe, and Oceania reported the highest levels of spending, whereas West, Central, and East Africa had the lowest, followed closely by South Asia.

According to Statista, there were just over one million professionally active physicians in the United States as of March 2020. The number of active specialist physicians in the US totaled about 535,600, and there were approximately 486,400 primary care physicians. California, New York, and Texas were the states with the most active physicians. Female physicians continue to be outnumbered by males in most medical specialties.

Hospitals and healthcare providers continue to be very document-intensive. These organizations use print to educate patients, market their offerings, explain the benefits of medical services, and track patients care. Printed materials such as brochures, flyers, direct mail, statements, and postcards are important communication tools. In addition, communication products and services help healthcare organizations support operations, deliver services, conduct marketing and sales, and drive revenue streams.

Thanks to ongoing advancements in digital printing technology, healthcare providers have more opportunities to differentiate themselves than ever before. Digital printing processes enable:



- ◆ The production of relevant, personalized communications that can be targeted on an individual level
- ◆ Just-in-time, on demand manufacturing to produce documents without any pre-printed components
- ◆ Workflow automation for more efficient production
- ◆ More cost-effective use of static or variable color
- ◆ High-quality color capabilities with inkjet technology

Digital printing technology also makes it possible to produce printed communications with foils, white/metallic inks, special textures, and other embellishments. The tactile nature of physical direct mail makes it more memorable than digital messaging, and printed communications can also be used to connect the recipient back to online channels for a true omni-channel experience.

Successfully selling print in the healthcare market involves understanding how the industry works, spotting key trends and influencers, locating decision-makers, and developing solutions and applications that are aligned with the market's unique and ever-changing needs. This vertical market kit is designed to serve as a guide for assessing and capturing the digital printing opportunity within the healthcare industry. It outlines the necessary fundamentals for achieving success in the healthcare market.



Part 1: Overview of the Healthcare Market

Major healthcare services include hospital medical care, outpatient care provided by physicians, chiropractic, dentistry, laboratory services, urgent care, elderly care, palliative care, and hospice care.

Key Types of Healthcare Providers

Healthcare includes a wide and complex mix of providers who are dedicated to learning about, treating, and preserving human health. Generally speaking, the healthcare industry is highly regulated. Healthcare providers and institutions are regulated by national or state/province authorities for quality assurance. The major types of healthcare organizations include physicians' practices, ambulatory care/outpatient centers, hospitals, home healthcare services, and long-term care facilities. Each type is profiled below.

Physicians' Practices

On a global basis, the World Health Organization reports that there are over 9 million physicians (not including midwives, dentists, or other health personnel). Over half of these practices consist of a single physician. Only a very small percentage of practices have 10 or more physicians. At the same time, however, many small or solo practitioners have merged—or are considering doing so—to form larger same- or multi-specialty groups.

Doctors frequently attract new patients through referrals from existing patients and other doctors, and from being included on approved lists of insurance plans. Doctors who contract with managed care plans may get new patients from the membership. Practices also use television, print/digital advertising, and direct mail to attract patients. Although physicians set the pricing for various healthcare services, insurance plan fee schedules or Medicare will usually determine what physicians will receive for their services.

Ambulatory Care/Outpatient Centers

Outpatient centers, also known as ambulatory care, provide a wide range of medical services and procedures that are conducted on an outpatient basis (i.e., where a patient's stay at the hospital or clinic, from the time of registration to discharge, occurs on a single calendar day). Ambulatory care can be offered at a hospital, doctor's office, or ambulatory surgery center (ASC). Procedures conducted at these facilities include blood tests, x-rays, endoscopy, some biopsies, radiology, catheterizations, minor surgery, plastic surgery, and eye care.

According to Statista, the total number of urgent care centers in the US surpassed 9,600 in 2019. These centers are designed to evaluate and treat conditions that are not severe enough to require emergency treatment but still require treatment beyond normal physician office hours or before an appointment with a physician is available.



Ambulatory care has skyrocketed in recent years; some estimates claim 60% to 70% of all surgical procedures in the US are performed on an outpatient basis, and revenues from ambulatory care are growing more rapidly than those from inpatient care. There are several reasons for the increase in ambulatory care programs:

- ◆ Changing demand for health services
- ◆ Shifting preferences of third-party payers and regulators
- ◆ Competitive influences

Hospitals

Hospitals are usually funded by the public sector, by health organizations (for profit or non-profit), health insurance companies, or charities (including direct charitable donations). Historically, hospitals were often founded and funded by religious orders or charitable individuals and leaders. Today, hospitals are largely staffed by professional physicians, surgeons, and nurses, whereas in the past, this work was usually performed by the founding religious orders or volunteers.

Home Healthcare

Home healthcare is an emerging industry in the healthcare sector. The home healthcare services market is largely driven by patients aged 65 and above, who contribute 70%–75% of the revenue generated. In recent years, many patients have leaned toward home healthcare over hospital settings due to its convenience and cost benefits. At the same time, however, the shortage of a skilled workforce, stringent laws, increasing competition, and rising gas prices are restraining growth in the home healthcare sector.

As people get older, they may require assistance with the basic activities of daily living. Although patients are the focus of these services, marketing and sales efforts are directed at those who authorize, recommend, or pay for treatment. Local, state, and federal government programs provide about 75% of industry revenues, including 41% from Medicare and 24% from Medicaid. About 8% of revenue comes from private health insurers and the rest is from individuals in the form of co-payments.

Long-Term Care Facilities

Long-term care facilities include nursing homes, supportive living facilities, sub-acute care facilities, and assisted living facilities. Nursing homes offer medical care and select therapies along with room and board, and may be certified to provide medical care. Subacute care facilities involve skilled nursing services and a higher level of medical supervision, although not to the level of a hospital or acute care facility. Assisted living facilities provide basic care for chronic illnesses and varying degrees of help with daily



living, typically in a home-like environment that affords a high degree of independence and autonomy to residents.

Assisted living has seen strong growth in recent years. Typical services include 24-hour supervision/assistance, exercise/health/wellness programs, housekeeping/maintenance, meals/dining, medication management/assistance, personal care services (including those associated with daily living activities), and transportation. Some assisted living communities specialize in serving individuals with specific needs, such as Alzheimer's disease or other forms of dementia (e.g., memory care units), intellectual and developmental disabilities, and particular medical conditions (e.g., Parkinson's disease).



Table 1: Types of Healthcare Organizations

Healthcare Services and Products	The healthcare industry incorporates several sectors that are dedicated to providing health-related products and services 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 (such as medical doctors) as well as a range of medical specialists, dentists, chiropractors, optometrists, and more.
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, x-rays, 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. Surgeons and anesthesiologists typically arrange to meet patients at the center, perform medical procedures, and then leave.
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 buy for a private practice.
Home Healthcare Services	These companies treat patients who have a short-term need for care after leaving a hospital or nursing home, as well as patients who require long-term treatment for conditions such 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.
Long-Term Care Facilities	These facilities provide skilled nursing services for recovery from chronic or acute medical conditions. Mental health and substance abuse facilities and the remaining facilities focus on various types of independent living, community care, and assisted living arrangements.



Key Trends in the Healthcare Market

An Aging Population is Accelerating the Demand for Services

As the human life span increases, the proportion of elderly individuals in communities also increases. The US Census reports that the population of persons 65 years and older is expected to more than double between 2012 and 2060, from 43.1 million to 92 million.

The aging population will lead to increases in the number of people dealing with chronic, expensive-to-treat diseases and disabilities, further straining healthcare 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 is less stressful and more convenient for patients. It is also less expensive than hospitalization for both patients and third-party payers. Ongoing advancements in technology are making it easier than ever to deliver quality care at home.

A Rise in Preventative Care

One of the top business opportunities in the healthcare market is preventive care. According to an article in the Harvard Business Review, within the next few years, millions of dollars will be spent globally on means of preventing, reducing the severity of, or eliminating serious diseases like cancer and chronic conditions. In the US alone, preventable chronic disease care accounts for 75% of healthcare spending. According to the World Health Organization, more widespread preventative care could decrease risk factors for chronic diseases. In addition, "at least 80% of all heart disease, stroke, and type 2 diabetes would be prevented, and over 40% of cancer would be prevented" worldwide.

However, it is also up to consumers to take action to manage their health and cooperate with their healthcare providers. Educational campaigns and tools to prevent illness are becoming more widespread and yielding success.

Physicians Are Adopting e-Technology

As is the case with many other industries, physicians are moving into the electronic age. Portable electronic devices and high-speed internet access are being used to take patient notes, communicate with hospitals, and even perform diagnostic tests. Doctors are using these devices at rates much higher than consumers because the technology helps them access information faster and stay organized. Particularly in the COVID era, many doctors are also shifting to telemedicine and offering online consultations in lieu of physical office visits. This trend will likely accelerate as time goes on, especially for routine consultations that often don't require a great deal of hands-on care.



Mobile Apps for Personal Health Maintenance

Now that smartphones and tablets have become ubiquitous, healthcare providers are using them to their advantage by creating mobile health apps. There are now over 350,000 apps available in the medical, health, and fitness categories of major app stores. These apps help patients manage their health by enabling them to monitor conditions, track progress, or record changes in weight or lifestyle.

Patients can use these apps to enter their medical history, including weight, blood pressure, physical activity level, and/or healthy actions like proper sleep and stress management. The apps then help the patient to track a symptom such as headache, weight loss or gain, or calories expended during a workout. There are also diagnostic health apps that allow a patient to perform self-screenings or dig deeper into a health concern before seeing a professional.

Mobile health apps are enabling patients to become more engaged in tracking their health. The storing of data within the apps enables patients and healthcare providers alike to track health progress.

Wearable Devices

Wearables and other smart technologies also offer great promise in improving and advancing healthcare. Unlike the use of a mobile app, these devices (e.g., fitness trackers or smartwatches) do not require their owners to actively enter information as health stats are passively gathered by a sensor. Although the initial installation requires the wearer to enter certain information, the user simply wears the device after that point. The Apple Watch and Fitbit fitness trackers are quite popular, and many people who own these devices wear them all the time. These devices can track physical activity and sleep, which are often closely tied to an individual's health and well-being.

Some wearable devices are specifically targeted toward senior citizens who may be living on their own. These devices can be used to track motion, blood pressure, or heart rate and can be set up to alert a caregiver or healthcare services in the event of a medical emergency.

Precision/Personalized Medicine

Medical treatments are shifting from a "one-size-fits-all" approach to a more personalized one, so that patients can be matched to the best therapy based on their genetic makeup and other factors. All providers strive to be more accurate, precise, proactive, and impactful for each individual that comes under their care. Now, physicians and scientists are able to take this mission beyond its original reach with the help of electronic health records, genetic testing, big data analytics, and supercomputing.



Also called personalized medicine, precision medicine is one of the most promising approaches to tackling diseases that have thus far eluded effective treatments or cures. The financial, clinical, and social imperatives for finding cures for cancer, neurodegenerative diseases, and rare genetic conditions have led to a surge in interest around precision medicine. With much more digital data at their disposal, researchers are now uncovering new relationships between genes, drugs, and populations.

According to the Precision Medicine Initiative, precision medicine is “an emerging approach for disease treatment and prevention that takes into account individual variability in genes, environment, and lifestyle for each person.” Although physicians have been tailoring their recommendations to individual factors (e.g., age, gender, preferences, mobility levels, community resources, preexisting conditions) for many years, true precision medicine relies on data to make the best possible decisions about specific treatment paths for the individual in question.

A Heightened Focus on Efficiency, Cost Reduction, and Prevention

The US Department of Labor cites cost containment as one of the key influencers in the healthcare industry, evidenced by the growing emphasis on providing services on an outpatient, ambulatory basis, limiting unnecessary/low-priority services, and stressing preventive care to reduce the potential cost of undiagnosed, untreated conditions.

Advancements in information technology have improved patient care and worker efficiency. In addition to promising significant cost controls for hospitals, electronic medical records (EMRs) improve the quality of care and reduce errors. Devices such as tablets and laptops are used to record a patient's medical history, information on vital signs, and orders for tests. This information can be transferred electronically to a main database that can be accessed by the patient or his/her provider. Rather than calling patients to remind them of upcoming appointments or test results, providers can now upload this information to a portal that patients can view at their convenience.

Genetic testing is getting quicker and cheaper, enabling researchers to collect larger volumes of data from more diverse patient groups. By combining this data with clinical, pharmaceutical, and socioeconomic information, and then applying analytics to these integrated datasets, researchers can observe patterns in the effectiveness of particular treatments and identify the genetic variations that may be correlated with success or failure. Clinical trials can then be used to test and validate these results, which may support future best practices or clinical guidelines for the treatment of specific conditions.



The Drive to Monetize Data

Data is power in all industries, and the healthcare vertical is no exception. Healthcare organizations that learn how to effectively use and monetize it will gain a competitive edge. The problem is that data is ubiquitous; identifying what's valuable and what's not within an organization's various departments and units can be quite challenging. The practice of identifying valuable data and transforming it into information to customize patient care and achieve the best possible outcomes is the domain of health informatics.

Health informatics is the practice of identifying valuable data and transforming it into information that can be used to customize patient care and achieve the best possible outcomes.

Patients are becoming more comfortable with sharing their data to benefit themselves and others. According to a survey from PwC (PricewaterhouseCoopers), 57% of consumers are comfortable sharing their personal data if it means improving their health. What's more, 25% of consumers will share this information to save money.

Although the market for advanced analytics and business intelligence software tools is expected to grow, the industry faces a myriad of challenges before data uses can expand and data assets can be monetized. These include addressing data quality and integration, developing scalable analytical tools, amending a shortage of practicing informaticists and trainers, and addressing privacy and security. The way that patient-reported data is collected may be another barrier. Firms that are able to use their data with intelligence and purpose to effectively and affordably manage patient care will stand apart from the competition.

New Competitive Dynamics Accelerate the Need for Marketing

Physician's offices have traditionally obtained new patients through referrals or being listed as an in-network provider for health insurance plans. As reduced reimbursement rates cut into revenues, many are turning to local advertising, direct mail, and digital marketing to attract new patients. Effective marketing programs are especially important for physicians specializing in elective treatments, such as plastic surgery, but also for general practitioners in competitive markets where consumers have many options for in-network providers.

Another area of new competition is the hospital market. Hospitals are in competition not only with other hospitals but with the emergence of freestanding ambulatory surgical centers, often owned by doctors. These surgical centers give the consumer more choices, and hospitals are feeling the pinch. The hospital industry has launched aggressive advertising touting its medical expertise and focus on patient care in an attempt to convince consumers to use hospitals' outpatient centers. This provides an opportunity for



print service providers (PSPs) to help in the marketing efforts, working with hospitals as well as the freestanding surgical centers in marketing their services.

Unlike older hospitals, outpatient surgical centers began with up-to-date technology and use electronic health record systems. These help to track patients, procedures, insurance, and billing. There is a big opportunity for print providers in supporting the sales and marketing efforts of these organizations with digital color and personalization. They are competing for the same patient base as are the hospitals. Brochures, information packets, specialty services, and cost comparison are all great applications to focus on.

Leveraging Social Media to Fuel Marketing and Fundraising

Social media has become a powerful force in the healthcare industry. From large hospital networks to patient support groups, new media tools like blogs, instant messaging platforms, video chats, and social networks are re-engineering the way doctors and patients interact. Social media is changing the nature and speed of interaction between consumers and health organizations. Today, healthcare consumers are using social media to find information on providers to address their unique needs and preferences. Word of mouth is also more important than ever; consumers respect the opinions of their peers and will often seek (and trust) recommendations from others in their communities.

Healthcare providers are seeking new ways to market their services, and social media has been successful in helping them achieve this goal. Healthcare providers are using social media as a vehicle to market services, communicate with consumers, and drive fundraising efforts.

Figure 1: Global Resources for the Healthcare Industry

American Dental Association (www.ada.org)	Federation of American Hospitals (www.fah.org)
American Health Care Association (AHCA; www.ahca.org)	Health Care IT News (www.healthcareitnews.com)
American Hospital Association (AHA; www.aha.org)	HospitalConnect.com (www.hospitalconnect.com)
American Medical Association (AMA; www.ama-assn.org)	HospitalLink.com (www.hospitallink.com)
Dartmouth Atlas (www.dartmouthatlas.org)	iHealthBeat (www.ihealthbeat.org)
European Association for Communication in Healthcare (www.each.nl)	IMS Health (www.imshealth.com)
European Association of Dental Public Health (www.eadph.org)	International Union for Health Promotion and Education (www.ijhpe.org)
European Association of Hospital Managers (www.eahm.eu.org)	Kaiser Family Foundation (www.kff.org)
European Forum for Primary Care (www.euprimarycare.org)	National Association for Home Care and Hospices (NAHC; www.nahc.org)
European Health Management Association (www.ehma.org)	National Center for Health Statistics (NCHS; www.cdc.gov/nchs)
European Hospital and Healthcare Federation (www.hope.be)	National Institutes of Health (NIH; www.nih.gov)
European Journal of Public Health (http://eurpub.oxfordjournals.org)	Office of Disease Prevention and Health Promotion (http://odphp.osophs.dhhs.gov)
European Medical Association (www.emanet.org)	Population Reference Bureau (www.prb.org)
European Medicines Agency (www.ema.europa.eu)	Prevention Magazine (www.prevention.com/health)
European Observatory on Health Systems and Policies (www.euro.who.int/observatory)	United States Department of Labor, Bureau of Labor Statistics (www.bls.gov)
European Public Health Alliance (www.epha.org)	World Health Organization (www.who.int)

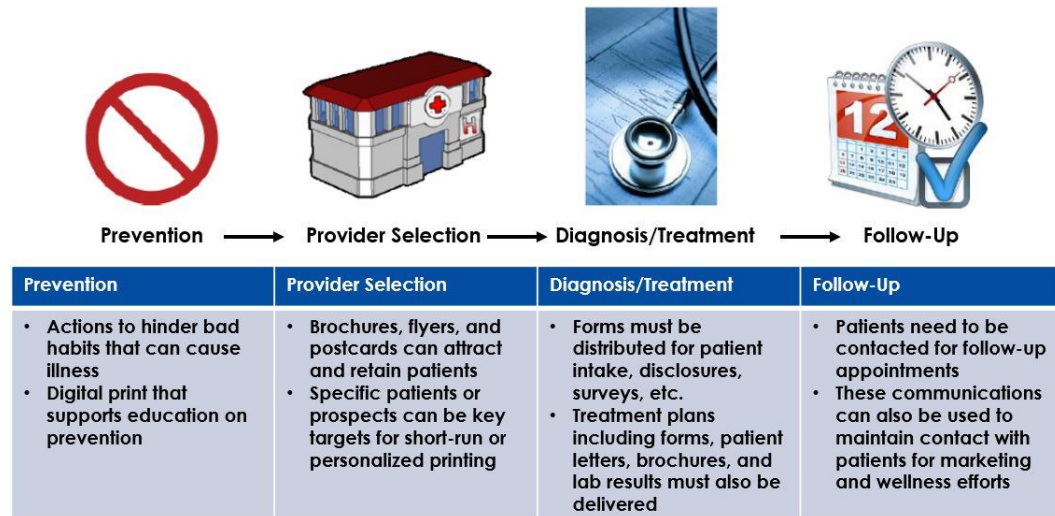


Part 2: Selling Communication Products in Healthcare

The Value Chain

Key segments in the healthcare market's value chain include illness prevention, provider selection, diagnosis/treatment, and follow-up. Each component of the chain requires communication products and services. Opportunities for selling digital printing in the healthcare market span all points of the industry's value chain.

Figure 2: The Healthcare Value Chain



Prevention

Prevention is the first step in the healthcare value chain. For many people, diseases and chronic conditions (e.g., obesity, diabetes, tobacco-related cancers, heart disease, or viruses like COVID) can be prevented. In addition, preventative measures can delay the onset of a disease or minimize its effects. Education is the primary means for supporting prevention. The healthcare sector is spending millions of dollars on prevention education, and the US federal government is spending billions to do the same. Health insurance companies are also increasing their focus on prevention and wellness campaigns.

Printed ads, television ads, direct mail campaigns, and signage are all being used to educate the public. There is a tremendous print opportunity in these marketing/education campaigns that hospitals, insurance companies, clinics, and physician groups are supporting to promote prevention and drive business.



Provider Selection

The second step in the value chain is the selection of a hospital, clinic, physician, or specialist. The healthcare market is highly competitive. Hospitals are seeking new patients to compensate for budget cuts and to offset rising costs. Physicians and specialists often align themselves with a group to gain additional marketing and buying power, and outpatient clinics are often competing against hospitals for surgical patients.

This step offers a key opportunity for print providers to assist healthcare providers with their marketing efforts. Digitally-printed brochures, flyers, postcards, solicitation letters, and customer testimonials are required for attracting and retaining customers. The majority of these organizations serve customers in their local area, making them key targets for purchasing and benefiting from short-run and/or personalized printing.

Diagnosis/Treatment

The next step in the value chain is the diagnosis. When a healthcare provider sees a patient, a multitude of printed forms must be completed (e.g., intake sheets, disclosure documents, surveys, release forms for insurance, and diagnostic forms). After diagnosis, a treatment plan is established. This also involves a mountain of forms, including treatment diagnosis, result letters back to patients, lab forms, and lab results.

While many healthcare entities have shifted to Electronic Medical Records (EMR), the American Hospital Association finds that most hospitals continue to lag behind in terms of EMR adoption. The most frequently cited barriers to implementation include initial and ongoing costs, interoperability with current systems, acceptance by clinical staff, and limited availability of well-trained IT staff.

Follow-Up

The final stage in the value cycle is the follow-up process. This includes contacting the patient for any follow-up appointments, as well as maintaining contact with the patient through marketing efforts such as hospital or clinic fundraising drives, blood/tissue/organ donor drives, and cancer drives. Most hospitals, clinics, and doctors' offices send out hard copy appointment reminders in the mail. This is a variable data application that pulls individualized information (e.g., name, address, date/time of appointment, and who the appointment is with) into a templated form.



The Patient Lifecycle

Understanding the patient lifecycle is another tool for uncovering communication opportunities. This is the process that healthcare providers follow to gain and retain patients. There are three important steps in the patient lifecycle: patient acquisition, patient services, and patient retention. Each step presents an opportunity for digital printing.

Patient Acquisition

Driving new patient traffic is a crucial step in the patient lifecycle. When acquiring new patients, it is important to identify the audience and send targeted messaging to the appropriate parties.

Patient Services

Once a patient is acquired, a positive patient/physician relationship must be maintained to ensure patient satisfaction. There are four key factors to consider: primary patient care, preventative screening, regular appointments, and encouraging wellness. These factors help keep the patient on a healthy track and promote overall well-being.

Patient Retention

Establishing an ongoing communication with the patient is a great way to show that the physician cares. The two key factors to patient retention are personalized communications and referral programs. Personalized communications can be presented through print and electronic mediums. Examples include patient appointment reminders, special event notices, and newsletters. Referral programs, which are optimal for patient acquisition, might offer current patients a reward for referring a new patient.

Defining the Communications Opportunity

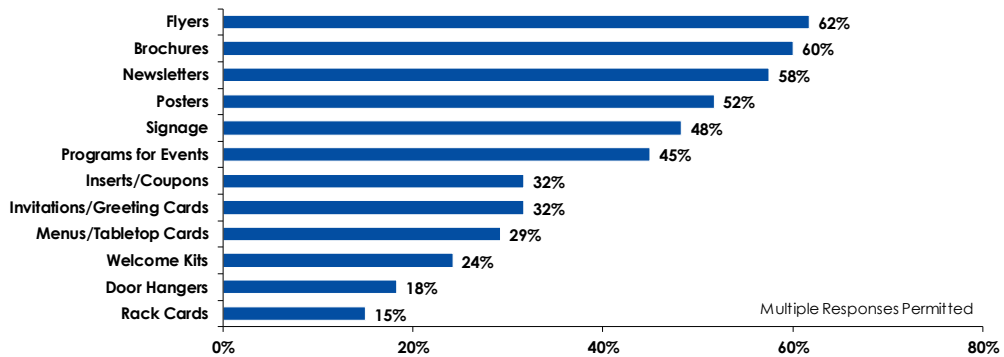
Healthcare providers have many interactions with their customers, from reminder notices to educational materials to statements. The healthcare market offers big opportunities to sell a variety of production inkjet-printed products. The processes of managing patient care, preventing illnesses, and attracting customers are quite communication-intensive. Healthcare providers continually communicate with patients and prospects to schedule appointments, promote wellness, and provide education on new treatments.

Communication products and services support the development and flow of products throughout the healthcare value chain. In 2020, Keypoint Intelligence conducted an in-depth study to better understand the print and communication practices of various vertical industries. Within the healthcare sector, the most common printed promotional marketing materials included flyers, brochures, and newsletters.



Figure 3: Printed Promotional Marketing Materials

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



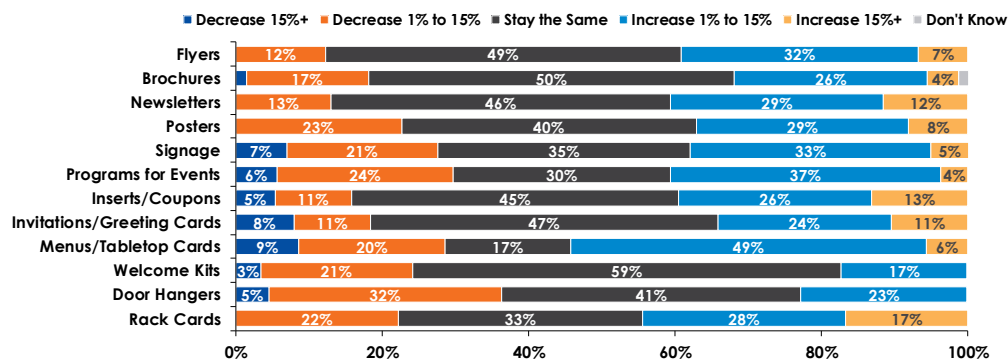
N = 120 Respondents in the Healthcare Industry responsible for printing services for marketing/promotional collateral
 Source: US Vertical Vision Study; Keypoint Intelligence 2020

Many of the applications in the Figure above can be delivered across media channels, and all strongly align with the benefits of short-run, on-demand, personalized printing.

When the respondents that purchased these applications were asked how they expected their spending to change in 2021, the share that expected an increase exceeded the share that anticipated a decrease in nearly all categories.

Figure 4: Anticipated Change in Spending on Promotional Marketing Materials

In 2021, how do you expect spending on the following types of printed promotional materials to compare to the past few years?



N = Varies; Base: Respondents in the Healthcare Industry that purchase these printed promotional marketing materials
 Source: US Vertical Vision Study; Keypoint Intelligence 2020

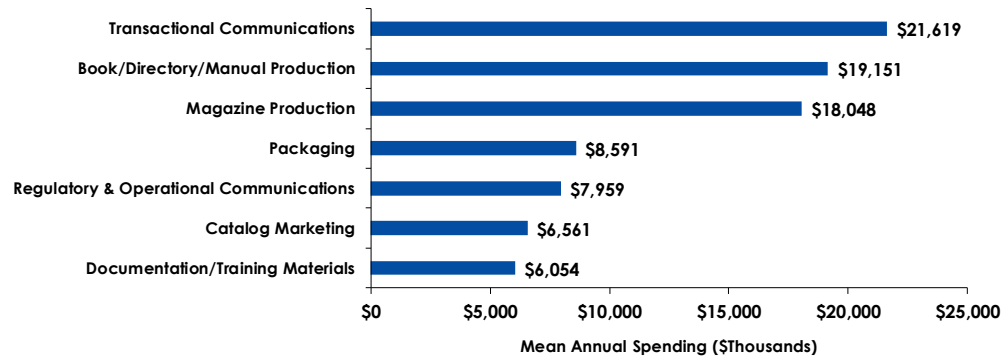


Spending in Key Areas

The healthcare industry invests heavily in communication products. The Figure below outlines mean annual spending on various areas within the sector. Spending on the production of transactional communications was the highest at nearly \$2.2 billion. It should be noted that marketing and communication spending in the healthcare industry tended to be on the low side in relation to other verticals.

Figure 5: Total Annual Spending on Key Marketing & Communication Areas

Approximately what was your company's/organization's total annual spending on the following last year?



N = Varies; Base: Respondents in the Healthcare Industry responsible for printing services for these communications
Source: US Vertical Vision Study; Keypoint Intelligence 2020

Print makes up a significant portion of the healthcare market's communication spending. According to Keypoint Intelligence's research, healthcare respondents responsible for creating, managing, or purchasing marketing/promotional collateral reported spending an average of nearly \$14,000 for individual print jobs.

Healthcare Providers are Expanding Their Use of Communication Channels

Healthcare businesses are expanding their use of communication tools to engage with audiences across media channels. Given this shift, it is only natural that most respondents in this sector anticipate a decline in their overall print spending. At the same time, however, print will remain an important component of communication spending. Printed communications offer particularly high appeal and effectiveness when integrated with digital media channels in personalized, data-driven campaigns.

An increasing number of healthcare marketers are recognizing the value of using an integrated cross-media approach to reach patients and prospects. They are using a variety of media types that include print, online, social, conventional advertising, e-mail, and text messaging. Healthcare providers are also starting to take advantage of real-time interactive connections to build stronger relationships with their customers.

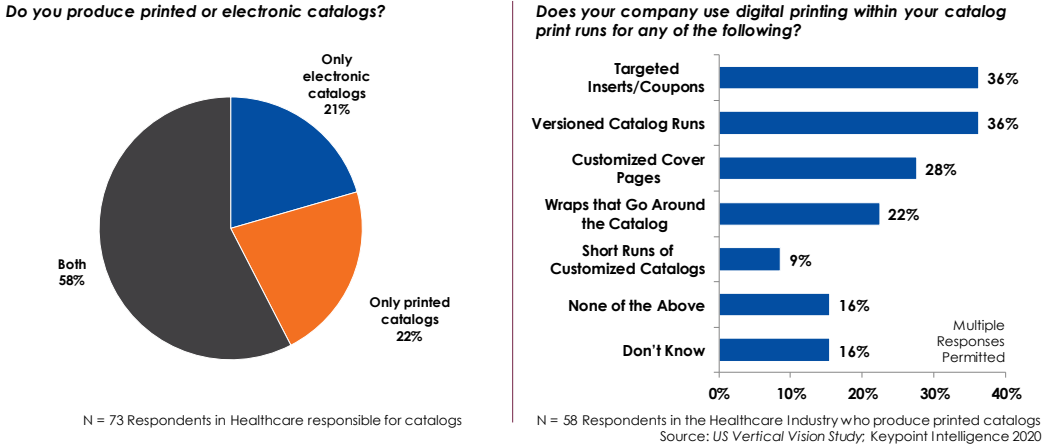


Digital Printing Serves the Needs of the Market

Digital printing continues to gain ground in the healthcare market. Many of the healthcare applications that are still printed via offset today are poised for a transition to digital because they can benefit from personalization, short runs, and quick turnaround times. Applications in the healthcare industry that are well-suited for digital printing include signage, brochures, marketing collateral, packaging, newsletters, labels, floor/wall graphics, direct mail, and catalogs.

Based on Keypoint Intelligence's research, nearly 80% of healthcare respondents that handled catalog production were printing at least some catalogs (meaning that they weren't producing all of their catalogs electronically). Of these, digital print technology was most commonly used for targeted inserts/coupons and versioned catalog runs.

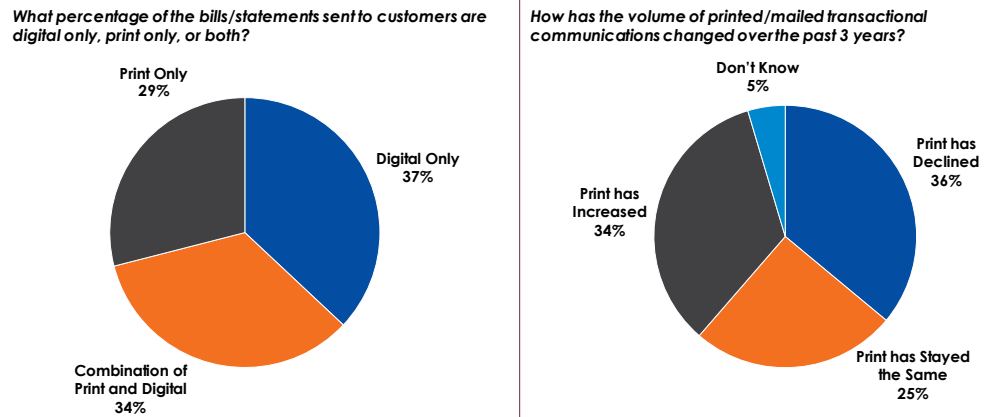
Figure 6: Digital Printing of Catalogs in the Healthcare Industry



Although healthcare respondents reported that 37% of bills and statements were sent to customers in digital format only, the flip side of this is that 63% of respondents are still receiving at least some transactional communications in printed format. In addition, nearly 60% of respondents reported that the volume of printed or mailed transactional communications had stayed the same or increased over the past three years.



Figure 7: Delivery Format of Bills/Statements



N = 87 Respondents in the Healthcare Industry with responsibility for transactional/regulatory communications
 Source: US Vertical Vision Study, Keypoint Intelligence 2020

As they strive to reduce costs, some businesses are attempting to accelerate the transition to paperless communications. The paperless option may be the default for new customers, or in some cases it may be the only option. Even so, Keypoint Intelligence's most recent transactional communications research suggests that this may not be the best long-term strategy. Over three-quarters of respondents to that survey wanted to decide which channels their providers used to communicate with them, and nearly half (47%) wanted printed versions of their bills and statements. In addition, 64% of respondents agreed that when they switched from one provider to another, it was often due to a bad experience—like a disregard of personal communication preferences!

In today's digital world, the key to success is actually a combination of print *and* digital communications. There is no "one size fits all" approach; it's about supplementing print with digital to have a stronger impact and enable the greatest customer experience possible. In a world where consumers have become inundated with digital communications, print can really stand out in a meaningful way while also driving consumers back to digital channels for increased engagement.

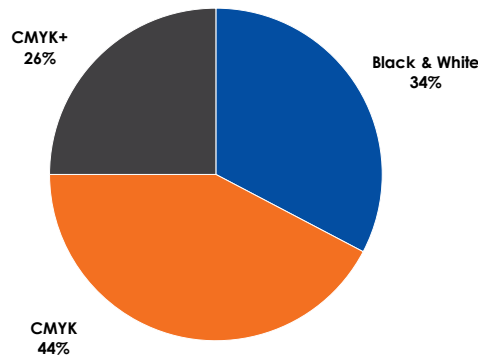


CMYK and CMYK+

As is the case in many industries, color printing is playing an increasingly important role in marketing/promotional collateral within the healthcare sector. Respondents reported that 44% of their print spend was devoted to standard Cyan, Magenta, Yellow, and Black (CMYK), and another 26% was dedicated to CMYK+ (i.e., the four standard process colors plus additional effects like metallics, spot colors, or glossy coatings).

Figure 8: Print Spend Devoted to Black & White vs. CMYK

How much of your print spend is devoted to the following?

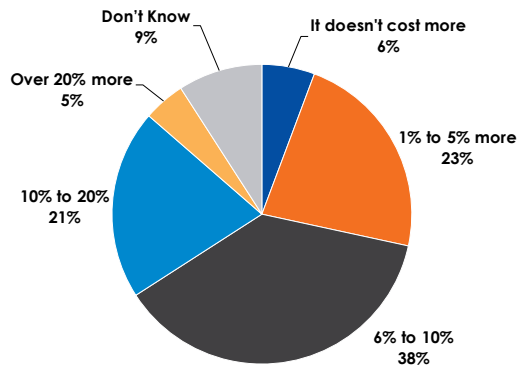


N = 120 Respondents in the Healthcare Industry responsible for creation, management, or purchasing of marketing/promotional collateral
 Source: US Vertical Vision Study; Keypoint Intelligence 2020

On average, healthcare respondents report that CMYK+ jobs cost about 8.5% more than basic CMYK printing. Like many other industries, marketers within the healthcare sector are finding that effects like metallic/fluorescent inks, white/clear coatings, or neons can bring additional flair and value to their printed communications.

Figure 9: Extra Cost for CMYK+

On average, how much extra do the jobs requiring CMYK+ cost in relation to standard CMYK?



N = 88 Respondents in the Healthcare Industry who spend money on CMYK process color
 Source: US Vertical Vision Study; Keypoint Intelligence 2020



Communication Application Revenue Opportunities

The healthcare market offers many opportunities for providers who offer digital printing supported by Internet-enabled workflows. Serving the healthcare sector requires a number of key offerings, including the ability to offer personalization, better management and ordering for communication materials, and integrated multi-channel communication workflows.

Personalized Print

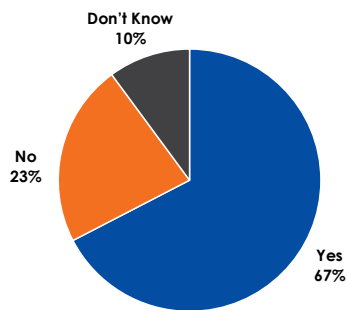
Healthcare establishments are big users of multi-channel direct marketing campaigns. Increasingly, these programs are highly personalized, with promotions that are customized to specific demographics or individuals with known health conditions. Although this personalization can be as simple as an address and salutation, it increasingly involves fully customized promotional or transactional documents.

Variable documents contain information such as text or images from a database or file, and apply logic or business rules to make them unique to each recipient. Variable data printing (VDP) solutions offer the capability to personalize all kinds of items, including direct mail, postcards, newsletters, brochures, reports, and statements.

Keypoint Intelligence's research confirms that nearly two-thirds of healthcare respondents are using customization or personalization to make their direct mail messaging more targeted. This customization might involve changing images or text modifications. Among those respondents that do create personalized direct mail, slightly over half of these campaigns are customized.

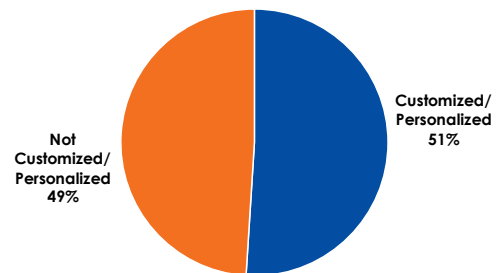
Figure 10: Personalized Direct Mail

Does your company/organization personalize or customize direct mail pieces to create more targeted messaging?



N = 89 Respondents in the Healthcare Industry who use direct mail

What percentage of your total direct mail campaigns use customization/personalization and what percentage do not?



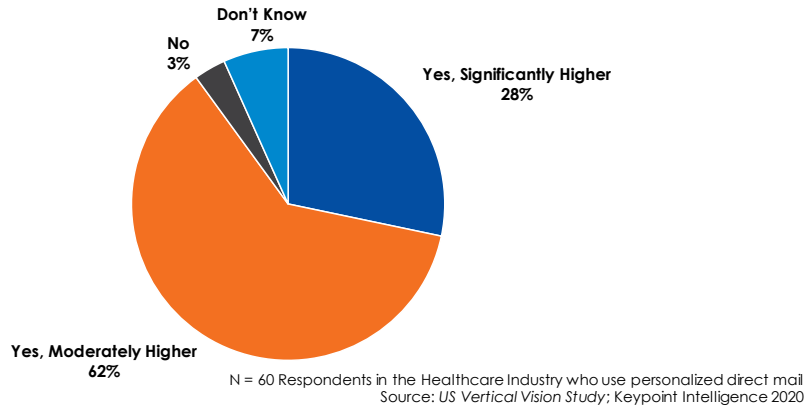
N = 60 Respondents in Healthcare who use customized direct mail
Source: US Vertical Vision Study; Keypoint Intelligence 2020



Personalization of direct mail pieces can pay off dramatically for all industries, and healthcare is no exception. To this point, 28% of healthcare respondents reported significantly higher response rates on direct mail campaigns that incorporated customization, and another 62% reported moderately higher response rates.

Figure 11: Response Rates Associated with Personalized Direct Mail

Does your company achieve higher response rates on direct mail campaigns that incorporate customization/personalization?



VDP enables PSPs to enhance the return on communication investments with its ability to enhance message relevance. Relevant communications drive response rates to marketing offers and communications that require an action. Organizations of all types need assistance with data-driven personalized print programs, and this creates an opportunity for external or in-house PSPs. To capitalize on this opportunity, PSPs must make smart investments in hardware and software products that power variable data. The ability to create relevant content is critical.

Online Ordering/Supply Chain Management

e-Commerce (also called Web-to-print) has taken hold in the healthcare market. These solutions encompass the entire communication production and delivery system, including page design, job file submission, online calculation, job tracking, soft proofing, online payment, online shipping, and inventory management. Marketers and print buyers rely on these systems to increase automation, improve operational efficiency, better control brand management, enhance customer retention, and remove costs and time from the print procurement process.

These online ordering systems enable users to upload print jobs; reprint standard items such as product catalogs, handbooks, and forms; create customized materials based on corporate-approved templates (mailers, business cards, business stationery, etc.); and order printed and non-printed items from inventory.

Other benefits of Web-to-print include a reduction in administrative and sales time in securing orders, enhanced brand control as proper uses of logos and formats are



controlled, and improved accounting as proper approvals and chargebacks are pre-programmed into the system. Web-to-print systems provide healthcare marketers with an agile and scalable communication ordering process that reduces costs from over-ordering of materials and assists in allocating dollars appropriately. Web-enabled ordering offers organizations the following benefits:

- ◆ A lower likelihood of producing ineffective materials
- ◆ A reduction in unnecessary inventory, thus increasing working capital
- ◆ The elimination of obsolete business processes
- ◆ Increased production and faster responsiveness to market demand

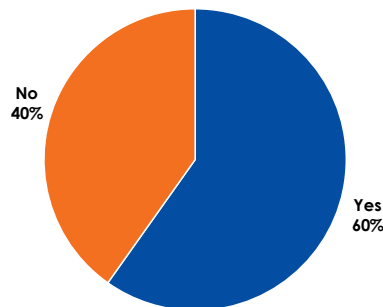
The benefits of Web-to-print include a reduction in administrative and sales time in securing orders, enhanced brand control (with the proper use of logos and formats), and improved accounting (because proper approvals and charge-backs are pre-programmed into the system).

e-Commerce and Enhancing the Experience with Digital Packaging

Like so many others, the healthcare industry has seen an increase in online ordering. Consumers and businesses have become more comfortable with online ordering than ever before. Although e-commerce is not quite as prevalent in the healthcare industry as it is in other sectors, it is certainly becoming more common. In fact, 60% of healthcare respondents to Keypoint Intelligence's survey are currently shipping directly to customers as a result of purchases made on their websites or e-commerce platforms.

Figure 12: Shipping Directly to Consumers or Businesses

Does your company ship products/packages directly to consumers or businesses as a result of purchases made on your website or e-commerce platform?



N = 127 Respondents in the Healthcare Industry responsible for printing services
Source: US Vertical Vision Study; Keypoint Intelligence 2020

Businesses across all verticals are working to deepen their connections with clients and consumers, and ongoing improvements to digital technology now enable an enhanced "unboxing experience" with packaging. Digital printing makes it possible to print more colors or embellishments on the increased number of boxes that are being delivered to

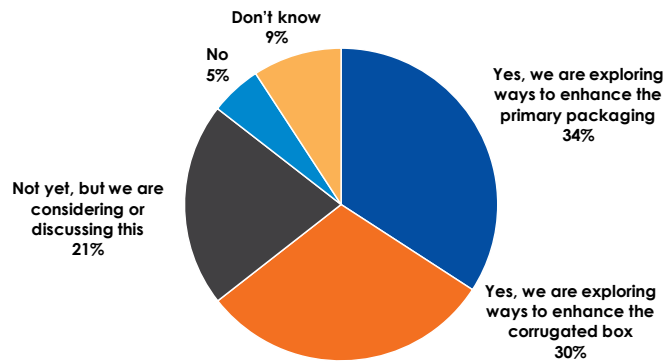


homes and businesses, packages can now be customized and personalized, and some are incorporating spot varnish, digital foils, or raised textures for more appeal. Businesses can also include more personalized printed materials within these packages. Brand owners are working to create the best experience possible in every way they interact with customers, and this includes the delivery of packages.

Of the healthcare respondents who were shipping products/packages directly to customers, nearly 65% were already taking steps to enhance the unboxing experience in some regard. Another 21% were discussing or considering the possibility.

Figure 13: Enhancing the Unboxing Experience

With more people and businesses ordering online, is your company exploring ways to enhance the “unboxing experience”?



N = 76 Respondents in the Healthcare Industry who ship products or packages directly to customers
 Source: US Vertical Vision Study; Keypoint Intelligence 2020

Now that consumers are using more channels than ever before, healthcare establishments have less of an opportunity to connect with their customers face-to-face—but this doesn't mean they still can't stay connected! Packaging is yet another medium that can be used to establish and maintain a relationship between businesses and their customers.

The rise of e-commerce ties back to that ever-important customer experience. Packaging is just another touchpoint that businesses can—and should—use to stay connected with their customers.

An Expanding Array of Media Channels

Healthcare marketers are moving into cross-media marketing as a strategy for reaching customers and prospects. Cross-media marketing is the use of two or more media types (print, e-mail, Web, mobile, and/or social media) supported by marketing services such as creative, campaign management, and data analytics. VDP is a key step in adding cross-media marketing services. Successful cross-media communication campaigns typically start with variable data, mailing services, and Web storefronts. Next, basic data services, online offerings, and personalized URL capabilities are added. This is generally followed by expanding capabilities into more extensive campaign management, data mining and



analytics, customer-relationship management tools, mobile barcode tracking, and marketing automation.

Offering other types of media and services that support and enhance the value of print is opening up new revenue streams for PSPs and in-house printing operations. In addition, moving into cross-media services can enable PSPs to increase digital print volumes. The demand for PSPs that support healthcare firms' efforts to communicate and engage with customers across media channels is growing. Many healthcare providers place a high importance on PSPs offering multi-channel integrated marketing, data management and analytics, mobile marketing, and online services. At the same time, more traditional ancillary services—graphic design, mailing, fulfillment, and marketing services—are still important and necessary.

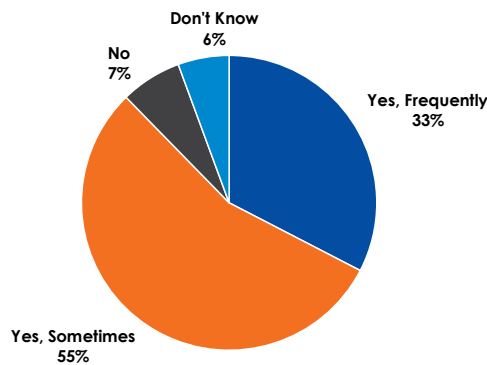
Leveraging Print in a Digital World

Healthcare providers on a global basis are expanding their use of communication tools to engage with audiences across an ever-widening mix of channels. Online channels have become increasingly important for the healthcare sector over the past several years. Consumers and businesses have also become more comfortable with online transactions than they have ever been before.

In Keypoint Intelligence's *Vertical Visions* study, healthcare respondents approximated that their spending split was 52% digital media versus 48% traditional media. Among firms that use direct mail, a strong majority were frequently or sometimes coordinating their direct mail campaigns with e-mail or other digital media.

Figure 14: Combining Direct Mail with Digital Media

Are direct mail campaigns coordinated with e-mail or other digital media campaigns?



N = 89 Respondents in the Healthcare Industry who use direct mail
Source: US Vertical Vision Study; Keypoint Intelligence 2020

Communication decision-makers in the healthcare market are investing in areas that enable the combination of print with digital media channels to create personalized, data-driven, cross-channel campaigns.



Selling to the Healthcare Market

Selling to the healthcare market begins with understanding the market and its dynamics. Part 1 of this vertical market kit provided an overview of the healthcare market and also identified strategies for keeping up to date on trends. Key steps in the selling process include:

- ◆ **Evaluating the Competition:** Evaluating the competition begins with assessing who healthcare providers trust with their communication needs and why. As noted earlier, healthcare providers are expanding their use of communication tools and optimizing marketing messaging to engage with audiences across media channels. PSPs have an opportunity to expand their stature in healthcare organizations by offering marketing support services. PSPs have been steadily expanding services to offer marketing services, and healthcare firms are taking advantage of these services.
- ◆ **Identifying Decision-Makers:** A critical step in winning work is identifying the right contacts in healthcare organizations—those with decision and budget authority. This is a two-pronged effort that includes identifying the units of an organization that purchase communications and the decision makers with the authority and funds to buy. Communication spending decisions for marketing, customer communications, internal communications and training materials occur mainly at the corporate level of healthcare firms. However, other levels also play a role. The dispersion of decision-making authority offers opportunities for PSPs and in-house printing operations to either sell or influence the sale of services across an organization.
- ◆ **Understanding Buying Practices:** Purchasing rules play a big role in buying decisions within the healthcare market. Procurement policies seek to leverage buyer power, control spending, and ensure that essential requirements (e.g., price, quality, and turnaround) are met. Understanding a customer's buying practices and guidelines helps in crafting winning sales pitches and proposals.
- ◆ **Addressing Customers' Challenges:** Identifying and understanding customers' challenges is a critical step in driving sales results and becoming viewed as a valued and trusted partner. Having a deep understanding of customers' challenges is the foundation for developing services that solve real issues and drive customer success. The idea is to identify and convert customers' most pressing needs and challenges into sales opportunities.
- ◆ **Detecting Key Customer Demands:** Successfully selling to healthcare decision-makers requires offering services that meet demands and solve problems. As is the case with any industry, it's important to understand and respond to customers' needs.
- ◆ **Offering Solutions to Buyers' Challenges:** Communication buyers in the healthcare market typically view their relationships with public relations firms as partnerships, but PSPs are mostly viewed as vendors. This presents an opportunity to change the status quo and gain customers by building trusted partnerships.
- ◆ **Forming Solid Customer Bonds:** Monitoring the trends of the healthcare market is a practical exercise and ongoing activity that leads to developing those services that solve customer problems. Keeping up with trends in the healthcare market can be as



simple as subscribing to e-newsletters, to scanning headline news from your e-mail box or joining discussion groups to keep current on trends or find sales prospects. Customers want to do business with companies that understand their unique market needs. Uncovering new opportunities to serve customers begins with compiling and leveraging market intelligence to position yourself as a trusted advisor.

These activities will result in delivering products and services that address real-world client needs. Other important steps include evaluating the competitive landscape, identifying decision-makers and what's important to them, understanding buying practices, developing prospecting and networking strategies that yield results, and offering services that solve client problems. The healthcare industry presents an excellent opportunity for PSPs who have the ability to produce high quality, customized, and personalized patient communications, as well as develop and manage patient retention, acquisition, and wellness programs. Healthcare providers need to focus on their core competencies (treating patients, managing care delivery, growing services, and staying current on procedures and treatments) while turning to partners to help them with non-core activities.

The Sales Message is Customer Success

Your job is to help your customers be successful. Print is playing a supportive role in today's multi-channel world, but so are all media channels. Adding ancillary services to offset declines in print revenues and better service customers is the new equation for success in serving the healthcare market. The healthcare industry offers solid opportunities for PSPs to grow business and digital printing volumes.

Communication buyers in the healthcare market want providers who can recommend products and services aligned with their unique needs today and in the future. They also demand proof that you understand their market and deliver the services you claim. The ability to create sales and promotions pieces for healthcare providers that address key market trends and demonstrate unique abilities to drive revenues and improve efficiency hinges on learning and understanding the market.



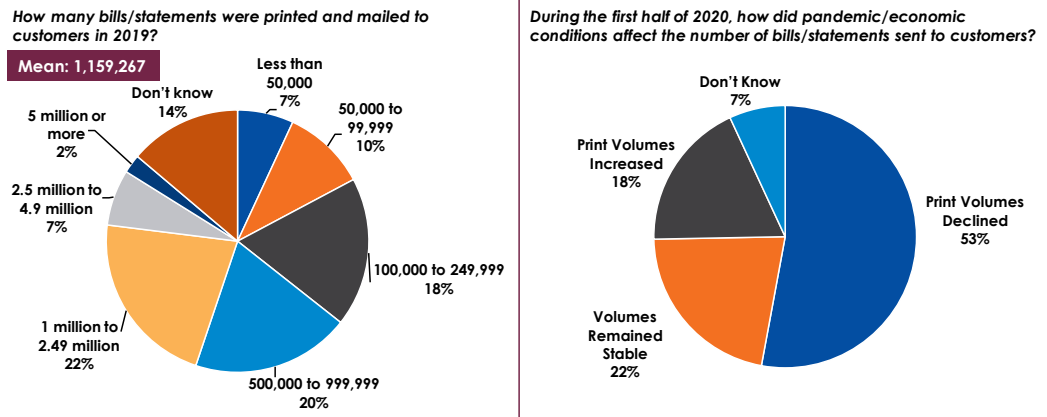
PART 3: The Impact of COVID

No discussion of this time in human history would be complete without mentioning the COVID-19 pandemic, which took the world by storm in early 2020. In the early days of the pandemic, few people knew what to expect and many were caught by surprise. Although most businesses within the healthcare sector were deemed essential and were therefore not required to shut down, the industry continues to feel the effects of the ongoing pandemic, the economic downturn, and lingering uncertainty about what the future holds. This section of the report explores COVID's evolving role within the healthcare market.

Direct Mail Printed and Produced Bills & Statements

On average, respondents in healthcare institutions printed and mailed nearly 1.2 million bills and statements to customers in 2019. As might be expected, the majority of these respondents saw a decline in their bill & statement volumes due to the arrival of COVID-19 and the economic downturn that followed. The healthcare sector continues to struggle due to rising costs and patients who are opting to delay or cancel procedures.

Figure 15: Bills & Statements: The Impact of COVID



N = 87 Respondents in the Healthcare Industry with responsibility for transactional/regulatory communications
 Source: US Vertical Vision Study; Keypoint Intelligence 2020

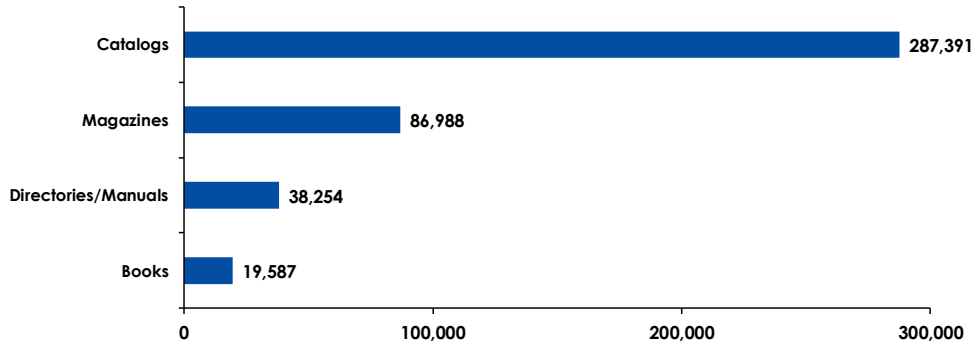


Other Types of Direct Mail

The Figure below outlines the average number of other direct mail pieces that healthcare companies reported printing/producing on an annual basis. The volume for catalogs was highest by a wide margin.

Figure 16: Direct Mail Pieces Produced Annually

On average, how many of the following did your business unit print/produce during 2019?

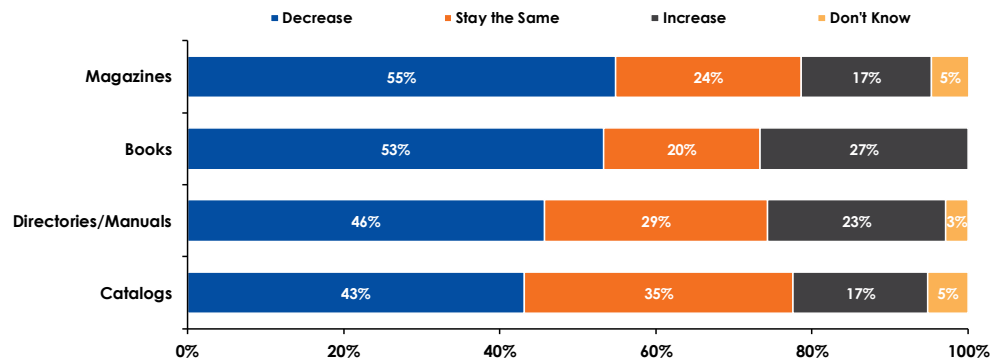


N = Varies; Base: Respondents in the Healthcare Industry who print/produce these applications
Source: US Vertical Vision Study; Keypoint Intelligence 2020

As would be expected, COVID-19 affected production volumes for all types of direct mail. This was especially the case for magazines, where 55% of healthcare respondents expected their 2020 volumes to decline in relation to 2019. At the same time, however, over half of healthcare respondents expected production of directories/manuals and catalogs to stay the same or increase during this same timeframe.

Figure 17: Anticipated Change in Volume

How do you think the total volume of pieces produced in 2020 will change compared to 2019?



N = Varies; Base: Respondents in the Healthcare Industry who print/produce these applications
Source: US Vertical Vision Study; Keypoint Intelligence 2020

While there is no denying that the pandemic had an impact on direct mail printing volumes in 2020, print will remain a vital part of the communications mix for quite some time. In fact, "digital overload" is actually positioning print for future marketing success. Savvy businesses have recognized this, and are now supplementing their digital marketing messages with direct mail, postcards, catalogs, and other printed communications. This



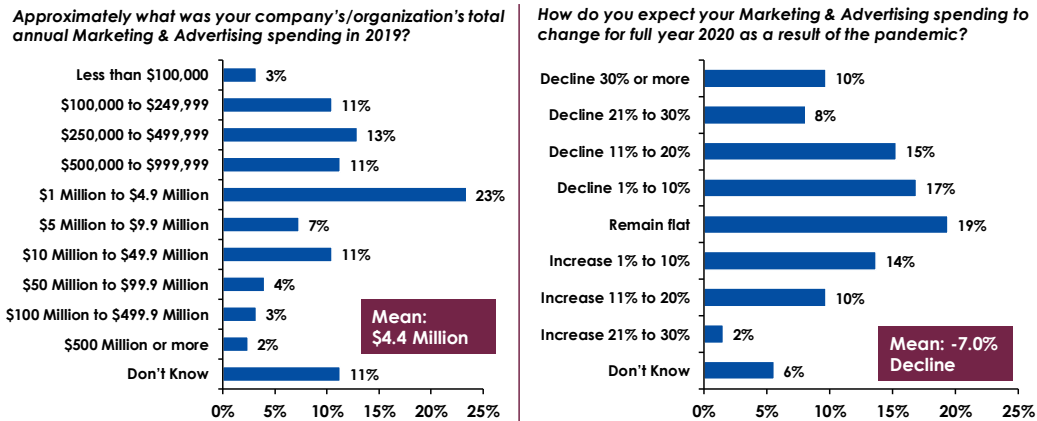
has proven quite effective for a very simple reason—in today’s digital world, printed communications cut through the clutter and get noticed.

Communication Spending Trends in Healthcare

Marketing & Advertising Spend

During 2019—which was, of course, pre-COVID—healthcare respondents reported spending an average of \$4.4 million on marketing and advertising. The arrival of COVID-19 had a major impact on marketing and advertising spending in a variety of sectors during 2020, and the healthcare industry was no exception. As noted earlier, many people are delaying or outright cancelling the treatment of non-life-threatening conditions as the pandemic continues. Once vaccinations become more widespread, we will likely see a spike in demand for healthcare services as more people feel comfortable visiting doctors’ offices and hospitals.

Figure 18: Marketing & Advertising Spend



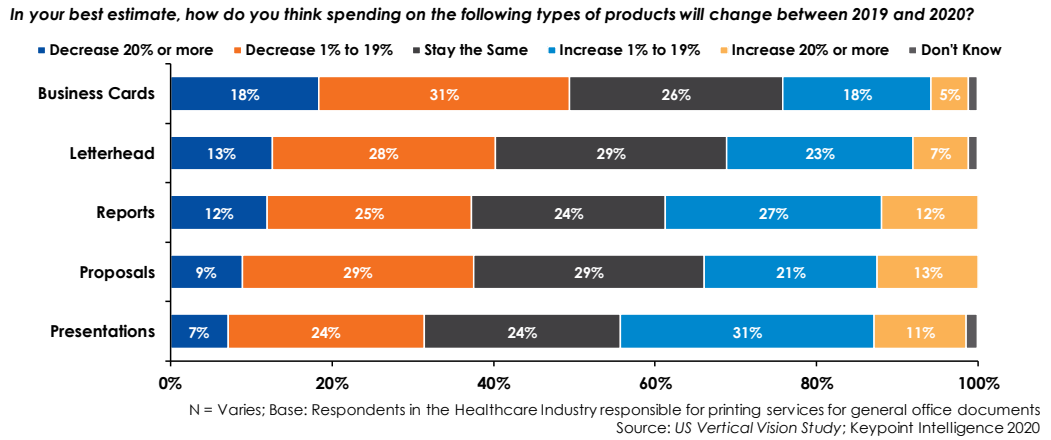
N = 124 Respondents in the Healthcare Industry responsible for senior leadership, line-of-business management, marketing, or sales
 Source: US Vertical Vision Study; Keypoint Intelligence 2020



Anticipated Change in Spending for Various Products

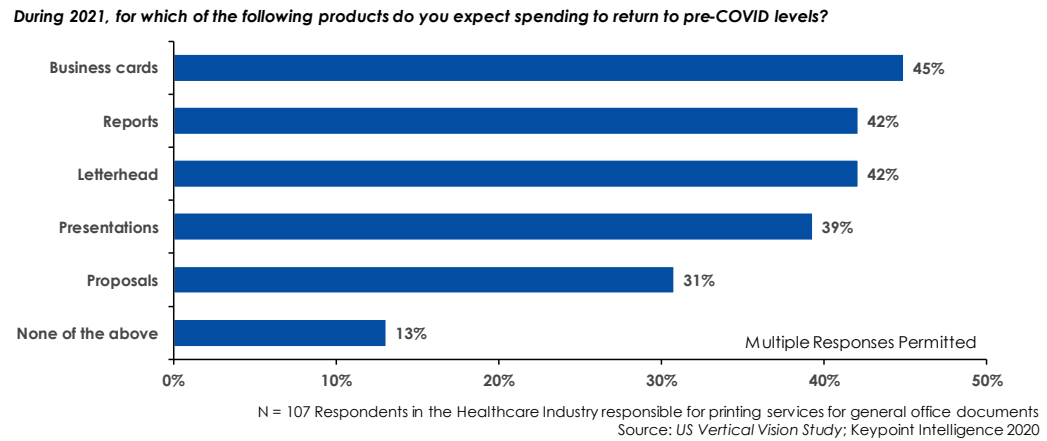
Respondents who were involved with printing services for general office documents were asked how they expected their spending on various products to change between 2019 and 2020. For all categories except business cards, over half of respondents expected their spending to increase or stay the same.

Figure 19: Year-Over-Year Change in Spending



It is also encouraging that over 40% of these same respondents expected their spending for business cards, reports, and letterhead to return to pre-COVID levels in 2021.

Figure 20: Expectations for Spending Returning to Pre-COVID Levels in 2021





The Bottom Line

Educating people about offerings and services, ensuring satisfaction, attracting new patients, and becoming an active member of a community all require ongoing communication efforts. Print is and will remain an important component of the communications mix for healthcare providers. These providers are leveraging the benefits of digital printing—short run, high-quality, personalization, fast turnaround, just-in-time, efficiency—to establish relationships with patients and prospects, advertise their offerings, improve the efficiency of internal operations, and increase their market share. They are also communicating with people and businesses across an ever-widening array of media channels. Growing revenues and reducing costs are critical success factors in the healthcare market, and digital printing is delivering results on both fronts. Savvy marketers are learning that print can be blended with other media technologies to deliver tailored offerings that encourage engagement and help foster loyalty.



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