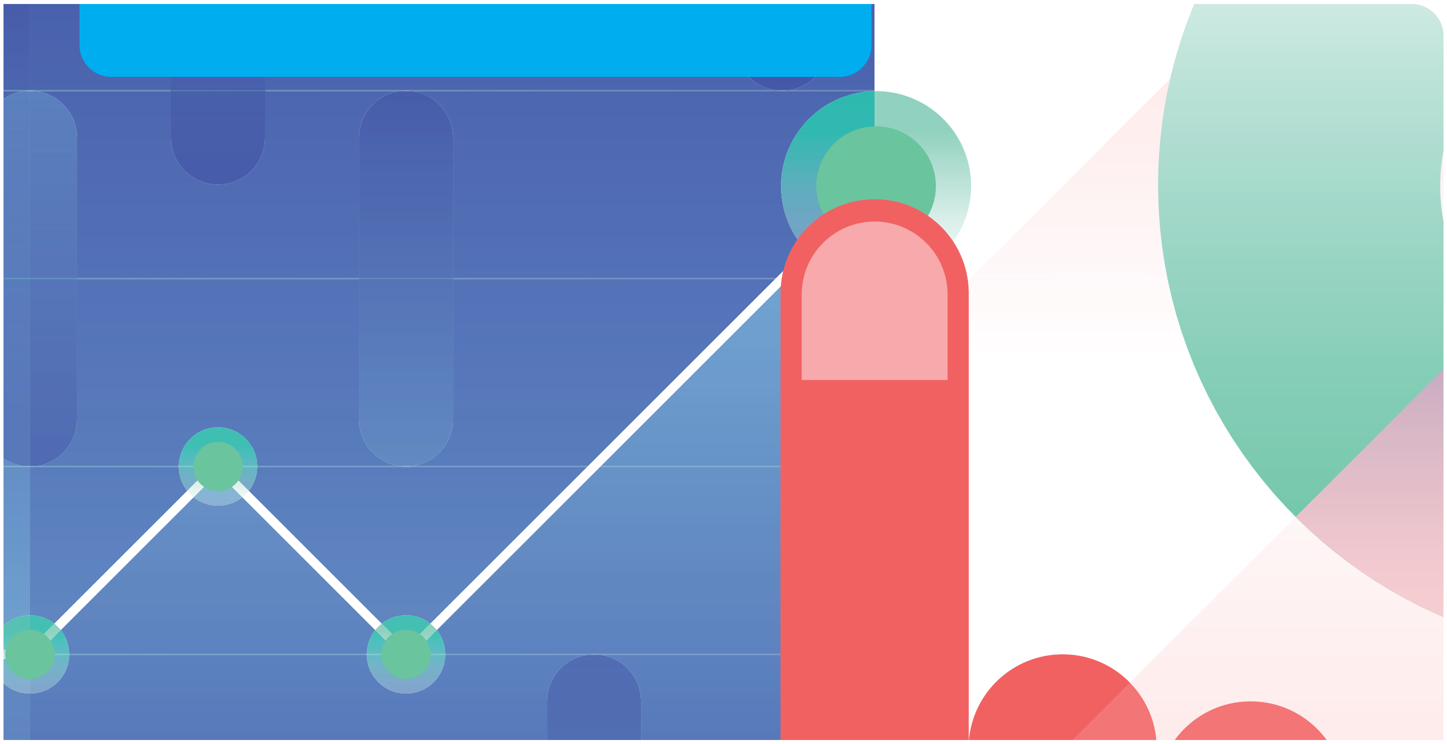

Behind the Print Buy

New Research: How Procurement, Agencies, and Provider Selection Shape Who Gets the Work

ALLIANCE INSIGHTS
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INTRODUCTION

In 2026, Alliance Insights surveyed 207 communication buyers, professionals directly responsible for purchasing or influencing print decisions within their organizations, to understand who print buyers are actually purchasing from and why, and what it takes for a print service provider to win and retain business[1]. The responses suggest that print spend does not always flow directly from a buyer to a provider. In some organizations, it may move through institutional structures — procurement frameworks and agency relationships — that could influence who gets the work before quality or price is ever considered.

This report examines three questions the survey data may help answer:

- Who is currently supplying print across different application categories
- How procurement functions and creative agencies may each operate as a middle layer in print spending decisions
- What criteria buyers appear to apply when they do exercise direct choice over their print provider.

For each question, the report draws on the survey data and offers considerations for print service providers assessing where and how to compete.

WHO GETS THE WORK

The survey asked buyers to identify their primary supplier for each print application they purchase. **Figure 1** shows that supplier selection is highly application-specific. Rather than relying on a single sourcing model, organizations use a mix of in-house production, corporate procurement, agencies, local and national print service providers, and online print platforms. The preferred supplier varies depending on the characteristics and requirements of the application.

Operational & Compliance Applications Produced In-House

Operational and compliance-driven applications are more likely to be produced internally. As shown in **Figure 1**, approximately one-third of organizations identify in-house production as their primary supplier for documents and manuals (34%), labels (33%), training materials (32%), bills and statements (32%), financial and legal materials (31%), newsletters (30%), and business forms (28%).

These applications share characteristics that make internal production attractive. They often involve standardized content, recurring production, compliance or confidentiality requirements, and the need for predictable turnaround. In some organizations, this reflects the presence of an in-plant print operation. In others, it may simply reflect a preference to maintain greater control over production, security, or workflow. The survey does not distinguish between these situations.

For external print providers, these findings suggest that success in these categories begins with understanding why an organization currently produces the work internally before determining how best to compete.

[1] Findings from this survey were used to support both this report and the analysis presented in the Canon U.S.A-sponsored Print Buyer Outlook Series (PBOS) report.

Creative & Logistics Applications Produced by External Providers

Applications requiring creative expertise, specialized production capabilities, or complex fulfillment are more likely to rely on external suppliers.

Among buyers of invitations and event materials, agencies are identified as the primary supplier by 22% of respondents, reflecting the role creative partners often play in campaign development and execution. Local print service providers are the leading supplier for signage (28%), likely benefiting from their ability to provide installation, regional service, and rapid turnaround. National print service providers have the strongest presence in point-of-purchase and display materials (30%), postcards (29%), and direct mail (23%), applications where production scale, geographic reach, and brand consistency are often important.

Online Print Platforms Serve a Broad Range of Applications

Although online print platforms are not the leading supplier in any application category, they maintain a meaningful presence across nearly every segment of the market. They are most commonly used for general office materials (18%), books (16%), marketing collateral (13%), direct mail (13%), invitations and event materials (13%), and postcards (12%). These figures may suggest that online platforms are being used across a broader range of applications than has typically been assumed, though the reasons behind individual purchasing decisions will differ.

Figure 1: **Primary Print Supplier by Print Application**

Q. Of the print applications you purchase, who is your primary supplier?

	Produced In-House	Corporate Procurement	Agency	Local PSP	National PSP	Online Print Platform
OPERATIONAL / COMPLIANCE-DRIVEN						
Documents/Manuals (n=111)	34%	14%	10%	17%	18%	6%
Labels (n=102)	33%	8%	13%	15%	21%	11%
Training Materials (n=90)	32%	18%	7%	14%	14%	14%
Bills/Statements (n=111)	32%	23%	5%	15%	16%	10%
Financial/Legal Materials (n=84)	31%	26%	8%	7%	18%	10%
Newsletters (n=94)	30%	16%	12%	16%	16%	11%
Business Forms (n=116)	28%	19%	16%	11%	16%	10%
CREATIVE/BRAND-LED						
Invitations/Event Materials (n=78)	23%	10%	22%	17%	15%	13%
Packaging (n=89)	19%	17%	16%	21%	18%	9%
Marketing Collateral (brochures, sell sheets, etc.) (n=103)	15%	16%	20%	19%	17%	13%
LOGISTICS-DRIVEN						
Direct Mail (n=128)	20%	19%	9%	16%	23%	13%
Postcards (n=69)	22%	9%	13%	16%	29%	12%
Point-of-Purchase/Display Materials (n=70)	13%	13%	16%	17%	30%	11%
Catalogs (n=85)	19%	24%	16%	18%	19%	5%
Signage (n=88)	18%	11%	9%	28%	24%	9%
GENERAL						
General Office (stationery, business cards, etc.,) (n=120)	18%	12%	11%	21%	21%	18%
Books (n=49)	16%	16%	14%	16%	20%	16%
Photo Specialty Products (n=49)	12%	24%	10%	20%	24%	8%

n = 207 Communication Buyers, Respondents were only shown the print applications they had previously indicated they influence or purchase
Source: Alliance Insights 2026

The most important insight from these responses may not be which supplier type appears most frequently in any given category, but what the data could suggest about how buying decisions are made. Supplier relationships in print tend to persist over time. They may form around capability fit, process familiarity, and organizational convention — and they may endure not because buyers have actively chosen to remain but because the perceived effort of changing providers can outweigh the perceived benefit unless a compelling reason to reconsider arises. ***Understanding which supplier type is associated with a particular category, and the factors that may be sustaining that relationship, could be a useful starting point for providers developing a growth strategy.***

Procurement frameworks, agency relationships, platform convenience, and organizational habit may each play a role in how supplier relationships are maintained. Providers considering entry into categories currently served by other supplier types may find it useful to identify which of these factors appears most relevant in a given situation — as the approach that may be effective in one competitive situation is not necessarily transferable to another.

Where Do You Stand in the Market?

The survey data may offer a useful starting point for providers thinking about where they stand in the market. For each application category a provider currently serves, it may be worth asking not just whether work is being won, but whether the provider is the primary supplier or a secondary one. If secondary, understanding why matters as much as knowing the fact. The reason could be pricing, lack of access to a procurement approved list, an agency relationship that directs work elsewhere, or simply that the provider's capabilities are not visible to the right decision-makers.

NAVIAGTING THE MIDDLE LAYER: PROCUREMENT & AGENCIES

The survey data offers useful context for how print providers think about their sales and account management approaches. The responses suggest that in at least some organizations, not all print spend may flow through a direct buyer-to-provider relationship. Instead, it may be managed through one of two intermediaries: corporate procurement or central purchasing on one side, and marketing or creative agencies on the other. Each operates according to different priorities, and each may require a different approach from providers seeking to work within that environment.

When Procurement May Influence the Budget

Among the print buyers surveyed, corporate procurement was identified as the primary supplier route most frequently in categories that may tend to involve compliance considerations, governance requirements, and financial accountability — financial and legal materials, catalogs, ballots, bills and statements, and business forms. In the highest instance, 26% of buyers in the financial and legal materials category identified corporate procurement as their primary route. That pattern may reflect the nature of the work itself: categories where auditability, consistency, and risk management are priorities may be more likely to sit within a centrally managed purchasing framework.

Where a central purchasing function manages print supplier relationships, it may operate through mechanisms such as approved vendor lists, formal tender processes, and multi-year contracts. One practical consequence is that the individual who uses the printed output — a legal team, an HR department, a finance function — may provide input on specifications but may not have sole authority over supplier selection. This separation between the end user and the procurement decision-maker, where it exists, could have implications for how providers approach these accounts. Procurement-influenced budgets may tend toward greater stability than marketing-driven budgets, governed by contractual arrangements rather than campaign cycles. They may also be slower to change: once a provider is established on an approved vendor list and delivering against a framework agreement, the organizational effort involved in switching suppliers may itself act as a deterrent.

That stability cuts both ways. For providers already inside a procurement relationship, it may represent a degree of protection. For those outside one, it underlines why understanding the procurement process — and what it takes to be formally recognized within it — may matter as much as the quality of the print itself. Relevant here is the survey finding that 78% of print buyer respondents use a customized print ordering portal provided by their print provider, and that 40% of portal users identified integration with internal procurement and inventory systems as a priority. Where a provider can offer that level of integration, it may contribute to a more embedded relationship over time, though outcomes will vary by organization.

When Agencies May Influence the Relationship

The agency dynamic operates quite differently. Where procurement tends to appear in categories defined by compliance and operational consistency, agencies tend to appear most frequently in categories shaped by brand identity, creative strategy, and audience engagement — invitations and event materials, marketing collateral, point-of-purchase and display materials, and newsletters. In the highest instance, 22% of buyers purchasing invitations and event materials identified a marketing or creative agency as their primary supplier route.

Where an agency manages the print supplier relationship on behalf of a brand, the print provider may be operating in a subcontractor capacity — selected, briefed, and paid by the agency, with the end brand potentially having limited visibility into who is producing their print. This structure may give the agency considerable influence over which providers receive work and how budgets are set. The categories where agencies appear most frequently as the primary supplier route are distinct from those where procurement leads.

It is also worth noting that in some organizations, procurement and agency influences may operate simultaneously. A central procurement function may determine which vendors are approved, while an agency or marketing team influences which of those approved vendors actually receives work. In that context, being on an approved vendor list and being known to the agency are not interchangeable. A provider absent from either relationship may find themselves bypassed regardless of their position in the other.

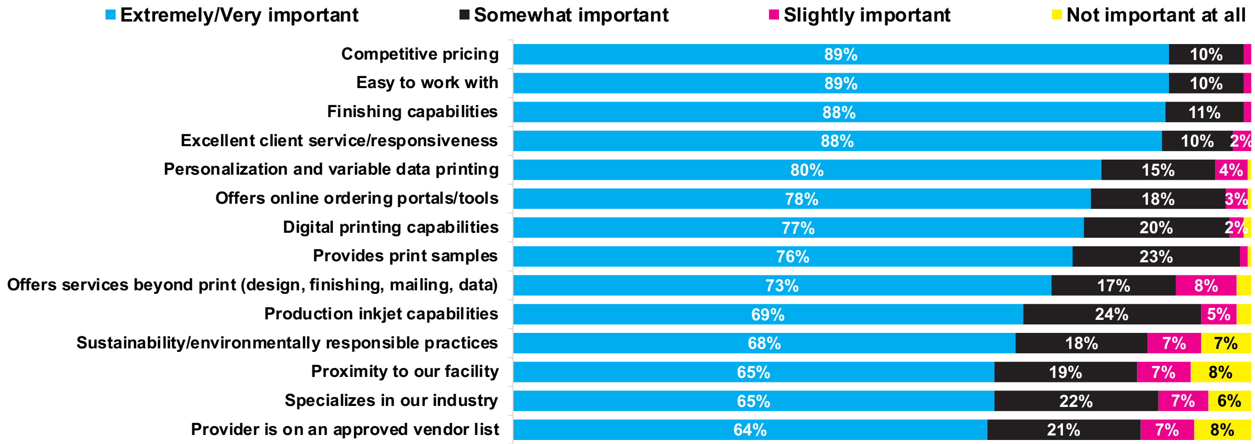
WHAT IT TAKES TO WIN AND KEEP A PRINT BUYER

In cases where buyers appear to exercise direct choice over their print provider — outside of procurement frameworks and agency relationships — the Alliance Insights 2026 survey data may offer some insight into how those decisions are made. Among the buyers surveyed, responses suggest that provider selection may involve a range of considerations spanning commercial terms, operational capability, relationship quality, and technology. Understanding which criteria appear most frequently cited as important may help providers identify where investment is most likely to be relevant.

As shown in **Figure 2**, competitive pricing and easy to work with were each rated important by 89% of buyers — the two highest figures across all criteria evaluated. One possible interpretation is that buyers may weigh the quality of the working relationship as highly as price, which could reflect the operational demands that print programs typically involve — tight timelines, frequent specification changes, and complex production logistics. Finishing capabilities and excellent client service and responsiveness were each rated important by 88% of buyers, completing what the data suggests may be a top tier of evaluation criteria. These four factors — pricing, ease of working relationship, finishing capability, and service quality — were each rated important by a substantial majority of buyers surveyed, and the consistency of these ratings may suggest they are worth prioritizing above other considerations.

Figure 2: **Criteria for Selecting Print Providers**

Q. When selecting a print service provider, how important are the following criteria?



n = 207 Communication Buyers
Source: Alliance Insights 2026

Below this top tier, the data identifies a range of capability considerations that may reflect where print programs are heading. Personalization and variable data printing was rated important by 80% of buyers — the highest figure among the capability-specific criteria. Online ordering portals and tools were rated important by 78% of buyers, and digital printing capabilities by 77%, suggesting that buyers may expect their print providers to support them across the broader workflow. Production inkjet capabilities were rated important by 69% of buyers, which may reflect growing familiarity with the technology among this buyer group. Sustainability and environmental responsibility was rated important by 68% of buyers. While this places it outside the top tier in the survey data, providers may find it worth considering whether sustainability credentials function as a threshold requirement in their specific markets — particularly in procurement-evaluated processes or agency approved list reviews — rather than as a differentiating factor considered later in the selection process.

If You're Competing for Direct Business

The four top-tier criteria — pricing, ease of working with, finishing capability, and service quality — may be a useful place to start when assessing how a provider is positioned relative to the buyers described in this data. The more relevant question may not be whether these factors matter, but how a provider actually performs against them in the eyes of existing clients rather than by internal assessment alone. The gap between the two is often where competitive vulnerability is greatest, and it may not become visible until a client has already decided to look elsewhere.

Of the four, easy to work with may be the least straightforward to assess. It covers a range of operational factors — how quickly proofs are turned around, how specification changes are handled, how clear invoices are, how accessible the team is on live jobs — rather than a single measurable metric. Providers who approach this as an operational discipline rather than a relationship assumption may be better placed as a result.

On the second tier, personalization and variable data printing rated highest among capability criteria, and the data may suggest it is becoming a standard expectation rather than a specialist offering. For providers who do not currently offer this at scale, it may be worth understanding whether its absence is affecting the ability to compete for certain work. Similarly, online ordering portals and sustainability credentials are areas where provider offerings and buyer expectations may be worth comparing, and where gaps, if they exist, may be worth addressing.

CONCLUSION

The Alliance Insights 2026 survey of communication buyers suggests that winning print business is not primarily a question of who produces the best print. It may be as much a question of who understands the structures through which print spend flows and who invests in positioning themselves appropriately within those structures.

The supplier landscape the data describes is a fragmented one. Different application categories appear associated with different supply models, shaped by the nature of the work, the governance requirements of the organization, and the relationships that have accumulated over time. In-house production, procurement frameworks, agency relationships, local and national providers, and online platforms each appear to hold territory in different parts of the market. The data may suggest that displacing an incumbent supplier requires understanding specifically what is sustaining that relationship — because the factor keeping a competitor in place in one category may be quite different from the one operating in another.

The procurement and agency analysis adds an important dimension to that picture. A provider's position on an approved vendor list and their standing with an agency that assigns work from that list are not the same thing, and in some accounts both may matter. The provider selection criteria data reinforces this: pricing, ease of working with, finishing capability, and service quality appear as the most consistently cited factors across the buyer sample — the baseline a provider needs to clear before capability or technology differentiators are even considered. Personalization, digital workflow integration, and sustainability credentials appear to be moving in the same direction, from differentiators to expectations.

The data suggests the providers best positioned to grow within that landscape are those who understand not just what buyers want from their print, but how buying decisions are actually made and who build their business development, account management, and capability investment around that understanding.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