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THE FUTURE OF THE PRINT INDUSTRY

A Dissertation submitted in partial fulfilment of the requirements for
BA (Hons) Graphic Design
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The candidate confirms that the work submitted is their own and that appropriate credit has been given where reference has been made to the work of others.

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ABSTRACT

Purpose of the study

The purpose of this paper is to investigate how the Print Industry, within the North West of England and Yorkshire¹, is currently innovating and developing. This will enable the printing and graphic communication sectors across the region to gain a greater understanding of where the industry currently stands, and what the future is for print.

Findings

The paper will describe the effects of the recession, the recent government cut backs, increasing ease of accessibility to new technology. Which has resulted in a rise of competition during the economic downturn. Government driven actions have also made the print industry far more 'greener' than ever before, forcing the communication sectors to be more environmentally conscious.

Recent project developments with the SMS (Short Message Service) texting campaign and Printed Electronics, certainly offers some hope for the industry within the next five to ten years.

¹ Regions include the following cities Leeds, Sheffield, Manchester, Liverpool. According to England's Regional Development Agencies. (<http://www.englandsrdas.com/about-the-regions> 21/10/10)

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APPROACH & INTRODUCTION

This study is based upon qualitative research. Investigating and analysing the main forces that are currently affecting the print industry within the region. These forces include technical, economic aspects and the support from business advisors.

This study also seeks to explore what the future is for the print industry and how it is currently developing and innovating. In order to find such findings, this paper will utilise in-depth interview's with print managers and directors from across the region.

The time constraints of this study have only allowed the focus on two national regions to occur. A full national study would provide more accurate findings of the country's current print industry.

For the purpose of this study the North West of England and Yorkshire will be consider as one region.

RESEARCH CONTEXT & BACKGROUND

History of Print Technology

This chapter explores the background of print and looks into the innovative changes made to the printing industry during the past twenty five years. Whilst providing an insight into the more recent developments within the industry.

The Printed word as we know it from mediums including: flyers, manuals, newspapers, and books came into fruition during the 1470's by William Caxton who was the 'first English printer to produce the first ever recorded book'². Caxton spent up to two years in Cologne, Germany learning the art of printing. Eighteen months later Caxton and Colard Mansion, a Flemish calligrapher set up a letterpress where they produced the first printed book in the English language; a translation of the story of Troy entitled 'The Recuyell of the Historyes of Troye'³. By 1476 Caxton returned to London, where he built the first English letterpress. Caxton later went on to produce over a hundred books during his lifetime, where he was actually the translator for the vast majority of his books using his knowledge of the French, Latin and Dutch languages.

The letterpress process was very long, which involved placing individual metal typefaces into a brace before pressing the paper against the metal type. Depending on the job, it would generally take a day to set it up and five minutes to print. This made the print industry a very skillful and specialist profession. The Industry gradually evolved, yet no major change occurred until the 20th Century. The introduction of Phototypesetting in the 1940's was a major movement in the way the printed word was produced. Two French electronic engineers, Rene Higonnet and Louis Moyroud. Ultimately created "the bridge to the era of digital typesetting"⁴. Phototypesetting uses strobe lighting and a series of lenses to project type from a spinning disk onto photographic paper.

² 20 Mar 2010 *The 500th Anniversary of Print in Yorkshire*
http://www.printyorkshire.com/news_details.aspx?id=74 11/10/10

³ (http://www.bbc.co.uk/history/historic_figures/caxton_william.shtml 11/11/10)

⁴ (<http://www.nytimes.com/2010/07/02/business/media/02moyroud.html> 21/11/10)

This would then be transferred onto a printing plate, ready to go to print. This improved the efficiency of print, and once the initial cost of the machinery decreased the cost of print became much more cost effective, it also “became much faster and easier for the operator”⁵, confirms Rini Paiva, the Director of Research [at the National Inventors Hall of Fame in Alexandria, America].

Letterpress and phototypesetting were common practice up until the 1970's. As the skill and industrial change gradually evolved, technological developments started being introduced into the printing sector.

From the 1970's change became more rapid. Litho print was the next major change to affect the Industry, and continues to be widely used today. Litho print can be sheet fed, or web fed. Sheet fed is individual sheets of paper widely used across the commercial printing sector. Web fed is a continuous process and heavily used in the print publishing sector, such as newspapers. These printing processes use four individual colour plates; Cyan, Magenta, Yellow, and Black. Each individual colour gets burned onto a plate. The plates then get placed onto the printer where the process of water and oil (ink) should not be mixed, this is where the name offset-lithography comes from. The size of paper has also reached its maximum of SRA2 (640mmx450mm). As technology and machinery have developed, the amount and size of paper fed through a printer at any one time has continually improved year in year out.

The introduction of 'Desktop Publishing' was also a significant development to the process and efficiency of print. Although desktop publishing is widely and freely used today, it has only been around for 30 years. During the 1980's Apple Macintosh Computers, Adobe, Aldus and Hewlett-Packard combined their ideas which saw the development of desktop publishing. In July 1985 Aldus PageMaker was released for Macintosh computers. Publishers were now able to put text into columns and insert images into their work, before sending the document to print. This software development gave Apple a major foothold in the industry, which still applies at the time of writing this study.

⁵ (<http://www.nytimes.com/2010/07/02/business/media/02moyroud.html> 21/11/10)

During the 1980's and 1990's in-house printing was very common in local authority, and the private sector. However banks and insurance companies had their own in-house printing units. In-house printing units relate to work which would come from within the organisation and printed within the same organisation. However more recently a reversal has taken place and in-house printing units have been outsourced to large companies. John Price, Print Services Manager [of Document Solutions in Wigan] agrees that implant units are becoming more "...restricted to local government, and educational establishments".

These significant changes within the industry have had major affects. More recently the printing industry has seen an increase in "...technological changes in it's production and design processes" (2009, p.7) ⁶. Developments in digital print have made it the 'next big thing' to have come out of the industry in recent years. The quality, finishing and efficiency are improving year on year both in lithography and digital print.

To conclude, the rate of innovative developments in the industry have ultimately been driven by technological change. As technology has improved, so has print. From the process to the way it's produced. Major introductions in the late 20th Century, has created a more efficient industry. However, the continued rate of innovative developments within the industry has seen a slow decline in skilled and specialist workers.

⁶ 15/12/09. Print Industry. A Decade on 2000-2009 Advertising Supplement. Yorkshire Post

METHODOLOGY

In order to investigate how the Print Industry in the North West of England and Yorkshire is currently developing. This study will rely upon in depth interviews taken from within the Industry. By undertaking this qualitative approach, it has enabled this paper to discover further written sources, which have been beneficial to this studies analysis.

THE EFFECT OF THE RECESSION

What effect does the recession have upon the industry as it aims to innovate, develop, and prosper during an economic downturn? Initially you may consider that the effects of the recession would see a major decline of the printed word as we know it. To a certain extent this is true, but because the Print Industry is one of the largest manufacturing industries in the country. The Industry within the region has a lot more to contribute.

The Industry within the United Kingdom produces a turnover of £15.1 billion ⁷ a year. The Yorkshire Print industry alone creates £1.7 million, and employs nearly 16,000 people within 853 companies ⁸ situated within the Yorkshire region. As for the North West of England, Print employs 14,000 people within 1,066 companies, turning over £1.5 million ⁹.

With the printing sector having a major input into the economy, one may expect that the employment levels would be at a consistent level. However, the employment levels have gradually fallen over the past twenty five years due to the advancement in efficiency and technology “...only 60 out of 12,000 printing companies within the United Kingdom employ over 250 people” ¹⁰. These figures identify that the industry is not purely reliant upon mass number of skilled workers; in fact, the sector is predominately reliant upon small and medium enterprises (SME). Within Yorkshire there are recent findings that support this point, “9 in 10 businesses within the print and related sectors employ fewer than 20 people.” (2010, p7) ¹¹. Employment levels have gradually decreased in recent years. In the UK alone, employment levels “...have fallen by

⁷ HC 746 (2008-09) II Ev 130

⁸ March 2010. BPIF UK Printing Facts and Figures. *BPIF Research analysis of ONS data* http://www.ipex.org/files/ukprint_flyer_final.pdf (12/01/11)

⁹ March 2010. BPIF UK Printing Facts and Figures. *BPIF Research analysis of ONS data* http://www.ipex.org/files/ukprint_flyer_final.pdf (12/01/11)

¹⁰ HC 746 (2008-09) II Ev 131

¹¹ DEVINS, D., 21/10/10. Print and related industries proving to be a resilient sector in transition. Business Supplement. Yorkshire Post

around 20% in the last five years, [with] the number of companies operating in the sector decreasing by 15%” (2010, p7) ¹².

During a recession and a downturn in the economy many businesses have to make cut backs. In some cases these come through job losses and redundancies, which have been visible during the past twelve months, across the UK. But within the Printing Industry Mike Hopkins, Project Manager [of Print Yorkshire] highlights a very valuable point; that many printing firms look at redundancies with a positive attitude; “[If] two people out of twenty lose their jobs, eighteen out of twenty keep their jobs”. This positive outlook upon any business can develop a smarter way of working and thinking. Therefore it would be reasonable to think that when the country is in a tough economic period, a company needs to stand out from the crowd to successfully emerge from the economic downturn. The recession can therefore make business owners think differently, more-so within print as it aims to innovate and develop.

Despite certain bodies considering the UK was still in an economic downturn in 2010; official sources state that the UK economy grew in the “...final three months of 2009...” ¹³ and therefore officially came out of the recession by the beginning of 2010 by ‘...0.1%’ ¹⁴. The British Printing Industries Federation (BPIF) conducts a survey each year annually on the current state of the Industry. In a recent survey the BPIF reported in September 2010, that there “appeared no change in trading conditions during the summer months of 2010, with a third of companies seeing an improvement in sales” ¹⁵. Whilst only 11% ¹⁶ considered that the market had deteriorated during the same period. The survey was carried out online during 1st-13th September 2010, consisting of 90

¹² DEVINS, D., 21/10/10. Print and related industries proving to be a resilient sector in transition. Business Supplement. Yorkshire Post

¹³ <http://www.guardian.co.uk/business/2010/jan/26/economic-growth-uk-recession> 25/11/2010

¹⁴ <http://www.guardian.co.uk/business/2010/jan/26/economic-growth-uk-recession> 25/11/10

¹⁵ BPIF Press Release, 29/09/10
BPIF Printing Outlook Survey shows signs of Summer recovery
http://www.britishprint.com/page.asp?node=296&action=view_news&tid=6740&sec=Press_releases&page=1 11/10/2010

¹⁶ BPIF Press Release, 29/09/10
BPIF Printing Outlook Survey shows signs of Summer recovery
http://www.britishprint.com/page.asp?node=296&action=view_news&tid=6740&sec=Press_releases&page=1 11/10/2010

companies throughout the UK, when combined employ over 10,000 people. With a complete total turnover of £1.2 billion. The printing sector is still in economic recovery and, the BPIF Outlook Survey predicts a stable forecast for the remaining months of 2010.

However, in those that have been interviewed concerns were expressed that the industry could fall back into a second recession, and it has been highlighted that the printing industry still have “significant problems”¹⁷ going forward.

Most recently the government published that there will be severe cut backs within the public sector. These cut backs include funding towards printed communication. Brian Coombs, Sales Manager [at Chapel Press Stockport] believes that “...it’s another nail in the coffin” for the Print Industry which is still struggling to come to terms with the recession. Printers are finding it hard to perform at a strong and consistent level; which have have fundamentally altered the future for print. The significant cut backs have forced many printers to change their outlook on business, focusing much more on commercial work. Price of Document Solutions agrees that “cuts from government spending has definitely been weakened [Document Solutions]...”.

This is not just a one off example, other printing companies across the two regions are also facing the same problem. John Whiston, Sales Manager [of Paragon Print] confirms that “...local councils budget in terms of print has halved...so it is affecting [Paragon Print] big style because I have to now go out and replace that spend”. The government spend that many printing firms have relied upon in the past have been forced to change, forcing many SME printing firms to research other sectors of business, and rely less upon government work.

To conclude, even though the Print Industry is a large supplier to the local and national economy, the employment levels have gradually deteriorated during the recession. Even though employment is an issue, the stringent government cut

¹⁷ MITTING, G., 20/07/09, *Decline in print industry is slowing, statistics show*
<http://www.printweek.com/business/news/920757/Decline-print-industry-slowing-statistics-show>
21/10/10

backs to the public sector have restricted development and forced the industry to change, and become less reliant upon local authorities for income. It could be argued that this decision has forced the industry to change significantly, re-branding itself in order to replace expenditure that has been lost from the public sector. On the other hand printing firms that do not take advantage of this 'opportunity to change' will unfortunately get swallowed up through the economic impact. Overall these changes within the region have been of great significance and, have forced the industry into a highly competitive market.

COMPETITION

Competition within the industry is very common. It has become more of an issue recently due to the development of electronic media, in addition to the government cut backs within the public sector.

With the introduction of privatisation in the 1980's, print was going through a growth period and became a major force within the economy. Due to the demand for more communication was made on businesses. This was because there was no alternative choice of media which could compete. At that specific time "No one ever knew the value of print. Print was the default communications medium because there were few other choices..." (2010, 5% Location 168) ¹⁸.

This poses the question do people currently recognise the value of print today, with the development of electronic media?

To a certain extent some people do value the use of print, as Price of Document Solutions confirms "...if you did a poll of people, I think they would rather get a birthday card in the post, than an email.". It is natural that we like to touch and feel objects, whether it's a type of fabric for a cushion, or a glossy brochure "...people prefer to handle printed materials." ¹⁹ confirms Nick Carter, Creative Director [of Positive by Design]. If a comparison was made between direct-mail and an e-newsletter, on an interactive level the piece of direct mail will undoubtedly perform as a better tool than an email or a SMS text would, confirming that marketers still value the use of print today. Matthew Lyall Creative Director [of Media21a] also agrees, "You will always have people 'flying' on a night out, you don't have people sending you a bluetooth text [because it's not as effective]". Even though the value of print is recognised within the design industry, printers within the region are finding it hard to compete with demanding tight budgets, and the convenience of using new technologies. Such examples would be emails over letterheads, Google over

¹⁸ WEBB, J., ROMANO, R., 2010. Disrupting the Future - Uncommon Wisdom for Navigating Print's Challenging Marketplace

¹⁹ (<http://www.guardian.co.uk/media/greenslade/2010/sep/24/paywalls-magazines> 11/10/10)

the yellow pages, websites over catalogues, and interactive pdf's over brochures. Printers within the region need to make marketers understand the value of print as they aim to develop and innovate as an industry, or even to use their expertise in the new technology.

Through personal observations there are companies within the region who are struggling to compete against the wave of new technology and see it as a hindrance to the industry. On the other hand a number of companies within the region have embraced the internet and used it as an innovative tool. The introduction and development of 'web to print', also known as CTP has created some substantial competition for many printers across the whole country, not just the study area.

Price [of Document Solutions] believes "It's hurting a lot of print companies who have found that they haven't invested into web to print systems."

However, those who have invested in web to print, have taken advantage by using it as a strategic business tool.

Jon Bailey, Sales Director [at ProCo Print] confirms "The internet obviously changed everything... Most of all it meant that the printing industry had a choice. If they (Printers) embraced the internet and worked with it then they had a chance of competing."

There are some established printing firms, for example 'Vista Print', and 'Printing.com' that have used the web to print system precisely as a strategic business tool, which enables them to easily maintain constant supply and accessibility through their website.

There are, however, some printing firms that are just opportunist's promoting cheap print, Price identifies "When you place an order on the internet for your print, you have no idea where it is being printed".

This point is also confirmed by Lyall who believes if "You pay your money, you take your choice".

Even if this is the case, personal service or that special relationship that many marketers have with their printer will gradually disappear. Even though the innovative development of 'web to print' can be seen as a success and could be developed further, the personal approach and relationship that a printer has with a customer could gradually be lost.

To a certain extent competition is holding back the progression of the industry as it competes with electronic media, however, the industry should view it differently. Print and other non printed sources are just part of a 'bigger picture', which is 'integrated communication'. The industry should embrace the developing technology and work with it in order to complete the 'bigger picture'. By doing this people will begin to understand the value of print and that it is an integral part of communication.

SUSTAINABILITY

To what extent does sustainability offer the print industry an innovative path to develop and prosper?

Initially you may consider that sustainability doesn't have that much directional force within the industry, on the contrary it does. Over recent years it has developed into a far 'greener' industry than is generally understood. Therefore within this chapter I aim to investigate how sustainability could be viewed as an innovative movement and whether it is encouraging the industry to develop?

Paper is an essential part of the printing process whether you're producing packaging, leaflets or business cards. I have observed within the media, that they consider the printing industry is not environmentally friendly, arguing that paper is bad for the environment and, that print and paper is a wasteful product. When you consider the headlines the media portray on the industry's printing process including it's sustainability, CO2 emissions, de-forestation. Only to find out that just "11% [of the world's forests] is used directly by the paper [and print] industry"²⁰. It should be recognised that paper is the most sustainable product in the industry.

The paper industry is probably the only industry within the UK economy that can put their hands up and confirm that their industry is far more sustainable than any other industry within the UK, or even the world. Jonathan Porritt, former head of the UK sustainable development commission confirms, "There aren't many industries around that can aspire to becoming genuinely sustainable. The pulp and paper industry, however, is one of them."²¹. Porritt goes on to say that the print and paper industries have been a sustainable industry for a long time, "[The Paper and Print Industries] at it's best...is inherently sustainable"²². This

²⁰ *Making Paper Destroys Forests*. <http://www.twosides.info/content.asp?ContentID=30> 15/11/10

²¹ GETTLER, L.,. 01/11/10 *Rallying call to defend print's place* <http://www.proprint.com.au/InDepth/236825,rallying-call-to-defend-prints-place.aspx> 08/11/10

²² GETTLER, L.,. 01/11/10 *Rallying call to defend print's place* <http://www.proprint.com.au/InDepth/236825,rallying-call-to-defend-prints-place.aspx> 08/11/10

is also backed up by the CEO Perspectives 2008 and Pricewaterhouse Coopers who say “Forestry, paper, and packaging are among the most sustainable industries in existence”²³.

Even though Print can sometimes come under fire from green parties via the media, not all environmentalists agree. Bernard Cassell, chairman of the Australian Paper Industry Association explains,

“All the environmentalists know that the paper industry is sustainable and they will privately admit to that but none will give up the spurious claim because of the affect it has on the public.”²⁴.

Even though Cassell, is speaking on behalf of the Australian Paper Industry Association the point is still valid and relevant within the region and UK.

Due to the influence of the media people still believe that the industry is not as energy efficient compared to electronic media. If this is the case then the Print Industry needs to make people more aware through stronger public relations across the region, but also as an industry. Hopkins agrees by explaining, “The industry could speak up for itself more and say you know what we are environmentally friendly, you can recycle our products, and in fact you can use recyclable fibres if you wish”. Even though this quote identifies print and its use of sustainability products, it also highlights that print as an industry needs to be much more aggressive in their marketing approach to promote the value of print within a sustainable environment.

The assurance that the future of the print and paper industries could be identified as a sustainable resource, was largely down to the founding of the Forest Stewardship Council (FSC) in 1993.

²³ *Print and Paper Is A Wasteful Product* <http://www.twosides.info/content.asp?ContentID=38> 15/11/10

²⁴ GETTLER, L.,. 01/11/10 *Rallying call to defend print's place* <http://www.proprint.com.au/InDepth/236825,rallying-call-to-defend-prints-place.aspx> 08/11/10

FSC is widely supported by many green parties including WWF, Greenpeace, and The Woodland Trust. The FSC provides international standards for forest management taking into consideration environmental, social and economic aspects.

Recent observations within the industry have found that businesses are asking for FSC approved paper stock, more so within the public sector. These changes have generally been steered by the government and local councils. Support for FSC registered paper stock has made many business owners become more environmentally conscious, which has therefore directed printers into change by becoming more environmentally conscious in order to gain work. As Whiston confirms, “[Being environmentally friendly] has certainly been driven by the government and the local councils. If you’re not printing on sustainable papers, if you’re not printing with vegetable inks, if you’re not printing with the environment in view they (public and private sector) will not give you the work”.

Printers within the region would agree that recycled paper stock has become largely fashionable in recent years and, this has naturally created supply on demand. We see prices rise on a day to day basis, this is largely due to inflation, but in this instance recycled stock has become highly fashionable, creating a high volume of demand.

Whiston [of Paragon Print] agrees, “Years ago that (recycled paper) used to be the cheapest paper because it was full of fibres. Therefore, years ago, that paper that nobody wanted, was the cheapest. But now because everybody ‘has to have it’, it’s now the dearest but the process is exactly the same, it all comes down to supply on demand”. However, in some instances some printing firms such as Media21a believe that recycled paper “is not always that good for the environment”. This comes down to opinion, but they believe that the long and extended process that the paper goes through to be labelled as recycled, “is not very environmentally friendly”.

On the other hand, being registered under FSC can be as much a benefit to printing firms than it is for the environment. As Coombs highlights “[Being] FSC registered does open doors”. Being registered under FSC certainly seems to

guarantee a solution that enables businesses and printing firms to highlight that the paper stock that they supply and use, has come from well managed sustainable sources.

Even though FSC has been going for nearly twenty years, there are in fact more current sustainable minded campaigns that are promoting sustainability within the graphic communication sector e.g:

- www.twosides.info
- www.re-nourish.com

Two Sides in-particular have a campaign under way called The Print Power campaign, that “will promote print and paper’s sustainability” (2010, p6)²⁵ . The campaign will also focus on informing and persuading marketers who choose other media channels that “print is effective as part of a multi-media campaign” (2010, p6)²⁶ . Two sides also offer a forum for the communication sector’s to work together and share experiences of improving standards and practices. This will ultimately maximise confidence with the continued use of paper and print as a communicative medium.

However, re-nourish.com is a non-profit organisation which provides graphic designers with an independent online toolkit for sustainability. It offers advice on being more ‘greener’ minded when it comes to printing processes, it even goes to the extent of what printing process is right for the job, additional ways to become ‘greener’ is by using their Project Calculator which will enable the designer “...to minimise paper waste during the printing process”²⁷.

Overall, even though there is some form of recognition that the industry is indeed more “greener” than it has ever been before. Sustainability within the industry has ultimately been driven by the government as it aims to be much

²⁵ 21/10/10. *PrintYorkshire - leading the way in innovation in new markets*. Business Supplement, p6 Yorkshire Post

²⁶ 21/10/10. *PrintYorkshire - leading the way in innovation in new markets*. Business Supplement, p6 Yorkshire Post

²⁷ Resources: Greener Printing http://www.re-nourish.com/index.php?l=resources_printing 15/11/10

more environmentally conscious. So it can therefore not be identified as an innovative movement but as a environmental process that needs to be recognised by the graphic communication sector. To conclude, sustainability does not seem to offer the print industry an innovative path to develop and prosper but more as a credited and stronger market to work with.

INNOVATION

Firstly what is innovation? It may be considered “disrupting the future”²⁸ as the definition of innovation, or ‘doing things differently’ through existing tools and resources. Whichever way you look at it Print certainly needs some form of innovative movement to stop it from stagnating. Over recent years printing firms have struggled to offer fresh new services. In a recent survey taken by marketing professional’s, “90% agreed that print still has a major role to play, [but] 97% of those surveyed believe that to ensure a profitable future print needs to adapt by integrating with digital media.”²⁹ This is certainly the case, as the print industry is seemingly treading water whilst other technologies are developing, it should be a major concern that the print industry should integrate within these developments.

To what extent do the current innovative developments within the regional industry help SME (Small, Medium Enterprises) printing firms to innovate, develop and prosper? Well, what are these developments? For somebody with a brief understanding of the industry they may know that digital print has and is developing the future of print. There are currently two other elements that are improving the development of the sector within the region i.e printed electronics and SMS texting campaign.

This part of the study has benefited from my research and interviews with significant people and bodies in the region.

The development of digital print over the past twenty years and most recently during the past five years has seen an increase of digital printing firms. This has certainly giving litho printers another form of competition to compete with, especially when digital print has become renowned throughout the industry for its short runs, quick turnaround and near perfect litho quality. Digital print however can only print up to A3 in size, which can cause certain limitations in

²⁸ J WEBB and R ROMANO, 2010. Disrupting the Future; Uncommon Wisdom for Navigating Print’s Challenging Marketplace.

²⁹ *98% of printers say the industry needs to adapt*
<http://www.dotgain.org/2010/10/what-im-thinking-about-this-week> 21/10/10

efficiency and productivity. Hopkins, believes once a large sheet size has been achieved digital print "...is going to be eating into the litho market, especially if they manage to hold the quality that they have developed over the last five years".

Industry Support

In any type of business that wants to develop and innovate, you need some form of guidance or support. In the Printing Industry, the BPIF (British Print Industries Federation), offers support to its members through specialist servicing. This includes support in HR, Health and Safety, Environment and in Training. As Coombs points out, "they (BPIF) support the internal management of the business and the law of how we work." The BPIF also offers apprenticeships schemes for its members, assessing the apprentice's on the job every six weeks over a period of two years. Other Business support is also available within the region including Business Link and Yorkshire Forward, who offer funding for training and guidance for businesses that are just starting out. As a body though BPIF certainly don't seem to back the future of British Printing, on a constructive level, that would make companies look forward together, on how the industry could develop. On the other hand the organisation Print Yorkshires strategy is 'to meet this target'.

Print Yorkshire provide opportunities for printing firms and other businesses to get together through networking events, they also encourage live projects which directly benefit the future of the print industry. Even though there is support out there to help the industry develop, there is concern that there is no direct support for small enterprises who wish to innovate and develop their business.

Shepherd [of Jade Print] questions, "What happens in a company of 10 people where the owner also carries out a production role? Where are they going to get the time to look at strategic innovation?".

Innovation and Market Development

This part of the study relies on an interview with Mike Hopkins, Project Manager at Print Yorkshire.

Being innovative within any business is an essential part of progressing as a company and as an industry. So the recent project that Print Yorkshire has been working on, Printed Electronics has certainly created some form of regional interest. Hopkins explains the thought behind the concept,

“What can we find to bring to print companies that offers them a prospect of a new market, or new customers to use with their existing equipment and to produce with their existing equipment.”

That is a very important factor when you realise how much printing presses can cost. Hopkins went on to say:

“It’s about integrating electronics, printing in normal litho printing process...making things interactive, speaking to you by touch.”

The concept is rather basic, with various hot spots placed on one side of the artwork, and an electronic circuit printed on the other, all done through a litho press. By touching the hot spots the artwork will be able to speak to you.

The concept has already identified its position within the market place, so far it includes education, retail, entertainment, and the third sector.

Other sectors will open up as the technology develops and production costs begin to fall. This project is certainly unique, and holds great prospects for the future. Financially it could supply the world’s print industry with a revenue of “...anything between 55 and 300 billion dollars by 2020.” according to Hopkins. Even if you take the lowest figure of 55 billion dollars “...71% of that revenue will come through to the printing industry, some major consultancies say”. To make this facility available to printing firms across the region and the UK it will take up

to 3-5 years. So the reality is that Printed Electronics is certainly not going to happen overnight, just like digital printing.

Digital Print has taken twenty years for it to turn into a 'cash cow' for many business owners. Hopkins confirmed that there had already been some interest from customers who would like to use the product, making the project a reality. Hopkins believes that the success of the project was all down to the SME commercial printers that were involved, "They are the cornerstone of the printing industry and most likely to achieve the maximum adoption of the technologies"³⁰.

The development of Printable Electronics, can certainly help the industry in the region, it will make people aware that print can still be engaging and an interactive piece of communication. CEO [of Print Yorkshire], Robert McClements identifies how significant the project is,

"Its use as an informative and educational tool can be increased so that its value can be multiplied. The market for print can be sustained, with the consequent sustainability of jobs and businesses" (2010, p6)³¹.

Another element which is being developed within the region is SMS (Short Message Service) texting campaign. Print Yorkshire confirmed that networking events will be occurring during 2011 to bring media experts from multimedia, and e-marketing sectors together with the print industry. In order to develop the SMS texting campaign, web to print, social media to print, and mobile to print systems are beginning combined and introduced into smart phone's applications. This will enable marketers and the general public to send their piece of artwork to any printer in the UK from any where in the world. An existing application such as 'Shoot It!' has already been tried and tested in

³⁰ HOOKER, A., 07/09/10 *Yorkshire print consortium prepares for printed electronics product launch*
<http://www.printweek.com/business/news/1026904/Yorkshire-print-consortium-prepares-printed-electronics-product-launch/> 15/11/10

³¹ 21/10/10. *PrintYorkshire - leading the way in innovation in new markets*. Business Supplement, p6 Yorkshire Post

America. This application allows you to send a postcard from your smart phone, making it a faster and cheaper than a conventional postcard.

Other types of 'web to print' and 'social media to print' applications include signposter.com, and print cloud.

This development of innovative projects can be implemented rather quickly and is ideal for the print industry to establish straight away.

Hopkins agrees, "Web to Print Solutions are ideal. The customer does all the work, does all the layout, the template, they proof it themselves and it is automatically imposed and sent to the press".

To conclude, in order for the Industry to develop and prosper, a printing firm should never have to say no. Each printing firm should always be active, as innovation involves all aspects of their business, not just print, offering physical and non physical services. So even if a firm can't offer the service, they should know of a supplier 'who can'.

As Whiston [of Paragon Print] confirms, "we have to offer everything under one roof, [a one stop shop]". In order for the industry in the region to out compete other forms of media, they have to "...show them (marketeers) what they want!" according to Bailey, Sales Director [of ProCo Print]. For example Printed Electronics and the 'to print' systems. In some cases it is not just about purchasing a new piece of equipment, or trying to demand print off customers. "What will save our industry are fundamental changes in the way we do business."³² Even though these projects offer some hope I don't know how businesses could financially support this development as a forward driver during the economic period.

³² Disrupting the Future, Uncommon Wisdom for Navigating Print's Challenging Marketplace, by Joseph Webb and Richard Romano (Yorkshire Post, 21/1010)

CONCLUSION

To conclude, the Print Industry in general has always found itself driven by exterior forces for example, the economy, and technology. The rate of innovation within the industry has been extremely rapid during the late 20th and early 21st century. The recession, particular the timing of the economic downturn, along with government cut backs within the public sector has forced the print industry to change.

Even though employment is an issue, the movement of government spend has exposed the weakness of the print industry and the need to find different sources of work, in particular the commercial sector. With continual competition within the industry, the printing sector also faces significant competition with the continual development of electronic media, although print has become far more 'greener' than it is generally perceived. Yet current innovative projects that are currently on going offer some hope for the industry, but the understanding that particular printing firms could support this innovating driver.

A recent analysis by Webb and Romano upon the global Print Industry encapsulates how the industry should develop and innovate,

"It's about challenging our assumptions, questioning the conventional wisdom that guided many print businesses in the heyday of the industry".³³

If the industry could do just that then I have no doubt that there will be a future for print, but it could look very different in the next 5 - 10 years.

Final Comments

In this conclusion I refer back to my objectives which were exploring the study of the print industry, focusing on the North West of England and Yorkshire development and past innovation. The findings based upon the qualitative

³³ Disrupting the Future, Uncommon Wisdom for Navigating Print's Challenging Marketplace, by Joseph Webb and Richard Romano (Yorkshire Post, 21/1010)

research were found relevant. The qualitative information has been used to show the impact the recession has had upon the industry, and how it currently is developing. The industry has shown interest in the findings of the study. Feedback of these findings will be done once the study has been accepted by the University of Huddersfield.

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