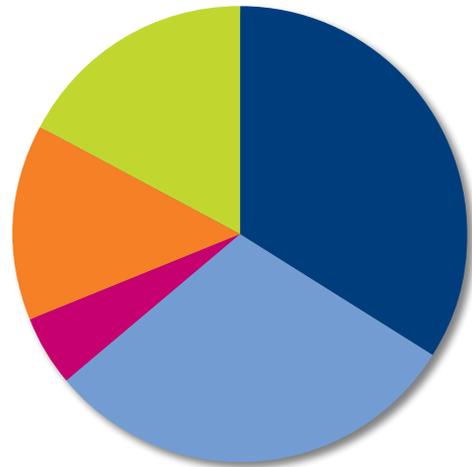


# PRODUCTS BY SECTOR

The vast majority of printed products have an impact on Marketing. The relationship is vital - not just for the directly related point-of-sale, direct mail and poster advertising material but also in the channels provided through newspapers, magazines and brochures; brand identity on printed packaging and labels; and, even the additional programme and ticket marketing collateral surrounding events.

Turnover share by product sector - Marketing is important with a significant direct and indirect impact



- Advertising literature & event programmes, tickets etc. 34%
- Newspapers, magazines, books, brochures etc. 30%
- Printed packaging and labels 14%
- Other printing 7%
- Security printing 5%

Source: BPIF Research analysis of ONS PRODCOM data for 2009.

# WHY PRINT MEDIA?

## The ideal medium

There's no doubt that the world in 2010 is defined by information. Whether it's news, opinions, interviews or advertising, information provides direction and structure to our lives. Print media, television, online, mobile and social media are all now vital components of any campaign. But which is most effective?

## Add print, add power

Print can be mass-produced or personalised in small quantities. It is engaging, versatile and creative. Research proves that advertising in print is twice as effective as on television for retailers, while catalogues and customer magazines allow your brand to engage with your customer for up to 25 minutes per session.

## Making the connection

The key to successful marketing is engagement, drawing your customer in through attention-grabbing content then rewarding them with the worthwhile offer or service. Print media works because it understands the needs of the customer and grabs their time and attention.

## Building the relationship

People typically return to a publication a number of times to take in the information it offers: information that's both authoritative and reliable. Publications will often be read by more than one person in a household. Direct mail is the most personal medium, ideally placed to maintain the consumer-brand relationship.

## High accessibility

Print is tactile and stimulates the senses. It puts your brand into your customer's hands. Print is accessible and portable too - there's no need to upload information, so no waiting time or problems with network access, while its light and foldable nature remains a huge benefit to the reader on the go.

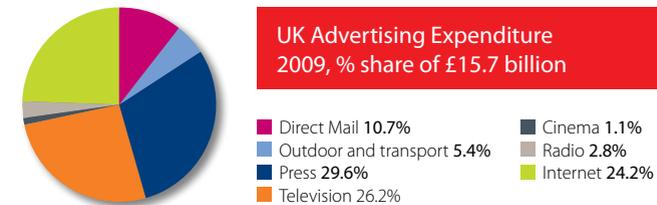
## Media-mix integration

An effective marketing campaign works best when print is used with other media as part of an integrated solution. By adding print to TV and online media, you almost double your brand awareness, and increase buyer's purchasing intentions by over 50 per cent.

Source: Print Power, [www.printpower.eu](http://www.printpower.eu)

# ADVERTISING IN PRINT

Printed media (direct mail, outdoor and transport and press) takes the largest share of advertising with over 45% of expenditure in 2009. While, print media is under threat from the rapidly growing internet sector and an expected return to growth in television advertising, the latest Advertising Association / Warc Expenditure Report forecasts that advertising expenditure will grow by 5.4% in 2010 and a further 2% in 2011.



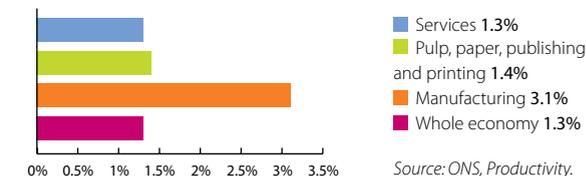
UK Advertising Expenditure 2009, % share of £15.7 billion

Source: Advertising Association / Warc Expenditure Report

# PRODUCTIVITY IN PRINT

Not many printing companies can generate the scale efficiencies that many of the largest manufacturers can. However, technology improvements have been drivers for above average efficiency gains.

Productivity (output per hour): Annual average % increase 2000 - 2009



Source: ONS, Productivity.

# PRINT IS SUSTAINABLE

**Two Sides** is an initiative to promote the responsible production and use of print and paper, and dispel common environmental misconceptions by providing users with verifiable information on why print and paper is an attractive, practical and sustainable communications medium.

The single biggest direct cause of tropical deforestation is conversion to cropland and pasture.

Source: [Replantingtherainforests.org](http://Replantingtherainforests.org) and NASA Earth Observatory.

In Europe the area of forest cover is growing at a rate of 1.5 million football pitches every year.

Source: EEA *The European Environment: State and Outlook*.

The Paper industry is a relatively small user of wood. Of the wood extracted from the world's forests, 53% is used for energy production, 28% is used by sawmills, and only around 11% is used directly by the paper industry.

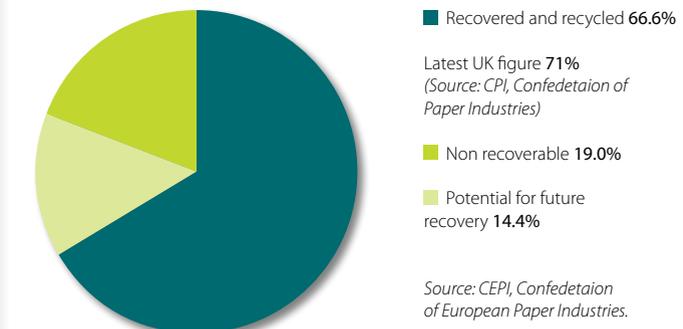
Source: FAO, *Food and Agriculture Organisation of the United Nations*.

The recycling rate in Europe reached 66.6% in 2008. The total amount of paper collected and sent to be recycled in paper mills came to 60.3 million tonnes.

Source: CEPI, *Confederation of European Paper Industries*.

For further information visit [www.twosides.info](http://www.twosides.info)

Recovery of European print and paper waste products



Latest UK figure 71% (Source: CPI, *Confederation of Paper Industries*)

Source: CEPI, *Confederation of European Paper Industries*.

# UK PRINTING THE FACTS AND FIGURES

- World's fifth largest producer of printed products
- £14.3 billion turnover
- £6.4 billion gross value added
- 10,500 companies
- 140,000 employees
- Positive trade balance of £1 billion in 2009
- £700 million capital investment in 2008



# WHAT IS PRINTING?

It's almost impossible to imagine a world without print. It's all around us and plays a vital role in our daily lives.

**Print is largely produced using sustainable materials.** It is predominantly paper-based, with three to four trees replanted for every tree logged in managed forests. Printing companies are at the forefront of improvements in environmental performance in manufacturing, with high levels of take-up for both the ISO 14001 environmental management standard and for FSC and PEFC chain of custody accreditations.

**Print is highly effective:** it provides the means to communicate 'messages' easily, quickly and cheaply.

**Print has impact:** it is creative, it engages, it is versatile and it is persuasive.

**Print has longevity and authority.** It is tactile and offers a 'real world' experience. It has a unique ability to grab and hold people's attention. In fact no other media channel can offer this combination of qualities.

**Print is an important vehicle for advertising, education, entertainment and information.** It serves all parts of the UK economy - including central and local government, financial services, retailing, distribution, travel and tourism and manufacturing industries.

**Print is an advanced manufacturing sector** that utilises cutting edge information and production technologies. And together with pulp, paper and publishing, it forms part of the UK's fourth largest industry.

# ECONOMIC IMPORTANCE

With a turnover of £14.3 billion<sup>1</sup>, gross value added of £6.4 billion<sup>1</sup> and employing nearly 140,000 people<sup>1</sup> in around 10,500 companies<sup>1</sup> the UK printing sector is an important economic contributor and employer in all UK regions. The UK is the fifth largest producer of printed products in the world<sup>2</sup> and contributes almost £1 billion<sup>3</sup> to the UK's balance of trade.

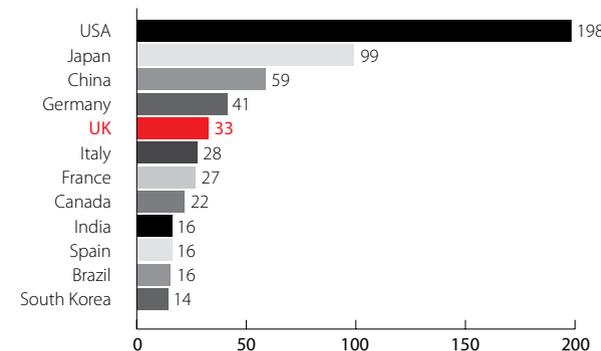
Sources:

<sup>1</sup> BPIF Research analysis of ONS data.

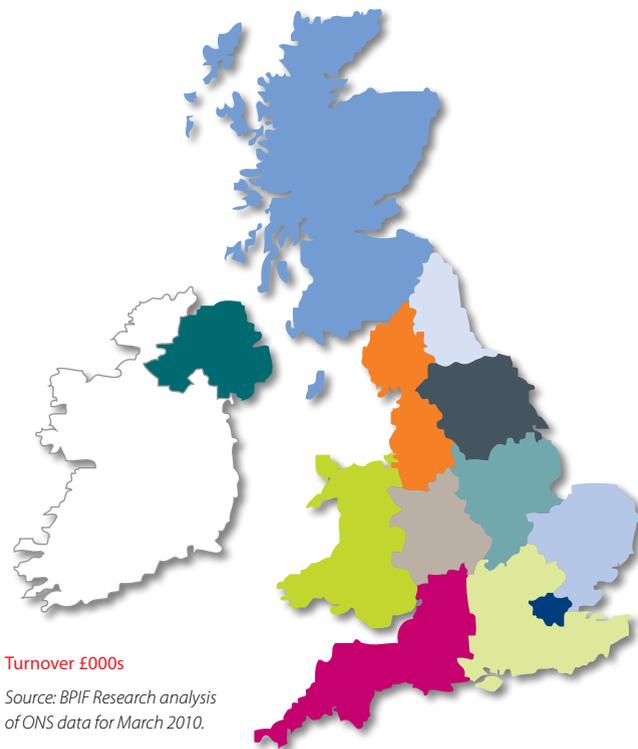
<sup>2</sup> Pira International.

<sup>3</sup> BPIF Research analysis of HM Revenue & Customs (HMRC) data - £974 million in 2009.

## The UK is the fifth largest printing country in the world



## Regional UK printing: Companies, employment, turnover



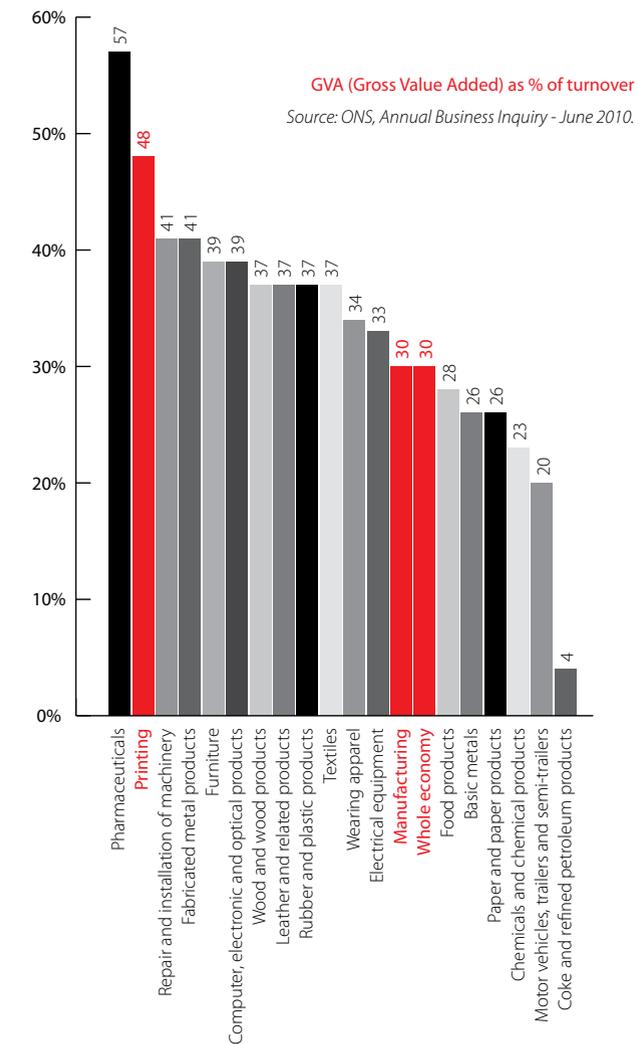
Turnover £000s

Source: BPIF Research analysis of ONS data for March 2010.

<b>North East</b> Companies 273 Employment 5,889 Turnover 797,048	<b>West Midlands</b> Companies 876 Employment 8,494 Turnover 694,366	<b>Scotland</b> Companies 487 Employment 6,234 Turnover 586,135
<b>North West</b> Companies 1,066 Employment 13,937 Turnover 1,424,678	<b>East</b> Companies 1,249 Employment 14,064 Turnover 1,421,805	<b>Northern Ireland</b> Companies 164 Employment 2,159 Turnover 180,537
<b>Yorkshire and The Humber</b> Companies 853 Employment 15,902 Turnover 1,659,608	<b>London</b> Companies 1,520 Employment 17,391 Turnover 1,983,959	<b>Wales</b> Companies 369 Employment 4,780 Turnover 470,247
<b>East Midlands</b> Companies 947 Employment 14,955 Turnover 1,431,056	<b>South East</b> Companies 1,784 Employment 24,470 Turnover 2,689,431	<b>England</b> Companies 9,521 Employment 125,694 Turnover 13,013,918
	<b>South West</b> Companies 953 Employment 10,592 Turnover 911,967	<b>UK</b> Companies 10,540 Employment 138,867 Turnover 14,250,837

# VALUE ADDED IN PRINT

Printing adds relatively more value than all but one other manufacturing industry



# CHANGES IN PRINT

The printing industry is going through huge changes as it transforms itself into the essential delivery vehicle for the entire spectrum of communications solutions demanded by its clients.

While print is a major part of the modern, digitally-based communications landscape, it is one of a number of channels multi-media world.

Today more and more printing companies are delivering integrated marketing solutions to their clients that add value to their businesses by expertly combining print and electronic media to leverage up the impact of both.

**Remember this...**  
Print adds value, not just as an efficient production process, but in providing a return on marketing investment.

# ABOUT US

The BPIF is the principal business support organisation for the UK print, printed packaging and graphic communication industry and is one of this country's leading trade associations. Visit our website to find out more about us or contact us at the address below.

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[www.britishprint.com](http://www.britishprint.com)