



# 44TH ANNUAL Print Design Survey

This special report is sponsored by **MAN Roland**, as a service to graphic design and production professionals. The 150-year-old global leader in the development of presses and advanced printing technology, MAN Roland is a longtime supporter of seminars and other informational efforts that help creatives make the most of the power of print. "As new alternative media battle it out for mindshare, print continues to demonstrate its strength as the leading choice for marketers, publishers and educators," says Vince Lapinski, CEO of MAN Roland. "One reason is that new pressroom technology makes print more cost effective, more attractive and more interactive than ever. But print users need to know how to activate those advantages. That's why MAN Roland uses every opportunity we can to keep the creative community in touch with the continuing evolution of print." For information about MAN Roland's Printing for Creatives Seminar series, contact: [www.manroland.com](http://www.manroland.com).

# Ain't Nothing Like The Real Thing

BY GORDON KAYE

Sometimes, when you have a conversation with an associate, a friend, a spouse or a lover, the exchange is about one subject on the surface, but the give-and-take masks a second, more meaningful communication.

As I poured over the multitude of responses to our annual print design survey, I had that feeling. On the surface, our readers are dutifully talking shop with us about print buying, paper specing, project selection, digital printing, recycled papers.

But, beneath the surface, they're responding to our rather mundane queries by belting out the lyrics of the 1968 Marvin Gaye and Tammi Terrell classic, "Ain't Nothing Like the Real Thing." To put it less melodically, our readers' essential message is that print exemplifies an authentic human connection that they fear is being lost in our increasingly digitized daily lives.

This idea bubbles to the surface in many different forms throughout the survey, but there are five clear and sometimes overlapping threads:

1

Print uniquely engages the emotions and stimulates the senses with its classic strengths of permanence, tangibility, sensuality and physicality. Print is hot and touchable, rich and textured, held and felt, in contrast to the cool and ephemeral nature of the Internet.

2

Print feels more trustworthy and credible than other media, and the very tangibility and permanence suffuses the content — and the content creator — with a sense of authenticity.

3

The current communications environment is cluttered and fragmented. In this era, a well designed and well executed printed piece can be a special experience, one with resonance and impact, one that moves beyond the digital cacophony.

Print is credible. Having a tangible object in your hands is part of the experience. Texture, smell, look and finish all send signals and a strong message to the intended audience.

— Steph Doyle, CPDR, Rockville MD

4

Paper is integral to the process, with the ability, when chosen and used properly, to bring a communication to full physical life for all five of the recipient's senses.

5

The Internet is wondrous, broad, efficient and convenient, but it is also just too fast, easy, cheap and fragile to carry certain messages. Thus, matching the right media for the right message — as well as combining print and non-print media — is a key challenge for the creative community.

So, yes, I know that on its face, this report appears to capture a discussion about the relative merits of opaques and coateds, digital and offset, FSC and SFI. But, as you read it, ask yourself, are we still talking print here, or is this really a heart-to-heart about the nature of our personal and professional lives? For me, I hear Marvin and Tammi: "No other touch can do half as much... Ain't nothing like the real thing."

# 92% Work in Print

The 2007 survey shows how vital print work is to graphic designers. The annual benchmark question is, how many readers — creative professionals at graphic design studios, advertising agencies, corporations and other institutions — design for print as part of their jobs? This year, 92% of respondents say that they design for print, which is up from 91% last year, though down slightly from the halcyon print days before Al Gore invented the Internet. In any event, it is a huge number that is more or less consistent with every survey in memory.

This year we also asked, what percentage of projects involve print design either completely or in part? Here, too, the dominant role of print stands out. GDUSA readers report that 75% of their projects are stand-alone print or have a print component to them. Similarly, when asked what percentage of time is spent designing for print, the average answer is 70%.

If more than nine in ten respondents design for print, for what other media are they designing, and how do other media compare?

Here, the usual suspects all appear, though in a slightly different order than last year. The survey finds that 72% of readers say they have been working on web design; 69% on point-of-purchase, sign and exhibit design; 59% on packaging; and 24% on motion and broadcast graphics.

A few thoughts to consider. First, these figures demonstrate that creative firms and departments continue to be involved in varied and complementary projects in diverse media. The content creator is at the center of responsibility, and control over multiple media is the basis for the graphic design community's considerable influence on communications, as well as its buying and specifying power.

Second, print projects are critical to how designers actually make a living, a conclusion confirmed by our strategic allies at The Industry Measure ([www.industry-measure.com](http://www.industry-measure.com)), who find that print and collateral remain the leading sales opportunities for graphic design firms by a wide margin. Third, point-of-purchase and package design stand as traditional and important staples of the business, which makes sense, since they have some of the physical attributes and appeal of print and, if anything, are even less impacted by new electronic media than print.

Fourth, web design continues to climb in importance. Indeed, at 72%, web design lands squarely in second place in terms of the kinds of projects that graphic design professionals work on. This can be explained, at least in part, by the growing range of web-related activities in which graphic designers are engaged — the ongoing maintenance of existing websites, creative design for new websites, developing email marketing campaigns, providing the programming for sites and dismantling discontinued sites, setting up e-commerce functions and designing content for videos, mobile media and games.

One logical explanation for the continuing strength of print, even while web work rebounds, is that cross-media projects — which encompass print and web components — are increasingly common. Fully one-quarter of respondents to this year's survey say they worked on cross-media projects involving print and Internet design during the past year.

## WHICH TYPES OF MEDIA HAVE YOU DESIGNED FOR IN THE PAST YEAR?

1. Print
2. Internet
3. POP/Sign/Display
4. Package
5. Environmental Graphics
6. Broadcast/Film/Video

## WHAT PERCENTAGE OF YOUR TIME IS SPENT DESIGNING FOR PRINT?

# 70%

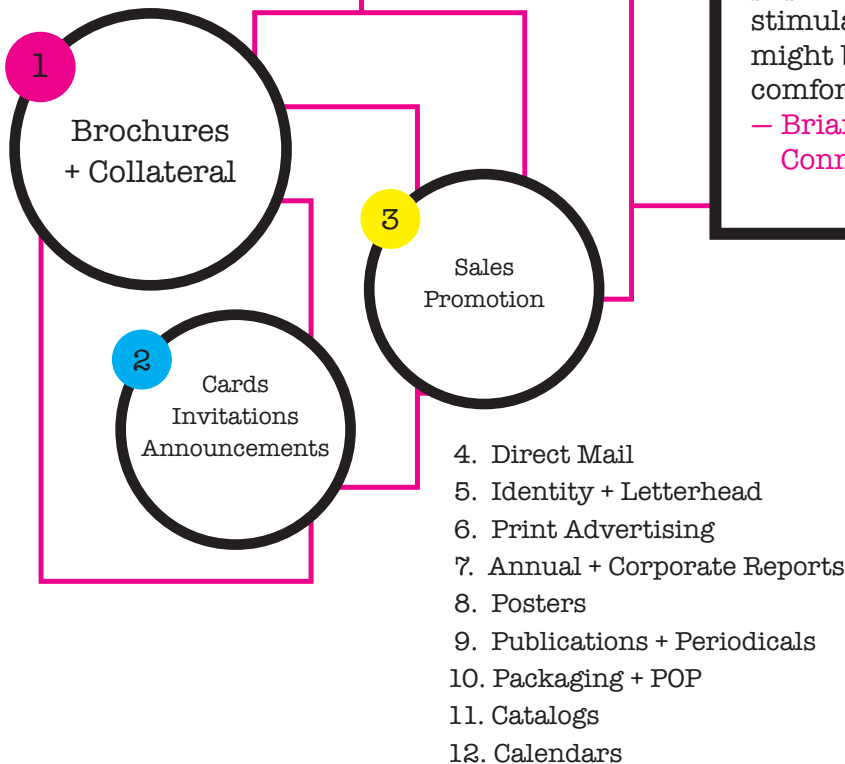
# Brochures and Collateral, Again

What kinds of print projects have creatives worked on in the past year? The types of projects remain consistent over time, but this year the exact order of frequency changed a bit. Brochures and Collateral is the perennial leader, and again ranks first in today's report. Interestingly, the category of Cards, Announcements and Invitations stepped into the second spot, completing a multi-year rise from being an ancillary activity to being a distinctly mainstream one. The Sales Promotion, Direct Mail and Identity and Letterheads categories round out the top five.

That brochures and collateral are on top is no surprise; the category is broad and useful and has long been the staple of creative firms. More interesting are the next few categories, each of which scored higher than ever. The increase in direct mail and cards, announcements and invitations, as well as a clear spike in letterhead projects, can all be seen as part of a "warming" trend in a sea of cool, electronic communications. More personalized and customized forms of print reflect the rise in one-to-one marketing and personalized communication — even handwritten notes — at the expense of mass media and mass advertising.

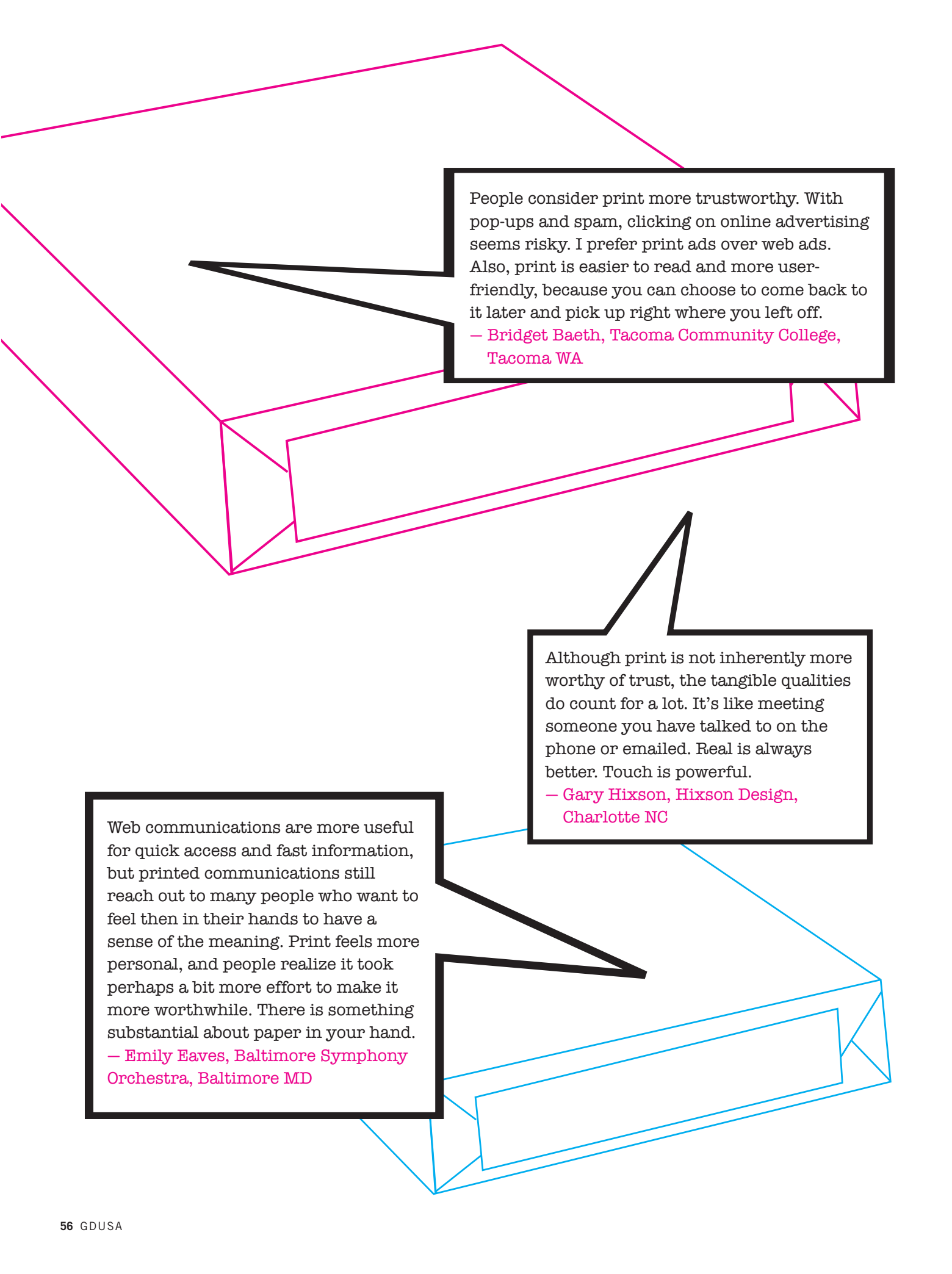
Also of note, annual report design and print advertising projects both jumped up the list two spots after drifting down, down, down over the past several years. Why they have fallen in this era is obvious, since each is seen as particularly vulnerable to competition from online products. Why they saw a bounce this year is not so clear, though it may speak to a pendulum swing back toward tangible output. Anyway, it is something we will monitor closely in the coming year.

WHAT KINDS OF PRINT PROJECTS HAVE YOU WORKED ON IN THE PAST YEAR?



Print will always be the most interactive form of communication. It bypasses the need for electricity and software to deliver its message. Print and paper engage the senses and stimulate creativity. Digital might be faster, but print is comfortable and friendly.

— Brian Hannon, Curran & Connors, Hauppauge NY



People consider print more trustworthy. With pop-ups and spam, clicking on online advertising seems risky. I prefer print ads over web ads. Also, print is easier to read and more user-friendly, because you can choose to come back to it later and pick up right where you left off.

— Bridget Baeth, Tacoma Community College, Tacoma WA

Although print is not inherently more worthy of trust, the tangible qualities do count for a lot. It's like meeting someone you have talked to on the phone or emailed. Real is always better. Touch is powerful.

— Gary Hixson, Hixson Design, Charlotte NC

Web communications are more useful for quick access and fast information, but printed communications still reach out to many people who want to feel them in their hands to have a sense of the meaning. Print feels more personal, and people realize it took perhaps a bit more effort to make it more worthwhile. There is something substantial about paper in your hand.

— Emily Eaves, Baltimore Symphony Orchestra, Baltimore MD

# 89% Specify Paper

As a companion figure to the 92% of readers who work in print and the 88% who buy printing, the 2007 survey also establishes that 89% of our readers specify, recommend, approve or buy the paper used in print projects. This figure is similar to last year's survey and within a few percentage points of the highwater mark reached in the mid-1990s.

In the broad sweep of graphic arts history, this figure is substantially higher than in the past, when the commercial printer and the paper distributor were largely in control of the final paper decision, when paper choices were more limited and when graphic designers had less influence. As we have noted in the past, the growth in responsibility and control by the creative community over paper decisions foreshadowed its gain of control over all aspects of production — hardware, software, pre-press, workflow, proofing, print buying and the like. Enough of the past.

As for today, the comments captured later in the special report tell much of the story about the state of paper specification. Creatives are remarkably committed to, as well as enthusiastic about, paper and what it represents in their personal and professional lives. They fully understand that the cacophony of our digital age is actually making the well-designed and well-specified printed piece more persuasive and valuable. And they comprehend that paper character and quality can make or break, enhance or undermine, a project or campaign.

At the same time, the comments also reveal a faultline in the graphic arts today between quality and commoditization, between good and good enough, between the judgement of the designer and that of the client. Paper specification, it would appear, stands astride that faultline.

DO YOU SPECIFY, RECOMMEND,  
APPROVE OR BUY PAPER?

YES 89% NO 11%

ARE YOU SPECIFYING PAPER  
MORE THAN, LESS THAN OR  
THE SAME AS LAST YEAR?

MORE  
15%

SAME  
61%

LESS  
24%

There is nothing like a printed piece to hold in your hand and take the time to digest. Take an invitation or a capital campaign appeal, for example: compare online, radio, television or telephone appeals to a print appeal. The later will always be far more effective when it comes to format affairs and significant capital campaign contributions.

— Michael Pollak, Metrodesign Associates, Homer NY

Quality is still a priority. Specifying the right paper is integral to the concept and design. Nothing beats the feel of a piece that complements the design.

— Sakol Mongkolkasetarin, Acme Advertising, Culver City CA

# 88% Buy Printing

Print buying among creative professionals has been a growth activity for several years. This will continue to accelerate, as the traditional wall between design and production comes crashing down and the number of firms operating in a hierarchical manner with a dedicated print buyer function dwindles. For the second year in a row, roughly nine-in-ten respondents say they buy printing as part of their jobs.

And as in the past couple of years, designers say they are buying more printing than in the recent past. What do they look for in a commercial printer? As with last year's responses, the winning printers combine price, quality and personal character. Thus, quality and price top the charts, but trust, customer service and reputation and branding also count for a lot.

For the first time this year, we asked readers specifically if they bought or are considering buying printing online through the national services exemplified by Modern Postcard, 48 Hour Print, 4Over, Team Concept Printing, Imagers and the like. More than half of respondents — 56%, to be exact — say they ordered printing online or are considering it.

Moving back to the general question of what designers look for in a commercial printer, one factor saw a jump from seventh place last year to fifth place this year: digital short run printing capabilities. And that provides a perfect segue into the next topic.

DO YOU SPECIFY, RECOMMEND,  
APPROVE OR BUY PRINTING?

**YES 88%** NO 12%

HAVE YOU BOUGHT PRINTING ONLINE  
FROM A NATIONAL SERVICE?

**YES 37%**  
CONSIDERING IT 19%

ARE YOU BUYING PRINTING  
MORE OR LESS OFTEN THAN  
IN THE RECENT PAST?

**MORE**  
**23%**

**SAME**  
**65%**

**LESS**  
**12%**

WHAT FACTORS ARE  
MOST IMPORTANT  
WHEN SELECTING A  
COMMERCIAL PRINTER?

1

Price

2

Quality

3

Customer  
Service

4. Trust + Reputation
5. Digital Short Run Printing Capabilities
6. Environmentally Friendly Practices
7. Paper Knowledge
8. State-Of-The-Art Equipment
9. Geographic Proximity
10. Easy-To-Use Website

Quality, trust and dependability are critical in the print buy. I want to work with printers with whom I can collaborate with and with which I can have a long-lasting relationship.

– Linda Warren, The Warren Group, Culver City CA

I look for printers that can help me make my print communications more successful in the marketplace. That understand something about marketing and not just ink on paper. That can take problems off my desk and make it a worry-free experience.

– Larry Bauer, Bauer Associates, Batavia IL

Communication with my printer is important. I want to know honestly what the turnaround time will be. If there are problems, I want to know about them. Any suggestions regarding paper use or anything which will improve the project in any way are always welcome. Price is a factor, although quality is the most important part of my decision.

– Mary Richinick, Charlton MA

# Digital Printing Captures the Era

It is not surprising that designers are looking to their vendors for digital presses and digital short run printing options. Indeed, the only surprise is that this did not happen years ago, because the value proposition for digital short run printing — fast, clean, customizable, efficient and seamless to the digital workflow — perfectly captures the spirit of this design era.

Our 2007 survey continues to document the fact that creative firms are embracing digital printing, as color and image quality improves, as designers become educated about specific advantages of the technology and as the service becomes more accessible. Use of digital printing continues at a record levels. Like last year, nearly three-in-four respondents to our survey report using digital short run printing in the past year. And more than one-third of respondents — up from one-quarter last year — report that they are buying or specing digital printing more often.

Interestingly, one of the most theoretically compelling advantages of the technology — the ability to customize and personalize — continues to become more important to print buyers. In the past, many print buyers viewed these capabilities, which meld sophisticated database marketing with print design and output, as too difficult to master or unnecessary to their projects. However, readers are increasingly noting customization capabilities as a major reason for choosing the technology.

DO YOU SPECIFY, RECOMMEND, APPROVE  
OR BUY DIGITAL SHORT RUN PRINTING?

YES 72% NO 28%

ARE YOU BUYING MORE  
DIGITAL SHORT RUN  
PRINTING THAN IN THE  
RECENT PAST?

MORE  
34%

SAME  
55%

LESS  
11%

We have an increasing volume of digital printing. It meets client deadlines and is more cost-efficient for runs under 1,000. We have actually placed a digital press inhouse for better quality, control and margins.

— Ravi Dhingra, Spectrum Communications,  
Norwalk CT

We have had a good experience with digital short run printing. Price and turnaround are very enticing, and color is improving from early digital presses.

— Andi Beierman, TA Design, Austin TX

WHY DO YOU USE  
DIGITAL SHORT RUN/  
ON DEMAND PRINTING?

Quick Turnaround  
Price  
Ease of Digital Workflow  
Ability to Customize  
More Precise Print Runs  
Color Accuracy  
Paper Choices  
Environmental Friendliness

# Types of Paper

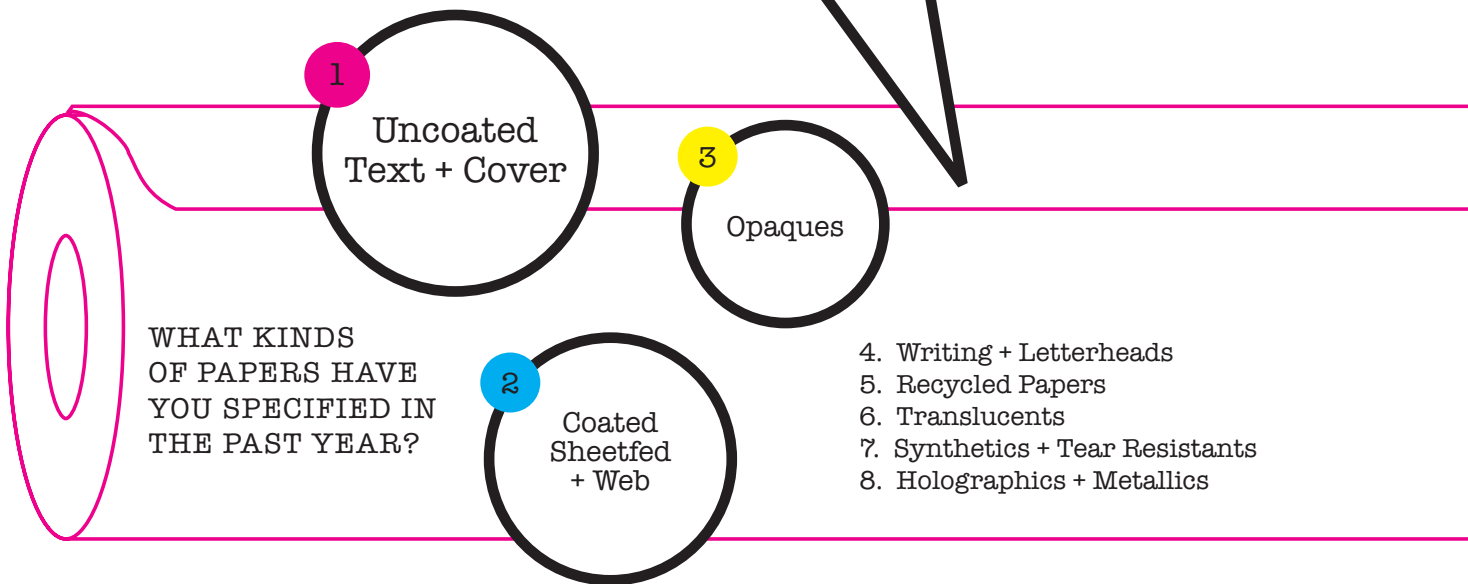
What types of papers are graphic designers specifying or buying? For the first time ever, several categories of papers scored virtually a tie at the top of the pyramid. Uncoated text and covers and coateds (predominantly sheetfed) remain in their accustomed and perennial places of honor. Catching up to them are opaques and writing and letterhead papers, which last year held positions three and five, respectively. All these categories are the staples of the business — suitable for brochures, collateral, sales promotions, annual reports, identity programs, direct mail, posters, cards and invitations and other mainstream print communications — so the results are gratifying but not terribly surprising. Most notable is the resilience of letterhead papers, which some thought had been left for dead by email, and the continuing rise of opaques, because of their straightforward value proposition in this budget-squeezed, white paper-loving era.

Designers and consumers will always enjoy and pay attention to a papers' quality, touch and feel. Sometimes this is conscious to the audience; sometimes it is subconscious. Either way, in the end it still makes a difference in the person's perception of the product or message being marketed.

— Dwayne Hamlett, Harland, Decatur GA

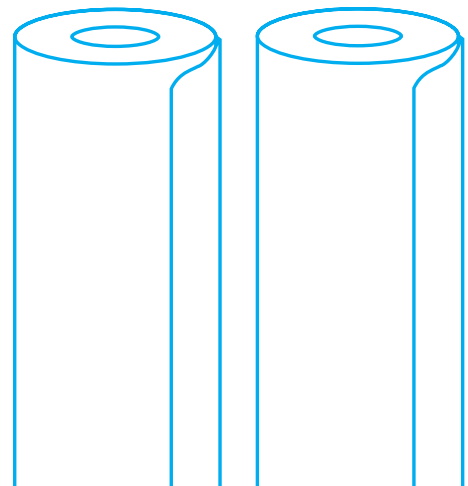
The choice of paper can take a project to the next level. As an art director, I consistently work with the production manager to sift through all possible options for paper stock for each and every project. This is an important step in the creative process, as paper stock can enhance the concept.

— Hope Sackin, Leverte Associates, Westport CT



The quality and environmental impact of a paper are definitely important. A paper's quality and character can make or break a printed piece. It is as though the paper itself is part of the language of design. The tactileness can evoke a sense of either quality or cheapness.

— Jason Fowler, Floodgate Media Design, Lynchburg VA



# Growing Green Movement

The color of 2007 is green. As this survey suggests, concern about the environment is being taken to heart by paper specifiers, papermakers, printers and end-users.

On one level, there is a renewed interest in recycled papers and materials, as well as the related matters of postconsumer content and landfill. Graphic artists have long had access to a range of premium recycled papers, and the pendulum has swung from high to low interest based on many factors, including, but not limited to, the health of the economy. But now — when you combine the *zeitgeist* of the era with the unprecedented quantity, quality and affordability of recycled — it appears that recycled paper use is poised to become a mainstream activity.

On another level, the recycled paper debate is no longer the end of the environmental conversation but rather only the beginning. The concept of environmental responsibility has broadened out to embrace issues of sustainability writ large, energy consumption and manufacturing impact, forest stewardship and natural resource regeneration, chain of custody and product lifecycle usefulness, carbon neutrality and climate change. The big picture — the total environmental and social consequences of papermaking, buying, specifying, delivering, printing, converting, using and reusing — is coming into focus.

So, in general, the 2007 survey responses suggest that designers are adopting a new framework for thinking about environmentally friendly papers and papermaking that seeks to promote recycled papers as a start and then moves a couple of steps further to encompass notions of sustainability and accountability and aligning positive social acts with a positive bottom line.

More specifically, the survey finds that more than half of all respondents report specifying recycled papers sometimes and that nearly one-third are specifying more recycled now than in the past. Similarly, a small but growing number are making their paper decisions based on FSC or SFI or other certifications. Moreover, as noted above, in their role as print buyers, designers are increasingly making print decisions based on the environmentally friendly practices of commercial printers. Finally, looking at the results from another angle, it is telling that there was minimal talk of the traditional barriers to recycled paper specification — higher prices and aesthetics. Objections on these bases simply did not arise this year, in stark contrast to past years.

What did arise in this context falls into the juncture of paper and politics: skepticism about global warming and the (left-wing) agenda of those promoting environmental accountability. While I am not immune to a bit of skepticism myself about the (not so) hidden agenda of certain environmental advocates, I can honestly say that designers raising this complaint within the survey were few and far between.

DO YOU SPECIFY,  
RECOMMEND, APPROVE  
OR BUY RECYCLED PAPER?

YES 58%

ARE YOU SPECIFYING  
RECYCLED PAPERS MORE  
OR LESS OFTEN THAN IN  
THE RECENT PAST?


MORE  
32%

SAME  
54%

LESS  
14%

WHERE DOES THE  
IMPETUS COME FROM  
FOR YOU TO USE  
RECYCLED PAPERS?

Designer	60%
Client	28%
Vendors	11%
Other	1%



If I can be green, I am. If I can direct a client to recycled papers or FSC- or SFI- certified papers, I certainly do it!

— Chris Carline, Chris Carline Design, New York NY

Recycled papers and environmentally sound practices are vitally important to the broad graphic design industry. Today, I spend more time teaching design than practicing, and I make all of my students aware of the role that they and their projects play in our environment.

— John Waters, Savannah College of Art & Design, Savannah GA

My clients and I are much more aware of environmentally friendly papers than ever before. Recycled papers have a much more professional look and feel than they did in past years. I specifically make it a point to look for the recycled logo on print collateral that I receive in the mail. I always try to specify and quote on recycled.

— Rosemarie Valentino, Valentino Graphics, Walpole MA



# Designers Reassert Control

Who actually controls the paper decision? Historically, that question has intrigued the industry, and there has been a competitive tension among creatives, clients, production people, printers and paper merchants. To address this matter, we ask readers to rank, on a scale from one to 10 — with 10 being the most important — which titles or functions most influence the final paper decision.

The results yielded two surprises. First, designers always rank themselves as influential in the paper decision process, but in 2007 they outdid even themselves. This year, our readers assigned themselves the astronomical score of 9.2 on the scale of 1 to 10. That is well above the average of recent years (last year's score was 8.4). Further, an unprecedented three-quarters bestowed upon themselves the highest ranking.

The second surprise was the reduced ranking of the client this time around. Over the past few years, clients have been seen as an increasingly integral part of the paper decision — either as partners or meddlers — with scores averaging around 6 out of 10. This year we saw a reversal, as the ranking fell to 4.7 out of 10. That is a big drop. Statistical quirk or sea change in the very elusive specification process? Tune in next year.

## WHO IS THE MOST IMPORTANT IN MAKING THE FINAL PAPER SELECTION?

1. Graphic Designer/Art Director/Creative (9.2)
2. Client/Customer (4.8)
3. Production Manager/Purchasing Agent (4.1)
4. Printer/Print Sales Rep (3.5)
5. Paper Merchant/Spec Representative (3.4)
6. Prepress Shop (1.4)
7. Office Supply Store (0.8)