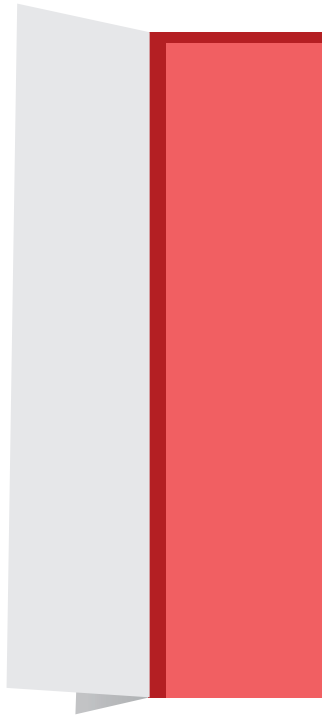


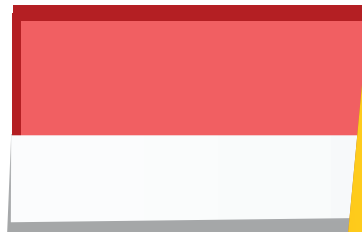
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PRINT

Survey



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SEE ME, FEEL ME, **TOUCH** ME, HEAL ME

Print and paper advocates in business and industry are analyzing the data, marshalling the facts, building their case, providing their proofs. In the face of the online wave, they are making highly cerebral arguments to promote print as a logical and strategic part of today's communications marketplace. Among them: print provides a high ROI, print drives online traffic, print periodical readership is actually growing, print readers spend more time per advertisement or per page, print reaches demographics not on the grid, print is sustainable and tree-friendly.

All well and good, and accurate as far as it goes. But GDUSA readers, in our 48th annual print design survey, have a different perspective on why print works. They see well-executed print as powerful, yes, and relevant, yes, and effective, yes. But their argument is less about logic and more about emotion.

They tell us, in large numbers and with stunning unanimity, that print is special because it offers the attribute of "touch" — the promise of tangible, sensual, authentic human connection. In so doing, these designers are tapping the essence of why print lives against the odds.

HERE IS A SAMPLING OF THE VOICES OF

TOUCH

Print still has a significant role in communications. Digital has grown significantly, but data shows print still commands attention and its proven to engage consumers. Many people still like to touch their communications — it's tangible and evokes emotions that, in some ways, digital cannot.

— **Rex Boatright, Valassis, Livonia, MI**

Print still has its place in the present and future of communications. As much as we are immersed in this digital age in our day-to-day lives, people are still very tactile in nature. My field of packaging is a prime example of people's need to see, touch and feel what they are about to purchase.

— **Patricia Reape, Conair Corp., Stamford, CT**

Great content and engaging design will always have a place. The reader cannot touch digital media. I get a great reaction from high-end text cover uses. Customers pay a premium for traditional business cards – not on coated paper. The iPad has replaced the newspaper, but newspapers are far from dead.

— **Bob Rankin, Rankin Design for Marketing, Leavenworth, WA**

I believe the trends in design that are taking place today will pass, and I think that print will always be favored because it is tangible and communicates effectively, although differently than digital media. No matter how advanced computers become, nothing can ever replace the beautiful quality of print.

— **Abigail Canary, AC Design, Babylon, NY**

Print will always be the reality, web design is only just the dream. GDUSA is on my desk – it is smooth and takes to my eyes – keep it up! How do you feel the weight of paper on the web? How about embossing, de-bossing, trim, folds, you name it? How on the web? Ever?

— **Deborah Ross, Palombi & Co, San Bernardino, CA**

I'm a firm believer in print, its immediacy and its tactile qualities. As clients move toward non-print media, I try to remind them of the power and effectiveness of print.

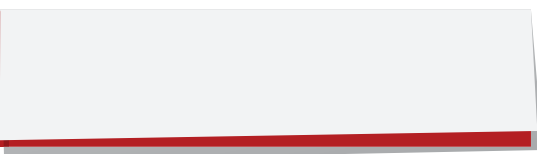
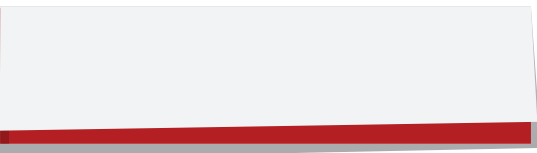
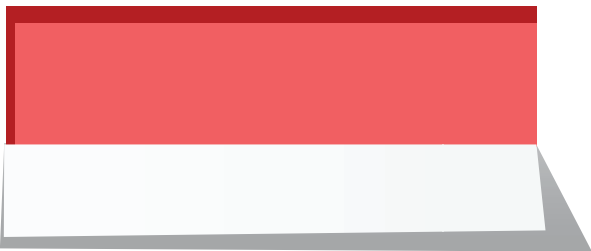
— **William Lancaster, Lancaster Design, Culver City, CA**

YES, I'M A FIRM BELIEVER IN PRINT, ITS IMMEDIACY AND ITS TACTILE QUALITIES. AS CLIENTS MOVE TOWARD NON-PRINT MEDIA, I TRY TO REMIND THEM OF THE POWER AND EFFECTIVENESS OF PRINT.

— **WILLIAM LANCASTER, LANCASTER DESIGN, CULVER CITY, CA**

The printed page can be held, folded, framed, cut and pasted, sold and bought all to encourage thought – without batteries!

— **V. Chindlund, Design Source & Associates, Glen Ellyn, IL**



All tactile qualities of print media go out the window with strictly digital media. There's just something euphoric about holding a bound book in your hands or seeing a large format poster framed and hung on the wall. I personally love print media vs. designing for the web. I feel I'm able to transfer my artistic abilities more readily.

— **Vanessa Shipe, V. Shipe Graphic Design, Fredericksburg, VA**

Print will always be a major part of any integrated communication package. I have yet to see any other form deliver the visual and tactile impact that print, when designed well, can give to the message.

— **Jim Nosakowski, Booker Page Design, Clinton Township, MI**

Paper should always enhance a project in terms of the message and mood that is being conveyed. We always try to use a premium sheet not just for reliable printability, but for a tactile quality that less expensive stocks don't offer. Brands aren't always a deciding factor, but a better brand usually means a better end result.

— **Christy Ann Coppola, Coppola Design, Clifton Park, NY**

My personal opinion is that paper is more important than ever. There is a certain connection and mental process that can only be experienced through paper. The act of touching and feeling the paper, along with reading or seeing what it has to say, goes beyond the light and pixel of the screen... I love to feel paper between my fingers and hear the crinkle of the page turn.

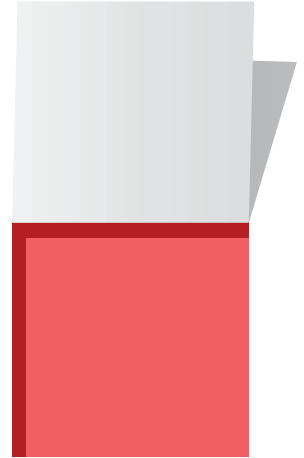
— **Meghan Correia, The Paper Pomegranate, Bellingham MA**

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— **Rex Boatright, Valassis, Livonia, MI**

ANOTHER CLEAR
RESULT OF OUR SURVEY:
GRAPHIC DESIGNERS
REMAIN CENTRAL TO
THE PROCESS, BUYING
PRINTING AND SPECIFYING
PAPER AS PART TO
THEIR PROFESSIONAL
RESPONSIBILITIES.

**GRAPHIC DESIGNERS
ARE CENTRAL TO
THE PROCESS**



Print Anchors the Graphic Design Business

Turning to the statistical results of our annual benchmark survey, it is clear that print and collateral continue to anchor the business of graphic design. Nine of ten GDUSA readers work in print as part of their mix, and print projects represent the majority of work for most designers.

More specifically, each year we ask how many creatives — at graphic design firms, agencies, corporations, and institutions — design for print. This year, 93% say they design for print as part of their media mix, up a tick from the past two years.



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

In 2011, online projects continue to hold a strong second place in the terms of projects: 71% of readers report designing for the web this year, more or less even with the past couple of years but, of course, a revolution in the broad historical sweep. Other traditionally mainstream activities — most notably, package design and p-o-p, but also television, video and film — remain strong and reasonably constant as well.

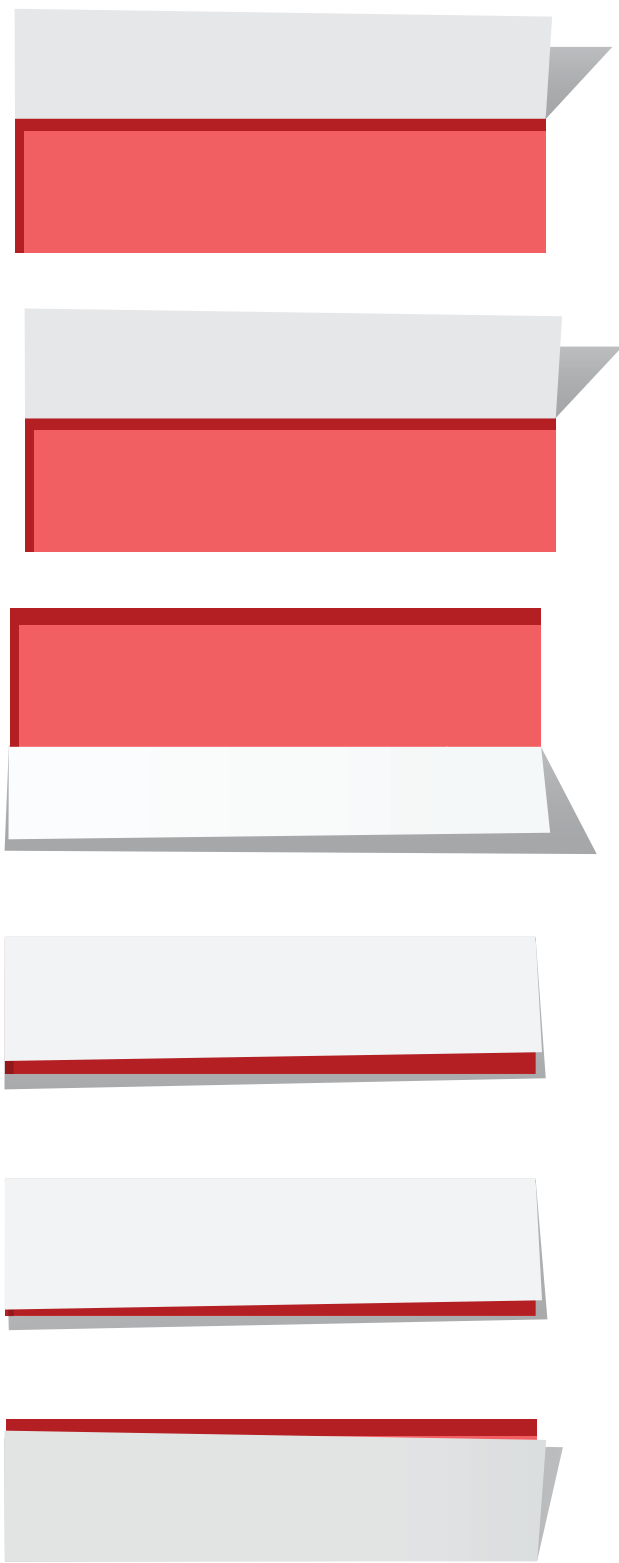
The massive overlap among activities provides an insight into how designers are earning a living, and where prints fits. One is that creative firms and departments are involved in varied and complementary projects across diverse media. Graphic designers have established their pivotal role in the communications world precisely because responsibility and control over multiple media — and the status and purchasing power that comes with it — has moved emphatically upstream toward designers and other content creators. A second conclusion, perfectly consistent with the first, is that cross-media or integrated media projects— encompassing print and online components in the same project, program or campaign — are increasingly common.

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

- ONLINE 71%
- PACKAGE 58%
- POP/SIGN 45%
- MOTION 24%

WHAT KINDS OF PRINT PROJECTS HAVE YOU WORKED ON IN THE PAST YEAR? (TOP 10)

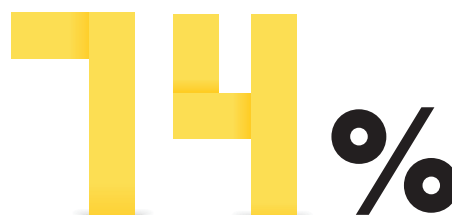
1. BROCHURES/COLLATERAL
2. DIRECT MAIL/DIRECT RESPONSE
3. SALES PROMOTION
4. IDENTITY/LETTERHEAD
5. PRINT ADVERTISING
6. CARDS/INVITES/ANNOUNCEMENTS
7. POSTERS
8. PACKAGING/POP
9. PUBLICATIONS/PERIODICALS
10. ANNUAL & CORPORATE REPORTS



Print Dominates Time and Projects

In addition to fact that most designers work in print sometimes, we also ask these professionals what portion of projects involves print design either completely or in part. Here, too, the centrality of print is affirmed: 74% of the projects have a print component to them and 71% of the readers' time is spent designing for print, also slightly up from last year's poll. For 84% of respondents, the majority of their projects involve print as part of the mix.

WHAT PERCENTAGE OF YOUR PROJECTS INVOLVES PRINT IN THE MIX?



WHAT PERCENTAGE OF YOUR TIME IS SPENT WORKING IN PRINT?



Print Buying Rises

Turning first to print buying, graphic designers have been increasingly thrust into the print-buying role over the past decade. The acceleration continues as customary walls between design and production have come crashing down, and the number of firms operating in a hierarchical manner with a dedicated print buyer function dwindles. Fully 87% of respondents this time around report buying or influencing printing, at least sometimes, as part of their jobs. The percentage reporting increased print buying and those reporting a reduction are roughly equal.

We also asked what creatives look for in a commercial printer? Consistent with the theme of human connection, the answers largely revolve around personal attributes: quality, service, trust, reputation, and knowledge. Moving up the list: digital short run printing capabilities and environmentally friendly practices. Of course, in this era, price is always the elephant in the room — not surprisingly, it pops up second in the rankings.



DO YOU BUY OR SPECIFY PRINTING?



Digital Printing Robust

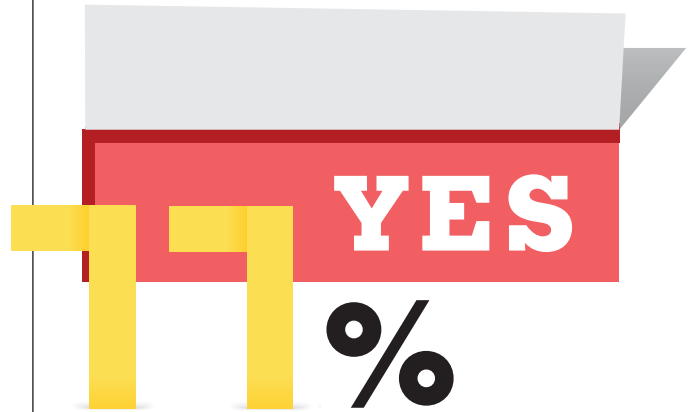
Designers continue to embrace digital short run printing. As we have long observed, the value proposition for digital short run printing for a range of projects — fast, clean, efficient, precise, customizable and seamless to the digital workflow — reflects the reality of this design era.

The past few annual surveys have documented the rise of this option, as color and image quality has improved, as the range of graphic possibilities has broadened, as designers become educated about the technology, as ROI metrics in direct mail have become vital, as databases become accessible, and as digital print providers have become more available.

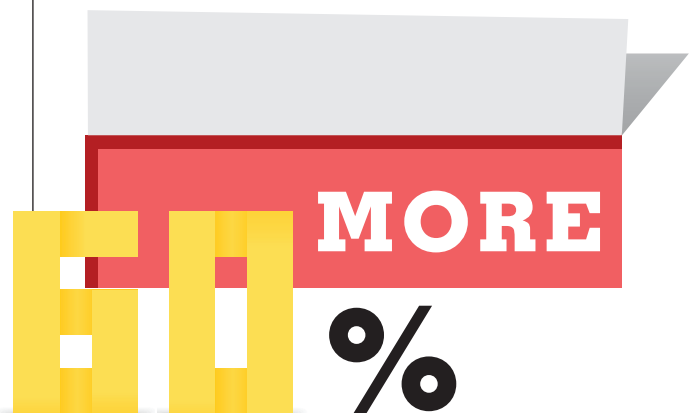
This year, nearly four-in-five respondents in our survey — 77% to be exact — report having used digital short run printing in the past year. Further, a robust 60% said they are buying or specifying digital printing more often now than in the recent past.

When it comes to digital printing, the buying calculus and set of expectations differ compared to traditional printing. Price is still important to the decision, but quick turnaround, ease of digital workflow, and the ability to customize printed pieces become critical factors. Quality and customer service do not loom quite so high.

DO YOU BUY OR SPECIFY DIGITAL PRINTING?



ARE YOU BUYING MORE DIGITAL PRINTING?



SAME 15%

LESS 25%

Online Print Buying Grows

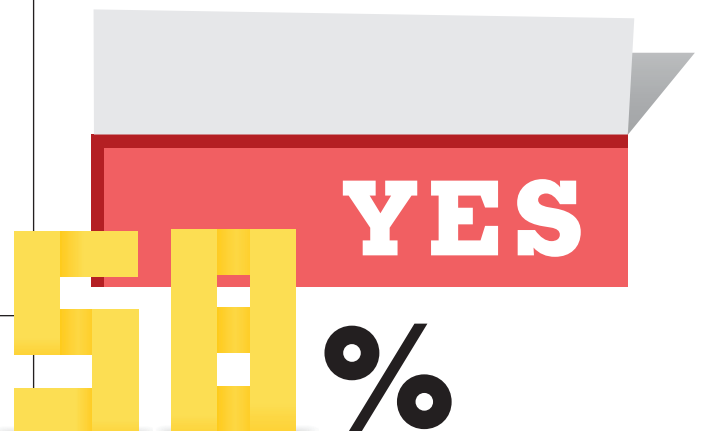
A substantial, and growing, amount of printing is being purchased via online services. Last year represented a milestone: for the first time, a majority of designers ordered print online through some very popular websites. In this new survey, the number climbs, again, to nearly six-in-ten.

Designers are generally positive about the experience, as well as realistic about the tradeoffs. They understand the strengths: it is fast, easy and inexpensive. And they have a wish list: more personal customer service and support, better instructions and proofing systems, faster fixes if a mistake is made, and more paper choices. Reader comments on this topic are noted later in this report.

WHAT FACTORS ARE MOST IMPORTANT WHEN SELECTING A COMMERCIAL PRINTER? (TOP 10)

1. QUALITY
2. PRICE
3. TRUST/REPUTATION
4. CUSTOMER SERVICE
5. TECHNICAL/PAPER KNOWLEDGE
6. DIGITAL SHORT RUN CAPABILITIES
7. GEOGRAPHIC PROXIMITY
8. ENVIRONMENTALLY-FRIENDLY PRACTICES
9. FULFILLMENT SERVICES
10. GOOD WEBSITE

HAVE YOU PURCHASED PRINTING ONLINE?



WHY DO YOU USE DIGITAL PRINTING? (TOP 5)

1. QUICK TURNAROUND
2. PRICE
3. EASE OF DIGITAL WORKFLOW
4. ABILITY TO CUSTOMIZE/PERSONALIZE
5. MORE PRECISE PRINT RUNS

Paper Matters

As a companion figure to the 93% of readers who work in print and the 87% who buy printing, the 2011 survey find that 85% of readers specify, recommend, approve or buy the paper used in print projects. This figure tracks last year's survey, though it falls about 10 points below the absolute high-water mark reached in the mid-1990s.

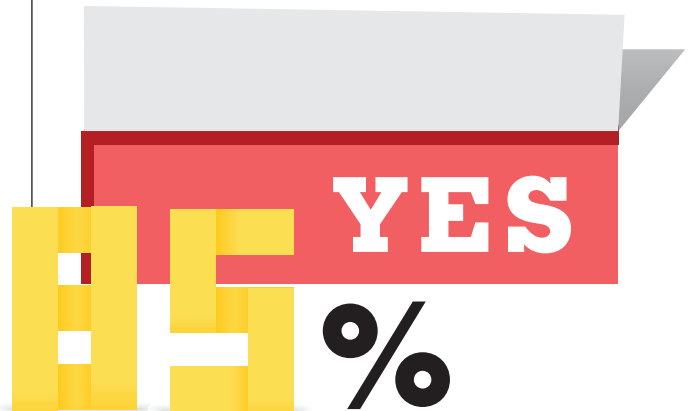
In the broad sweep of graphic arts history, this figure is substantially higher than when GDUSA commenced publication in 1963. At that time, the commercial printer and the paper distributor were largely in control of the final paper decision, paper choices were much more limited, and graphic designers had less influence. The growth in responsibility and control by the creative community over paper decisions foreshadowed its control over all aspects of production — hardware, software, prepress, workflow, proofing, print buying and the like.

As for today, the comments captured in this report tell much of the story about the state of paper specification: On the one hand, creatives are committed to, and enthusiastic about, paper and what it represents in their personal and professional lives. They fully understand that the well-designed printed piece is more persuasive than ever in this cluttered era. And they comprehend that paper character and quality can make or break, enhance or undermine, a project or campaign.

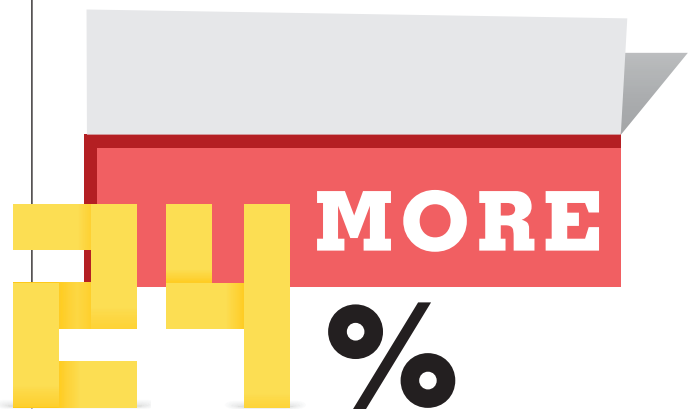
On the other hand, they reflect the critical fault line in the graphic arts today: between quality and commoditization; between good and good enough; between the judgment of the designer and that of the client. Paper specification, they seem to say, stands astride that fault line, exacerbated by the slow-growth economy. For example, only 24% of readers say they are specifying more paper this year than last, while 34% say they are specifying less.

That said, designers are adamant about controlling the paper decision. Historically, there has been a competitive tension among creatives, clients, producers, printers and paper merchants. This year, as has been true for nearly four decades, designers rank themselves as the most highly influential in the paper decision process. On a scale of 1-10, they gave themselves an 8.9. Even taking into account that human beings have a tendency to see themselves as more central than they are, this result is telling.

DO YOU SPECIFY, RECOMMEND OR BUY PAPER?



ARE YOU SPECIFYING PAPER MORE OFTEN?



SAME 42%
LESS 34%

A Range of Papers

What types of papers are graphic designers specifying? The two perennial leaders are Coated (Sheetfed and Web) and Uncoated (Text and Cover). This year, the coated contingent won a slim victory in the polling. Letterheads finished a strong third place, a rebuff to the belief that email has killed traditional letters and stationery.

Other popular performers — Opaques, Translucents, and Synthetics — are joined this year by “Papers For Digital Presses.” This makes sense given the rise in digital short run print buying and the recent introduction of digital grades by several prominent papermakers.

We also included “Recycled Papers” as a choice, and it placed a lofty fourth overall in the rankings. Obviously, the recycled or green designation cuts across all main paper groupings. Still, it is a category clearly resonating with designers. Which provides a perfect segue into the next category, green papers and sustainability.

WHAT KINDS OF PAPERS HAVE YOU SPECIFIED IN THE PAST YEAR? (TOP 10)

1. UNCOATED TEXT/COVER
2. COATED WEB/SHEETFED
3. WRITING/LETTERHEADS
4. RECYCLED PAPERS
5. DIGITAL PRINTING PAPERS
6. OPAQUES
7. TRANSLUCENTS
8. PACKAGING
9. SYNTHETICS
10. METALLIC/HOLOGRAPHIC

ARE YOU SPECIFYING GREEN PAPERS MORE FREQUENTLY?



WHAT ATTRIBUTES INFLUENCE YOUR GREEN PAPER SPEC? (TOP 5)

1. RECYCLED CONTENT*
1. CLEAN ENERGY*
3. 3RD PARTY CERTIFICATION
4. MILL REPUTATION
5. LAND AND FOREST MANAGEMENT
6. CARBON NEUTRALITY

* TIE

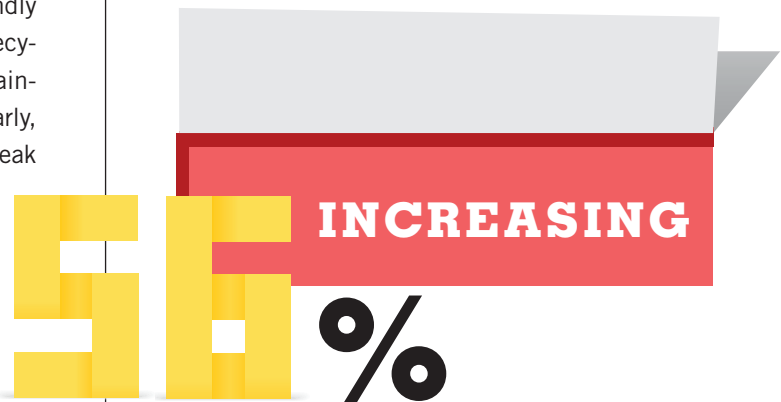
Paper and Sustainability

Sustainability continues to exert a powerful impact in print decisions, as exemplified the majority of designers specifying environmentally-friendly papers, the many who are increasing that spec in an otherwise flat year, and the growing number who care about third party certification and the eco-friendly behavior of the papermaker.

As noted last year, somewhere along the way this decade, the conversation about environmentally friendly print and paper shifted dramatically from simply recycled content, landfills and trees to issues of sustainability and stewardship in the broadest sense. Similarly, today's paper companies, and their promotions, speak with sophistication and ease about all manner of environmental issues. Postconsumer waste, yes, but also FSC and SFI certifications, alternative energy sources, carbon neutrality and so much more. And they are moving vigorously to provide more and better product.

The survey results certainly suggest that graphic designers and other paper specifiers are embracing and driving these trends. Results reveal, for example, that 55% of GDUSA readers specify eco-friendly papers at one time or another. Moreover, 41% of GDUSA readers say they are specifying environmentally friendly papers more often than a year ago. The remaining 59% report specifying "green" papers at about the same frequency as in the recent past. For those of you following the math, that leads to a striking result: 100% say they are specing green papers more or the same as last year while zero percent — nobody — is reducing their eco-friendly paper specifying or buying.

SUSTAINABILITY AS A DESIGN FACTOR IN YOUR PROJECTS IS...



SAME 41%
DECREASING 4%

WHAT INFLUENCES THE DECISION TO 'GO GREEN' ON A PROJECT (TOP 5)

1. SPECIFIC PROJECT
2. CLIENT BRAND
3. CLIENT REQUEST
4. YOUR PERSONAL BELIEFS
5. CONSUMER DEMAND

What do readers mean when they refer to “environmentally friendly” papers? The survey results speak to the breadth of concerns. The attributes readers say they expect are led by “green energy” and “recycled content” at the top of the heap. These are followed by “third party certification,” the “mill’s green reputation,” “forest and land stewardship” and “carbon neutrality” bunched just below. Clearly, the energy crisis — our dependence on foreign oil and the need for cleaner methods — is weighing heavily on people’s minds.

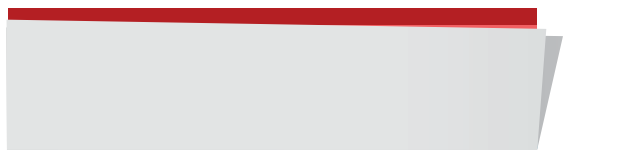
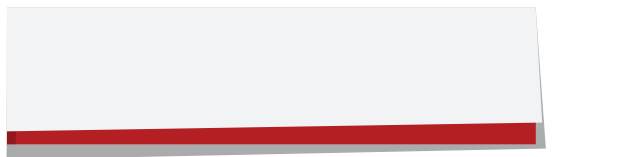
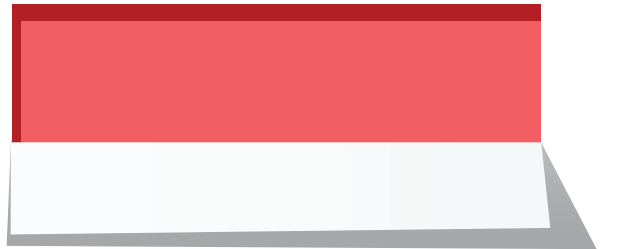
Two additional queries broaden the overview and sharpen the insight into the high levels of interest in environmentally friendly papers and printing.

In one question, we asked, simply, whether “sustainability” as a design factor is on the increase or decrease among projects and assignments. Here, 56% said sustainability is a growing factor and more than 41% say it has remained the same. Again, that leaves a very small band that sees green print and design as a declining influence.

A second question explores where the locus of the decision to engage in eco-friendly print projects. In this connection, it appears that the source of the motivation to “go green” runs the gamut from the nature of the specific project to the client’s branding to the ethics of creative person or agency to a perceived demand by the consumer.

In short, the decision emerges from a mix of practical matters (does “green” support the message or the brand or the corporate identity?) and the philosophical (what are my personal, company or client’s ethics?). Frankly, most designers give the nod to effective communication and client needs — over personal ethics.

Finally, as noted above, designers, in their role as print buyers, also report making print decisions based on the eco-friendly practices of commercial printers, with “Environmentally Friendly Practices” placing in the top ten factors for the second year in a row. This was true for general commercial printing and digital short run print decisions.



Selected Comments

DOES THE QUALITY, CHARACTER, BRAND OF PAPER STILL MATTER?

Often we design to the qualities of the paper. The paper available is considered, even in brainstorming. It is an important factor and must be considered early in planning (notions aside). The quality reflects on us as well so a relationship is inferred — that's another reason for specifying.

— **Christopher Chance, Image2Icons Graphic Arts, Sadler, TX**

The quality of the paper still matters, particularly when it is part of the design. You cannot achieve this on the screen. Print design will continue to thrive; it will just be more focused on quality, and the choice of the right paper will be more important than ever.

— **Lucie Stewart, Lucie Stewart, Falls Church, VA**

We care about paper! That is like telling a classic painter to not finish his/her painting. The quality of paper puts the final touch on a print piece. The quality of the paper the piece is printed on is like putting icing on the cake. Why put so much hard work into a project if you are going to print on cheap paper?

— **Chris Bradshaw, Bradshaw Graphics, Leesburg, VA**

WHAT HAS BEEN YOUR EXPERIENCE WITH DIGITAL PRINTING?

I have found that digital short run printing, in general, makes my life as a design professional much easier. The turnaround is generally quicker and the options are expanding daily! I do need to spend more time and thought on my color choices, as the accuracy of colors can sometimes be off. Overall though, I find it a very valuable resource every designer needs.

— **Jacqueline Strouse, San Diego, CA**

Given the rate at which information changes and the variety of sources consumers have for information, it doesn't make sense to do large print runs. So we find printing quantities going down. This is where a digital press is great... The short-run economics coupled with increasing image quality has made digital printing our go-to solution for more than half of the print jobs we handle.

— **Steve O'Neal, O'Neal Design, St. Louis, MO**

For digital presses, I discuss the paper options with the printer, my client and at that point recommend the best option. My process is the same as with offset printing. My clients trust me to make the final decision.

— **Miriam Lisco, Walsh Design, Seattle, WA**

Digital printing is ideal for short runs but I still prefer offset due to quality... offset presses are historic, romantic. Those who are in printing because they love printing will always lean toward them until the quality/cost ratio make digital a bigger contender.

— **Sarah Schumacher, Creative Anomalie Design, Kansas City MO**

HOW IMPORTANT IS SUSTAINABILITY IN YOUR DECISIONMAKING?

THERE IS CURRENTLY NO GOOD ALTERNATIVE TO INK ON PAPER FOR MANY PROJECTS, ALTHOUGH I BELIEVE THE WAY WE USE PRINT MUST CHANGE. PRINT WILL CONTINUE TO BE NECESSARY IN MY LIFETIME BUT I JUST HOPE WE CAN COLLECTIVELY BECOME MORE PURPOSEFUL ABOUT ITS USE AND, THEREFORE, BE LESS WASTEFUL.

— **GAGE MITCHELL, MODERN SPECIES, MADISON WI**

Sustainability is socially responsible. It insures a tomorrow for print!

— **Sal Donofrio, Donofrio Design, Villa Park, IL**