

2016

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# Impact of Electronic Technologies on Print

**By: PRESENTED BY MARCO BOER  
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# About the Researcher/Author

- IT Strategies Founded 1992
- 15+ years of market research and product development in non-consumer/general office printing markets
- Strong emphasis on qualitative, deep research on future trends
- Noted for independence of thought and analysis

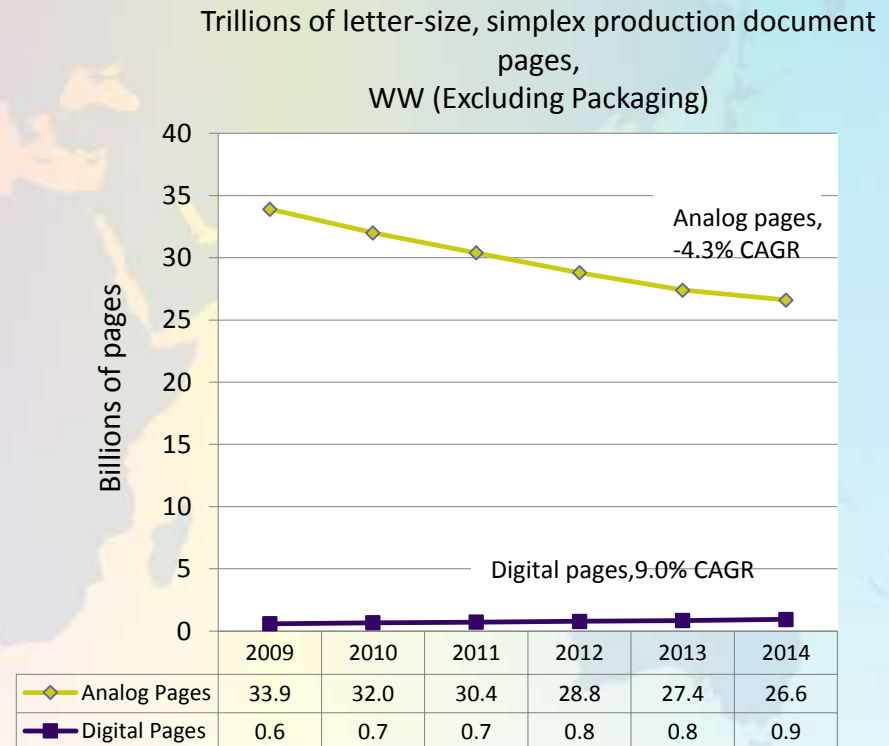


# Megatrends in Digital Printing Applications: Digital Print will not Replace Offset

- A Tipping Point from analog to digital production page volumes (where it exists) is decades away for the production print market overall

- Tipping point for most applications is unforeseeable

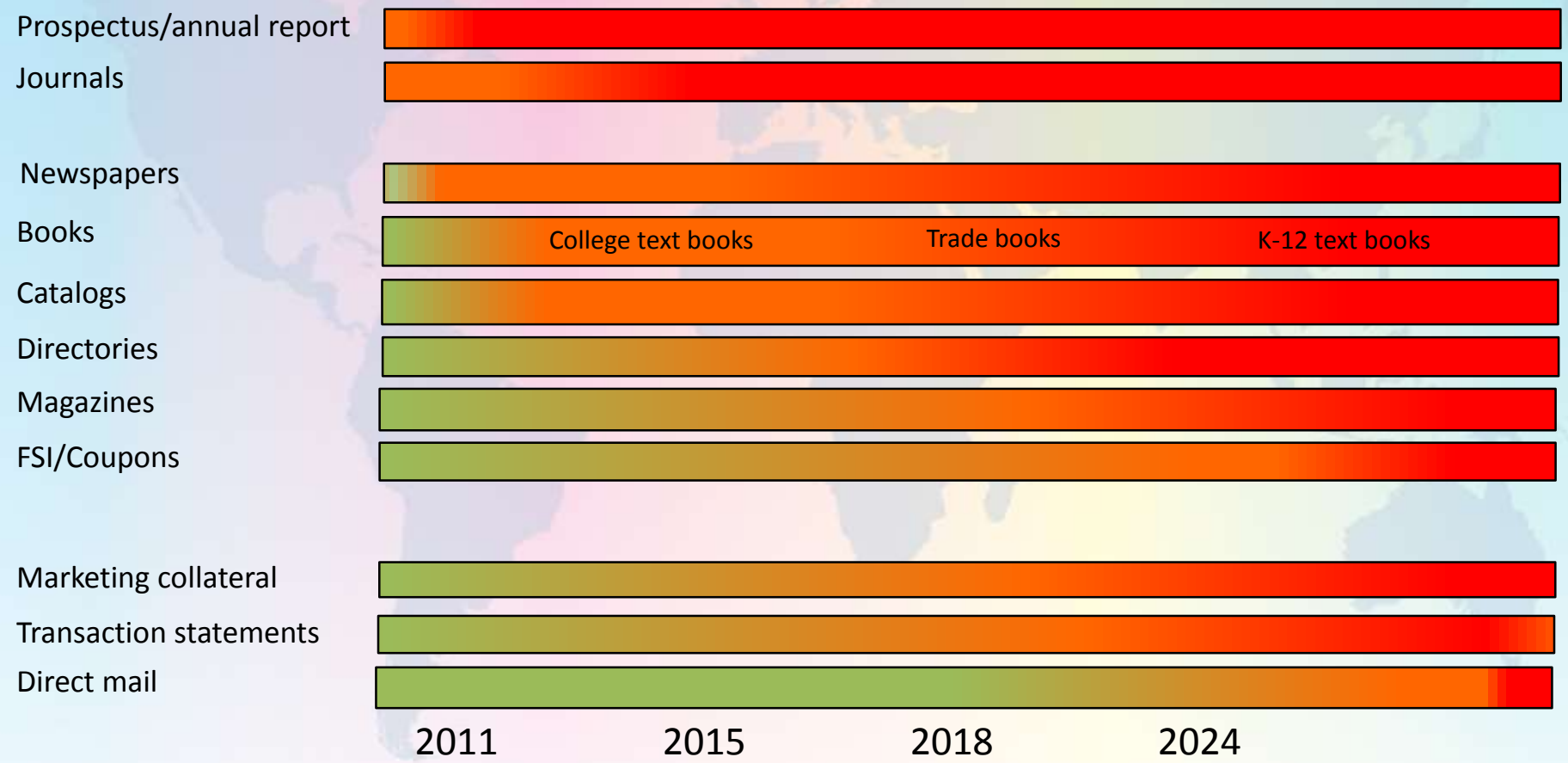
- Analog production page volume is shrinking independently of digital production print volume growth



# Study Methodology:

- Primary and Secondary Research
- 55 expert interviews (5/application in US)
  - Books
  - Catalogs
  - Directories
  - Freestanding Inserts/Coupons
  - Direct Mail
  - Journals
  - Magazines
  - Marketing collateral
  - Newspapers
  - Prospectuses/annual reports
  - Transaction statements
- 5+ electronic eco-system player interviews
  - Leading Silicon Valley thinkers
- 750 US respondent consumer opinion e-mail survey
- Published in 2012, but remains very valid today

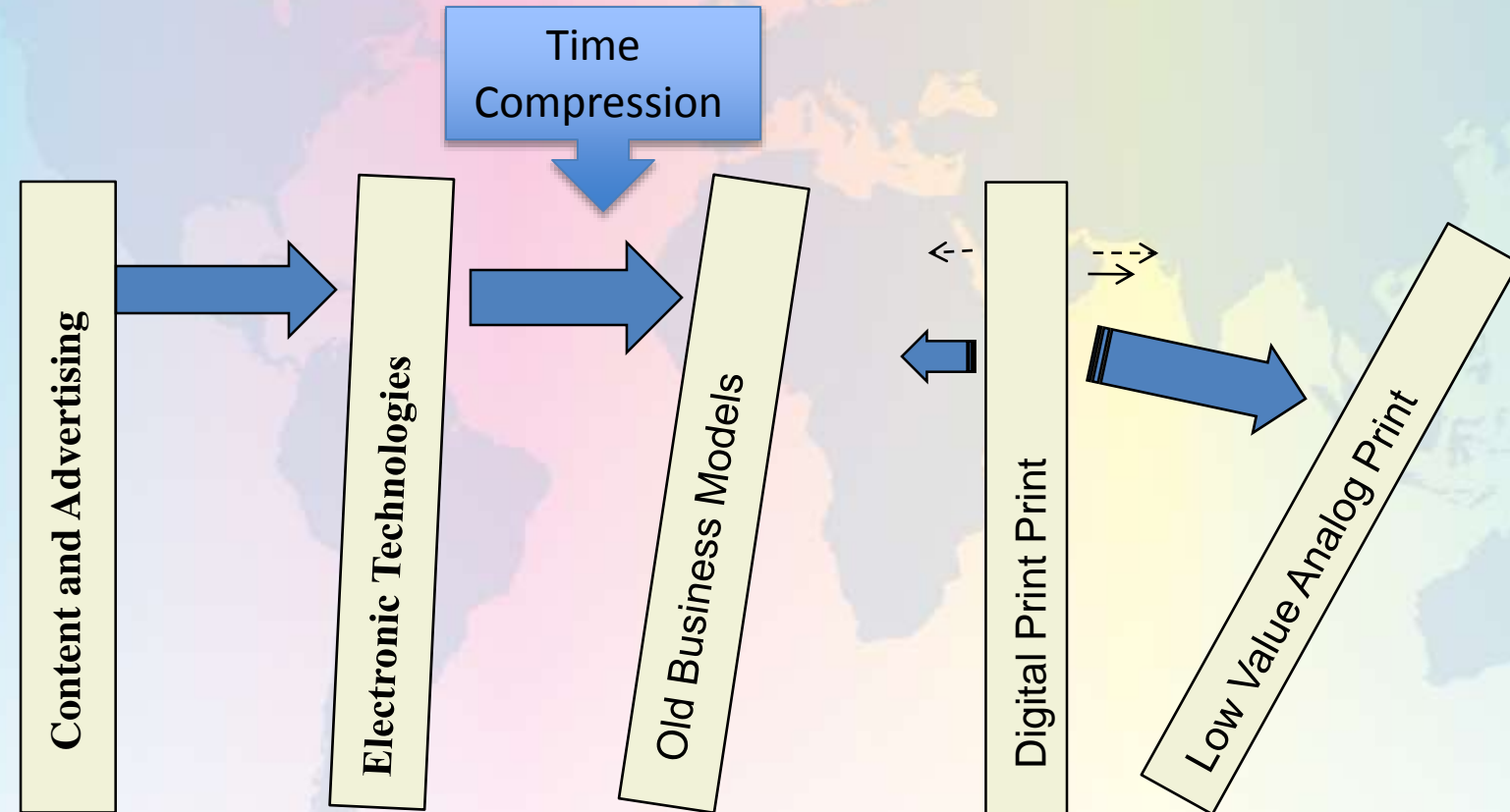
# Impact of Electronic Technologies on Print Volumes: Comparative Summary



Legend: Significant impact

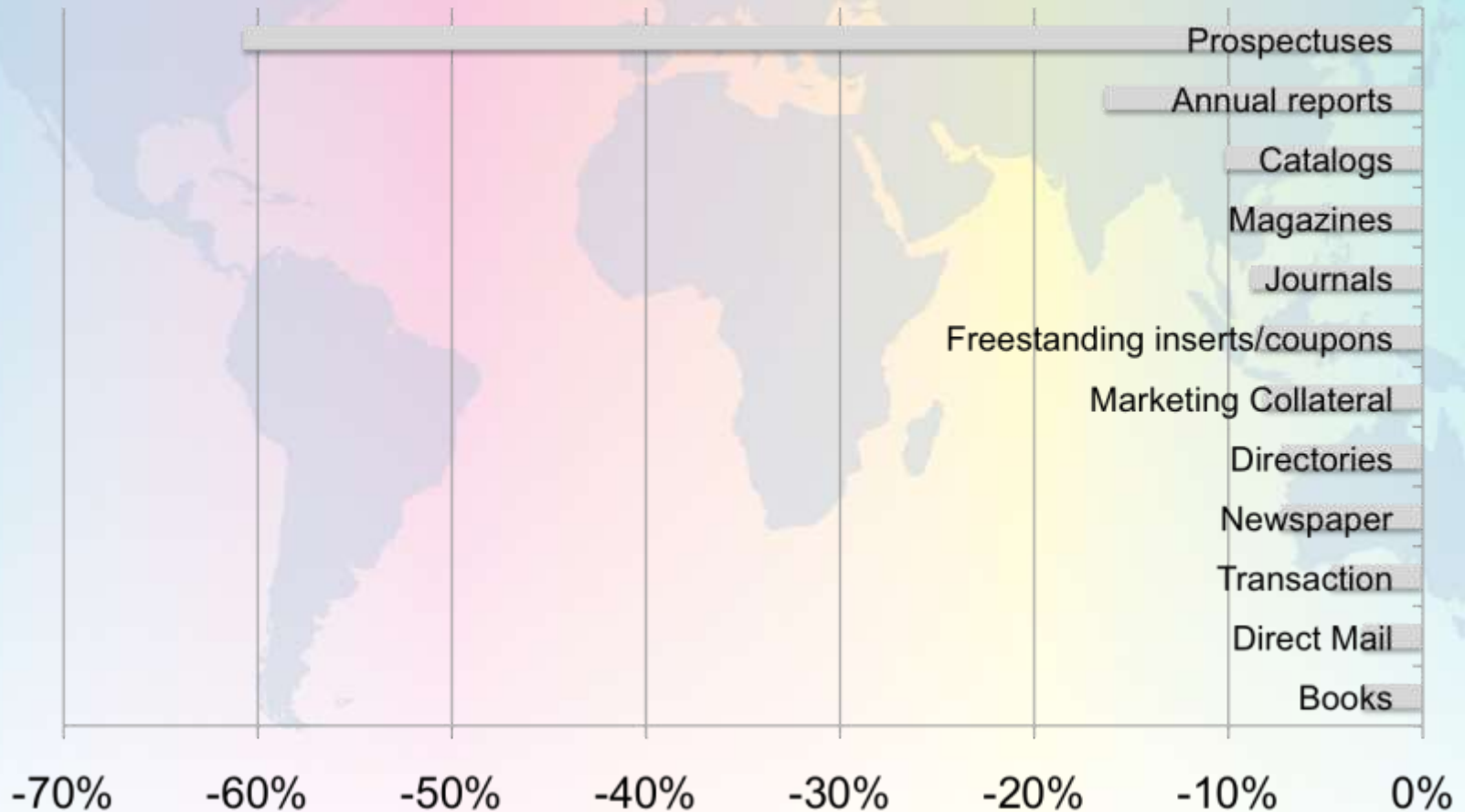
- not yet felt
- under way
- has occurred

# Content and advertising pressure



# Electronic Technology Impact by Application: Relative Feel of Pain 2009-2014

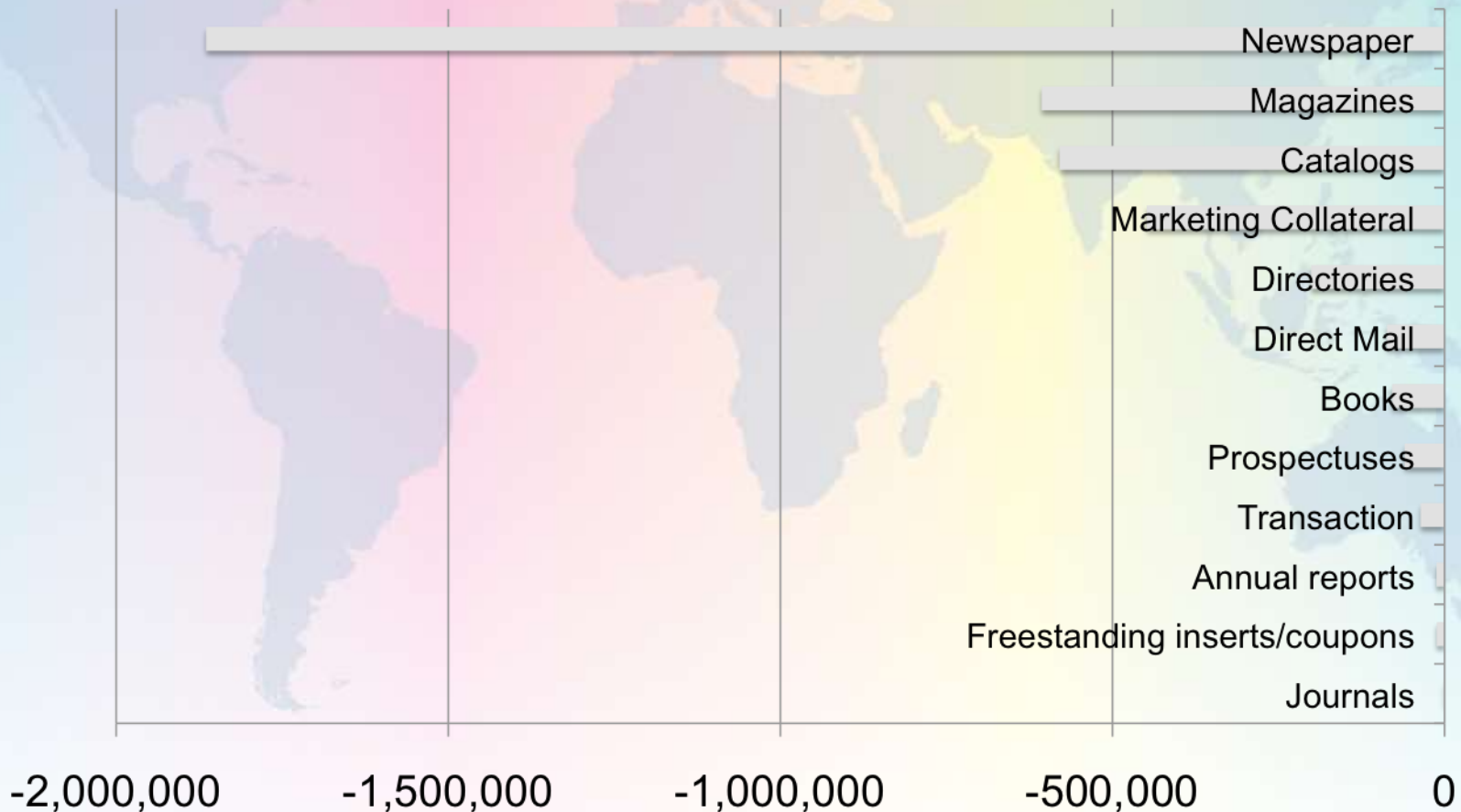
Percent page volume decline for respective application





# Actual Impact on NPES/PRIMIR Members

## Page Volume Decline cumulative 2009-2014



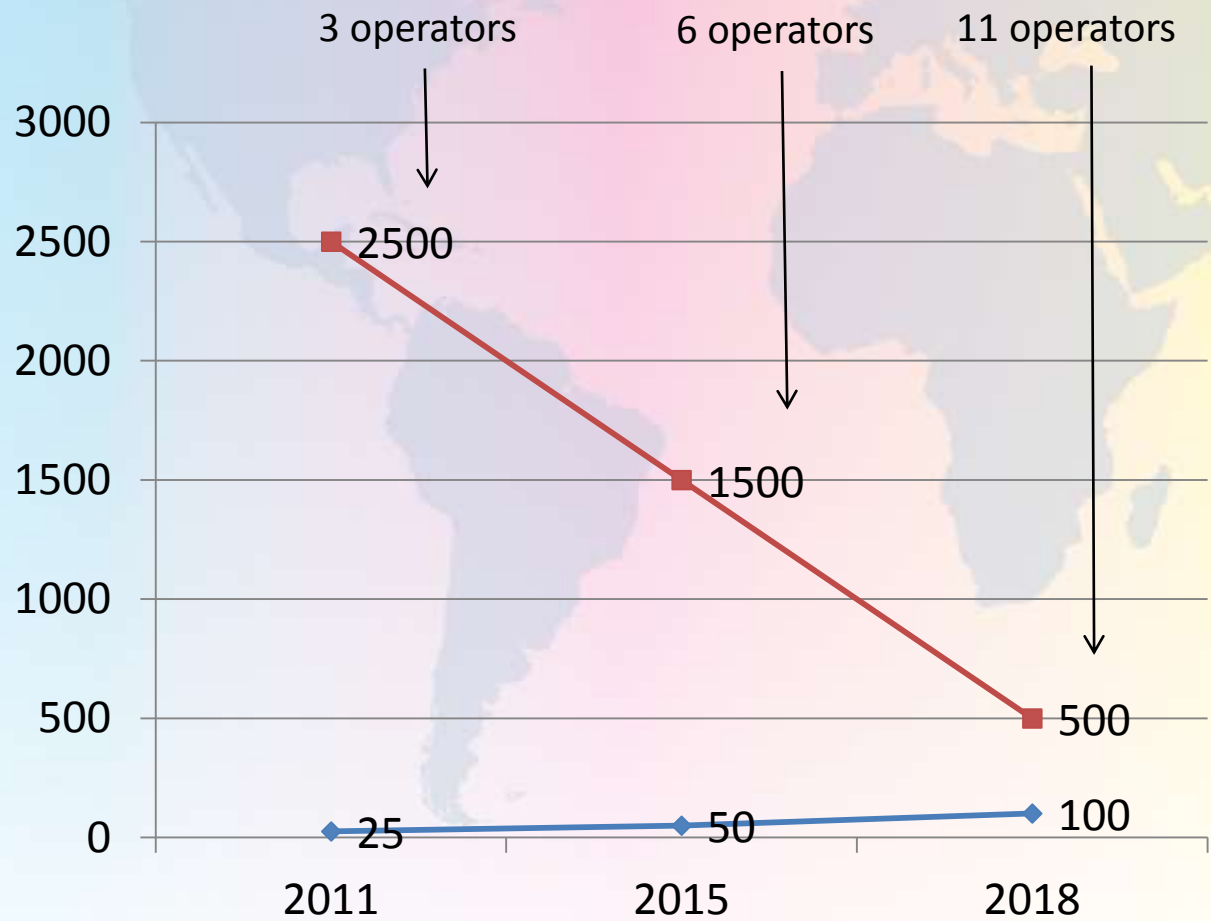
# Implication for Indonesia and other SouthEast Asian countries

	Indonesia	US
Households with Landline telephone	12%	41%
Mobile phones/inhabitant	126/100	100/100

- Indonesia leapfrogged in communication direct to mobile electronics. Legacy print applications under less threat in Indonesia

- But...in print watch:
  - The “efficiency squeeze”
  - Demand for consistent, higher output standards
  - Labor

# The Efficiency Squeeze: Staff Requirements Up as Print Volume Decreases



	2011	2015	2018
Set-up time/job/minutes	20	20	20
Jobs/Day	25	50	100
Total Set-up time (hours)	8	17	33
Hours/Staff for set-up	3	3	3
Staff needed	<b>3</b>	<b>6</b>	<b>11</b>
jobs/day	25	50	100
Ave. run length	2,500	1,500	500
total print volume	62,500	75,000	50,000

◆ Jobs/Day  
■ Run length/Job

# Implications for NPES/ PRIMIR Members

- Page volumes are in irrevocable decline, but offset print won't disappear
- There is an opportunity to grow value and profit with digital production printing; it will co-exist along side electronic technologies
- Rate of change will be different for every Print Application
- Opportunities:
  - Focus on high-value, lower-volume print applications
  - Re-direct into sustainable and growing print applications (packaging, decorative print)
  - High-value niches (printed electronics, etc.)

# I believe...

- The creation of printing technology is a complex, multi-disciplinary science. It is the continuing process of further extending the marriage of chemistry, physics, mechanical, and electrical engineering to address an ever greater range of applications that can be printed digitally that has me hooked on print.



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