

CMIC SUMMIT 2013

ROCHESTER INSTITUTE OF TECHNOLOGY



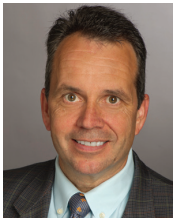
PRESENTERS



Ivan Mironchuk

Ivan Mironchuk is Solutions Account Manager, North America for the Adobe Digital Publishing Suite. Specializing in editorial workflow systems and digital asset management, Ivan is an Adobe Certified Expert in InDesign and InCopy. A known publishing technology specialist, Ivan is a consultant and a co-author of *Hand of a Master: Advancements in the Graphic Arts*.

Ivan holds a B.S. in New Media Publishing and a M.S. in Printing Technology and Digital Publishing from RIT.



Bruce Leigh Myers

Bruce Leigh Myers, Ph.D. is an earned Doctorate in Graphic Communications with over twenty-five years of extensive industry experience currently serving as Assistant Professor in RIT's School of Media Sciences.

Bruce worked as a resident professor in Graphic Communications at a New Jersey State University from 2000 – 2004, and served over twelve years as an Adjunct Instructor teaching theoretically based Graphic Communications concepts at New York University. Industry experience includes over fourteen years in various sales, training and management positions at X-Rite, Incorporated and eleven years in technical, sales and management positions at Agfa.

Dr. Myers' areas of specific technical expertise include color management, statistical process control, quality management, quantitative research design and analysis.



Wayne Peterson

Wayne Peterson is the Principal of the Black Canyon Consulting Group Inc. Wayne's 30-year career in Graphic Communications has included CEO assignments three times, as well as C-Level roles in marketing and business development. He has created and built five strong brands, and led three fast-growing firms. He founded the Black Canyon Consulting Group in 2008.

Wayne's practice specializes in Cross-Media Communications, and equips clients to compete, win, grow and thrive. It focuses on three areas: effective revenue growth, customer creation and retention, and competitive strategy and branding. Wayne's practice includes primary research, client consultation, executive coaching, sales coaching and life coaching. Wayne also serves as a fractional Chief Strategy Officer for selected clients. Clients include printing and other graphic communication firms, publishers, associations, and technology development firms nationwide.

SESSIONS

ADOPTION OF TECHNOLOGIES FOR CONTRACT COLOR PROOFING

WEDNESDAY, OCTOBER 9

11:00 - 11:30 AM

Bruce Myers • Assistant Professor
RIT School of Media Sciences

EXECUTIVE SUMMARY


A confluence of technological innovations has impacted the lithographic commercial printing industry in general, and color proofing in particular. In this study, the current state of technology adoption of contract color proofing is examined, including virtual “soft” proofs and both halftone-based and continuous tone hard copy proofing technologies.

Data were obtained via a quantitative, cross-sectional survey that was distributed to commercial printing organizations. The survey sought responses from potential respondents regarding the various technologies utilized to produce contract color proofs.

Data are analyzed and compared to a similar 2005 study, with emphases on implications for relevant stakeholders suggested by the obtained results.

CMIC 2013 AGENDA

WEDNESDAY, OCTOBER 9	
8:00 - 8:30 AM	CONTINENTAL BREAKFAST
8:30 - 9:00 AM	CMIC SUMMIT 2013 WELCOME
9:00 - 9:30 AM	CMIC AGENDA
9:30 - 10:00 AM	THE NEXT GENERATION WORKFORCE FOR THE GRAPHIC COMMUNICATIONS INDUSTRY
10:00 - 10:15 AM	BREAK
10:15 - 11:00 AM	CUSTOMER PANEL - PROMOTIONAL
11:00 - 11:30 AM	ADOPTION OF TECHNOLOGIES FOR CONTRACT COLOR PROOFING
11:30 - 12:00 PM	TECHNOLOGY CONVERGENCE WITH THE USER AT THE CENTER
12:00 - 12:45 PM	LUNCH
12:45 - 1:15 PM	ROI: WILL TODAY'S ANALYSIS TECHNIQUES WORK IN 2020?
1:15 - 1:45 PM	STRATEGIC EYE ON GLOBAL COMPETITION
1:45 - 2:15 PM	BREAKTHROUGH TO PAPERLESS MAIL
2:15 - 2:30 PM	BREAK
2:30 - 3:15 PM	CUSTOMER PANEL - TRANSACTIONAL
3:15 - 3:45 PM	MEDIA LAW AND THE GRAPHIC COMMUNICATIONS INDUSTRY
3:45 - 4:15 PM	SMS STUDENT SHOWCASE: CUSTOMIZED PRINTING - "PAW PRINT"
4:15 - 4:30 PM	EVENING AGENDA
4:30	ADJOURNED



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CROSS-MEDIA INNOVATION CENTER at RIT

Adoption of Technologies for Contract Color Proofing in Commercial Printers: A 2013 Analysis

Bruce Leigh Myers, Ph.D.
Assistant Professor
Rochester Institute of Technology, School of Media Sciences

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**Contract Color Proofing Technologies:
An Industry Challenge**

- **As Commercial Printing Evolves, the Role of Contract Color Proofing Also Changes**
- **Proofing Subject to the Impact of Potentially Disruptive Technologies**
- **Could Adoption of Contract Color Proofing Technologies Yield Insight to Perspectives of Media Buyers?**

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Audience Survey

- **Among Commercial Printing Organizations, Which Represents the Greatest Growth Percentage for Contract Color Proofing Technologies for Process Color Jobs Since 2005?**
 - A. Non-half-tone hardcopy proofing (e.g. Inkjet)
 - B. Virtual, Monitor-Based Proofing
 - C. Half-tone-based hardcopy proofing (e.g. Kodak Approval, Fuji Final Proof, or Press Proof)
 - D. Jobs Requiring No Contract Proof at All

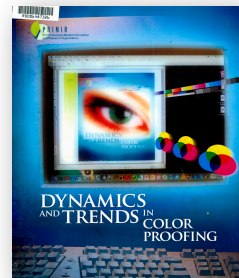
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A 2005 Benchmark for Comparison

- State Street Consultants:
2005 Print Industries Market Information and
Research Organization (PRIMIR) Study**
- *Dynamics and Trends in Color Proofing 2005 - 2010*



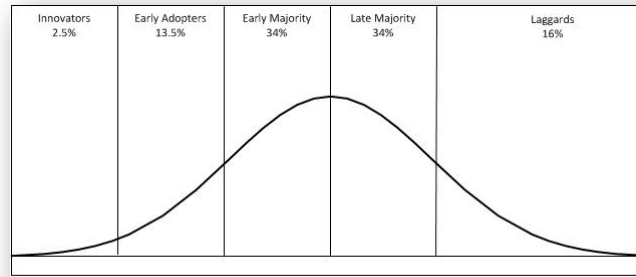
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Repeated Research: The Benefits of Longitude

- **Everett Rogers (1962) Diffusion of Innovations**



Adopter Categorization on the Basis of Innovativeness. Adapted from Rogers *Diffusion of Innovations, Fifth Edition* (p. 281).

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Methods

- **Quantitative, Cross-Sectional Mail-Based Survey**
- **100 Companies Drawn from *Printing Impressions* top 400**
- **Survey Data Collection Following Dillman's Total Design Method**
 - Just Over 50% Response Rate with 5 Respondents Disqualifying Themselves as Not Being Commercial Printers
 - 49 Useable Responses

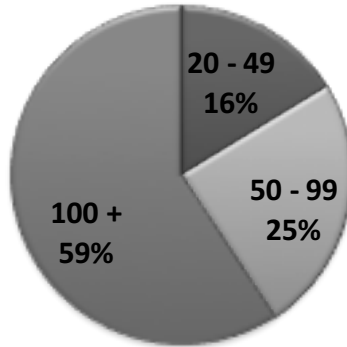
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Demographics

Number of Employees



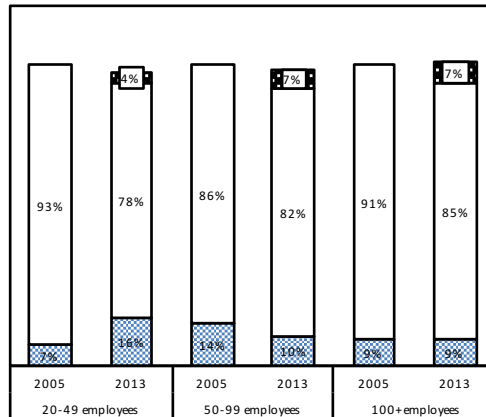
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Contract Color Proofs Utilized by Commercial Printing Companies
by Company Size: 2005 Compared to 2013

Virtual Hard Copy No Proof Required



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Virtual Contract Color Proofing Adoption Among Commercial Lithographic Printers:

Some Percentage of Contract Proofs Virtual:	63%
Percentage of Virtual Proofs Color Managed \geq 50%:	42%
Percentage of Virtual Proofs Non-color Managed \geq 50%:	35%

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Hardcopy Contract Color Proofing Adoption Among Commercial Lithographic Printers:

Continuous-tone Hardcopy Proofing	88%
Inkjet-based Contone Hardcopy Proofs:	64%
Toner-based Contone Hardcopy Proofs:	23%
Toner-based Contone Proofs - Color Copier:	7%
Toner-based Contone Proofs - Digital Press:	16%
Other Contone Hard Copy Proofs:	<1%
Halftone-based Hard Copy Proofs	11%
Ink-on-paper Halftone-based Proofs	3%
Digital Halftone-based Proofs	8%

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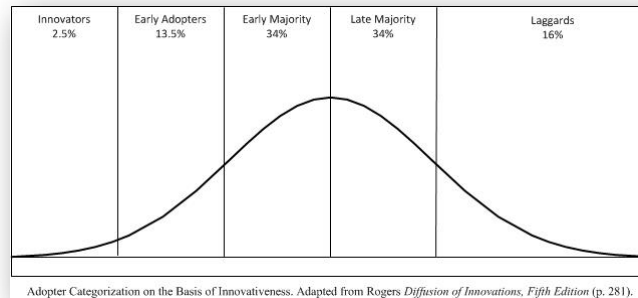
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Rogers' Revisited: Where Are These Technologies?

Inkjet Hardcopy
Halftone Hardcopy
Virtual "Soft" Proofs

Toner-Based Digital Press
Toner-Based Color Copier
No Contract Proof At All



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Job-Related Factors: 2005 - 2013

2005	2013
Quality of Job	Turnaround Time
Type of Job	Quality of Job
Complexity of Job	Type of Job
Price Customer is Willing to Pay	Complexity of Job
Turnaround Time	Price Customer is Willing to Pay

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Implications: A Historical Context

- **Iris 3047 Inkjet: 1985**
 - Market Not Quite Ready for Continuous Tone Proofing
 - Where Are My Halftone Dots?
- **Since CTP: Widespread Adoption of Continuous Tone Inkjet Proofing Realized**
 - Continues to Be Dominant Technology
 - “Contone inkjet proofing, once a novel and even radical method, is now common and widely accepted...”

-PRIMIR *Dynamics and Trends in Color Proofing*, 2005, p. 41

Proof “Appearance” Becomes Critical Judgment Criteria

- **Trend: Less Color-Critical Proofs Become Growth Market**
- **Possible Relevant Factors:**
 - Standards-based Printing
 - More Pressroom Controls
 - More Confidence?
 - Fast Job Turnaround Becomes More Highly Desired Attribute
 - Insufficient Time?
 - Shorter Press Runs
 - Not worth the ‘insurance’?

Conclusions

- **Some Potentially Surprising Findings**
 - Halftone Hardcopy Proofing Neither Decreasing or Increasing
 - Continuous Tone Hardcopy Technologies Dominate
 - Digital Press as Offset Proofer

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Conclusions

- **Promise of Virtual Proofing Not Realized in Commercial Segment**
 - Used Across a Broad Segment of the Commercial Market, but Not Increasing as a Percentage of Contract Color Proofs
- **2003: Soft-Proofing Introduced with Great Fanfare**
 - Both ICS Remote Director and Kodak Virtual Matchprint Earn GATF InterTech Awards
- **"Soft proofing will be the de facto standard proofing method in the industry in two-and-a-half years..."** – Dan Caldwell, vice-president, operations for Integrated Color Solutions Inc. as quoted in Canadian Printer, December 2003

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Conclusions

- **No Contract Proof Necessary or Non-color Managed Virtual Proof Sufficient?**
 - Apparent Growth Since 2005
 - Implications of Many Sorts

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Future Research Questions

- **Future Data to Contribute to Diffusion of Innovations Analysis**
- **Expanding to Other Markets**
 - Packaging
 - Publication
- **Qualitative Analysis**
 - Deeper Understanding of Relevant Stakeholders' Views
- **Market Size**
- **Projections**

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Audience Survey Results

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Thank You!

Q & A

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