

for Affiliates this month in Center research:

An Investigation into Printing Industry Demographics

Although printing is one of the most documented industries in the United States, the dozen or so major sources of information about the printing industry each arrives at a different view for the size and scope of the industry. A recent RIT research report by Frank Romano, "An Investigation Into Printing Industry Demographics" (PICRM-2003-01), examines this phenomenon, and develops a new set of criteria for defining and quantifying the industry.

Who is Keeping Tabs?

First we look at who is currently keeping tabs on the industry. Both private and governmental groups maintain databases of printing companies in the U.S.

- The Bureau of Labor Statistics (BLS) keeps track of the number of businesses by category within each U.S. county, called the *County Business Patterns* (CBP). CBP data are extracted from the Business Register, the U.S. Census Bureau's file of all known single- and multi-establishment companies.
- Reed Business Information publishes eight regional editions of the traditional *Graphic Arts Blue Books*, comprising a comprehensive list of more than 123,000 individuals at 73,000 printer, trade shop, and supplier locations. The directory was started by A. F. Lewis in the early 1900s.
- Dun & Bradstreet develops and maintains credit ratings, drawn from a global database of 79 million companies. Its database is reported to be updated nearly one million times a day.
- The National Association for Printing Leadership (NAPL)'s *Blue Book* series surveys the commercial printing market, and is the primary source of information on budgeted hourly rates for specific equipment and systems. NAPL tracks trends, financial and revenue patterns, and provides an index of printing activity, but does not publish lists or provide estimates on the number of firms. Revenue estimates are for commercial printers only.
- The *Yellow Pages* automatically lists anyone in the U.S. who has a business phone number. InfoUSA compiles lists from all U.S. Yellow Pages directories and gathers data from other sources as well. Its web site was used in Romano's study to define a list of printers for quantification.
- Printing Industries of America (PIA) publishes the annual

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The e review

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Ratio Studies for printing companies by market and technology. The Ratio database allows printers to compare costs and other data against peer companies.

- State Street Consultants (SCC) of Boston, MA, maintains an extensive database of major printing firms with information on equipment and usage patterns.
- C. Barnes & Co., a market research firm that specializes in the printing and graphic arts industry, publishes annual directories, reports, and custom research studies. Its 2003 *Printing & Graphic Arts Directory—U.S. & Canada edition* lists the leading 3,000 companies.
- CAP Ventures performs continuing analysis of the corporate, print buying, and printing environments and uses its databases to survey the corporate and commercial industries.
- NPES, The Association for Suppliers of Printing Publishing and Converting Technologies, sponsors in-depth research on behalf of its members, but does not publish industry demographic information.
- The three major printing trade magazines have circulations of about 80,000 each.
- Some industry suppliers have acquired commercial databases and mailing lists, and have then used their sales force and other marketing approaches to create their own databases. These databases, while among the best in the industry, are proprietary.

How Do They Compare?

The perplexing thing about these twelve information sources is that they do not agree. Five of them in the table below show conflicting numbers for the size and scope of the printing industry. The counts, especially for larger firms, tend to be within a reasonable range, though there are variances of 20% or more.

Table 1: A Quick Comparison of Five Data Sources
[click to view](#)

Why are the numbers different? Simply put, it is because the various sources are using different criteria to determine what a printing company is. Frank Romano contends that, in order to determine the size of the printing industry, the approach and terms of the research, including the term “printer,” must be defined.

Questions to Address

This brings up 15 questions to address:

1. Is any person or company with a reproduction device that sells print a printer?
2. Should anyone who provides copying services be counted?
3. Should anyone who provides digital printing services be included?
4. Do packaging printers count?
5. Do specialty printers count?
6. Do screen printers count?
7. Do newspapers count?
8. Should we include prepress and post-press (finishing) services?
9. Should we count firms or plants?

(Web site, publications,
general info)

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10. What years' data are we using?
11. What is the difference between a small printer and a quick printer?
12. Should we categorize by reproduction processes?
13. Should "in-plant" operations be considered?
14. What about companies that do not provide data?
15. What about multi-national firms?

The response to these questions will change the basis for comparable demographic information about the printing industry. Table 2 indicates the various answers that four information sources have indicated to these questions.

Table 2: U.S. Printing Industry from Four Points of View: What Types of Firms are Included
[click to view](#)

The **Romano study** goes on to create a database including all of the major printing firms, in order to understand the demographics of the largest printers, as well as a sampling of medium- and small-sized printers. The firms that make up 65% of industry revenue are quantified and defined.

Conclusion

Because the printing industry is diverse and complex, selecting a set of criteria for quantifying and tracking the industry is equally diverse and complex. The number of information sources has multiplied over recent years, so there is more information than ever before, but some of it may be more confusing than clarifying. The printing industry needs a centralized data service to maintain and publish relevant information on a timely basis. The database created by Romano's study is an attempt to accomplish this.

2003 Research Monographs:

To access this research monograph, "An Investigation Into Printing Industry Demographics," and

http://print.rit.edu/research/index_byyr.html

Next Month:

We will look at how environmental programs for small businesses in the U.S. have evolved and explore their effectiveness from the perspective of small companies.

