

Opportunities for Print

In a Post-Recession, New-Media World

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GAA Leadership Summit April 27-29, 2010

In Today's Business Environment

- You've got to move fast....



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In Today's Business Environment

- You also need to keep an eye on the competition....



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A Challenging Time

- Trading partners losing faith in U.S. economy
- Long-running war continues to drag on
- Restless citizenry engaging in street protests
- Electronic communications making paper obsolete



The Year Was 1971

- 1st trade deficit led U.S. to drop gold standard
- Viet Nam war well into its 2nd decade
- Anti-war protests, not tea parties
- Paperless office



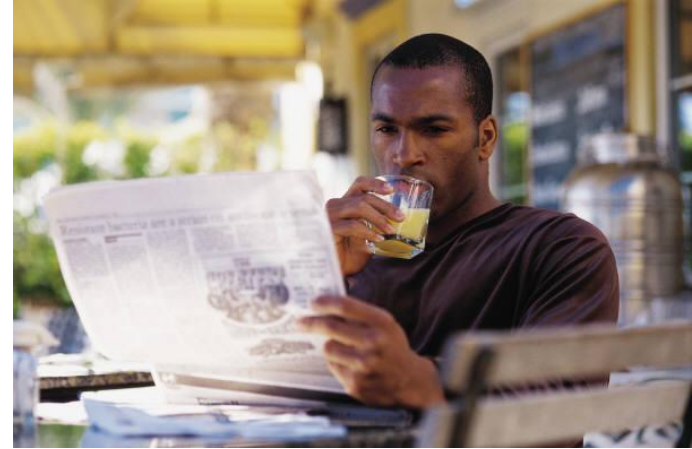
Many parallels to 2010



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Fast Forward 40 Years

- Office still not paperless
- New threats to
 - Newspapers, magazines, books...even TV
 - Commercial print businesses



Yet print still has a critical role

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Our Topics Today

- State of the four major print technologies
 - Flexo, gravure, offset and digital
- The new world of integrated graphic communications
- The opportunities in print



Flexography



- Key Apps
 - Packaging, packaging labels
- Strengths
 - Prints on anything: plastic, cellophane, metallic film; curved or flat surfaces
 - Wide range of fast drying inks



Label applications won't go away

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Gravure



- Key Apps
 - Art prints, magazines, postcards, newspaper inserts, packaging, vinyl flooring
- Strengths
 - High density suitable for high-quality art prints
 - Industry's fastest and widest presses
 - Wide range of substrates



The industry's top image quality

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Photo Courtesy of Windmoeller & Hoelscher Corporation

Offset



- Key Apps
 - Newspapers, magazines, brochures, stationery, books
- Strengths
 - Lowest cost for large volume, high-quality prints
 - Consistent high image quality



Most popular form of commercial print

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Illustration: Heidelberg Druckmaschinen AG

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Digital

- Key Apps

- Marketing collateral, direct mail, bills and statements, books, photo books

- Strengths

- Variable printing / personalization
- Cost-effective short runs
- Highly automated
- The emerging quality standard



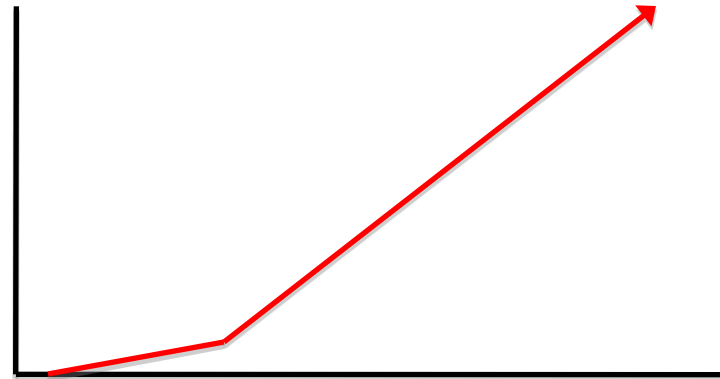
The only print form that's still growing

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Photo Courtesy of Xerox Corporation

Hockey-Stick Growth in the 2000s

- 89% of U.S. population has cell phones
- 63.8% of U.S. households have broadband Internet
- Digital photography, video, audio



Explosion of New Media

- Varied and complex range of media
- Always on
- Increasingly interactive

Linked 

twitter



facebook



Consumers set the agenda

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Internet, Print and Paper Peaks

- 1991 — Internet access in households
- 1998 — Broadband Internet in households
- 1998 — Gravure peaks
- 1999 — Household paper consumption peaks
- 2000 — Offset, film photo prints peak
- 2001 — Newspaper, first class mail peak



Flexo, digital print, broadband still growing

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A New World for Print

- Fundamental changes in consumer / business behavior
- Recession exacerbates industry challenges

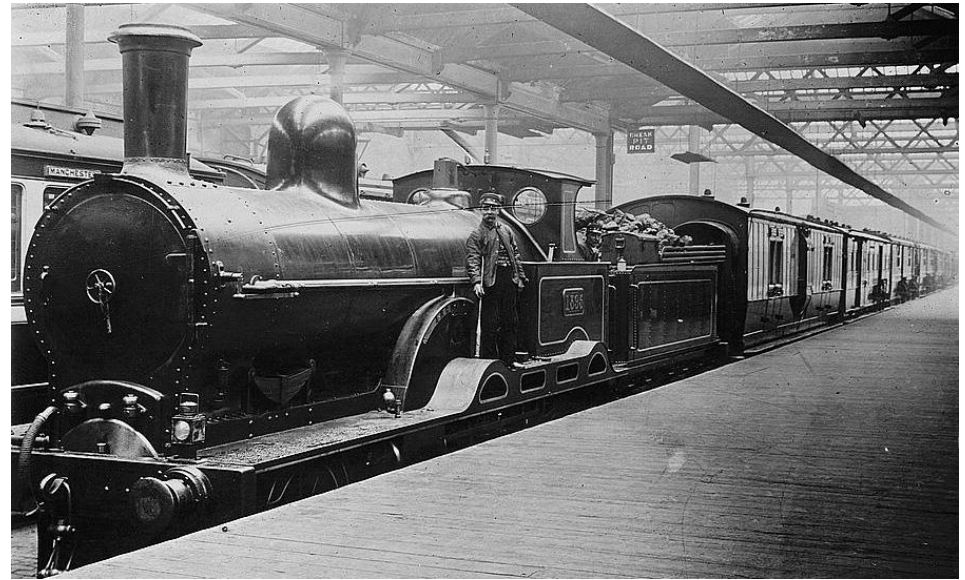


Your old business won't return

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What Business Are You In?

- Railroad or transportation / logistics
- Print or
 - Communications
 - Book supplier
 - Packaging
 - Vinyl flooring



Your customers drive your agenda



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Marketing Communications Provider

- Old Competencies
 - Creative / layout
 - Color management
 - Workflow
 - Printing
 - Finishing
- New Competencies
 - Web /mobile
 - Programming
 - Data / content
 - Analytics
 - Strategy

*Operations + marketing = interactive,
multi-channel support services*



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Embrace Digital

- Personalization
- Automation
- New applications
 - Digitally printed packaging
 - Digital photo books / specialty products
 - In-store book manufacturing



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New Multi-Channel Opportunities

- Social media
 - New channel like emails, PURLs
- QR (quick response) codes
 - Scan with camera phone to perform a task
- AR (Augmented Reality)
 - Scan with camera phone to call up interactive graphics



The Opportunity

- Deeply engage your customers
- Embrace digital
- Participate in the interactive world
- Innovate and Integrate



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Thank You!



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