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Where to now for Printing Industries? – James Cryer

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By James Cryer

In the aftermath of the *Printing Industries* election, it's worth asking what the Association is actually for and who is its constituency? As the dominance of printing fades in a fragmenting digital marketplace the quest for meaning and relevance takes on more urgency. James Cryer, industry seer and gadfly, kick-starts the discussion.

It is with a sense of *schadenfreud* that we watch retailers grappling with the challenge of online-ordering from overseas vendors. They, like us, in the printing industry, have to adjust to the new realities that there are alternate forms of delivering product to market. Print customers now have more options in terms of how they buy, when they buy and from whom. This results in downward pressure on prices. While this may be a cause for lament to many traditional printers with high cost-bases, to many new breed suppliers in the printing industry lower prices mean increased volumes and increased profits.

And who are these new breed suppliers? They come in many forms; online internet suppliers, hub-and-spoke manufacturing systems, digital printers, the list is extensive. But they all share one agenda – to knock off as much print as they can from traditional offset printers. As far as *Printing Industries* is concerned there is one major question; do we want them to remain outside the tent or should we welcome them in from the cold, knowing that they have murderous thoughts on their mind?

Are we one industry or many?

Historically, the industry- or more accurately, employer-associations were formed to promote and protect the interests of a very specific group: employers. All their guns were pointing in the same direction. Now, the great tectonic plates have shifted and, horrors of horrors, customers have choices.

One of the dilemmas we face, as an industry body, is the name of our association – the *Printing Industries* Association. Note, that's plural, not just *one* segment. On that basis alone we should open the floodgates and welcome all the alternate vendors and suppliers of print, even though many existing sheet-fed offset members are bleeding because of them.

On the other hand, if we're fair dinkum, we'll admit that the PIA is essentially the sheet-fed offset lobby group. So why should it admit members whose intentions are hostile to the wellbeing and profitability of its members? In a perfect world its name would probably be the *Commercial Printers Association*, as that more accurately describes its historical constituency – or it did, ever since my great-grandfather sat on the board back in the 1920's when it was called the *Master Printers Association*.

Therein lies our dilemma.

We now exist in a diverse if not complex industry consisting of many different sectors, some of which may be seen to be in competition with other segments. This is one of the inherent problems of any industry association – to find more similarities than differences between its members, and to encourage competitors to sit down together.

We're not alone: LATMA faces a similar challenge. As its name implies, it represents label manufacturers – but what about manufacturers of shrink-sleeves? Are they complementary producers, or competitors? Should they be admitted to LATMA, or not?

Twitter Feed

Defining who we represent –

There are dangers in over-specialising by just including, say, sheet-fed offset printers, which alienates other segments and turns them into the enemy. But by being too inclusive, by having everybody in the lifeboat, it defeats the purpose of arguing for special concessions. As the old saying says, 'you can't please everyone!'

The priority is to define the reach and branding of the PIA. Just who does the PIA represent? Who is its target audience?

The PIA has inherited the name to die for, as it implies it speaks for the entire printing industry — whatever that may mean. Through no fault of its own, on a good day it may represent only about half of the total printing industry. Historically, its traditional heartland has always been offset printers but not even that's correct, as it doesn't attract membership from the magazines segment and virtually no interest from the big newspaper battalions.

Traditional roles of an industry association -

I suspect it is easy to inflate the powers of industry associations to do much at all. It's easy for us to toss all our problems at the association to fix, but all that does is absolve us, as individual members, of taking some responsibility for fixing our own problems.

Let's re-visit the core issue of: what purpose does an industry association serve?

● Back in the good old days, it acted as a blunt weapon to bash unions and was really a default instrument of torture used to further the ends of the bosses. Luckily those days are over.
● It can also serve as a lobby group to press the special interests of a particular industry and the PIA has had some good wins recently with the Federal Government, it must be said.
● It can serve to provide legal advice and even represent companies in litigation.
● And it can disseminate technical advice and hold forums, etc.
● It can also promote the industry to the wider community, through promotional and educational initiatives and importantly, through the mechanism of the National Print Awards.

But, for us to advance as an industry body, we have to match up our range of services and benefits to the template of 'what do the punters want?'

For example -

● would they want someone on-board to act as an industry events manager? I suspect 'yes'.
● what about more technical forums? Definitely.
● legal and workers' comp/OH&S advice? Probably an overwhelming 'yes'.
● are we extracting maximum promotional bang-per-buck from the NPA's? Probably not. They're a dazzling showcase of the industry, which I suspect we keep pretty well hidden within our four walls. We are virtually under-pricing the cost of submitting an entry and then not capitalising on the event by promoting to the wider community – i.e. schools, print-buyers, and the media?

What are the benefits of membership? -

One of the big problems the PIA faces as an industry body is making membership seem exclusive and desirable. Back in the olden days, when it rejoiced in the title *Master Printers,* there was the inference that it was restricted to certain companies that had passed a test and the public would benefit by dealing with these companies as against the rest. Like dealing with a licensed plumber who guarantees his work.

Is there some way in which membership of the PIA can be restricted to those companies who have some kind of accreditation, be it in print quality, environmental standards or good employee relations? We can only look in envy at our brothers the builders, with their *Master Builders Association,* which somehow maintains the illusion that all their members are better than all the non-members.

But therein lies the problem, print is readily available to every man and his dog, from anyone who wishes to call himself or herself a printer and quality has become such a moveable feast as to be virtually unenforceable, even in a court of law.

Therefore do we need an association? Or perhaps do we deserve one? Have we been too ready to commoditise our industry? Quick to desert our original role of content generators, we now get files thrown at us like starving dogs. Are we just a bunch of tarts searching for some legitimacy under a nice-sounding name, like … *Printing Industries?*

One industry or many? -

And as an association, we can't even agree on who or what we are. Do we only represent offset printers and/or digital printers? Certainly not the suppliers, who've got their own organisation, GAMAA.

And what about print-management companies? Last time I looked they were part of the printing industry, but to hear comments from various quarters, PMC's should be hung, drawn and quartered, and then chopped up into little pieces. Is that any way to treat a 'friend'?

And what's our attitude to the big mailing-houses of this world? On the one hand they print stuff. On the other hand, they're busily installing massive transpromo capacity which will swipe millions of $$$'s away from the traditional offset base. That is, they're out to attack our traditional print base, still want them as members?

Another phenomenon is the rise of the manufacturing hub. By definition they're printers so you have to welcome them. But their sole aim is to drive the cost of print south by more efficient use of technology. In other words – knock off your business. Still want to buy them a drink?

The point is, it's difficult to accommodate everyone in the lifeboat. We have to define who we are and it's not going to be easy.

Challenges facing us all –

 Taking a deep breath, the best approach may be to arrange a series of industry-wide forums to define who

we are and what we want to become.

Some key issues -

- Industry Viability   (threats/opportunities, etc)
- How to improve the branding (higher profile, attract school-leavers, compete with internet, etc)
- Training   (future pathways into the industry, etc)
- Membership Needs   (a kind of on-going finger-on-the-pulse approach)
Apprentices   (Do we really need Apprentices, or trainees?)

It would make sense to hold industry-wide forums that occasionally, attended by different industry groups, e.g. packaging, print-brokers, newspapers, signage etc. those that have a particular need, or problem to solve, at any particular time.

 Friend or Foe, we have to decide –

We have to accept that the world is changing. I can recall reading excerpts of minutes of early meetings of the *Master Printers'* in the 1890's, complaining about price competition, eroding margins and those rogue printers who undercut agreed-upon prices just to win tenders. So, nothing changes there.

Do we, *Printing Industries,* represent just offset, who have a vested interest in protecting their investment in plant and equipment or do we represent anyone and everyone who plays a part in the industry.

The various voices of dissent during the recent elections suggest there's an undercurrent of disagreement on these issues that should be addressed. Either we address them or allow these voices to continue as a distant rumble of unfulfilled anger.

Publically defining our role will help define who we are as an industry and what we stand for as an industry body.

James Cryer,
JDA PRINT RECRUITMENT

3 Responses to "Where to now for Printing Industries? – James Cryer"

1. October 15, 2014 at 9:38 am, Survivor said:

James – you are right on, with what many ex-members of PIAA have been saying for the past few years. There is no relevance in the PIA for the new breed of print generators and the sooner the PIA wake up to this, the more chance they have of survival.

You are also being very generous suggesting PIA may represent up to half of the industry. I heard membership is dropping like flies and the only thing keeping them alive is the government funding

2. October 15, 2014 at 11:33 am, Don Woolman said:

As a former member of the SA Executive of PATEFA and now PIAA I could not have put the views of James Cryer better myself. His views reflect a lot what is being thought within our industry. I say "thought" and not openly discussed within open forums. I was also a former President of LATMA and have seen the impact of the label industry coming t

3. October 16, 2014 at 10:35 am, Steve Peck said:

A very interesting, relevant and thought-provoking article James. And, of course, beautifully written!

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