

The Magazine About Magazines

Masthead

Q&A

Association
President
Philip Boyd



Q As president of the Canadian Business Press, you're sensitive to what has been an especially tough last couple of years for the trade press. What are the top three concerns that publishers are telling you?

A Well, the top concern would be weak markets and little sign of improvement. The strength of the Canadian dollar is also hurting revenues.

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THE DIGITAL BOTTLE NECK

**Our biennial
Production Survey
reveals congestion
in the high-tech
prepress process**

On a bad day, you might hear a production manager cursing under her breath, "We didn't have this problem when we used film..." Not that there's any movement back to film-based production methods, mind you. Things are faster, better, and ostensibly cheaper, with digital technology. But as our 2003 Production Survey reveals, the digital transfer of advertising files has yet to fully live up to its promise.

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Digital Bottleneck

Technical standards exist, but in practice, most publishers accept almost any digital ad files they get. Is this the way it was supposed to be?

DATA COMPILED BY ROMA HUTA. STORY BY ART WARREN

continued from cover >

This is the seventh time since 1991 that Masthead has surveyed trends in magazine print production, and in recent years the story has been summed up in one word: digital. In most senses, the revolution is all but over. In 1999, for example, 16% of respondents said they printed with computer-to-plate technology. That number is now 79%. Final film is still produced to make contract colour proofs and burn plates at some shops, but the trend to CTP is inexorable.

Trouble is, abandoning film meant abandoning a well-entrenched standard. And while industry-endorsed digital ad file standards exist, the reality is that most publishers, hungry for every sweet ad dollar, accept just about any ad file, then eat the sour costs of fixing the bad ones.

According to our survey, 32% of all submitted ad files don't meet the publisher's specifications, and production departments spend 16% of their overall workload fixing bad files. Only 19% of magazines charge their clients for this work; 52% never charge, and 30% "sometimes" charge. So some of the savings with digital may be lost to higher workloads.

Furthermore, only 38% of the magazines represented in our survey have adopted the official, Magazines Canada dMACS standards for digital ad files, which focus on the PDF/X-1a format. Why is it so hard for magazine publishing to have one widely adopted standard? Greg Antonacci, production manager for Family Communications in Toronto and chair of the manufacturing and technology committee of Magazines Canada,

sums it up this way: "I asked my publisher if he saw any value in an industry-wide policy enforcing a single standard. His response was that it was kind of irrelevant to him, because he needs to satisfy the customer and not put up roadblocks. And he also has to respond to his competitors, who are doing anything to get the business. If that means accepting a PowerPoint file, then we have to do it, too." He adds: "It seems kind of petty to be charging clients \$50 or something to fix files when they are spending thousands with you."

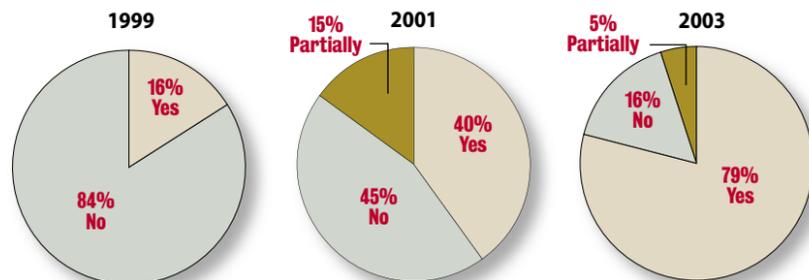
Sound familiar? Come to your own conclusions with the data from this year's survey. Following is a summary of the most significant results, representing production practices and realities at 268 magazines. In many cases we've compared the results to our last survey in 2001.

PRODUCTION: THE BIG PICTURE

Do you print with computer-to-plate technology?

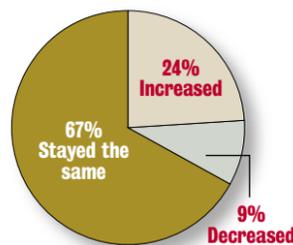
NOW THE STANDARD, CTP HAS DELIVERED SUCH benefits as closer-to-deadline ad closings, meaning more time to sell. White-knuckled production staffers then have to deal with those really late ads,

praying the ad files will print OK. Of the 16% of respondents not printing CTP, most say they are considering making the switch. It's not much of a choice anymore, with most printers relegating their film-based plateburners to the printing museum.



CTP adoption over the years

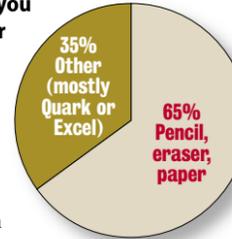
Has the size of your production staff increased or decreased since 2001?



DIGITAL TECHNOLOGY CERTAINLY HASN'T LED TO widespread staff savings; in fact, our numbers indicate it could be the opposite, though organic growth could also explain the 24% increase in staff sizes.

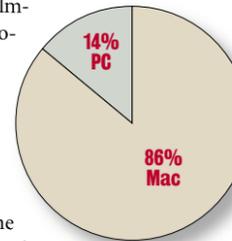
What software do you use to dummy your issues?

WHILE MANY VENDORS offer software tools for ad management and dummied, it appears most Canadian production managers still rely on spreadsheets and pencils.

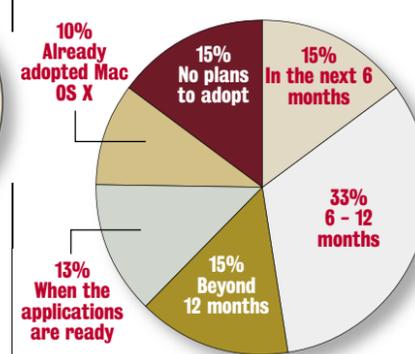


Mac or PC?

WE LOVE OUR MACS. IT remains the overwhelming favourite in production, design and edit departments, and has increased its market share 14% since our last survey. The newest object of desire: the Mac G5, touted as the fastest desktop computer ever.



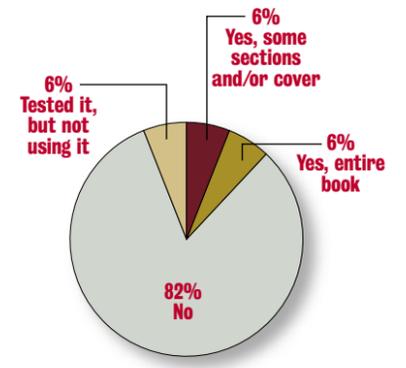
Do you expect to adopt Mac OS X?



PUBLISHING IS ONE OF THE LAST HOLDOUTS FOR adopting Mac's "new" OS X operating system, which is actually three years old and recently upgraded to the new "Panther" version. Two years ago, 49% of respondents said they had no plans to adopt OS X. Now almost everybody is making plans. Part of the motivation: vendors increasingly are not supporting older OS 9 software programs, and newer programs such as Adobe Acrobat 6—OS X only—have real print-production advantages.

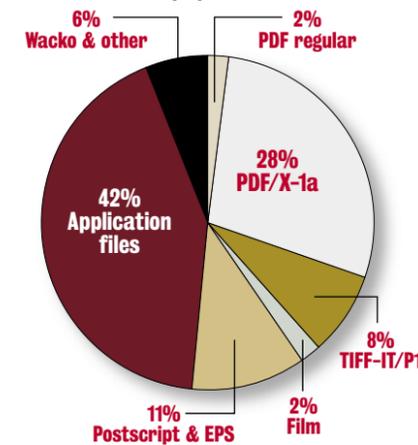
Do you use stochastic screening technology?

A NEW QUESTION THIS YEAR, REFLECTING THE interest in stochastic printing, which takes advantage of computer-to-plate's ability to create microdots on the printing plates for super-high-resolution reproduction. It's gaining popularity with some high-end titles, and for newsstand covers. A trend to watch.



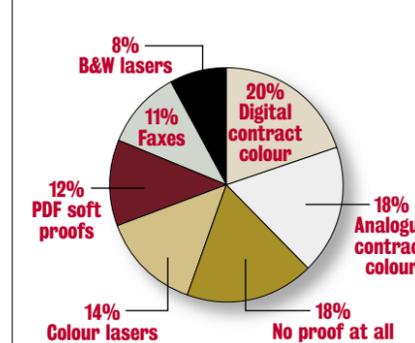
ADVERTISING WORKFLOW

Digital advertising file formats: Which are most popular?



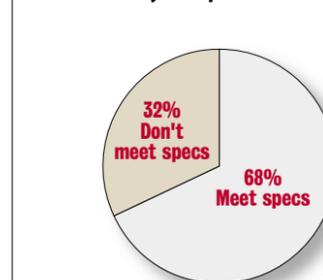
THE PDF/X-1A STANDARD, APPROVED BY MAGAZINES Canada, is making strides, jumping from 4% to 28% of all ad files created in the last two years. PDF/X-1a is a subspecies of the popular PDF open standard from Adobe Systems. Created especially for four-colour print production (with provisions for spot colours), it strips away all the non-print-related coding that PDFs can contain for other uses, such as Web documents. The format is increasingly easy to create; it's built into the latest version of Adobe InDesign, and plug-ins for QuarkXPress are available. Our data show the older TIFF-IT/P1 format is waning in popularity, and film has almost vanished: hands-up everyone who has a copy-dot scanner gathering dust in the corner. But at the end of the day, application files such as Quark are still the most popular ad file format.

What type of proofs do advertisers submit with their ad files?

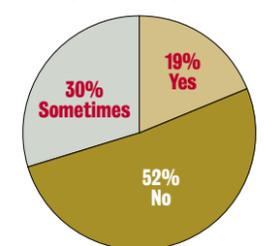


A NEW QUESTION THIS YEAR, WITH THE SURPRISING (or is it?) result that "no proof" is tied for the second-most popular type of "proof" submitted. "That could be our new industry standard," one production wag muttered recently. "No proof. Then we're not responsible for anything that goes wrong."

What percentage of ad files meet your specs?



Do you charge for fixing bad ad files?

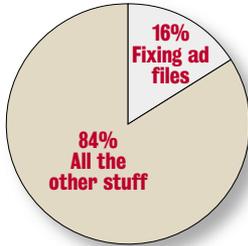


If not, why not? (selected comments)

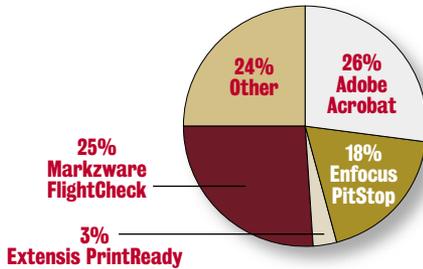
- "We're nice"
- "We charge for major changes, but many submit artwork as RGB or at 72 dpi. To make those minor adjustments, we don't usually charge"
- "Value-added service. Clients wouldn't pay. Ad rep won't ask client"
- "Too nice"
- "To keep the peace!"
- "They wouldn't pay"
- "That's a joke, right?"
- "Service"
- "Seems petty to surcharge"
- "Sales staff unwilling to do"
- "Part of our service"
- "Our sales staff would be outraged to have to enforce these charges since half of the problems stem from the fact that the sales rep did not communicate proper specs up front"
- "Our competitor doesn't"
- "Old company policy"
- "Not worth the trouble"
- "It took me 2 minutes to fix"
- "I wish I knew!"

PRODUCTION SURVEY

How much time does your department spend fixing bad ad files, as a percentage of its overall workload?

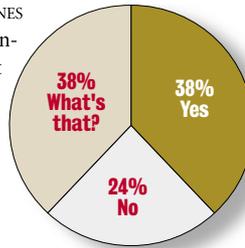


What preflighting software do you use?



Have you adopted the dMACS standards?

INTRODUCED BY MAGAZINES Canada, the dMACS standards are to digital what the well-known MACS standards were to film. Reasonably well adopted by the larger consumer magazines, awareness appears low across the greater industry. Visit www.magazinescanada.com for more.



Make-goods by the numbers:

283

Estimated number of make-goods provided by survey respondents in the last 12 months

\$565,400

Estimated rate-card value of those make-goods

\$4,276,000

Extrapolated value of all make-goods provided last year across the industry

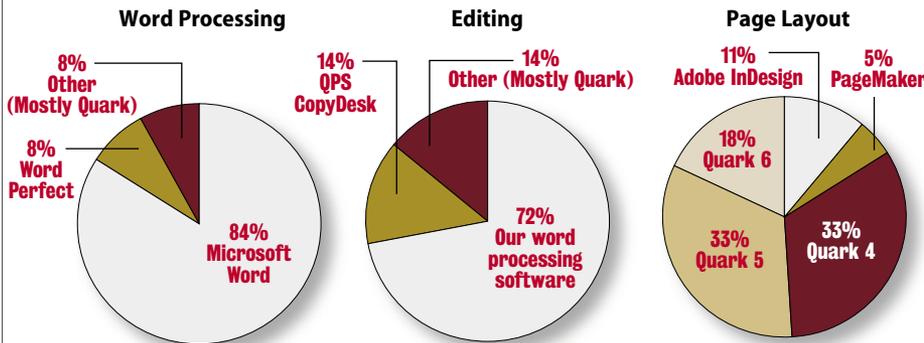
To determine the value of all make-goods supplied across the entire industry, we used Statistics Canada's number of 2,027 magazines in the country, and did the math. Four million bucks is lotsa dough, but only 0.5% of total industry ad sales. Cost of doing business?

Ranking of reasons for make-goods:

1	Problems with the ad file
2	Colour problems
3	Insertion errors
4	Positioning problems
5	Other

EDITORIAL WORKFLOW

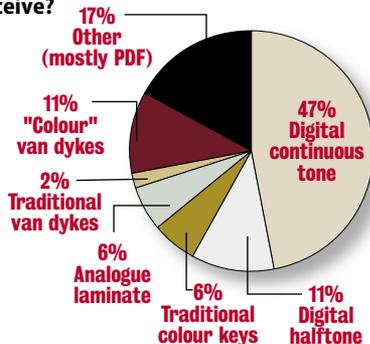
Which software packages do you regularly use in your editorial and art departments?



THE BIG NEWS IN THIS AREA IS THE INDESIGN vs. Quark page layout battle. Our results show InDesign making slow but steady progress, moving from 7% to 11% market share since 2001. But Quark clearly remains the dominant force. The bat-

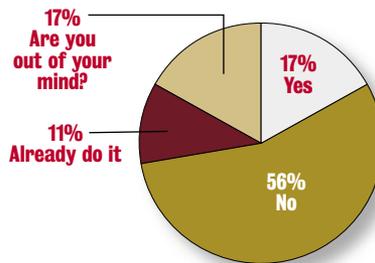
tle heated up this fall with the launch of InDesign CS, part of Adobe's new Creative Suite package of publishing software, and Quark 6.0. Both programs are designed for Mac OS X, which publishers must adopt in order to upgrade to InDesign or Quark 6.

What type of final colour proofs do you receive?



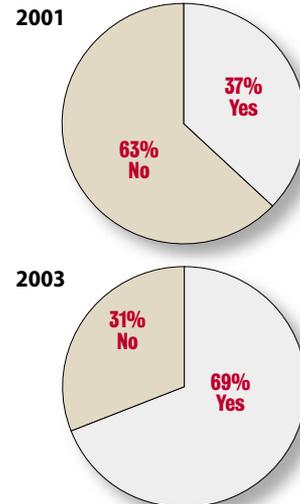
WE ALSO ASKED FOR ACCURACY RATINGS OF different proofing types, with 100% being a perfect colour match. Average scores: colour keys, 90%; digital halftone, 85%; digital contone, 84%; analogue laminate, 82%; colour van dyke, 69%.

Do you expect to adopt soft proofing for final proofs within the next two years?



MANY VENDORS ARE PROMOTING COLOUR-managed soft proofing technology, but it's a hot debate whether the industry will ever be able to abandon hard-copy colour proofs. It works for 17% of publications, presumably where colour is not so critical. For the rest, we'll see.

Does your department have a digital camera?



THE BIG SWING IN DIGITAL CAMERA USAGE IS PERHAPS one of the best indicators of the triumph of digital print production. For smaller pubs and trade mags, digital has become the photographic workhorse, and the cameras have a role at big consumer magazines, too, either for smaller photos or scouting.

How we did the survey

The Masthead Production Survey was compiled from responses to our hard-copy and online survey questionnaire. We had 55 responses from production managers responsible for 79 consumer, 83 trade, 10 association, one farm and 21 other publications, for a total of 268 magazines. Collectively they produce 1,186,131 pages a year, with total combined circulation of 12,616,319. A big thank-you to all who participated. **M**