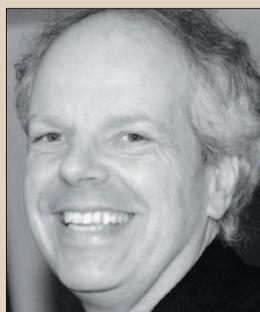


The Magazine About Magazines

# Masthead

## Q&A

Frank Publisher  
Michael Bate



**Q** Not only are you back in the publishing saddle, you recently introduced a hardcopy edition of *Frank* to complement Internet-based *eFrank.ca* that launched in September. Why?

**A** I'd like to say this was all part of some brilliant business plan, but it was accidental. We had no intention of getting back into print, but after a few days of publishing online,

**continues on page 25 >**

## 2006 PRODUCTION TRENDS SURVEY: POWER ON

Digital standards remain elusive, but does it matter?  
A mish-mash of workflow types may be an advantage

**T**he 2006 Production Trends Survey reveals once again that "digital standards" is an oxymoron. There are practically no standards for anything: advertising file formats, editorial and production software,

proofing types, delivery modes. The strange thing is, it doesn't really matter. It works. And dare we say, where once there was only one way of doing things, is the variety of workflows in magazine production today actually a good thing?

**continues on page 12 >**



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# 2006 PRODUCTION TRENDS SURVEY: POWER ON

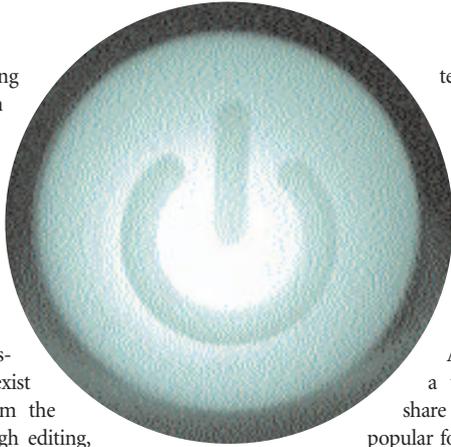
*As our latest Magazine Production Survey shows,  
kinks in the digital workflow are quickly disappearing*

DATA COMPILED BY JENNIFER HOLLINGSWORTH STORY BY ART WARREN

**T**he overwhelming conclusion from *Masthead's* biennial Production Trends Survey (our eighth since 1991) is that magazines are now an entirely electronic medium—but for one final moment of truth. Words, photographs, illustrations, advertisements exist as digital 1s and 0s from the instant of creation, through editing, design and production, right up until the press blanket applies a dot of ink in precisely the right location to manifest binary code into a paper magazine. Magic.

Behind that magic is a hodge-podge of production systems, software, file types and proofs. The thinking used to be the lack of standards was a hurdle to be jumped before digital could truly be said to have arrived. It didn't work out that way, due largely to competing vendors offering different solutions. And in some respects, the trend is to more ways of doing things, not fewer. Where Quark used to be the only game in town, for example, there is now InDesign (though Quark still dominates the market; see our chart).

The good thing about this customized rather than universal approach to production is exactly that: it's customized. Publishers can choose software and sys-



tems that work for their magazines, their budgets, their markets. Production can now provide a competitive edge. Who has the most efficient and customer-friendly production system and staff?

If there is any emerging standard, it is PDF. Adobe's file type has become a workhorse, increasing its share in three major areas: as a popular format for receiving ad files; as a format for sending files to the printer; and as a quick on-screen proofing format. (Adobe's Photoshop and Illustrator programs are also *de facto* standards.) Though its market share is apparently shrinking, according to survey results, Apple's Mac and OS X could still be said to be another standard. We also used to ask about computer-to-plate printing; we didn't publish a chart this year, because it too has become standard.

Which brings us to the ultimate standard, ink and paper. But even it has challengers. There's the Web, of course. And now there's another newcomer, the digital edition. A surprising 32% of all respondents said they are producing digital editions: complete electronic versions of the print publication, with all editorial and ads. Whether DEs replace print or become an add-on to print is still unresolved; the answer at this point seems to be, "it depends."

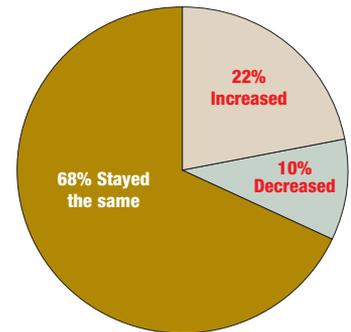
## How we did the survey

The *Masthead* Production Trends Survey is compiled from responses to our hard-copy and online survey questionnaire. We had 67 responses from production managers responsible for 151 production/art staff people. Collectively they produce 77 consumer, 49 business-to-business, 17 association and 30 other magazines (mostly custom, ethnic and religious), for a total of 171 magazines. This accounts for 286,728 pages per year with a total combined per-issue circulation of 14,454,240. *Masthead* has donated \$134 to NABS Canada, the media-industry charity ([www.nabs.org](http://www.nabs.org)), on behalf of all survey participants—a toonie for each survey returned. Thanks to all who participated.

## PRODUCTION: THE BIG PICTURE

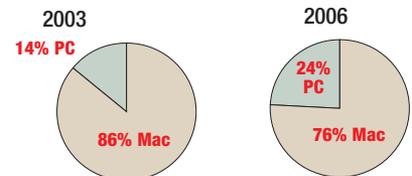
**Has the size of your production staff increased or decreased since 2003?**

This picture has stayed amazingly stable since our last survey, with percentages changing only 1% or 2% in each category. It suggests there have been no great savings in production staff salaries with digital technology.



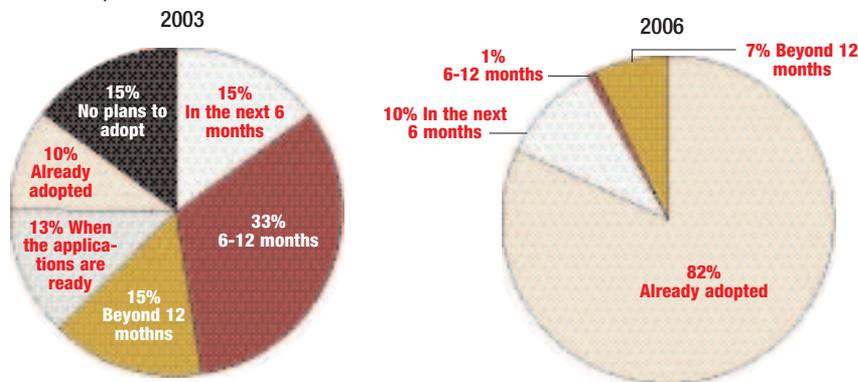
## Mac or PC?

Macs still rule the roost, but this time out have lost 10% market share to PCs. Cost may be one reason, and graphics software is increasingly platform-agnostic. We know one production guru (a printer) who says hardware doesn't matter any more; but we know many more who still swear by the Mac. Amen.



### If you're a Mac shop, have you adopted OS X?

Our forecast in 2003 for OS X adoption has more or less proven accurate, with the vast majority now on the modern operating system. Only a few holdouts are still pushing OS 9 past its best-before date. Tiger's real cool—don't you love those widgets?—but we're still kinda hoping there will be a version of OS X called "Tabby."

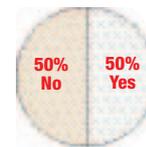


### Do you publish a digital edition of your mag?

NEW!



### If not, do you plan to publish a digital edition within the next two years?

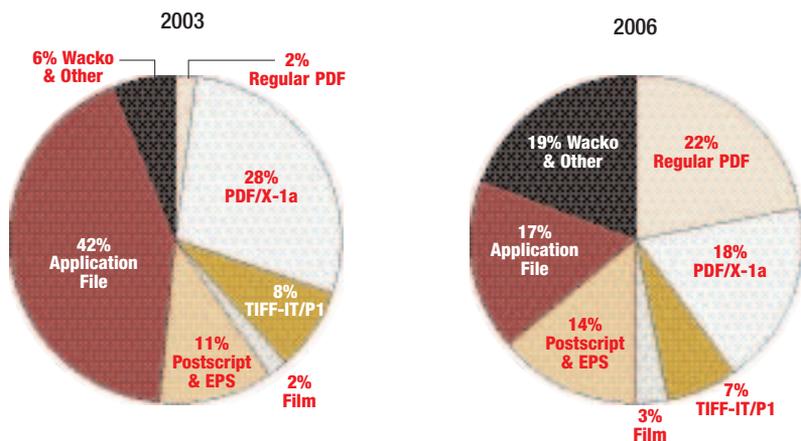


"Digital edition" has come to describe a complete electronic version of a print magazine, with all editorial and ads as they appear in print, but delivered to readers in an electronic format. Pushed by an ever-increasing list of vendors, digital editions are finding their place in the publishing landscape, often as free sample issues for circulation building. P.S. Have you seen the cool sample DE of *Masthead*? Visit [www.mastheadonline.com](http://www.mastheadonline.com).

## AD FILES: A RICH ECOSYSTEM OF MANY SPECIES

### Digital advertising file formats: Which are most popular?

According to our survey, one industry-wide standard for digital ad files remains elusive. But PDF is clearly gaining popularity as a file format, with PDF and PDF/X (the print-specific version of PDF) now claiming 40% of the pie, compared to 30% in our last survey. That appears to be at the expense of application files. Some publishers prefer the flexibility of application files for correcting mistakes, but with PDF editing software more readily available, there's even less of a need to accept app files. Oddly, the "Wacko and other" category—which covers PowerPoint, Word, and other file types—has grown considerably. JPGs, maybe?



### Make-goods by the numbers:

**726**

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

**\$1,071,770**

Estimated value of those make-goods

**\$1,476**

Average value each make-good according to our survey

**\$14,929,568**

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

To determine the value of all make-goods supplied across the industry, we used Statistics Canada's number of 2,383 magazines in the country, and did the math. This has more than tripled from our last survey. Not sure why, unless it's a function of our sample. But it's a big chunk of change, about equal to the revenues of an entire mid-size publishing company.

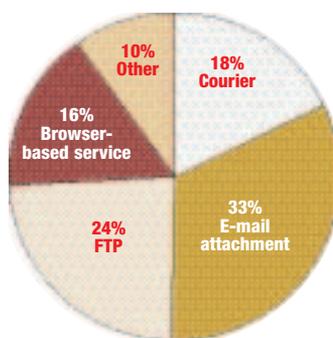
### Ranking of reason for make-goods:

- 1 Problems with the ad file
- 2 Colour problems
- 3 Positioning problems
- 4 Insertion errors
- 5 Other (mostly bindery)

NEW!

### How do you receive ad files?

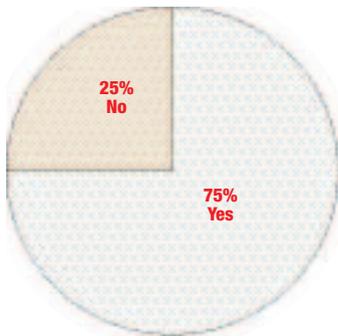
Ever waited for that past-last-minute ad file to arrive in your e-mail in-box? Thought so. Our new question clearly shows the predominance of electronic delivery modes, with 73% of all ad files delivered via e-mail, FTP site or a browser-based delivery service such as Loading Dock or Quickcut. We also asked: "In a perfect world, how would you like to receive all ad files?" The winners: FTP or e-mail.



## COVER STORY

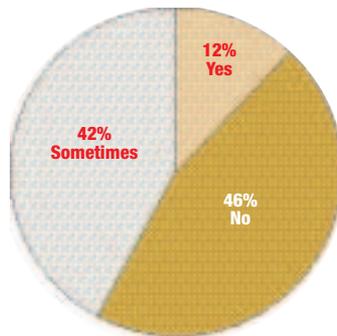
### What percentage of ad files meet your specs?

Happily, at least according to our survey, more ad files meet specs—perhaps a result of the increasing use of PDF. In our last survey, 68% of ad files were up to snuff, and that's now grown to 75%.



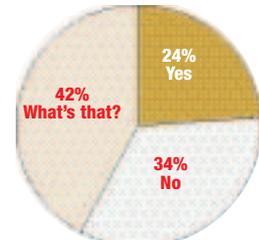
### Do you charge for fixing bad ad files?

The picture here is similar to our last survey in 2003. Back then, 52% said they don't charge, 30% said they sometimes charge, and 19% said they always charge. The trend seems to be towards charging for major repairs, but not worrying about the minor fixes.



### Have you adopted the dMACS standards?

Magazines Canada's dMACS technical standards (which specify PDF/X1-a as the standard ad file format) have been around for several years and are well adopted by the major publishing houses. But according to our survey, adoption has actually slipped, with 38% saying "Yes" in our last survey compared to 24% this time. And a significant number of production people still aren't familiar with them. You can read about dMACS on the Mags Canada website.



## PROOFING: WHAT YOU SEE...

Do you employ colour management technology? If not, are you planning to adopt in the future?

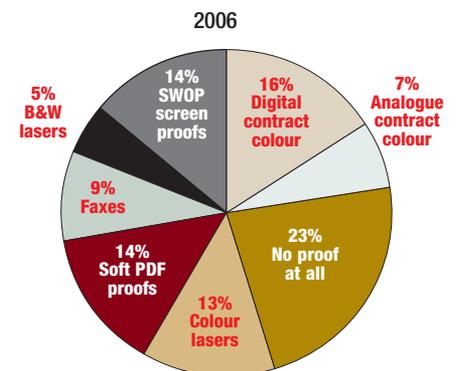
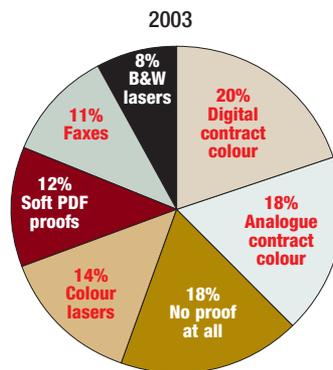
**NEW!**



There's a lot of talk in the industry about "printing to the numbers," and what makes that utopian vision possible is colour management. By using standard ICC colour profiles from camera to monitor to proof to press, the theory goes, you'll get predictable results every time. We are on the cusp of this revolution in printing, but it still takes lots of work and fiddling with calibration to make it happen. We've put this new question in the proofing section, because what it really means is having the printed result match the proof (either hard-copy or on-screen) every time.

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

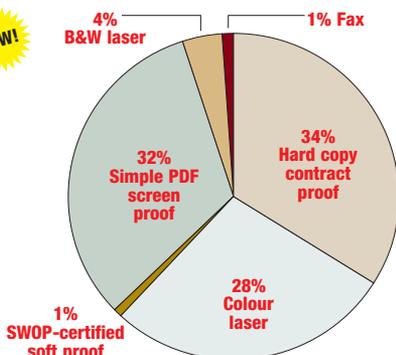
This year, "no proof" has actually moved into the top spot for type of proof supplied with ad; in our last survey it was tied for second place with analogue contract proofs. Even back in 2003, that was startling enough for the venerable U.S.-based *Seybold Reports* to publish the result on its website. Having no proof is a mixed blessing. On the one hand, there's no proof against which to match colour or even copy. On the other hand, it could speak to the consistent quality coming off presses these days. And "no proof" presumably removes the publisher's liability for mistakes. Presumably.



### In the real world, what level of proofing submitted with ad files is normally acceptable to you?

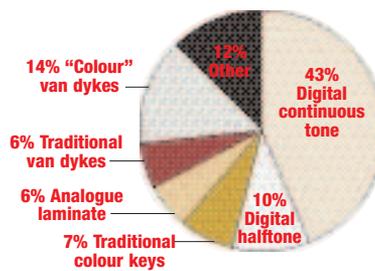
A firm majority would still prefer hard-copy colour proofs, either high-quality contract colour or colour laser proofs. But for a significant minority, PDF soft proofs are acceptable on a day-to-day basis.

**NEW!**



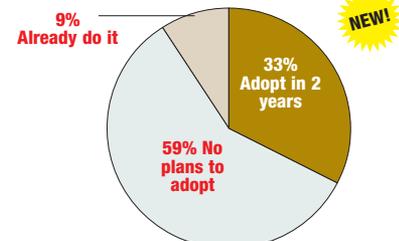
### What type of final editorial proofs do you receive?

This chart is virtually unchanged since our last survey, with Epson or Fuji Pictro-style digital continuous tone proofs being the most popular (slipping slightly from 47% in 2003). And like last time, we asked respondents to rate the colour fidelity of each type of proof, with 100 being a perfect score (proof-to-press match). The results: colour keys, 97; digital contone, 91; digital halftone, 85; analogue laminate, 81.



### Do you expect your magazine to adopt SWOP-certified soft-proofing within the next two years?

You may have read about or seen at shows the new high-end virtual or soft-proofing systems on the market, such as Kodak's Matchprint Virtual or ICS Director. These systems use colour-calibrated monitors and special software to meet standards set by the U.S.-based Specifications for Web Offset Publications. The promise: faster proofing and no hard-copy costs. A trend to watch.

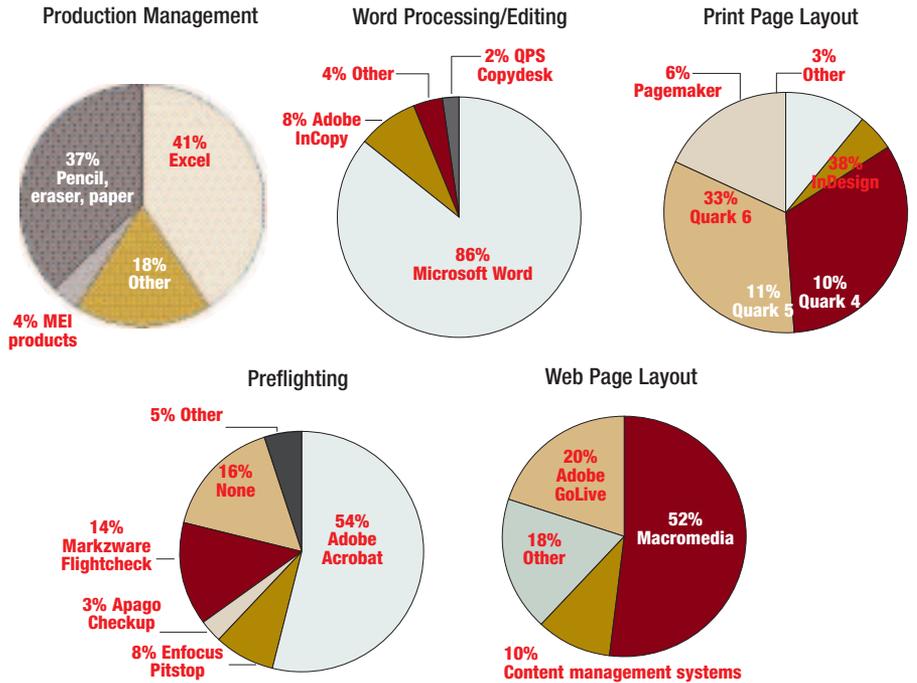


## SOFTWARE: ADOBE, MICROSOFT, QUARK ARE THE 3 KINGS

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

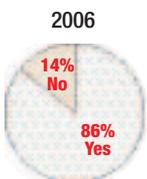
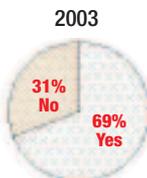
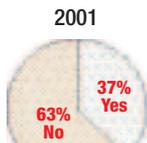
The story everyone's been watching is the battle of the page layout programs. Adobe InDesign (now part of Creative Suites) has clearly made big strides, more than tripling its share since our last survey, but Quark (versions 4 to 6) still commands the largest pie slice. The question is

whether Quark 7, due in the next few months, will help Quark retain or gain market share. Mighty Adobe is also eating up market share in the pre-flighting department with Acrobat. And with Adobe's purchase of Macromedia, it is now automatically the biggest player in Web authoring, too.



## DIGITAL PHOTOGRAPHY

Does your department have a digital camera?



Of all the editorial photos used in your magazine, what percentage are taken digitally?



No doubt about the trend here. Although this is a new question on our survey, we asked respondents to time-travel back to 2003 to estimate their use of digital photography. But it's not a panacea; see right.

Your opinions on digital photography

"Advantage: faster, quicker. Disadvantage: Colour reproduction is extremely important to us so JPGs are useless, but no matter how much you beg and plead, people would rather e-mail you a crappy JPG than courier you a transparency."

**"Advantages far outweigh the disadvantages. Biggest single advantage is the incredible saving in turnaround."**

"Great for making sure you've got the right shot at the photo shoot."

**"Bad resolution. More colour-correcting required."**

"Big fan. Keeps costs down, allows for quick turnaround and on-the-spot editorial opportunities with original content. Sometimes the quality is phenomenal, other times it is not up to standards."

**"Digital cameras have made everyone a photographer... too bad. The selection process is tedious, because everyone sends everything. Availability, access and speed make it work."**

"With today's modern cameras, as long as you can hold the darn thing steady, you almost always get a useable shot. Not necessarily a good shot, or a worthwhile shot, but technically it's useable. That's up about 400% from dealing with prints."

**"We are experiencing problems choosing selects because we have to rely on our monitor and Photoshop work done by photographers."**

"Improper colour correction pisses me off about as much as those consecutive percentage questions in this survey." **M**