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NPES news

THE ASSOCIATION FOR SUPPLIERS OF PRINTING, PUBLISHING AND CONVERTING TECHNOLOGIES

Sizing and Segmenting the Printing Industry

By William K. "Kip" Smythe, NPES Vice President

How big was the printing industry in 2004 in terms of annual revenue? It seems like a pretty straight forward question — but depending on who you ask, the answer was either $162 billion or $82 billion. How big is the industry in terms of locations? Depending on which source you consult, it's either 43,000, 34,000 or 27,500. But this question is a little trickier: are we counting companies, establishments, plants, sites or what?

All of this data comes from highly reputable sources that have been tracking the printing industry for decades. So how can the numbers be so radically different? It is, after all, the same industry. . . isn't it?

It all comes down to definitions and terminology. Some sources include newspapers as part of the printing industry while others don't — because they view them as publishers first and foremost who happen to deliver content on newsprint. Others include newspapers but don't view manufacturers of folding cartons or corrugated boxes or flexible packaging as part of the printing industry. Many times we are left with a mixed bag when market segments are not clearly delineated or are left out of the equation altogether.

This begs the question: "Can we all come to agreement on just what segments comprise the industry?" That's become a critical point of focus for PRIMIR, the Print Industries Market Information and Research organization. PRIMIR has committed to bring together consultants who regularly publish data on the size and growth prospects of the printing industry to debate and come to resolution on clear and uniform definitions we all can stand on. A desired outcome of this effort would be that consultants would publish their numbers along with footnotes listing the specific industry segments included in their forecast.

As a first step, PRIMIR invited a dozen of the leading industry consultants and hosted an in-depth session on this topic. The debate was intense and animated, and some progress was made. With regard to the question of reporting the size of the industry by number of locations, the group came to agreement on the following hierarchy:

Figure 1

Company —> Establishment —> Plant

A company may have many establishments and plants at various locations around the country. Some of these establishments may be "sales offices." For the purposes of identifying viable locations where NPES members may sell products, only "plants" where production takes place are of interest.

INSIDE:

president's perspective

Ralph Nappi
NPES President

Strategy is a Commodity, Execution an Art

Last November the business community lost one of the great management gurus of our time, Dr. Peter Drucker, who provided sage advice and many lessons during his six decades of consulting and teaching. The most noteworthy for me was his statement "Strategy is a commodity, execution an art." How many sound strategic plans sit on shelves gathering dust after months of endless management and staff retreats, debates and discussions?

In 2003, Larry Bossidy and Ram Charan authored the year's best-selling business book, *The Discipline of Getting Things Done,* which sends another strong message for today's business leaders that planning is only part of the equation for success.

Since joining NPES, I have been visiting many members and speaking with many more. One encouraging lesson I've learned is that our industry hears Drucker's point loud and clear. Our member companies understand that strategic planning is only worth something when it's fulfilled with a clearly-conceived action plan.

Equally encouraging is the message from our members' customer base. At the NPES Annual Meeting and at the VUE/POINT® advisory meeting in November, I was impressed by print company leaders' accounts of how they've transitioned their businesses to adapt to the changing environment. A brief sampling of soundbites reflects their new approach:

"We offer integrated communication solutions. It's not just about printing any more."

"We don't sell printing; we sell speed."

"We're not hiring printing sales reps, but seeking out top flight advertising account executives."

I hear many such statements from leaders who have been effectively implementing strategies to not only survive but thrive in a declining market.

THIS PAST HOLIDAY SEASON MADE ME RE-THINK THE OLD business adage that I once viewed as untouchable: "Markets make businesses, businesses do not make markets."

If you subscribe to XM radio or own an iPod, you know that even mature industries like music and entertainment have been completely turned upside down. If there was ever an example of creating a market, here it is. In the fall of 2004, I bought a new car. With the car came a three-month complimentary subscription to XM radio. I joked to family and friends, "Who would ever pay for satellite radio when the car includes a six-CD changer, AM-FM radio with 18 pre-set channels and a cassette player?" After four weeks of using XM radio, I signed up for a three-year subscription!

Another example: Last November some very good friends gave me an iPod. I thought, "That's cool, but when will I use it?" These days I am listening to digital books and watching Podcasts of

Sunday morning news shows. Talk about creating markets! I'm not so sure that when XM and Sirius were doing their market research, customers said "Can you please provide me with 24/7 commercial-free disco music via satellite anytime, anywhere I want it." And today a very small electronic device with a funny name and designer colors has saved the old-line computer company called Apple. And iPod has little to do with their core competency – computers!

In our industry a similar opportunity and transition is occurring. Recognition of the broader business is vital. Are we in the print business or paper business or are we in the information business? Remember the old railroad axiom? Are the railroad companies in the railroad business or in the transportation business? If iPod is a computer company, maybe the question we need to ask is not what business are we in, but what business should we be in?

THERE'S STILL A HEALTHY OUTLOOK FOR PRINT. Studies indicate that the catalog and magazine businesses are still in a growth mode. And even in the embattled book publishing industry, people are still more inclined to open a book by a fire on a cold night as opposed to plugging in a notebook computer. Even today's electronically-savvy college students prefer books to their "e" siblings.

But there is still no doubt the pie is getting smaller for what we currently do. Like our best customers, we must adapt. At the risk of over-simplifying, here are three potential avenues for consideration. The first is determined if you are the low-cost supplier of a product or service to your current marketplace. The second, be a high-end or niche player; third, view the business in an extremely different light by being broader in your consideration of the market and analyze exactly what business you should be in.

Dr. Drucker noted that strategy without execution makes an organization a commodity. NPES cannot afford to be a commodity for your business.

If NPES is good, we help you understand and identify the emerging trends in our industry. If NPES is very good, you look to us to provide strategies to help you deal with those future forces and trends. If NPES is excellent, you will look to us as an integral business partner and consultant to help you implement the strategies that make your organization thrive in the future. ●

SIZING and SEGMENTING continued

Printing Processes vs. Segments

Another factor contributing to confusion is the tendency to report data that is mixed by market segments and printing process. For instance, it's not unusual to see charts that segment data by commercial printers, packaging printers and "digital" printers. The question here is whether or not "digital" printers are a market segment like commercial printing or a process/technology used by commercial printers. There was much debate about this issue in our first meeting and more discussion will be necessary before agreement can be reached on this. Preliminary agreement was reached on "process" breakdowns for the industry as follows:

- Lithography (Web and Sheetfed Offset)
- Flexography
- Gravure
- Screen Printing
- Letterpress
- Electrophotography/Ink Jet (i.e. digital printing)
- Other

Indeed, there are several consultants and PRIMIR members who are adamant that "digital printers" are a unique market segment....stay tuned for details!

Market Segments vs. Products Produced/ Applications

Is direct mail a product produced by a commercial printer, or are there enough printers specializing in direct mail printing to constitute a unique market segment? Similarly, are catalog printers a unique segment, or are catalogs a product produced by commercial printers? Having an accurate definition of the market segments that comprise the printing industry is key to developing an accurate estimate of the industry's size. All of this becomes important when designing samples for research studies and when extrapolating data from samples to the universe. Accurate counts make for accurate estimates and forecasts!

> “How can the numbers be so radically different? It is, after all, the same industry... isn't it?"

OUR INDUSTRY CAN BE viewed as a three-dimensional cube with one side being the market segments that comprise the industry, the second side being the products produced by the printers in those market segments, and the third side being the processes that the printers use to produce those products. The PRIMIR cube is a work in process and the first generation is illustrated in Figure 1.

PRIMIR will continue this year to engage the industry consultants in further debate on this topic and will make further refinements to the “cube” with the goal of providing clearer, more accurate data on the printing industry. ●

PRIMIR launches five new studies for 2006

The Print Industries Marketing Information and Research Organization (PRIMIR) has created five new task forces to guide development of new market research studies scheduled for completion during 2006. These new studies include:

The Worldwide Market for Print

This study will identify the size of the global print market and provide a breakdown analysis of the size of the market by geographic region, including breakdown by major application and print processes. An overview of the major markets and how/why they differ from each other, as well as major trends for a five-year period, will be featured.

Digital Printing Outlook in a Production Environment

This study will provide a quantitative analysis of the installed base of variable-data capable black and white and color digital printing equipment (>60 ppm in production environment) in North America by geographic region, and by size/type of firm including printers, trade shops, and in-plants. This study will also provide a qualitative overview of trends including prepress workflow and pre/post press processing, and inline finishing, as well as a discussion on barriers and drivers to adoption of digital printing. The analysis will result in a forecast through 2011.

Trends in Inkjet Technologies

This study will review the technology and product lifecycle of inkjet products used for output applications (non-proofing). It will discuss growth/decline in various applications such as signs, direct mail, transactional, posters, point of purchase displays, industrial applications, etc. Drivers and barriers for adoption of this technology in the various applications, as well as various print market segments, will be reviewed. The study will provide trends and forecast the potential impact on litho and toner markets.

Magazine Printing and Publishing in the US-2006-2011

This study will assess key changes taking place in magazine printing and publishing through 2011 in North America. It will address ad formats (digital vs. film) and impact on turnaround, time, cost, quality/quality control, targeting, zoning, and globalization. Trends in the number of titles (by category), circulation, readership, demographics/psychographics, and custom publishing will be identified. Distribution and consumable trends will be covered. The study will also discuss trends and effectiveness of “e-zines,” and publisher strategies re: print vs. Internet and profitability measurements.

Quick Printing-2006-2011

This project will define the size of the quick print market (dollars and sites), and profile the profit leaders including product mix and print processes. It will identify sales trends for the next 5-years, and segment the 2005 market size by franchise quick printers, owner/operator entrepreneurs, superstore quick print sites, FedEx and UPS owned sites.

PRIMIR SM

One on One: Michael Evans

Having served as a consulting economist for NPES for two decades, Michael Evans shows little sign of slowing down. We sat down with him recently to get his thoughts on the global economy, opportunities abroad, and the launch of Worldscan, a new global forecasting publication for NPES members.

What's been driving you to build up a global outlook in economic forecasting?

All manufacturing is becoming a global economy. In many cases there is no such thing as US company, or a German company or a Japanese company; they're all internationally linked. We see this trend more perhaps in the auto industry than in others, but it's coming. You get Part A from this country, Part B from that country, put them all together in Country C and ship them to Country D. If times are not flexible enough to take advantage of cost differentials on a worldwide basis, they're probably not going to be in business much longer.

> "Global competition will force tariffs to come down over the next decade."

It used to be to a large extent that international meant Europe and obviously that's not the case anymore. Whether you think China or India is going to be the biggest success story of the 21st century, obviously the action is heating up in Asia.

How would you compare the opportunities in India and China?

India is just as big as China, and they have certain advantages that China doesn't have — like the English language, rule of law, and a stable banking system. Obviously there are disadvantages; everybody knows about the horrendous red tape bureaucracy and lack of infrastructure. Nobody is saying that India is another United States yet. The point is they have a tremendous, enormous growth potential.

Are there other countries in the Asian region that members should be looking at?

The whole Indian subcontinent — Pakistan, Bangladesh, and other smaller countries are certainly going to be an area of explosive growth. Indonesia — that's over 200 million people, a big country. Other places are emerging as well, smaller countries like the Philippines and Malaysia that are sort of niche product places but are also growing rapidly. The growth tigers had a bad fall in the late 90's but they've come back. You definitely don't want to ignore Asia.

What about barriers? We've heard that tariffs are an issue, especially in our industry.

They are a serious problem, and in my opinion they are going to come down — not in every country every year, but over time, countries that insist on keeping their tariffs high are essentially going to be shut out of world markets and wither on the vine. Global competition will force those tariffs to come down over the next decade or so.

What's your perspective on doing business in the Middle East?

You have to be very careful about going into the Middle East even if the area you pick is modernized, westernized pro-capitalist, etc. It is the toughest call in the world because the politics change so quickly. I would give it a few more years until things settle down. The Saudi Foreign Minister said recently there's going to be civil war in Iraq. I don't know if he's right or not but these guys are a lot closer to these things than we are and that didn't sound like a very encouraging forecast to me.

What about **Worldscan?** *What's your vision for it, what specifically can members anticipate? What should they be expecting from this new publication?*

Worldscan is patterned on **MarketScan** in the sense that the first part is a discussion of the economy and the second part is a discussion of specific product lines of printing machinery and supplies. In the first part I provide brief discussions of most key areas of the world. In the western hemisphere we've got the US, Canada, Mexico and Brazil. In Europe we've got Germany, France, Italy, Belgium, Netherlands, United Kingdom, Eastern Europe and Russia. In Asia we have Japan, Korea, China, Australia and India.

I discuss the outlook for all these countries, and try to compare it in most cases to the consensus outlook so that people will know where my views differ on the subject. You can get the consensus anywhere; the point is what's really going to happen.

From the point of view of NPES member company leaders, what are the top tier *forecasting and econometric indicators they should be most interested in while driving their businesses?*

Domestic and international are two entirely different sets of indicators. The indicator that bridges both is obviously what's going to happen to the value of the dollar and key currencies. The trade weight average of the dollar, or if you happen to do a lot of business in Japan — then the yen would be important or the Euro, whatever it is.

Domestically, you have to have some idea what the Fed is going to do. That's actually not as difficult as it used to be, because the Fed has become more transparent over the years. For example, if the Fed is going to tighten up on interest rates then you know the economy is not going to grow as fast next year and vice versa. You have to at least be aware of that.

We don't have as many good measures of the industrial sector as we ought to but new orders are still important. You still want to keep your eye on capital goods, new orders. There is what we call a core rate excluding aircraft and defense, because those orders just bounce up and down. I still follow that one closely.

On the other side, inflation is basically not a problem these days except for materials and energy inflation, which as far as I can tell is not predictable as it depends on geopolitical situations.

Internationally, besides the value of the dollar, you need to take a longer term perspective. You want to see which areas of the world are growing fast and which are not — obviously that's a big focus of Worldscan.

It seems like you're getting some enjoyment from the international perspective.

There's a quote I like that I saw a few years ago: "In the 21st century there's going to be two kinds of economists: international and unemployed." I'd rather be the former. ●

Membership Points of View

Promoting the Potency of Print

For this month's Point of View, we asked NPES member delegates to share their stance on promoting print as a viable communication medium for the future — in the face of competitive pressures from web and e-media.

Betty LaBaugh

Public Relations Manager
Presstek

"The dynamics of the printing business have changed dramatically with increased competition from alternative communication media. Yet print still has a strong role to play far into the future. Our challenge as an industry is to educate marketing professionals on the most effective means for integrating multiple media – including print – into a multichannel business communications strategy. The most effective printed communications will be increasingly targeted and relevant to the recipient. As a result, we will see even shorter run lengths and tighter cycle times than we are seeing today.

"At Presstek, our efforts are focused on delivering affordable solutions to our customers that enable them to produce short-run color profitably, yet at a price point that takes into consideration the increasing demands on their customer's marketing budgets. Presstek is working to make this a reality for the small- to mid-sized printer through the delivery of both educational initiatives and innovative products and services."

Chris Morrissey

Corporate Vice President, Marketing
Sun Chemical Corporation

"Print is a core business for Sun Chemical. We support initiatives like The Print Council to help keep print at the forefront of the communications scene. Statistics show that print is still the kingpin of the advertising world; and packaging is growing in communication impact – more than ever, it has to jump off the shelf. When you look at new products, pouches, labels...there is more unique printed coverage than ever before. We're helping to drive the aesthetics of print, in terms of coatings, matte and gloss effects, metallics....all to make the medium more attractive, whether in commercial, publication, or package printing.

"For print to evolve and continue as a huge part of our economy, it has to be productive. Sun Chemical has developed effective benchmarking and turnkey systems such as our Print Easy product line of inks and founts to help customers lower the cost of their print jobs. I think as the industry becomes more efficient, it's going to enjoy a better future."

Eric Frank

Vice President, Marketing
KBA

"One of the ways KBA promotes print is through technology innovation. We've developed presses that print on a wide range of substrates, enabling communication through paper,

board, various plastics, even lenticular printing. With an expanded portfolio, printers can better promote their offerings and the medium as a whole.

"We recently introduced the world's largest printing press, an 81-inch. I've been working with a lot of customers on point of purchase and retail marketing, to show the new color capabilities and quality they can get in super large format. So now, stores that might have leaned toward putting their promotional campaign on the internet can take advantage of a very attractive large format print media option.

"KBA is also very active in business development with our customers. When a new equipment purchase is made, we meet with their sales, production and support staff, to develop messaging, expand their marketing horizons, and educate them on the value, versatility, and ROI of print."

Universal McCann Insider's Report Projects Growth for Direct Mail; Other Ad Media Are Mixed

2005 BUDGETS OF NATIONAL ADVERTISERS

	% Change Over 2004	2005 Projections ($000,000)
4 TV Networks	+1.0%	$16,880
Spot TV	-7.5	10,517
Cable TV	+ 15.0	18,888
Syndication TV	+ 3.3	3,792
Radio	+ 1.5	4,441
Magazines	+ 5.0	12,859
Newspapers	+ 1.5	7,743
CONSUMER MEDIA SUB-TOTAL	**+ 3.7**	**75,120**
Direct Mail	+ 8.5	56,627
Yellow Pages	+ 1.5	2,142
Internet	+ 15.0	7,881
Other National Media	+ 5.6	35,377
TOTAL NATIONAL	**+ 6.0%**	**$177,147**

THE OUTLOOK FOR 2006 NATIONAL ADVERTISING

	% Change Over 2005	2006 Projections ($000,000)
4 TV Networks	+ 6.5%	$17,977
Spot TV	+ 8.5	11,411
Cable TV	+ 7.0	20,210
Syndication TV	+ 4.5	3,963
Radio	+ 4.0	4,619
Magazines	+ 5.5	13,566
Newspapers	+ 3.5	8,014
CONSUMER MEDIA SUB-TOTAL	**+ 6.2**	**79,760**
Direct Mail	+ 7.5	60,874
Yellow Pages	+ 3.0	2,206
Internet	+ 10.0	8,669
Other National Media	+ 6.4	37,650
TOTAL NATIONAL	**+ 6.8%**	**$189,159**
TOTAL LOCAL	**+ 4.0**	**$102,846**
GRAND TOTAL	**+5.8%**	**$292,005**

The "Insider's Report" by Robert J. Coen, Senior Vice President and Director of Forecasting at Universal McCann, is a widely cited compilation of current advertising data and predictions for the future. Mr. Coen has spoken and participated at NPES events like PRINT OUTLOOK.®

In the most recent edition, Coen notes that when all the numbers are in, 2005 ad spending totals are likely to fall below previous projections...but he also sees strong growth in direct mail and some other print media.

Following are some excerpts from the December 2005 "Insider's Report" (reprinted with permission).

Universal McCann now expects U.S. advertising in 2005 to total $276.0 billion for a gain of 4.6% over 2004. Last year we forecast that U.S. advertising would increase 6.4% in 2005, but now it is apparent that U.S. ad growth in 2005 fell somewhat below our expectations...

Next year we will look for better advertising growth in the U.S.

Spending for advertising by national advertisers was soft in 2005 in most media except for cable television, direct mail, and the Internet...

Most local retailers have reduced the share of their marketing budget spent on traditional media advertising. Expenditures for price promotion announcements distributed by mail or newspaper inserts have replaced a lot of radio, television and newspaper display ads...

In the past, when the return to higher ad spending has appeared, the trend continued for a number of years until the economic recovery ran out of steam. In 2005, despite reasonably good economic conditions, the advertising expansion faltered and, for the first time in recent history, failed even to keep pace with nominal GDP...

Dot-com consumer advertising continues to grow and these new marketers are expected to expand their role in media and marketing again next year... there are signs that special sectors...like dot.com marketers, have increased their spending in the traditional mass media while also undoubtedly raising budgets for their Internet promotional activities...A cross-analysis indicates that the dot.com expansion in spending has not seriously affected any group.

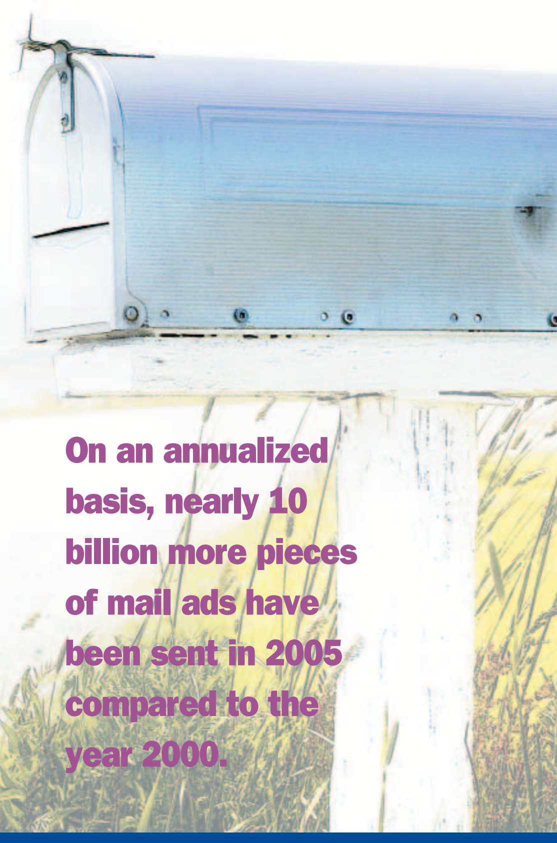
The changes in national marketers' advertising spending in many of the traditional mass media have been modest in 2005, but one exception has been mail advertising.

In 2004 the restriction on telemarketing — the "Do Not Call" regulation — started an upturn in mail advertising usage and the momentum continued into this year.

In the first half of calendar year 2005, the number of pieces of mail sent at the regular standard mail rate increased nearly 5%...On an annualized basis nearly 10 billion more pieces of mail ads have been sent in 2005 compared to the year 2000.

This trend has been influenced by the telemarketing restrictions, but it is also another indication that marketers have, in recent years, focused their marketing resources on more immediate measurable short-term responses. We expect that many of these programs will be continued and even expanded in 2006 despite higher postal rates and higher paper, printing and handling costs...

Total national advertising in 2006 is expected to increase at a slightly faster pace than it did in 2005...In 2006 national advertising growth should again outpace general economic growth, but only modest improvement at the local level appears likely. •



On an annualized basis, nearly 10 billion more pieces of mail ads have been sent in 2005 compared to the year 2000.

Spring Meeting in Tucson: Mark your calendar for the NPES Spring Meeting being held **March 23-25, 2006** at the Loews Ventana Canyon Resort in Tucson, Arizona. Program and registration materials will be mailed to members later this month. **February 22** is the cut-off date for room reservations with the NPES block. Contact the hotel at 520/299-2020 to make your reservation. For more information contact Irene LaBranche at 703/264-7234, or e-mail ilabranc@npes.org.

VUE/POINT® Conference Update: The Graphic Arts Show Company (GASC) has released program details for the 2006 VUE/POINT® Conference, April 10 - 12, at the Hilton in the Walt Disney World Resort, Orlando, FL. Among this year's sixteen featured panel discussions will be:

- Walking the Walk — A Look at Those Who Have Become More Than Just Printers
- Solution Selling — How to Retool Your Sales Team
- Opportunities in Wide Format Printing
- Remote Workflows Realties
- Ramping Up for Web-To-Print
- Digital Asset Management — Has it Become a Required Offering?
- Building a Business from One-To-One Marketing
- Learning About Lists — The ABCs of List Procurement
- Why You Should Embrace Mailing and Fulfillment

Michael Vinocur, the event's manager, emphasized that this year's conference will be more than technology — it will be about growing attendees' entire business. Attendees are encouraged to bring their families to take advantage of the Conference's proximity to the many attractions that the Orlando area has to offer, including Disney World, Sea World and more. The Conference registration deadline is **February 27**. Complete information about VUE/POINT can be found at www.vue-point.com.

Marketing Opportunities in China: China is a ripe market for sales; the country's printing industry is growing by about 10% yearly. NPES will exhibit product information literature for member companies at two prominent trade shows in China this year; Printing South China in Guangzhou, March 7-10 and All In Print China in Shanghai, June 14-17. Companies participating can enhance their efforts by using the NPES booth and the marketing services of the U.S.-Sino Printing, Publishing and Converting Technologies Training Center. The center can translate literature into Chinese and print on site, as well as refer manufactures to dealers and distributors. For more information about these services visit www.npes.com.cn and click on e-assistance. To contract for services, contact Greater China Project Director Ya-Ping Zhou at 619/238-4222, or e-mail npeszhou@aol.com.

Literature for the Printing South China exhibit must be received by **February 17**. To register for the exhibits visit www.npes.org/itrade/pavilion.html, or call 703/264-7200.

A new Standard for exchanging variable data to output devices has been approved by ISO. It allows content creators and print providers greater flexibility in design, development, exchange and production of documents by enabling a greater variety of output devices to be used by authoring systems using variable data. The standard specifies the methods for the use of Personalized Print Markup Language (PPML) and the Portable Document Format (PDF) for the exchange or identification of all elements necessary to render a variable data imaging job as intended by the sender. It specifies document layout and content data and makes provision for product intent specifications using the Job Definition Format (JDF) (e.g. paper selection, binding, finishing, etc.). *ISO 16612-1, Graphic technology - Variable printing data exchange - Part 1: Using PPML 2.1 and PDF 1.4 (PPML/VDX-2005)* has been published as an ISO standard. An order form for this publication is available at www.npes.org/standards/orderform.html. For more information, contact Director of Standards Programs **Mary Abbott** at 703/264-7229, or mabbott@npes.org.

A new report on the *Evolution of New Technologies in Europe: Direct Imaging* is now available free in the Members Only section of the NPES web site, http://apphost.infosrc.com/npes/closed.html. The report details how Digital Imaging (DI) has grown in Europe over the past ten years and indicates the rate at which it will likely grow in the coming years. The report also includes a summary of advantages and disadvantages of DI expressed by European users. It is the fourth in a six-part series on new printing technologies, focusing primarily on six of the largest developed countries in Europe. For more information, contact International Trade Data Specialist **Saranga Senaratna** at 703/264-7200, or e-mail ssenaratna@npes.org.

California Fax Ban extended: A federal judge has extended the stay on aspects of the new California law banning advertising faxes into and out of the state. The original stay was to have expired January 31, but has now been extended through February 27. A decision could be announced before that date. Following the hearing, NPES and other opponents of the law are optimistic that the court will grant a motion for partial summary judgment on the pre-emption issue that only Congress has the authority to regulate interstate commerce. For more information contact Government Affairs Director Mark J. Nuzzaco at 703/264-7200, or e-mail mnuzzaco@npes.org.

***NPES News* is published monthly by the Marketing and Communications team at NPES.**

Managing Editor:
Doug Sprei
(703) 264-7215

Correspondents:
Keith White
John McKeon
Kip Smythe

Circulation:
Darcy Harris
(703) 264-7200

In Defense of Newspapers

By Steve Lopez

A guy is walking down the street. He comes to a newsrack with a fabulous array of headlines and it stops him in his tracks. Now the guy reaches into his pocket for two quarters. Two quarters. What else can you buy for 50 cents?

The moment he plunks the coins into the box you see a shot of our team on the scene in Baghdad, a local politician in handcuffs after a big Page One expose, the sports columnist is going toe-to-toe with the Dodger owner, the car columnist test-driving the sporty new convertible and the perfect shot of the prep stud on a touchdown sprint. I'd point out in my TV ad that 50 cents buys you a seasoned editorial staff of 900 people covering every corner of the world and you also get the TV listings, the box scores, the crossword puzzle and enough coupons to cut the cost of dinner in half.

For these reasons and more, you're going to miss us when we're gone. Wait till all you've got to choose from is one of the thousands of fly-by-night Internet news sites or one of the millions of blogs posted by unapologetically biased hacks who haven't left the house in five years. Boy, are you going to miss us.

IF NEWSPAPERS DIE, YOU'LL STILL HAVE radio, sure. But you might also find yourself fiddling with a laptop that keeps crashing the moment it finds the story you want. Even in the best-case scenario, you can't pass the A section to your wife or husband and take the sports or entertainment page to the bathroom. Divorce rates will spike. As for you older folks out there, imagine trying to read the news of the new Medicare prescription plan on a cell phone screen.

All of this unpleasantness can be avoided, you know. And the cost to you? Two quarters, 50 cents...the last great bargain in America. ●

I don't know if you've heard the news, but I'm dying. That's right. I'm a newspaperman. Vultures are circling as I speak. I'm vinyl records. I'm VHS. I'm the Pony Express. In lieu of flowers, please buy me a drink.

They say the cause of imminent death is the flight of readers and advertisers to cable television and the Internet, but let's not overlook the self-inflicted wounds. In a 30-year career I've worked for seven newspapers and three corporate conglomerates referred to by some of my peers as the evil axis: Gannett, Knight Ridder and the Tribune Company.

Despite gargantuan profits by those behemoths, the wizards in charge have skimped on promoting their own newspapers. Wait a minute. Aren't they in the business of convincing companies they've got to advertise to survive? Yes, I understand we're in the midst of a vast reinvention of the media universe and some of these forces are irreversible. But if our ship is going down, can't we at least put up a better fight? Make some waves? Send up a flare?

I CAN'T FIGURE OUT WHY, BUT no newspaper executive has ever followed my suggestion on how to properly promote the product. Here's what I'd do in my TV ad.

Steve Lopez is a columnist for the Los Angeles Times. This piece was transcribed from his commentary on National Public Radio's "All Things Considered" on December 16, 2005.

NPES meetings schedule

2006

NPES Info Exhibit
Graphics of the Americas
February 3-5
Miami Beach, Florida

Trade Mission and Exhibit
E-Age Print 2006
February 7-13
Chennai, Madras, India

ICC Meetings
February 14-16
Tokyo, Japan

CGATS/SC3/SC4/USTAG
March 6
Mesa, Arizona

Product Exhibit
Printing South China 06
March 7-10
Guangzhou, China

NPES Spring Meeting
March 23-25
Tucson, Arizona

NPES Info Exhibit
IPEX 2006
April 4-11
Birmingham,
United Kingdom

VUE/POINT®
April 10-12
Orlando, Florida

ISO/TC 130
WG 1 – WG 4
April 21-28
San Diego, California

ISO/TC 130 WG 5
May 16-19
Vancouver, BC, Canada

NPES Info Exhibit
ExpoPrint Latin America 06
May 31-June 6
Sao Paulo, Brazil

ICC Meetings
June 14-16
Leeds, England

NPES Info Exhibit
All in Print China 06
June 14-17
Shanghai, China

ICC DevCon Europe
June 19
Leeds, England

NPES Info Exhibit
ROSUPAK 2006
June 19-23
Moscow, Russia

ISO TC 130 Working
Groups and Plenary
September 25-30
Berlin, Germany

GRAPH EXPO® and
CONVERTING EXPO®
October 15-18
Chicago, Illinois

NPES Info Exhibit
Argentina Grafica 2006
October 23-28
Buenos Aires, Argentina

ICC Meetings
November 2-4
Scottsdale, Arizona

NPES Annual Conference
November 4-6
San Diego, California

ICC DevCon 06
November 6
Scottsdale, Arizona

NPES Info Exhibit
Print World 2006
November 18-20
Toronto, Canada

NPES Trade Mission
and Exhibit
PAMEX 06
November 30-December 4
Mumbai/Bombay, India

2007

GRAPH EXPO® and
PackPrint℠
September 9-12
Chicago, Illinois

2008

GRAPH EXPO® and
CONVERTING EXPO®
October 26-29
Chicago, Illinois

2009

PRINT® and PackPrint℠
September 11-17
Chicago, Illinois

2010

GRAPH EXPO® and
CONVERTING EXPO®
October 3-6
Chicago, Illinois