

**United States Congress**  
**Committee on House Administration, Oversight Subcommittee**  
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**Testimony of James R. Hamilton**  
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Thank you, Mr. Chairman and members of the Committee. My name is Jim Hamilton and I am a Group Director at InfoTrends, a market research and consulting firm for the digital imaging and document solutions industry. My area of expertise is production printing and publishing.

Mr. Chairman, before I get started I'd like to ask permission to submit a report for the record which provides statistical back-up to this short testimony.

The United States Government Printing Office's core mission as stated on its web site ([www.gpo.gov/about/strategicplan.htm](http://www.gpo.gov/about/strategicplan.htm)) is to "Produce, protect, preserve, and distribute documents of our democracy." When the GPO was founded one hundred and fifty years ago, the only feasible method of producing, protecting, preserving, and distributing documents was in print. Today, with a multitude of electronic distribution methods widely available, that has changed. An appropriate question for today is "What is the best method (or what are the best methods) of producing, protecting, preserving, and distributing any type of document?" To effectively answer this question requires an understanding of the purpose of the document and the customer it serves. The answer must build on a strategy that takes into account changes in digital technology and distribution methods for published content.

Five technology trends are key to understanding digital market directions:

- Print, which used to be the central information delivery method, has become secondary
- Traditional print reproduction methods, which are best suited to manufacturing many copies of the same content, are under increasing pressure to meet tight deadlines and to provide economic short runs of the most up-to-date and targeted information
- Digital print methods are well established today for short-run, quick turnaround, targeted, and personalized work; and new technology developments, specifically related to high-speed color inkjet printing, will challenge conventional printing press technologies even further in the coming years

- Offset printing technology, while under attack from a range of digital technologies, remains viable because there are still compelling economic reasons for using it for many types of documents, particularly those that are required in large numbers (say one or two thousand or more)
- High-speed Internet connectivity and mobile phone technologies have enabled information delivery in ways that are impossible for print to achieve

There are also some major industry trends that cannot be overlooked:

- Market consolidation among commercial printers has reduced the number of sites significantly over the past two decades while at the same time industry employment levels have also dropped
- Automated workflow tools have allowed workers to become much more productive, which has resulted in an increase in revenue produced per worker
- Many printers are evolving from craft-oriented, print-only manufacturers into service-oriented marketing service providers who meet clients' overall promotional needs
- A service (rather than a craft) orientation is well suited to meeting customer needs for the creation, management, and distribution of information whether in electronic format or in print

At the same time that technology and other trends are impacting the printing industry there are a number of content-related factors, particularly around the digital delivery of information that are impacting the use of paper and print.

- Digital delivery of information has many advantages, including ease of searching; the inclusion of live hyperlinks and multimedia; the ability to content quickly; portability; tight control of content; and the ability to update as needed.
- Print continues to have significant value as a content delivery method through its physical aspects such as the lack of requirement for an electronic device to read it, the ability to easily archive, to annotate a document, to read without concern for electricity or battery life, and to easily recycle the paper
- Print is also egalitarian in the sense that it doesn't require high-tech devices or monthly service plans

- Publishers and other content providers have seen how digital print and electronic delivery can be used in combination to create a “data warehouse” of documents that allows books to be delivered as orders are received
- The models for delivering and paying for content in the digital age are evolving and have had a significant impact on the publishing market
- The success of electronic delivery is in large part dependent on appealing mobile devices that have only entered the market recently
- Libraries are embracing their position as source of information rather than a repository of books
- Formatting has moved away from designing for print first; the needs of e-delivery are seen as more important and are the basis for decisions on the choice of fonts and other design elements

Print’s move to secondary status happened over a period of about twenty years. The Internet, cell phones, and mobile connectivity have all contributed to that shift. Adjusting to such a massive change is not easy. InfoTrends has seen firsthand how private and public organizations have refocused on the use of content and how it is captured, formatted, distributed, and archived. The GPO’s leadership role in this transition is well acknowledged. Moving forward, the challenge for all will be to meet the document users’ need for accurate information delivered in the most effective means. With technology changing at a rapid pace, and a requirement to preserve documents with an eye toward history, that is no simple task. Electronic distribution methods certainly have many advantages, and yet the permanence of print remains very relevant to the GPO’s mission of production, protection, preservation, and distribution.

A multi-channel approach is the goal. Doing so takes advantages of the best of each method: (1) the low-cost manufacturing benefits of conventional printing presses; (2) the short-run, quick turnaround, targeted, and personalized benefits of digital print, and (3) the immediate, timely, and mobile benefits of electronic delivery through a global connected network. Understanding how the GPO executes on such an approach requires a clear knowledge of the purpose of each document and the needs of the customers served. With that in hand, assessing the current and future production requirements for the GPO becomes feasible.

Thank you for the opportunity to address the Committee. I welcome any questions the committee members may have.

Respectfully submitted,

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Jim Hamilton is Group Director responsible for InfoTrends' Production Printing & Media consulting services in the areas of production copying and digital printing, wide format, labels & packaging, production workflow, customized communications, and document outsourcing. Mr. Hamilton is responsible for conducting graphic arts market research, market forecasting, custom consulting projects, and creating editorial content for product and market analysis reports. Mr. Hamilton has been involved in the graphic arts and publishing industries since 1980, and has been a member of InfoTrends' On Demand Printing & Publishing Consulting Service since 1995. Prior to joining InfoTrends, Mr. Hamilton worked at Linotype-Hell as an Applications Analyst and author of the company's Technical Information Series. He also worked as a freelance graphic designer in the textbook publishing industry. He has an M.S. Degree in Printing Technology from Rochester Institute of Technology (R.I.T.) and a B.A. Degree in German from Amherst College.