

people in print

INFORMING FUTURE DECISIONS

Developing a Database of Labour Market
Intelligence



April 2007

Canadian Printing Industries Sector Council



ABOUT CPISC

The Canadian Printing Industries Sector Council (CPISC) provides a national forum for collaboration on human resource and workforce development issues within the printing and graphic communications industry. Incorporated in April 2006, CPISC's mission is to identify and implement strategies to address skills development and learning within the sector. Our overall goal is to improve the quality of the sector's labour force.

The guiding principle within CPISC is partnership. We bring together employers, employees, education and government to develop innovative approaches to skills development for the current and future workforce of this technology-based industry. The intent of CPISC is not to duplicate what exists but to build on what is currently being done and to develop on a national basis the programs and services that will meet the human resource development needs of the industry as a whole.

INTRODUCTION

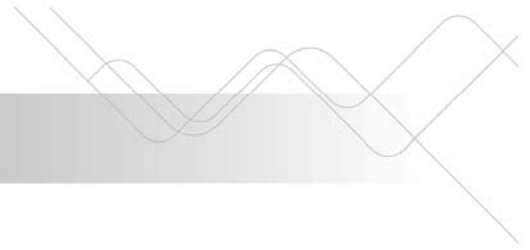
The past two decades have been characterized by rapid changes in technology, increasing global competitiveness and the restructuring of business practices. Despite this, the Canadian printing and graphic communications industry has continued to grow and flourish.

The printing and graphic communications industry has embraced technology. This has resulted in a constant need to upgrade and retrain the current workforce while ensuring that bright, motivated young people are attracted to this vibrant industry. All workers – current, new and potential – need to have opportunities to acquire the high level of skills they will need to succeed in the future.

Jobs within the printing and graphic communications industry fall into the following production process areas.

Pre-press – Pre-press includes preparing digital and traditional material for the press, according to customer's specifications. Traditionally, pre-press occupations included scanner and camera operators and film strippers – we used to talk about proofing the blues, going to film and preparing a camera-ready version. However, digital technologies and increased customer participation in prepress activities have blurred previous traditional classifications. Responsibilities now include revisions and corrections of customer files, digital creation of type, page layout, scanning, imposition, colour separation, film and plate preparation and digital asset management. The majority of the work performed in the prepress process requires highly sophisticated software.

Press – Press involves the actual printing of the document on a sheet-fed or web offset press. A sheet-fed press is just what the name implies – sheets of paper being fed into a printing press. Web presses operate with rolls of paper rather than single sheets – for example, newspapers are usually printed on Web presses. This process area includes press operation and troubleshooting. Employees install and adjust plates, prepare blankets and cylinders, select and mix inks, run the



press, monitor print quality and press performance, troubleshoot problems, ensure a safe operating environment and perform preventive maintenance on presses. As well, two other press systems – flexographic printing and digital printing – are rapidly growing areas that warrant particular attention.

Finishing and bindery – Finishing, bindery and distribution are the final steps in the production process. They include the assembly of finished products for the customer or consumer. Employees collate and bind printed sheets, perform finishing operations such as drilling, embossing and laminating, and prepare the final product for mailing and distribution. This process area now frequently includes the creation of a website that can host catalogues, databases and even e-commerce. As such, aside from the traditional occupations involved in finishing and binding a document together, this area now also includes a rapidly growing graphic communications component.

In addition, there are a number of jobs that support the production processes. **Production support** occupations include customer service and sales representatives, estimators, production managers and schedulers, and plant supervisors, as well as accounting and office staff, mechanics, electricians and material handlers.

The three production process areas and the production support area are each highly complex and integrated, and vary widely with the size of the company, types of presses, range of job titles and production output.

BUILDING A RELIABLE INFORMATION DATABASE

Like many industries, the printing and graphic communications industry faces a number of challenges. However, there are also a number of issues that are quite unique to the industry. The reality of the printing sector today includes:

- rapid technological change
- a geographically dispersed, varied workforce
- a lack of skill standards
- few training programs, many of which do not meet the needs of the industry
- changing demographics of the workforce as employees near retirement and recruitment efforts target – along with all the other sectors – a dwindling cohort of young people.

As well, the printing industry has virtually re-invented itself, as state-of-the-art technologies have become standard throughout the production process. The industry has responded to the challenge by restructuring, investing in new equipment and training and re-training workers. As technological advances continue to impact the printing and graphic communications industry, employers need solid information to support their human resource decision-making.



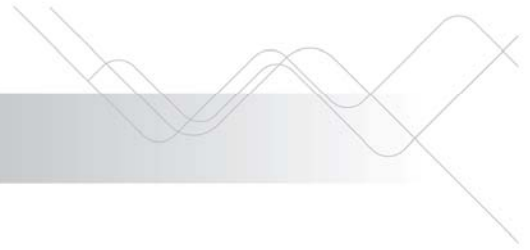
There are two types of labour market information that are of interest to CPISC members.

- **Labour supply information:** This includes information about the current and future composition of the workforce, such as age of workers/impending labour and skills shortages; male/female ratio; workforce diversity (generation mix, immigrants, and Aboriginal peoples); turnover rates; casual/full-time employment; deployment of workforce by production process area; pay rates and compensation packages.
- **Labour demand information:** This includes information on technological change, implementation and integration; globalization trends; import and export opportunities; education and training opportunities; productivity in terms of GDP and shipments produced.

Some information is known about the printing industry:

- It is Canada's longest established and most widely dispersed information technology-based manufacturing industry.
- It is the fourth largest manufacturing employer in the nation, with more than 113,000 men and women who work in some 8600 establishments from coast to coast.
- The printing industry is dominated by small firms, with 75% of companies employing fewer than 20 people. Industry establishments range from large production operations with more than 300 employees to smaller establishments with less than 10 employees. Less than 3% employ more than 100 people.
- In 2004, the GDP in Printing and Related Support Activities was \$5.7 billion. In 2006, the printing and graphic communications industry produced nearly \$11.5 billion worth of shipments.
- It is a highly competitive industry that is responsive to changing market realities and a continuously evolving workplace. This is reflected in the amount of re-structuring the industry has undergone in recent years involving significant changes in the total number and size of plants.

However, the information outlined above comes from a variety of sources and for different time periods. As well, there is no guarantee that the data are comparable – in effect, we may be comparing apples and oranges. To be able to plan for the future, employers need accurate labour market information on which to base human resource decisions. For example, recruitment and retention are huge issues throughout all of the printing industry – or are they? Before CPISC can provide an accurate analysis of human resource trends and issues, we must first develop a solid database of statistical information and indicators.



PROJECT OBJECTIVES

During the course of this project, the Canadian Printing Industry Sector Council will develop a database of accurate, current labour market statistics, indicators and information on the printing industry.

The project aims to develop labour market intelligence to help inform human resource planning in the industry and to assist the Council in planning projects that will respond effectively to the workforce development needs of the sector. The information will establish a benchmark that will allow CPISC to track changes and to respond to the future HR needs of the industry.

PROJECT ACTIVITIES AND TIMELINES

The project will run from April 19, 2007 to March 31, 2008. CPISC is undertaking a two-pronged approach to developing a database of accurate, current labour market information.

In the first instance, CPISC is partnering with the Printing Industries of America (PIA) to develop a Canadian equivalent to their Quarterly Market Survey. Gathering this information over time will allow CPISC to provide employers with environmental scans of the industry in comparison to their biggest trading partner – the US. But more importantly, accurate labour market statistics and indicators will provide employers with information needed to make enlightened human resource and workforce development decisions.

PIA's Quarterly Market Survey is conducted every three months. The questionnaire is administered online. CPISC will work with PIA to adapt the survey instrument to the Canadian reality. We will determine the frequency of the survey – for example, we may opt to conduct the survey once a year. Data will be analyzed both from a Canadian perspective and as a comparison with the American data.

As a complement to the online survey, CPISC will begin to compile data and indicators from other sources including Statistics Canada and Strategis. As well, CPISC will begin discussions with Statistics Canada regarding their data sets and surveys, to ensure that the questions on their surveys accurately reflect the printing and graphic communications industry. In this way, CPISC will be able to provide a comprehensive array of labour market information to employers.

CPISC will rely on the expert advice provided by the Project Working Group, in order to ensure that the information gathered is relevant and meets the needs of the printing and graphic communications industry.

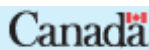


AND THIS PROJECT WILL LEAD TO...

Accurate labour market information has been identified as one of the three building blocks for the sector, the other two being skill standards and a review of training programs and providers. Until CPISC has solid, accurate, up-to-date information about the printing and graphic communications industry, it will be difficult if not impossible to respond effectively to the workforce development needs of the sector.

This project is a first step in building a solid set of labour market information on which to base workforce development decisions. It will serve to gather baseline data on which CPISC can build to establish itself as a source of accurate, current labour market information for the printing and graphic communications sector. Up-to-date labour market information will be presented on the CPISC website and be featured in CPISC's quarterly newsletter. CPISC will also produce a report summarizing the labour market information analyzing current and future trends and issues in workforce development. As well, the data gathered through the survey will provide valuable information for the development of a technology roadmap.

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The opinions and interpretations in this publication are those of the author and do not necessarily reflect those of the Government of Canada.