

Seybold PDF Survey for 2003 Highlights Trends, Contrasts European and North American Practices

Shift toward fixing bugs directly in the PDF file; increases foreseen for InDesign and Office as PDF creation tools; JDF takes hold in Europe but not North America

Useful as it was, our 2002 PDF Usage Survey (see Vol. 2, No. 11) could tell us only about the state of the industry at a single point in time. Adding the 2003 Survey data now allows us to look at the direction of change. Some of the findings will not surprise you; for example, PDF continues to gain adherents among both graphic designers and printers. But there have also been a few surprises.

As we noted at the time, last year's survey had one glaring weakness: Most of the participants were in North America, making it impossible to draw meaningful results about European practices and preferences. For the 2003 version, we were able to include more European participants, thanks largely to publicity and support from a number of graphic arts associations in Europe. At the Amsterdam PDF Summit, we presented a preliminary analysis of the main differences between North American and European patterns (see Vol. 3, No. 5).

However, in Amsterdam we did not yet have enough responses from PDF receivers (that is, prepress houses and printers), and so our discussion was limited to PDF generators (designers, publishers and other document creators). We are now able to remedy that shortcoming.

	N. America	Europe	Last Year
Receivers	18%	21%	26%
Generators	82%	79%	74%
Total	977	241	2221

After Amsterdam, our research team completed the survey, garnering enough responses from PDF receivers to allow valid statistical inferences. Last year's dearth of European data still limits us, of course. Nevertheless, we can look across time within North America, and we can look across the Atlantic with a snapshot of 2003.

Fixable errors

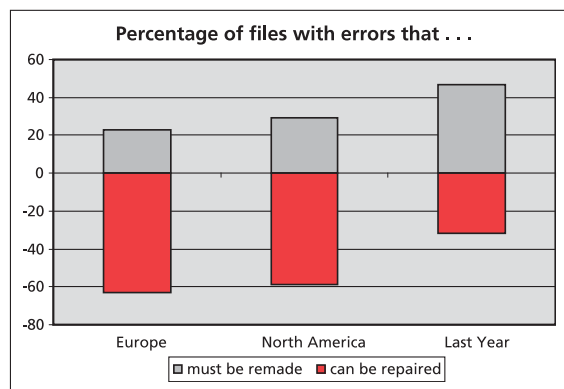
Our survey does not suggest that fewer files have PDF errors this year. But it does suggest that PDF receivers are better able to fix the PDF file directly instead of editing the native document and remaking the PDF. Credit may be due to improved file-fixing tools, better user training or increased use of restrictive specifications such as PDF/X—or all three, and perhaps other factors too.

As this graph suggests, the total fraction of files with errors hasn't changed much. But last year's North Americans more often went back to the native document (or asked the client to do so).

Corroborating evidence came from several other questions. For instance, the fraction of PDF generators who send no native files to their printers is slightly greater than last year; likewise, the fraction of receivers who get no native files is up a bit. The differences are small—statistically, they are not very significant—but all point in the same direction.

The recommended tools

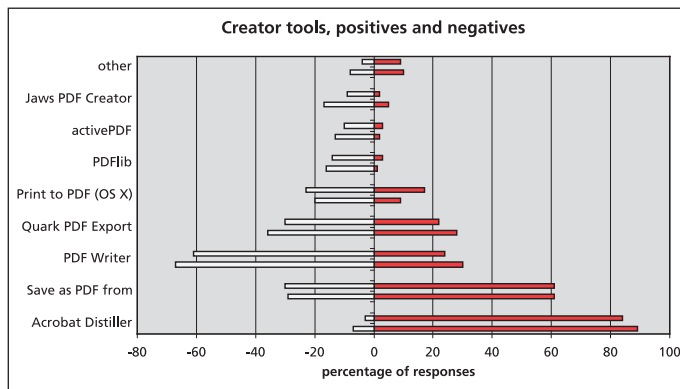
Our survey asked PDF receivers what file-creation tools they recommend to their customers, as well as what tools they try to discourage. The picture this year is nearly identical to last year's: nearly every printer recommends Adobe's Distiller. Opinion is firmly against PDFWriter—about two-thirds of our respondents said they discourage its use, about the same as last year. Oddly, a quarter of them said they recommend it, even though Adobe no longer distributes it.



In comparing each product's positives and negatives, we noted that almost every product stands about where it did last year. The sole exception is Apple's Print to PDF feature in OS X; although both the positives and negatives increased a bit, the growth on the positive side was greater. We think this signifies two things: Printers are more aware of it, and it works better than it used to.

What people actually use

Although printers can recommend or disparage particular PDF-generation tools, that presumes that they or their customers want to make PDF. The alternative, of course, is to work with native application files. Looking at what printers say they are actually getting, and at what creators say they are actually submitting, we found that the use of PDF has increased very slightly—



last year's percentage was already high—while Quark, Illustrator and PageMaker files declined slightly. InDesign usage rose slightly.

With minor variations, we see the same patterns among both the receivers and the generators in our survey.

The intriguing question (and one that we cannot answer) is how to read the Microsoft Office usage. In North America, it's on the upswing. Usage in Europe is much lower than in North America, but we lack data for 2002, so we cannot say if it's growing. Remember, this survey was taken before Adobe released Acrobat 6, with all its new features to integrate with Office!

Looking forward. Our respondents' expectations for the coming year tend to confirm the same pattern. Nearly everyone expects to see more PDF. Substantial minorities say they expect to see more InDesign, Quark and Office documents. Neither printers nor creators think the other file types will be on the rise.

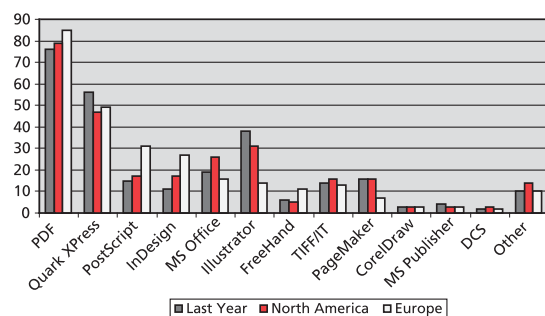
An interesting point here is how many more European creators are predicting growth for InDesign. For most other native applications we suggested, the Europeans were noticeably less bullish. On the other hand, printers in both Europe and North America seem to have roughly the same expectations.

What we worry about

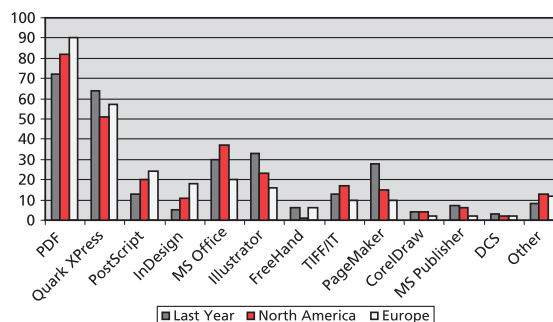
The survey asked both generators and receivers which potential problems were of greatest concern to them. Again, the broad patterns were the same as last year: Font embedding led the list across the board. Insufficient image resolution and color-space mistakes were also high on everyone's list.

CURRENT USAGE

What 3 file types do you submit most often

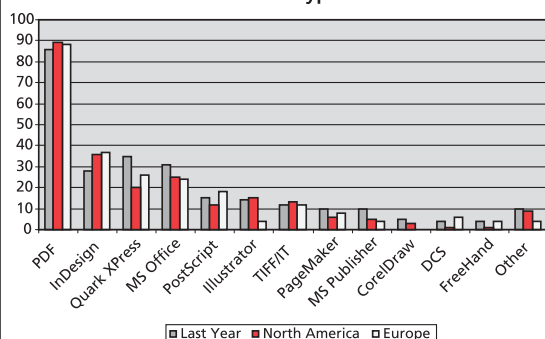


What 3 file types do you receive most often

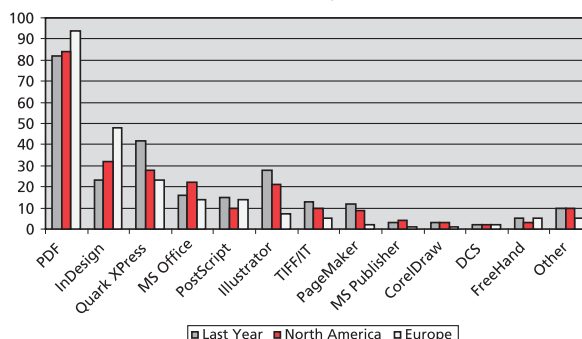


EXPECTED USAGE

Receivers: what 3 file types will increase



Generators: what 3 file types will increase



The creators have always worried that the PDF might not be consistent with the native file and that it might be hard to edit (*e.g.*, because of font subsetting). Interestingly, those fears are worse than last year—and to a lesser extent, the same is true on the printer side. Obviously, there have been some bad experiences. We suspect that a lot of the trouble began when Adobe added transparency to the language, which caused problems not just for RIP vendors (and their customers), but also for designers, who had to learn the new do's and don'ts.

Interestingly, Europeans are much more concerned about transparency and color-space and page-size problems than their American peers.

Whither JDF

In our May article, we noted that JDF was not getting much traction among North American creators, while Europeans seem distinctly more enthusiastic about it. Not surprisingly, the same pattern holds when we compare North American PDF receivers: The vast majority answered “no” or “not sure,” and barely a tenth said “yes” about their intention to install JDF.

It's different in Europe. Not only are the creators more enthusiastic—nearly a third of them gave a “yes” answer—but the printers are even more positive: Nearly half said they plan to adopt JDF.

One must treat these results with caution, of course. Our survey question did not specify any timeline for adoption, so the difference between North American and European responses may have as much to do with economic expectations and planning horizons as any merits of JDF itself.

Conclusion

Space here doesn't permit a discussion of many other topics that our survey covered. For instance, adoption of PDF/X-1a has jumped, although it's used far less in Europe. PDF/X-3 has a solid foothold among both printers and creators—apparently in roughly equal numbers on both sides of the ocean.

We'll be discussing the survey at Seybold San Francisco—those slides are posted to the Seybold365 Web site—and a thorough report will soon be offered through our online store.

Peter Dyson