

Printing and publishing

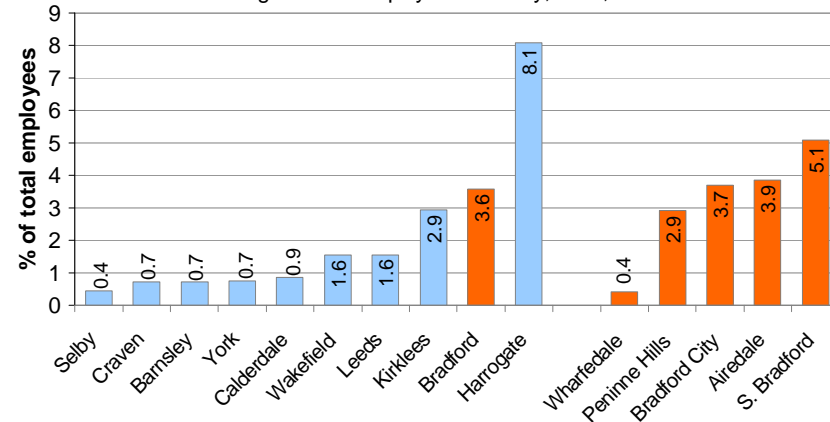
Bradford District Industry Sector Profiles 2012

Key points

- There are around 200 printing and publishing businesses in Bradford with approximately 6,800 employees.
- It is an important sector in the local economy, accounting for 3.6% of all the district's employees – far higher than the national average of 1%.
- Over half of all Bradford employees in this sector are based in Bradford City but South Bradford has the largest proportion of printing and publishing employees.
- Employment in printing and publishing increased in Bradford as well as in the Yorkshire and Humber region and Leeds City Region (LCR) between 2009 and 2010
- Future employment growth is forecast at a slightly faster pace than for all industries and services in Bradford.
- Average earnings in printing and publishing in the Yorkshire and Humber region are slightly higher than average earnings for all industries and services.

Printing and publishing is well represented in Bradford

Printing & publishing employees as a proportion of total
Source: Business Register and Employment Survey, 2010, NOMIS



Sector definition:

Activities included in this sector are book, periodical and other publishing activities, printing, reproduction of recorded media and software publishing.

Printing and publishing is included in this series of sector reports because of its importance to the local economy in terms of its comparative size and performance over recent years.

Employment in printing and publishing

There are approximately 6,800 employees working in printing and publishing in Bradford. Of this total 54% work in printing (3,600 employees), 45% are engaged in the publishing of books, periodicals and other publishing activities (3,000 in total) with fewer than 1% of employees in this sector working in the reproduction of recorded media and software publishing.

Employees in printing and publishing 2010

Area	No. of employees	% of total employees in each area
Great Britain	269,000	1.0
Yorkshire & Humber	36,200	1.7
Leeds City Region	27,300	2.2
Bradford	6,800	3.6
Airedale	1,400	3.9
Bradford City	3,900	3.7
South Bradford	1,200	5.1
Pennine Hills	200	2.9
Wharfedale	100	0.4

Source: Business Register and Employment Survey 2010, NOMIS
(Numbers rounded to the nearest 100)

Bradford has a significantly greater proportion of employees engaged in the printing and publishing sector (3.6%) than Great Britain (1.0%), the Yorkshire and Humber region (1.7%) and Leeds City Region (2.2%). Within the City Region only Harrogate has a larger proportion of printing and publishing employees (8.1%).

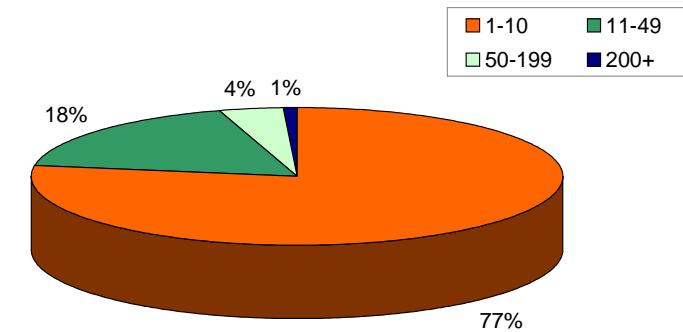
Within the district, Bradford City has the largest number of employees in the sector but South Bradford has the largest proportion of its employees engaged in this sector.



Printing and publishing businesses

Bradford has proportionally more larger companies than is the norm for this sector. Almost 23% employ over 11 employees compared with the national figure of 13%. Around three quarters of businesses in this sector are small, employing between one and ten employees - a significantly smaller proportion than LCR, Y&H and GB with on average over 82% of businesses in this size-band.

Proportion of digital businesses in Bradford in each employee sizeband
Source: Annual Business Inquiry 2008, NOMIS



Total printing & publishing businesses = 200

Bradford City contains around 40% of all businesses in this sector in the district but 64% of all employees reflecting the relatively large number of bigger businesses in this area.

Employment trends

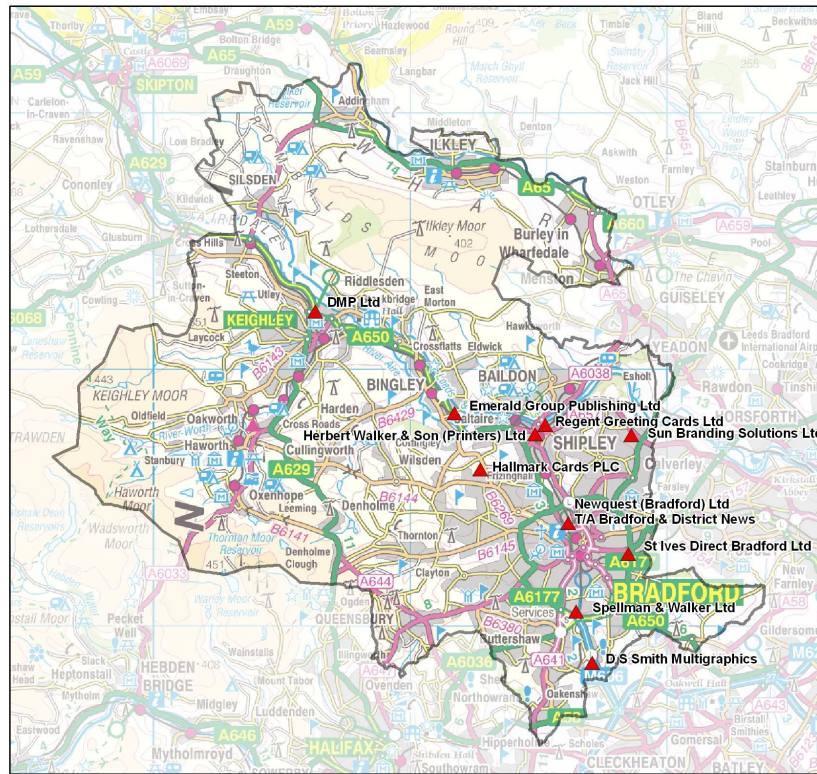
Between 2009 and 2010 the number of employees in the sector increased in Bradford (by around 1,300) as well as across the Y&H region and LCR. This was in contrast to the picture at national level where employee numbers fell. The table below shows some parts of Bradford saw very large percentage increases but these mostly represented fairly small numbers of employees.

Change in employee numbers 2009 to 2010

Area	No. employees		Change 2009 to 2010	
	2009	2010	No.	%
Great Britain	272,900	269,000	-3,900	-1.4
Yorks & Humber	30,200	36,200	6,000	19.9
Leeds City Region	23,700	27,300	3,600	15.2
Bradford	5,500	6,800	1,300	23.6
Airedale	800	1,400	600	75.0
Bradford City	3,500	3,900	400	11.4
South Bradford	900	1,200	300	33.3
Pennine Hills	100	200	100	100.0
Wharfedale	100	100	0	0.0

Source: Business Register and Employment Survey, NOMIS
(Numbers are rounded to the nearest 100)

Location of major printing and publishing employers



Source: Key Companies, Bradford Central Library, CBMDC

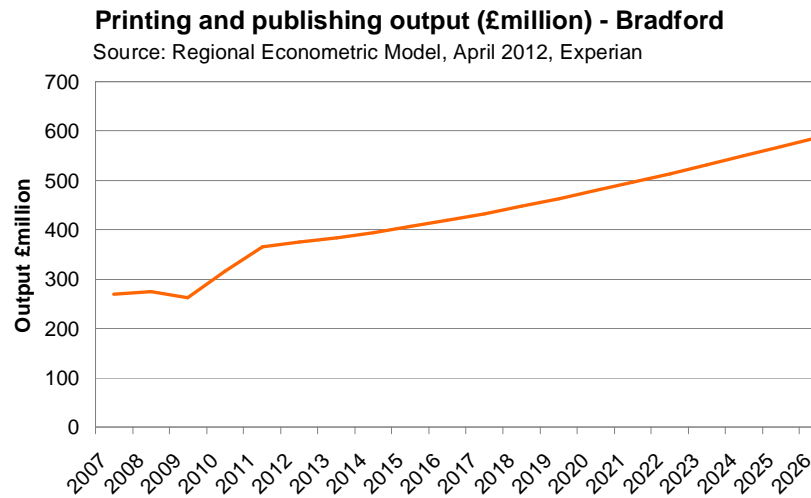
Case study: Hallmark UK

Hallmark UK is an American-owned greetings card publisher established in 1958 and headquartered in the Heaton area of Bradford – which is both the company's UK and international base. It is now one of the biggest private sector employers in the district with 1,300 employees but has 3,100 employees in total in the whole of the UK. It is one of the largest greeting card manufacturers in the world.

The company also has a 200,000 sq ft warehousing and distribution facility in Dawson Lane, Dudley Hill, Bradford, having consolidated its manufacturing base in the city in the nineties. Around £12 million has been invested to upgrade the distribution centre including investment in new technology.

The company is currently undergoing a major restructure of its UK operations following a review of all areas of the UK card operation.

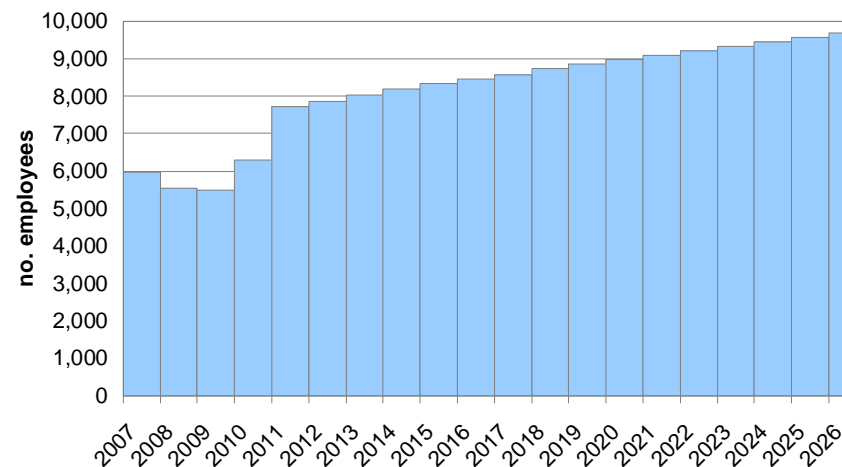
Employment and output growth is forecast



The recession has adversely impacted on output from the printing and publishing sector, as can be seen in the chart above. However, it is anticipated that output will start to increase from 2011 and carry on rising for the rest of the forecast period ie to 2026. The rate of growth for this sector is expected to outstrip the rate of growth anticipated for all industries and services.

Employment, as measured by full-time equivalents, also fell during the recession in Bradford. The rate of growth over future years for this sector is however forecast to be significantly greater than the average rate of growth for all industries and services. The REM (Regional Econometric Model) forecasts the number of full-time equivalents for printing and publishing in the district is expected to rise from 7,860 in 2012 to around 9,690 in 2026.

Printing & publishing employment trends and forecasts - Bradford
Source: Business Register and Employment Survey, 2010, NOMIS



Additional printing & publishing sector analysis

Provisional regional earnings data for 2011 indicates that the printing and publishing sector is a relatively high paying sector with full-time workers earning on average £493.30 per week compared to overall average earnings for all industries and services of £465.50. This suggests that overall skill levels in this sector are slightly higher than average and that the industry has relatively high productivity levels.

The printing industry - national & regional outlook

The UK printing industry has a turnover of £14.3 billion, gross value added (GVA) of £6.4 billion, and employs nearly 140,000 people in around 10,500 companies - according to analysis of ONS data carried out by the British Printing Industries Federation (BPIF).

Printing adds relatively more value than all but one other manufacturing industry (pharmaceuticals) - when measured as GVA as a percentage of turnover.

The UK is the fifth largest producer of printed products in the world and contributes almost £1 billion to the UK's balance of trade.

Key facts Yorkshire and the Humber printing sector:-

Companies	853
Employment	15,902
Turnover	1,659,608

The printing industry is currently going through huge changes. Today more and more printing companies are providing integrated marketing solutions to their clients that add value to their businesses by combining print and electronic media to increase the impact of both.

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