

The interior design industry and print's role  
in the market today

# THINK DÉCOR

## INTRODUCTION

The current  
European décor  
market place

## PERSPECTIVE

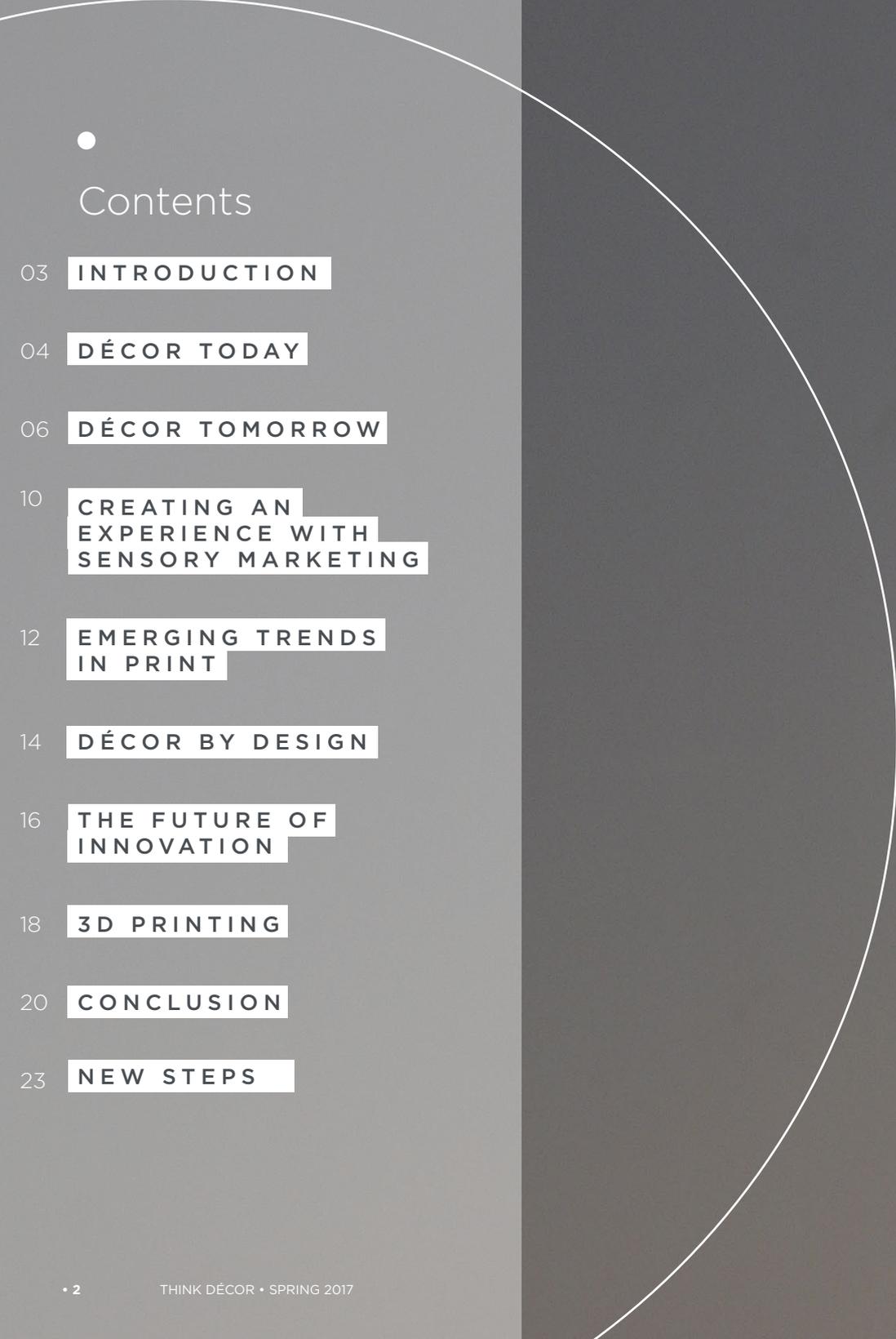
The key trends shaping  
the décor space

## INSIGHT

The opportunities  
uncovered for PSPs



Canon



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Decoration is the furnishing or adorning of a space with fashionable or beautiful things

”

**“Companies are creating an emotional connection with their consumers by telling a story, of which the product or service is a component”**

Ministry of Foreign Affairs, EU

Trends in décor are constantly changing. Whether it's for commercial interiors such as offices, retail spaces and hospitality suites, or for individual consumers, these movements in design are calling for interiors to be more adaptable, personable and dynamic than ever before - and in a European economy that demands the right to self-expression, it's no wonder.

From business and industrial environments to the new wave in home entertainment, the growth in markets that are now exploring decorative applications will see the industrial print sector reach more than \$107 billion by 2020.<sup>1</sup>

Think Décor will look at the trends that are currently shaping the European décor industry - whether it's consumers and their need for individuality or the pressure of an on-demand economy - and how both brands and consumers are helping to define its growth. Looking at both the present and future landscape, it will also highlight how print service providers (PSPs) can tap into this diverse market using print solutions as a way of creating an entirely bespoke experience ○

1: The Future of Functional and Industrial Print to 2020, Smithers Pira, 2015

# Décor today

**The European décor industry is showing no signs of slowing down, with the digital print market estimated to reach 225% of its 2013 worth of \$120.9 billion by 2024.<sup>2</sup> In fact, some of the biggest growth sectors in design last year were in textiles, for clothes and interior décor, packaging and wallpapers and interiors.<sup>3</sup>**

Spanning across a number of different industries, we're obsessed with the way things look. However, where the design takes centre stage, it's important that the practical considerations behind décor, such as audience, function and cost don't get overlooked.



Take décor for **industrial environments** for example. Primarily used to motivate and engage a busy workforce, we also expect it to reinforce the brand's identity, at the same time as making an impact on the customer. Reported to be worth \$67 billion in 2015, the functional print and industrial sector will see a significant increase in the coming years, reaching more than \$107 billion in 2020. Printed décor and laminates, including flooring, is now one of the highest growing applications in this sector,<sup>4</sup> with digital printing offering the perfect solution. Making interior decorative applications is therefore becoming a more accessible niche for PSPs.



In the same way, competition in the **retail sector** is driven by the desire to retain shoppers. A great example of how design is used to create an experience, the fast-paced nature of retail introduces the concept of flexibility, allowing for spaces to be refreshed when necessary. The rise of omni-channel marketing has prompted retailers to rethink their approach to customer experience, seeking to create a seamless retail experience across all channels. Retail trends can ultimately have a huge impact on printed signage demand, with the global printed PoS and retails signage market predicted to reach \$49.8 billion by 2020.<sup>5</sup>



Another example is in **hospitality** where the brand is everywhere. While we probably don't notice it straight away, the small details – from decorative table coverings and restaurant menus to wall coverings and fabric umbrellas – are used collectively to tell a brand's story. Where visual prompts help create an immersive experience for consumers, wide-format printers can help PSPs bring a creative vision to life.



When it comes to **consumers**, the focus is on making their homes more attractive. Our desire to have a space that represents us, whether it's through soft furnishings, wallpaper, glass, ceramics or laminates, has driven what we spend on highly personalised interior elements. Digital printing was made for the consumer age, with the global home décor market expected to garner \$644 billion by 2020.<sup>6</sup> In Europe, the online home furnishings sales market reached €30bn in 2015 alone.<sup>7</sup> With the rise of customised home décor products and businesses in Europe including leading vendors like IKEA, it's likely we'll only see more market growth in the next couple of years.

While the European décor industry has grown significantly in the last five years, it is the trends we're seeing today that will shape its future growth. ○

2: The Future of Functional and Industrial Print to 2020, Smithers Pira, 2015

3: 'Global industry is upbeat for future', Print Week, 2015

4: Industrial Printing market to reach over \$103 billion by 2018, Smithers Pira, 2014

5: Printed PoS/signage market predicted to reach \$49.8 billion by 2020, Smithers Pira, 2015

6: Home Decor Market by Product - Global Opportunity Analysis and Industry Forecast 2014 - 2020, Allied Market Research, 2015

7: Home Decor Market by Product - Global Opportunity Analysis and Industry Forecast 2014 - 2020, Allied Market Research, 2015



Play Room  
12'-6" x 12'-8"

Nook  
12'-0" x 13'-0"

Study  
14'-0" x 12'-0"  
12' ceiling

Covered Porch

Foyer

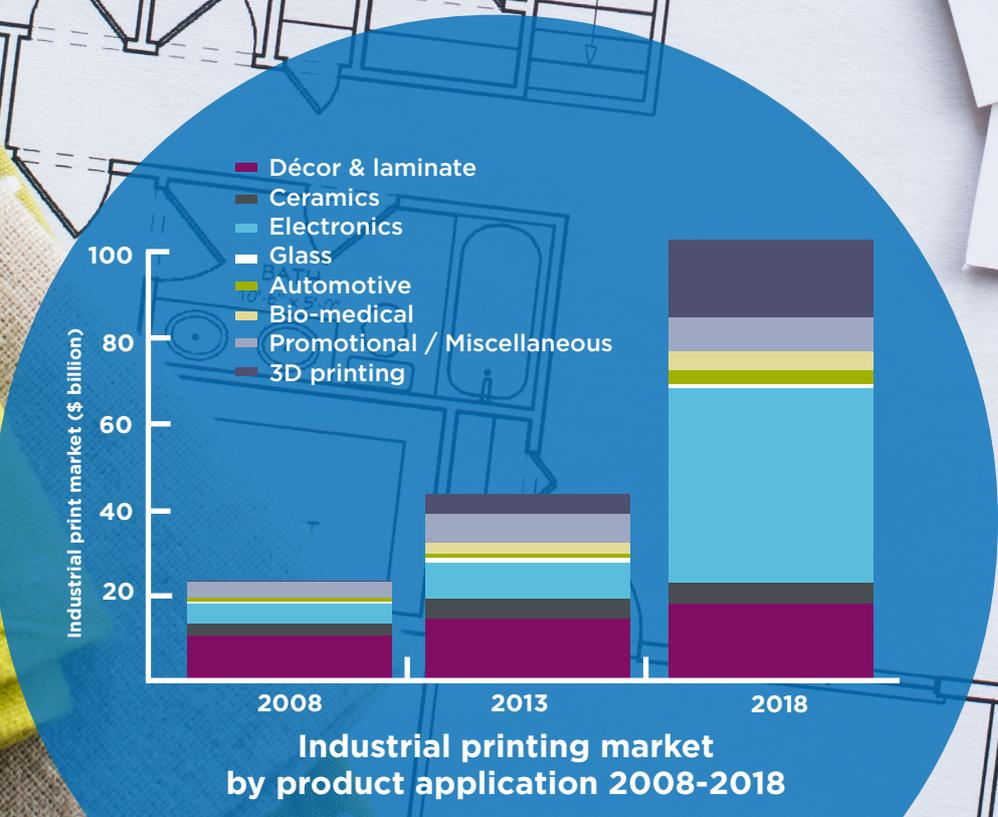
Pantry  
Pwr  
Cl  
Utility

Close

ROOM #3  
x 12'-4"

DN

KITCHEN/  
DINING ROOM  
12'-10" x 12'-4"



**Industrial printing market by product application 2008-2018**



# Décor tomorrow

**Humans are driven by a need for identity. We want to be able to clearly define who we are to others. The growth in prosperity has only triggered the emergence of self-expression, with consumers now looking to create their own brand identity – a personality for which they are both acknowledged and remembered.**

But whilst consumers are looking for this feeling of uniqueness, brands are looking for ways to keep them engaged. Interior design companies are responding to consumers' need for individuality by giving them the opportunity to design their own products. Digital printing is meeting this demand for tailor-made services perfectly, with solutions that not only provide a platform for customisation, but at a relatively low cost and – crucially – with a fast turnaround. Printers and designers both understand and appreciate the importance of time and speed in today's world. For example, furniture designer Brad Sewell took the idea of time and incorporated it into the design process. His Campaign furniture range was made to ensure the size, shape and weight of the pieces conformed to UPS and FedEx regulations. This allowed for smooth delivery and

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Inkjet will add huge value. But in order for inkjet to succeed in any industrial process, leadership is required from both manufacturers and customers in order to ensure the right solution is created. For large scale industrial printing this may not be easy, however the flexibility that inkjet will give producers is worth the effort, investment and time. Those that take the opportunity to invest with inkjet now will gain competitive advantage.

Marcus Timson, Co-founder, Inprint

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easy fitting, as well as to save customers from the hassle of multiple delivery dates.<sup>8</sup>

It is important to recognise that while smaller-scale commercial printing is very much focused on consumer experience, industrial printing is far more focused on production and production methods, which explains why the take-up of digital methods in this sector has been slower. Today, the successes of companies like IKEA are a testament to the growth of semi-customisable décor on an individual level, while printers such as The Print Foundry are already capitalising on the rising desire for individualised prints with which to decorate their homes. In the future, we can expect more changes and further shifts, with inkjet printing growing particularly well.

As with most print for profit, digital print is growing in importance. In 2008 inkjet accounted for less than 5% of industrial print, in 2012 it was over 19% and in 2018, Smithers Pira forecasts inkjet will be over 30% of the market by value.<sup>9</sup>

Even vendors like McDonalds are appealing to our sense of self, using vibrant graphics to redesign its stores that relate to customers in different ways.<sup>10</sup> While brands focus on the concepts, PSPs bring the vision to life by producing the creative collateral in which consumers can interact. From leaflets and posters to large-scale advertising boards, fast, cheap and high-quality digital printing is helping businesses execute successful multi-channel marketing campaigns on a daily basis. >

8: The On-Demand Economy Is Growing, and Not Just for the Young and Wealthy, Harvard Business Review, 2016  
9: Smithers Pira, The Future of Industrial Decoration and Printing to 2018  
10: Large format vinyl wall coverings are omnipresent, FESPA, 2012

“

Digital print is an efficient and easy way to translate creativity into unique projects. It allows us to develop exclusive areas and personalise venues such as hotels and restaurants.

Whether we have to create a custom mural, wallpaper or window transparency, we use digital printing for both artistic and practical applications.

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**Michael Berman, CEO of Schoos Design**

Naturally, there are also elements of resistance to the latest technology in décor – many industrial print companies have heavily invested in analogue printing and not without good reason. With flooring manufacturing for example, digital inkjet printing is often not the most practical solution. The run lengths are huge and demand for quality production is high, not to mention that the finished product also needs to be robust and durable. Any new technology will need to work harder to gain acceptance by a market that prefers to do things how they currently do, which means that full transformation for industrial print will take time.

According to the InPrint Décor Survey 2016, for décor applications such as ceramic, the main deciding factor for utilising digital print is when it is judged to help a business become more efficient and competitive. The creative potential, while important, is not always enough. The world is changing and all industries are producing small batches of products. This is due to a frequently changing demand from the end consumer. Analogue itself doesn't play to this trend. Digital does. When production companies in flooring understand this fully, they will shift to wanting to use digital to provide flexible production options as it enables them to stay competitive and ultimately save money. ○





Hopper



We spend  
**80%**  
of our lives in  
interior spaces

# Creating an experience with sensory marketing

**“...in a world where digital devices dominate, engaging consumers by stimulating their senses beyond purely visual or audio advertising has the potential to be incredibly powerful.” – Marketing Week**

Retail brands are starting to understand the sensory and psychological significance behind décor and, while sensory marketing is still a rising trend, it's already having a profound impact in the world of retail and hospitality.

Spending on average 80 per cent<sup>11</sup> of our lives in interior spaces, it's no wonder that our environment has such a dramatic effect on us. Whether it's impacting our productivity, mood or overall wellbeing, our surroundings play a huge role. And since 2016, pundits have been predicting a surge in reality marketing, with added sensory experiences including 4D cinema and video in particular, set to soar over the next decade.<sup>12</sup>

A natural sensitivity to our surroundings has encouraged individuals to seek out environments with certain attributes. Physical comfort is an example of this, such as spaces with the right temperature, as well as physiological comfort – spaces that are familiar but also offer the right amount of stimulus. Brands are now starting to recognise the importance of enriching all five senses and investing in a multi-sensory marketing campaign, in which print solutions play a part.

A high profile example of sensory advertising was McCain's "smellvertising" campaign which it ran at 10 bus stops around the UK to promote its Ready Made Jackets product. Six-sheet posters at the bus stops were fitted with 3D fibre-glass jacket potatoes, which, on the press of a button, heated up and emitted the smell of an oven-cooked potato. The posters also dispensed money-off vouchers to encourage consumers to try Ready Made Jackets.

The growth of multi-sensory solutions available for printers today is an exciting opportunity for those that wish to stand out from the crowd. However, many are still hesitant to explore this area because they don't know where, or how, to begin. But printers who are willing to consult with experts in this field and consequently expand their offering to include multi-sensory solutions, may find that there are rich rewards, including the opportunity to work on some truly innovative campaigns. ○

McCain's scented bus stops  
Image source: [www.thedrum.com/news](http://www.thedrum.com/news)

<sup>11</sup>: Christine Piotrowski, *Becoming an interior designer: A guide to careers in design*  
<sup>12</sup>: Top sensory marketing trends for 2016, Marketing Week, 2016



# Emerging trends in print

**With trends in décor constantly changing and evolving to make the most of advances in print technology, designers are taking more risks when it comes to the world of interiors.<sup>13</sup>**

Take 3D printed fibre optics. Student M.Grossl used 3D print to create a modular lighting system for use within interior environments. The system uses 3D printed elements to form a modular honeycomb structure that can be customised to fit any space. Or 3D wallpaper. Designers Kyra and Robertson Hartnett of twenty2, teamed up with New York art college, the Pratt Institute, to produce a curated collection of 3D wallpapers. Available in five styles, the wallpaper gives a 3D effect without the need for special 3D glasses.

Another example is customised kitchen splashbacks, with design studio Complete Graphics recently announcing it would be offering personalisation to its customers through digital print. These evolutions are part of what IDC described as the enterprise commitment to digital transformation (DX) in the next decade, which will eventually lead to the emergence of a DX economy. Take Israeli company Elkeslasi Surface Design, whose use of digital platforms has helped transform the way it works, allowing its designers to experiment with different processes and textures and create a line of unique applications. This includes using digital technology to rediscover the ancient art of Marquetry – a 16th century process that saw artists apply pieces of veneer to a structure to form decorative patterns, designs and pictures.

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In the race for more innovative, sustainable and smart décor, digital technology is a powerful enabler.

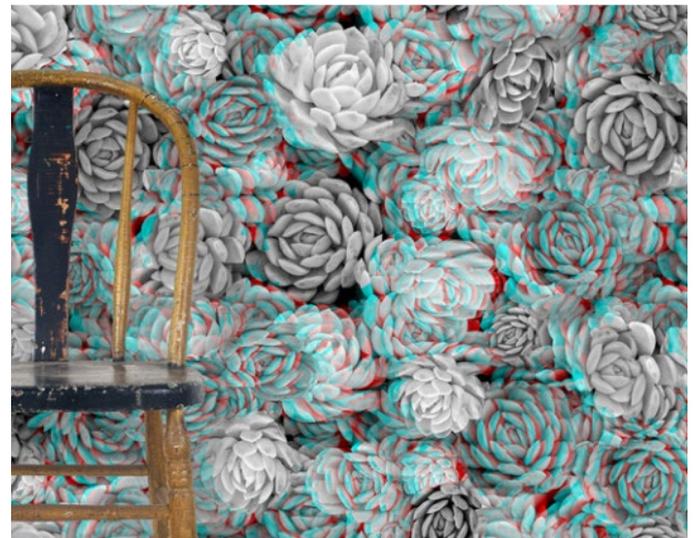
Giora Elkeslasi,  
Elkeslasi Surface Design

”



#### Twenty2, 3D wallpaper

Image source: <http://www.digitaltrends.com>



As IDC believes that the scale-up of digital business strategies will drive more than half of enterprise IT spending beyond 2016, the expanding DX economy will become a crucial driver, scaling up digital supply chains and distribution channels. IDC predicts that by 2018, more than half of large enterprises will create and/or partner with industry cloud platforms to scale up their digital supply and distribution networks.

While it's obvious that the European décor industry is having a direct effect on print, innovation in printing technology is having an equally big impact on the design process itself. ○

### 3D objects and ornaments

The speed and precision of 3D printing has greatly influenced interior design. From ornaments and toys, to pots and containers; its ability to produce highly intricate models within a matter of hours has inspired a wave of talent.

### Posters and prints

Unique artwork adds individuality to a space. The rise of online art retailers printing to order, such as Society 6, has facilitated a resurgence in independent art at an affordable price point.

### Floor

The ability of industrial print to mass produce designs has seen it become the go-to method for producing printed flooring and linoleum. For more bespoke projects, vibrant patterns using digital printing can be applied to a substrate for application to the finished surface.

# Décor by design

Print service providers today can push the boundaries of print, creating unique spaces that harness the latest in digital and 3D printing technology. Here, we look at some of the most widely used applications that can be employed to create a bespoke environment.



### Wallcoverings and wallpaper

Printed wall coverings are ideal for all commercial spaces: including offices, shops, cafés and perfect for high impact graphics or subtle, themed or corporate branding alike.

### Fabric

When it comes to textiles, functionalities including coatings and active materials, can be applied more efficiently using digital print than with conventional methods.



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# The process of innovation

## Wide-format Printers

The worldwide decorative textile market, worth \$165 billion, has been identified by FESPA and industry consultancy InfoTrends as the wide-format industry's most exciting growth application. Together with the \$21.2 billion decorative laminate market and the \$26 billion wall covering sector, it provides wide format print providers with a wealth of opportunities. In return, wide-format printing can truly help deliver on the mass customisation demands that are prevalent today.

Digital printing has made a fundamental contribution to the ability to individualise a space. Its benefits, such as short print runs and personalisation, enable both consumer and corporate customers to achieve a unique look in their home or business – from environmental graphics for hotel lobbies and retail showrooms to creating custom building materials such as imitation marble wall panels at a fraction of the cost of the real thing.

As highlighted in Canon's Think Personal report, wide-format printing has also simplified manufacturing and production processes and is optimising productivity and quality of workflow like never before.

Today, there is no shortage of web-based, print-on-demand solutions that allow creative customers to express themselves in unique ways. In addition, new links between physical products and digital products are beginning to emerge that are making the market even more dynamic. With web-to-print, it is possible for PSPs of all sizes to offer personalisation-as-a-service. Software advancements provide a way to customise products with imagery or content without specialist skills and are supporting the growing trend of self-curated content, where customers are now designing their own products.



**To support its growth and ambition to deliver £124 million of improvements to homes and estates in Bolton, Bolton at Home relocated to two new offices and enlisted designer Stella Corral to ensure that the interior design reflected the vision and aspirations of the organisation.**

**Working with Lintec Graphic Films and its Vitrocolour film product, Corral was able to push the boundaries of her imagination and deliver an optimal working environment in light and space with the privacy their work demanded.**



**The design team explored a variety of print effects, such as cut-outs and frosted features alongside bold use of colour. Capable of being printed with any number of colours, Vitrocolour allows designers to devise scratch-resistant, vibrant and eye-catching glass surface treatments. Light transmission, colour and positioning can all be varied to provide bespoke treatments tailored to the nature of the space. ○**

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Each area of the offices has a different feel and colour palette to create a refreshing working atmosphere

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Designer Stella Corral,  
Lucentia Design,  
[enquiries@lucentia-design.com](mailto:enquiries@lucentia-design.com)



# 3D printing

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**The advent of 3D printing has had a profound impact on a variety of sectors. Gartner has predicted that end-user spending globally on 3D printers is expected to increase from \$1.6 billion in 2015 to around \$13.4 billion in 2018, with custom printing of home decorations being one of the key emerging use-cases predicted by PwC.**

3D printing is revolutionising the way manufacturing and engineering companies are working and offers a wealth of opportunities to the creative industries - particularly décor. As explored in Canon's Product Design report, 3D printing brings great benefits to the product design process.

Being able to share printed pre-prototype models to determine market and customer approval, explore innovative thinking and test more frequently to avoid rejection further down the line is invaluable.

The wider economic implications of 3D printing are also significant: McKinsey Global Institute research suggests it could have an impact on the global economy of up to \$550 billion a year by 2025. As 3D printers are to become increasingly more



accessible with relatively quick and inexpensive processes, its impact on the Décor industry cannot be under-estimated. 3D printing allows designers to experiment with new combinations of materials, new shapes and structures and is already being utilised in the design and production of furniture, lighting and decorative ornaments in both commercial and domestic environments.

Lighting designer, Robert Debanne, uses 3D printing in a bid to think beyond traditional printing methods, giving him the tools to illuminate tessellations and geometric patterns within each of his modern designs.

It is also an ideal process for making one-of-a-kind personalised items. ○

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3D printing will empower people to personalise everything from furniture to accessories. We'll make the transition from having the very few designing for the masses to the millions customising designer pieces to their personal taste.

**Janne Kyttänen, co-founder of Dutch design studio Freedom of Creation**

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## CONCLUSION

**Acoustic ceiling for a high tech company:**  
Printed aluminum panels bended as U shapes  
(Lamellas) used as an acoustic solution.  
Elkeslasi Surface Design

“

Global trends such as sustainability and recycling are very present in today's décor industry. With architects and designers looking for new ways to protect environmental resources, at the same time as utilising natural materials such as cement, rust, wood and marble, we will start to see more unorthodox applications made possible by developing technologies.

**Giora Elkeslasi, Elkeslasi Surface Design**

”

# Conclusion

Enabling production is one thing – but achieving sales is quite another. For digital printed décor to succeed, companies must be willing to invest in and grow their offering with the right devices, and the right consultancy. In today's personalised, customised world, digitally-printed interior decor is transforming the spaces we live, work and play in and no-one stands to benefit more from this than PSPs. The ability to deliver something bespoke is already a game-changer, but the ability to do this on a wider scale than ever before is potentially revolutionary.

We all know the power of print – that it can be used in multiple ways in a variety of industries, from initial design to end production. Many PSPs use print in ways that are applicable with a wide range of different materials already. But the opportunities are practically endless and all businesses should investigate how they can use print solutions to elevate their business and improve their bottom line. ○

**NEXT STEPS**

**David Tower Hotel Wall Cladding:**  
Printed Aluminum composite panels,  
Elkeslasi Surface Design



# Next steps

## Do your research

If you are sensitive to every surrounding you visit, you'll be amazed at the level of potential for digital décor. Pay attention to how print is being used to decorate spaces and how much of the décor we encounter is digitally printed.

It is also important to consider what areas your business can most closely align to. Different parts of the décor market have different requirements.

These could include:

- Creating a high value ambience e.g. hospitality and restaurants
- Influencing customer experience e.g. retail POS
- Presenting aesthetic and highly functional interiors e.g. commercial and hospitals
- Personalisation and customisation e.g. consumer markets

## Assess your current capabilities

Look at which areas of décor have the highest digital adoption rates in your market. Are there local trends in décor that lend themselves towards digital growth? How popular is personalisation and customisation? Do consumers have sufficient access to it? And finally, what creative talent do you have inhouse and what talent can you tap into from your suppliers and customers? Media manufacturers continually develop new materials for these growing markets, so keep in touch with your local suppliers to stay ahead of the competition with access to new developments. If you have existing customers that you could offer décor applications to, this is the perfect opportunity to begin.

## Consider your technology

In order to tap into the growing on-demand economy, there are digital workflows and processes that need to be put in place. Ask yourself how you could combine your digital print capability with other processes to develop unique, creative offerings. It could be analogue print processes or 3D printing for example. What pre-press workflows from software to pre-treatments and finishing could you investigate or use?

High value effects can be created using textures made from multiple layers of ink, or varnish patterns or special finishing effects. Experiment and push the limits of your creativity and your print equipment to create inspiring samples for your customers. Remember that originality is the key to inspiration.

## Lead by example

Finally, decorate your own facility with digitally printed applications. What better way to showcase the creativity, quality and range of applications that form part of your services than to display them in their entirety? Check out local design and décor exhibitions for creative inspiration and concepts to keep you inspired and ahead of the curve.

## Speak to Canon

Our product specialists, application experts and account managers are here to help. They represent one of the largest production printing portfolios in the industry, from roll-to-roll and cut sheet production printers, UV flatbed printers and flatbed cutting systems to water based inkjet and unique CrystalPoint and Single-pass systems. We can help you learn the skills to push the boundaries of print and materials to create an outstanding offering for your existing or potential print customers. ○



**Mikado Art**  
Printed Aluminum Mikado Sticks,  
Elkeslasi Surface Design

For more industry insights, why not subscribe to our magazine for the print community, Think Digital, at [www.canon-europe.com/thinkdigital](http://www.canon-europe.com/thinkdigital)

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