

# **State of the Mart**

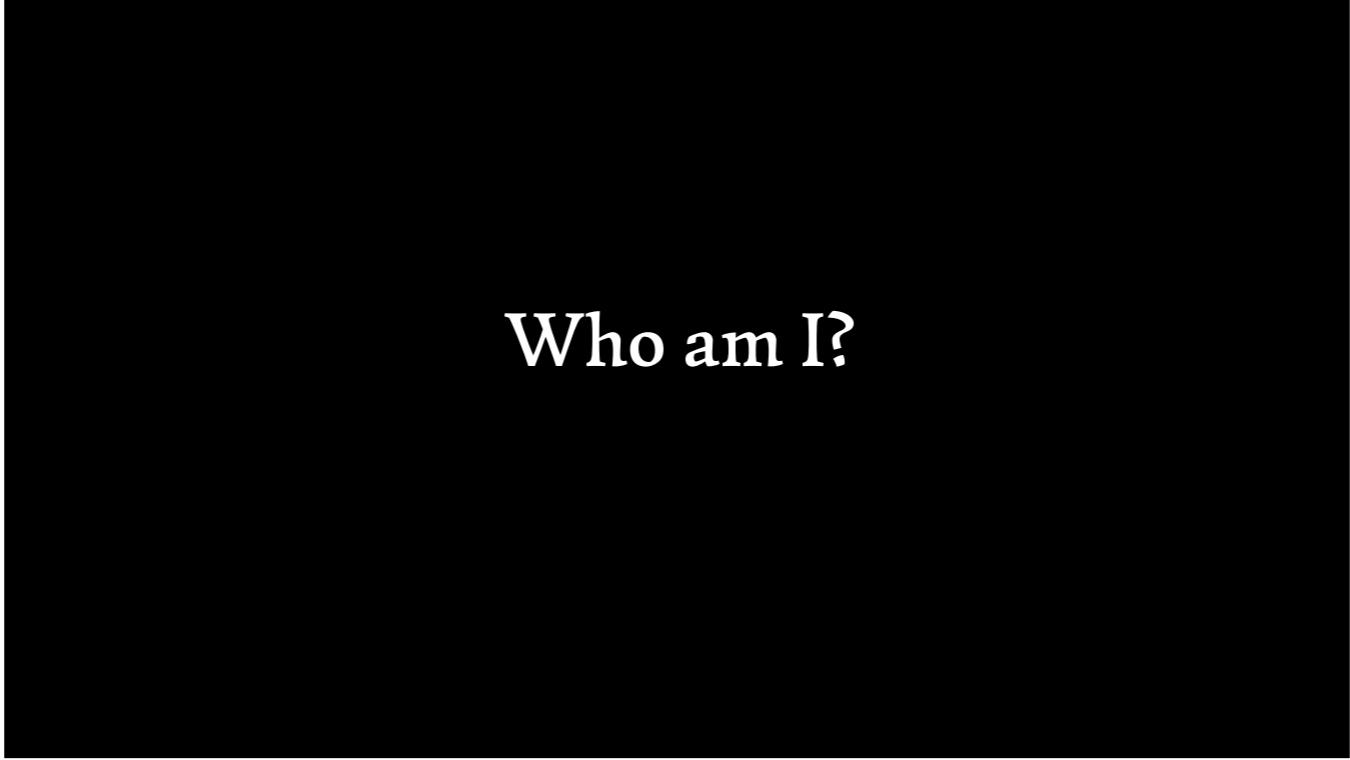
**How fonts are made and sold today.  
How the market might look tomorrow.**

I've spoken at a lot of conferences but this is the most challenging one for me, fitting to the theme. I like speaking to strangers. But most of you aren't strangers. It's really intimidating to speak in front of people I've followed and looked up to for decades. So it was already daunting, and then I saw Catherine Dixon's incredible keynote on Wednesday and I was thinking ... well ... crap. At least I knew I couldn't live up to hers, so I felt a lot better after that. So, thanks Catherine of setting the bar so high!

And, I can't imagine a better place to do this than in Brazil, not only because of how the growth of interest in type in this part of the world, but also because this is perhaps the most welcoming place on earth. A place where somehow I have a lot of friends, even though I've only been here once before. So thank you for your welcome.

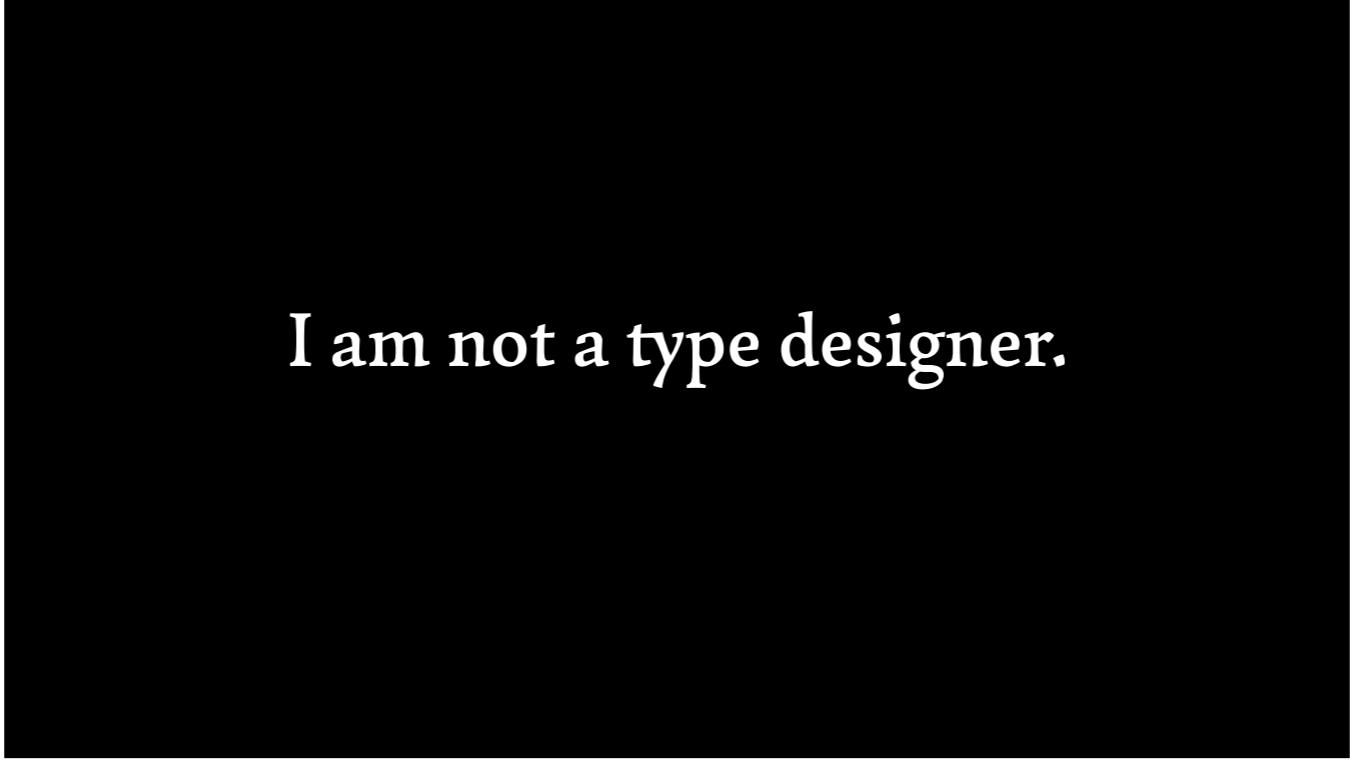
Before I get started, it would be helpful to know more about who is out there. How many of you have fonts for sale right now or plan to do so?

How many of you have your own website for selling your fonts? How many of you rely on a distributor for most of your font sales?



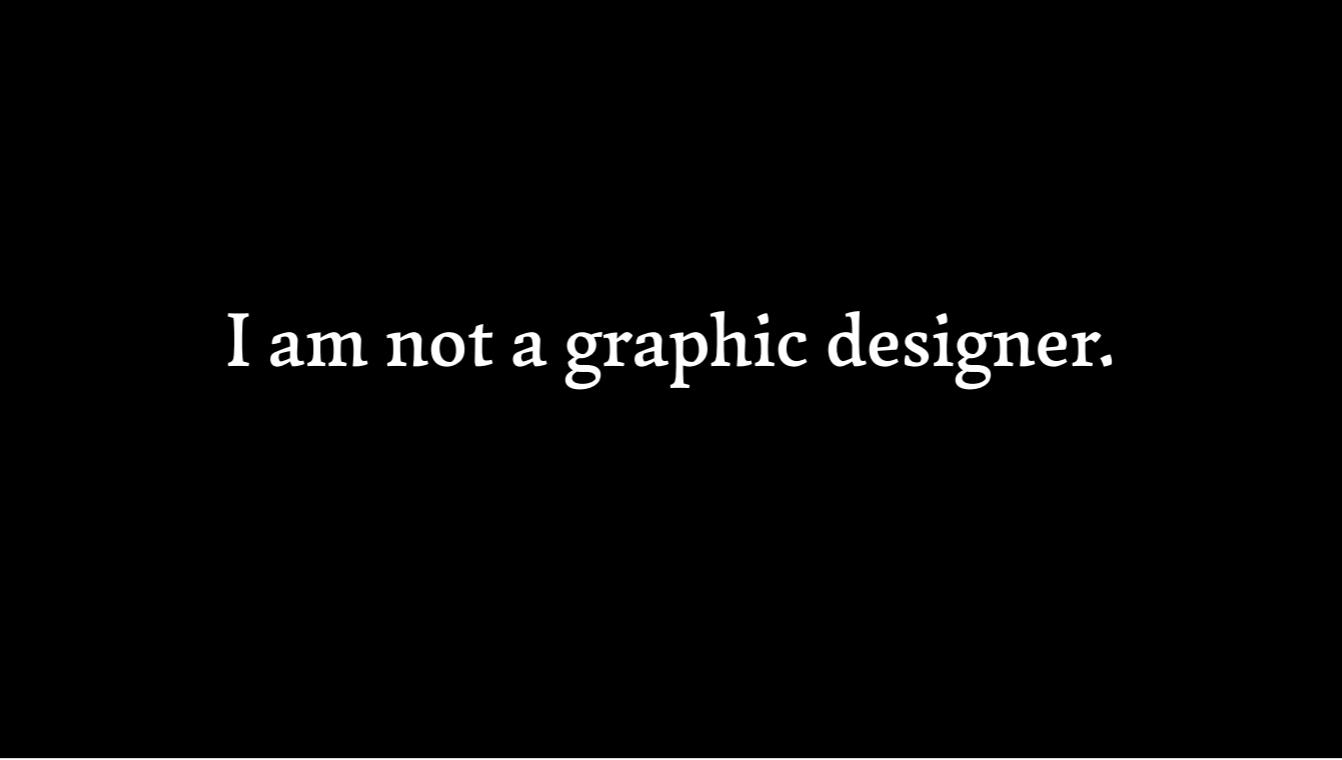
Who am I?

I feel a little unqualified.



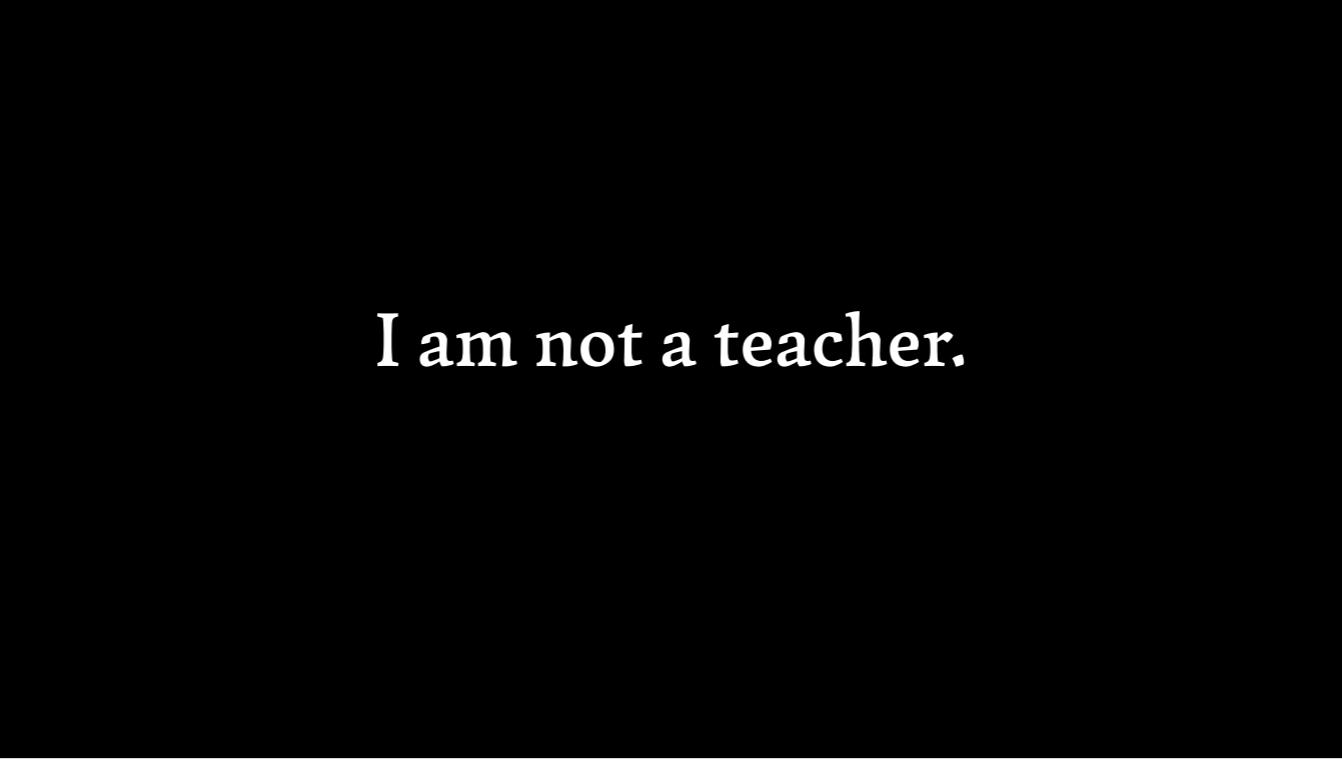
I am not a type designer.

I don't make fonts. I am in awe of those who do.



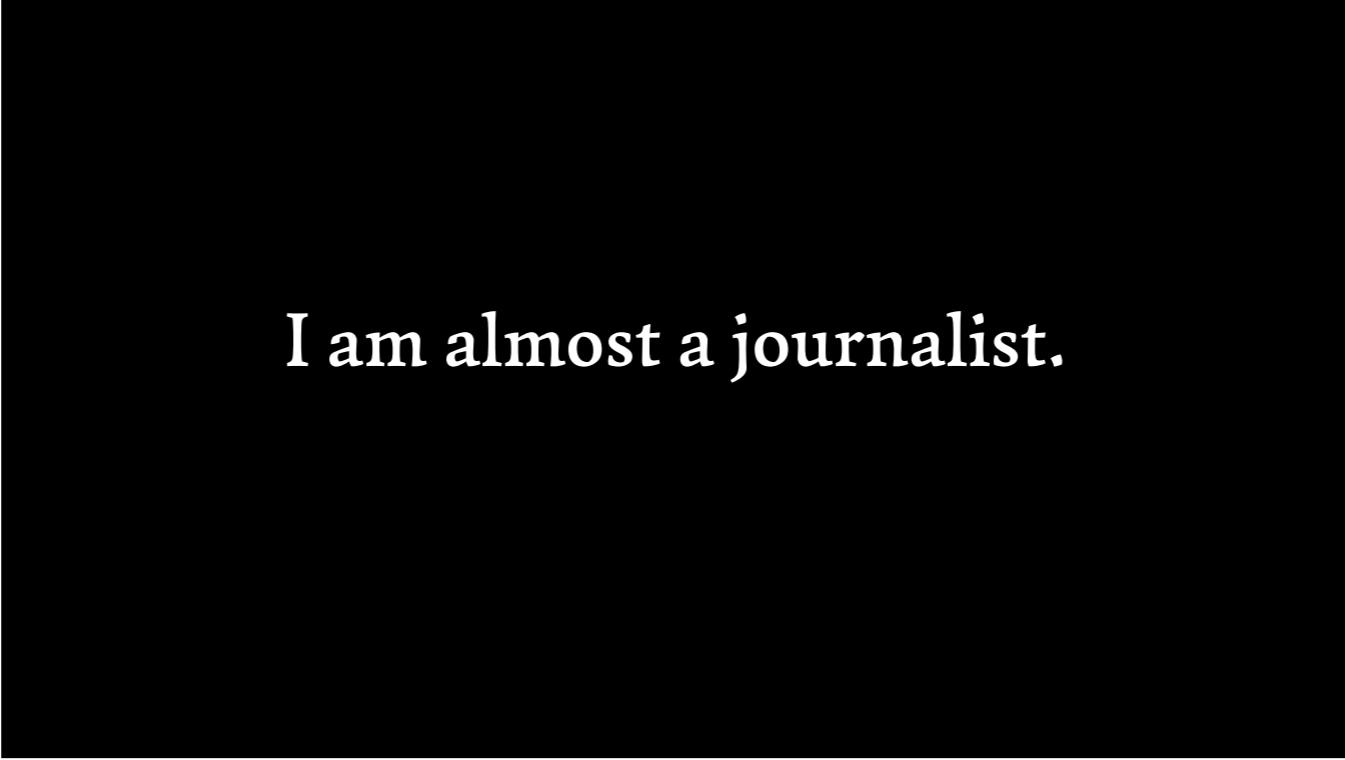
I am not a graphic designer.

I'm not often designing, so although I do buy fonts because I love them, I rarely get to use them.



I am not a teacher.

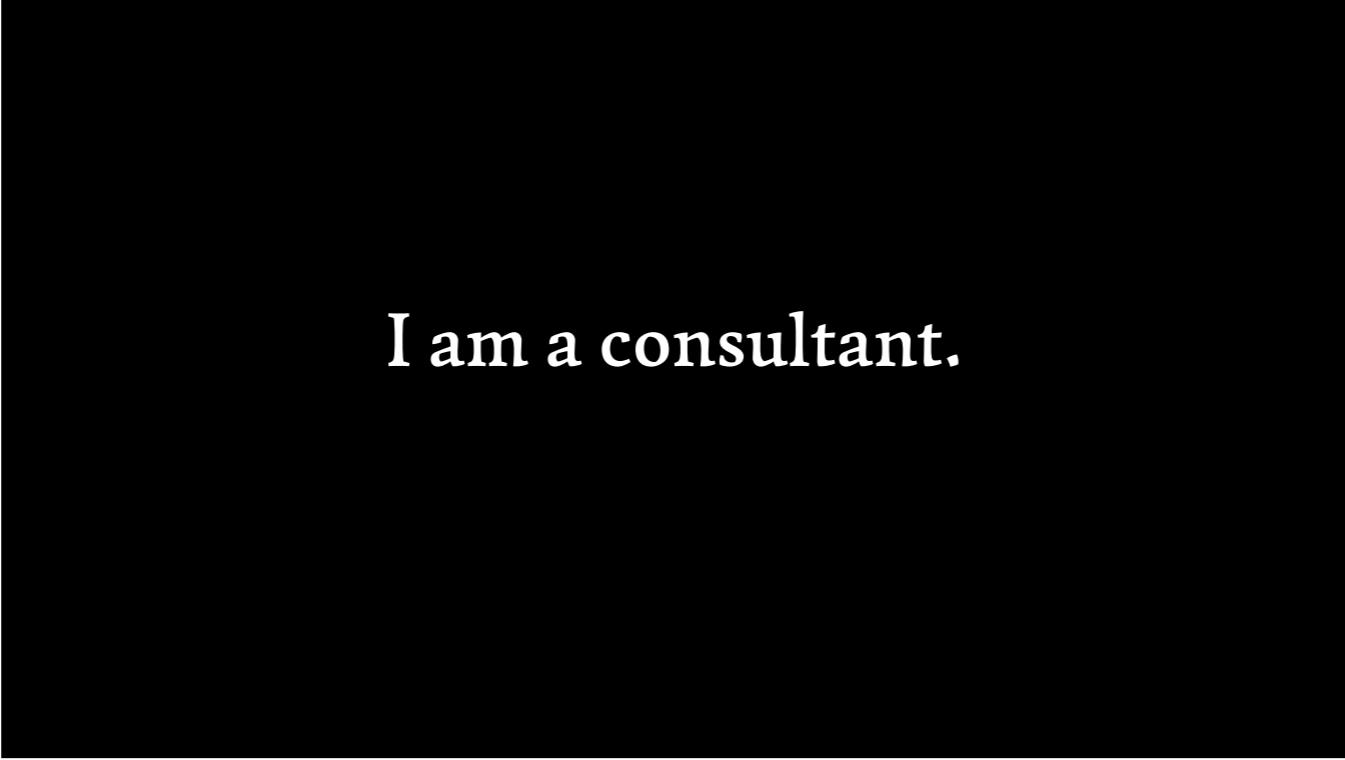
Occasionally I teach at Type Camp, or do a guest lecture or critique at the our design schools in San Francisco, but I'm certainly not a teacher. I still stand in awe of teachers. Of people like Catherine and Indra Kupferschmid. Even more than I am in awe of type designers.



I am almost a journalist.

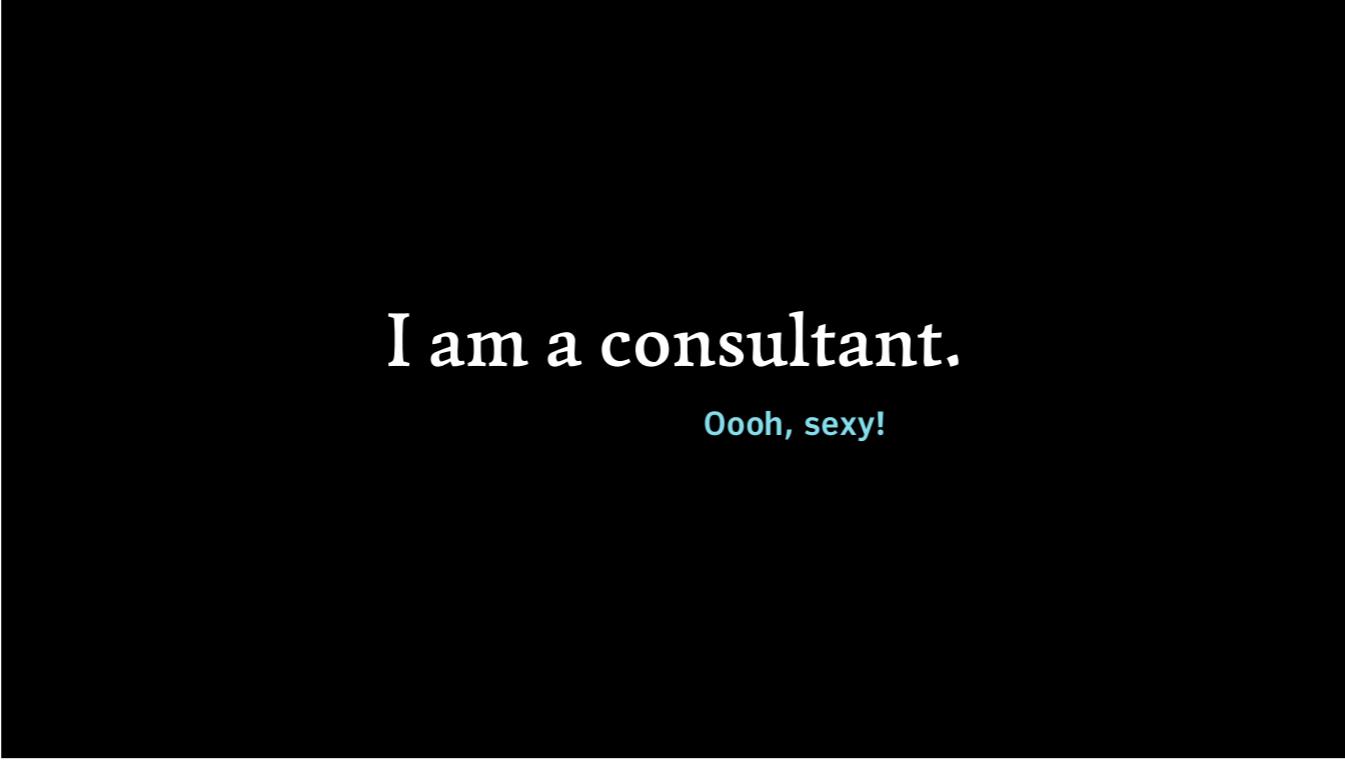
I write about typography. I try to report on the news of the type industry. Sometimes I have an opinion and try to articulate it. But I can't qualify myself as a journalist, because I respect that trade and it requires a specific training and a full-time commitment.

So what's left?



**I am a consultant.**

What's left is this lowly title. What is a consultant anyway? It's hard to imagine a more generic term. The only image that the word consultant conjures is something like this...



I am a consultant.

Oooh, sexy!

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# Consultant

And that's kind of boring and yucky.

This is not really me either. So who am I?



# Consultant Font Broker?

Perhaps it might be better to call myself a “font broker”. Much like a stock broker helps buyers find and buy stocks, I try to help font users choose and use fonts.



# Font Broker

But maybe anything related to Wall Street isn't such a positive term either, given what the world thinks of Wall Street these days.

So maybe you can help me come up with a better job title. But a lot of what I do is connecting designers with fonts. And essentially that means connecting font buyers with font sellers. This really is me! Type designers in one ear. Type users in the other.

Part of this happens through a couple of websites:



One is Typographica, where we review typefaces and books, and publish short essays on the current scene.

TYPE REVIEWS, BOOKS, COMMENTARY

# TYPOGRAPHICA

Nameplate set in ATF Wedding Gothic. Your typeface could be next. Learn more.

TYPE REVIEWS ▶ FEATURE ▶ DESIGNER ▶ FOUNDRY

**OUR FAVORITE TYPEFACES 2014**

**Our Favorite Typefaces of 2014**

BOOK REVIEWS

COMMENTARY ▶ PREVIOUS NEXT ▶

## Taking Your Fonts to Market: Foundry, Reseller, or Go Solo?

STEPHEN COLES ON NOVEMBER 20, 2008

My sincere apologies for our extended hiatus. Perhaps it's appropriate to break the six-month silence with an answer to a type question that I hear more than almost any other: "I am a new type designer. What's the best way to get my fonts on the market?"

Here is the best answer I can muster, drawn from over 10 years of examining the retail font industry (in what some might call disturbing

RELATED

- Ripening
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- Precision
- End-of-Ye
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- Farewell,
- Library S
- Type Foun

RECENTLY

- Agmena
- Type Foun
- Type Wor

One of these essays was something I wrote way back in 2008 about a type designer's options for selling their work. It's certainly out of date now. There are many new options, many have changed, particularly when it comes to webfonts and subscription models, but there are principles there that can still be applied today. Some of what I'll talk about now is an extension or update of this piece, but I won't cover all of it tonight, so take a look at it on the site. You can find it in the footer at Typographica.org.

The other site where I'm involved in connecting makers and users is Fonts In Use, an archive of real-world typography indexed by format, industry, and, of course, by typeface. This is a collaborative project with major contributions by people like Florian Hardwig, Nick Sherman, Indra Kupferschmid, and the generous support of sponsors like Font Bureau and Mark Simonson. And also the contributions of all the designers and other type lovers who have submitted work to the site.

I've learned a lot from Fonts In Use about how graphic designers choose typefaces. More on that later.



And in the last year or so, another site that informs how I experience the industry is TypeDrawers, a typography forum with an emphasis on type design. This is where font makers (and some users) gather to chat about technical issues, or politics, or marketing strategies, or get help with new designs in progress.

I took over the forum from its founder James Puckett in 2014, and it's now moderated by a team of 7, including Jackson Cavanaugh, Marina Chaccur, Ramiro Espinoza, Nina Stössinger, James Todd, and Dyana Weissman.

So this, along with a few years on the creative team at FontShop from 2004–11, gives you a sense of what colors my view of the industry. Not as a creator or a user, but someone who frequently interacts with these people.

The screenshot shows the homepage of TypeDrawers, a discussion forum for typeface design, lettering, and typography. The header includes links for 'Discussions', 'Activity', 'Best Of...', and 'Sign In'. A search bar is at the top right. The main content area features a 'TypeDrawers' section with a brief introduction and a link to 'The TypeDrawers Rules'. Below this are several discussion threads: 'Project Faces by Adobe', 'Licensing for high volume print', '[Question]Leading/line-spacing in Fontlab?', 'New brush typeface: Inky (?)', and 'A straight version of Abraham: Bram'. Each thread includes basic stats like views and comments. On the left sidebar, there's a 'Howdy, Stranger!' message for new users, and a sidebar menu with links for 'Sign In', 'Register', 'Categories', 'Recent Discussions', 'Activity', 'Participated', 'Best Of...', 'Categories' (with sub-links for All Categories, Typeface Design, Technique and Theory, etc.), and 'Lettering and Calligraphy'.

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Home > Type Design Software

## Howdy, Stranger!

It looks like you're new here. If you want to get involved, click one of these buttons!

[Sign In](#) [Register](#)

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[Categories](#)  
[Recent Discussions](#)  
[Activity](#)  
[Participated](#)  
[Best Of...](#)

**Categories**

All Categories	977
Typeface Design	787
Technique and Theory	318
Type Design Software	180
Type Design Critiques	88
Type Business	82
Lettering and Calligraphy	20
Technique and Theory	15
Lettering Critiques	5
Typography	67

**Export old-style non-OpenType "kern" table**

 **Ray Larabie** Posts: 232  
October 12 in Type Design Software

In FontLab, under *Options/Generating OpenType & TrueType/Kerning* there's an option for *Export old-style non-OpenType "kern" table*. In the past, this was necessary because so few applications supported OT hinting tables. Now we live in a futuristic font utopia where all our dreams have been realized. Should I turn this thing off now? To be honest, I just kind of forgot it was there.

Tagged: kerning fontlab, legacy

**Comments**

 **James Puckett** Posts: 947  
October 12

I don't think I've ever put a non-OpenType kern feature in a font, unless Glyphs does so quietly. Nobody complains.

 **PabloImpallari** Posts: 362  
October 12

Yes, turn it off. In particular for webfonts, 'cause you want them to be smaller.

 **Christoph Koeberlin** Posts: 36

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The screenshot shows the TypeDrawers website. The left sidebar has a dark blue header "TypeDrawers" and a light blue footer "FontShop". It contains links for "Home", "Howdy, Stranger!", "Categories", "Recent Discussions", "Activity", "Participated", "Best Of...", "Categories", "Typeface Design", "Technique and Theory", "Type Design Software", "Type Business", "Lettering and Calligraphy", and "Typography". The main content area has a blue header "TypeDrawers" with tabs for "Discussions", "Activity", "Best Of...", and "Sign In". Below the header are "Howdy, Stranger!" and "Howdy, Stranger!". The main content lists discussions like "Licensing for high volume print", "TypeSchnitch Project Update", "Language support & character set standards: how do foundries label their Latin products today?", "First font license", "A list of regrettable font names", and "URW++ Acquired by Global Graphics (UK) for US\$5M". Each discussion includes views, comments, and a timestamp.

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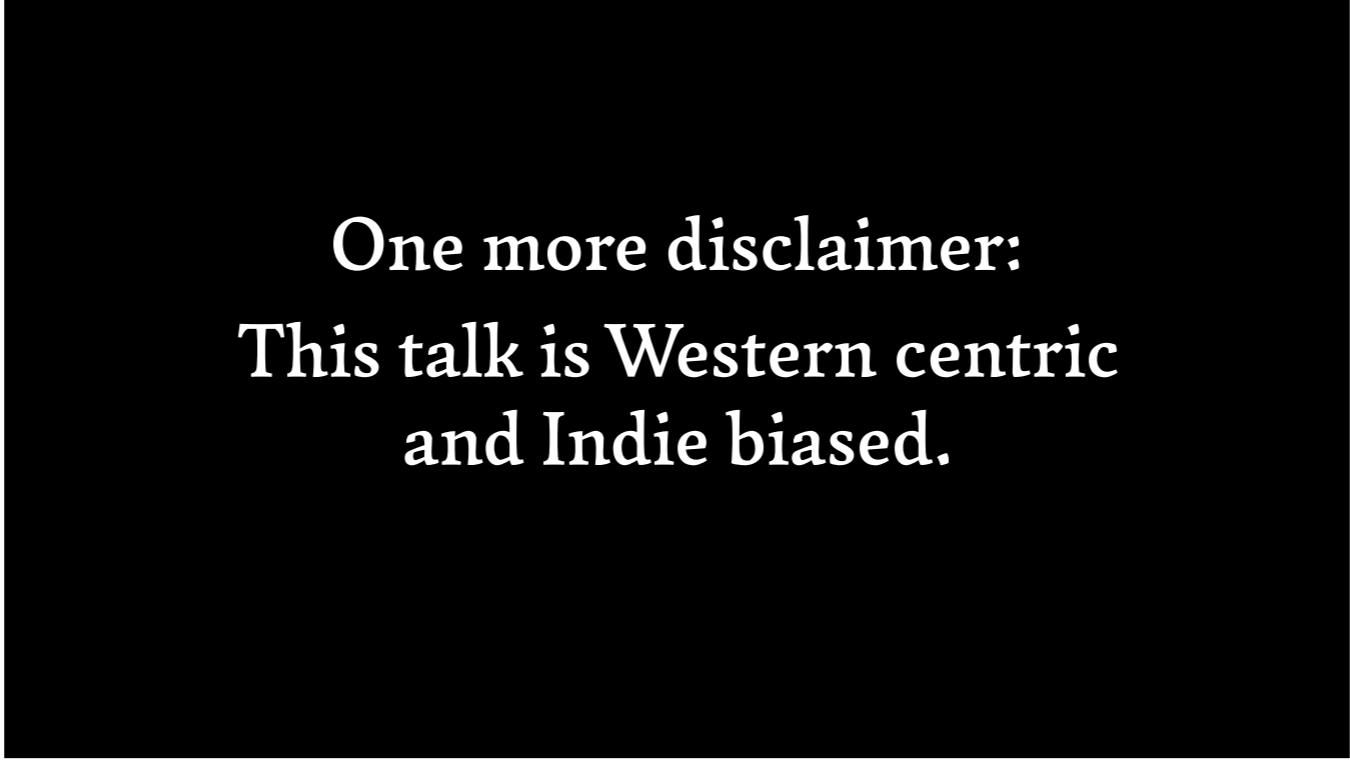
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# **One more disclaimer: This talk is Western centric.**

It's important that I clarify that my comments here pertain to type in the Western, primarily Latin-specific world.

Other regions and scripts need study, and should be better understood by Westerners, myself included. It's just not my expertise, so not what I'll be talking about today. Toshi has promised me that he'll give a talk next year that will educate us about the Asian market. Right Toshi?



**One more disclaimer:  
This talk is Western centric  
and Indie biased.**

Also, what I'll be focusing on is the part of the industry that has seen the most creative growth in the digital era: the independent foundry.

There have been important developments and really valuable technical and business contributions from larger companies like Monotype, Adobe, and Google. Contributions that benefit all type designers in some way, including sponsoring ATypI and making this conference possible. But theirs is not the perspective from which I'll be speaking today.



What do I mean by independence? It can be a fuzzy term. I don't claim to have the only definition. In fact there are other definitions to come. But here are two ideas that could represent independence.

1. A type foundry that is owned and run primarily by type designers.
2. Not dependent on another company, such as an external sales platform, for their livelihood. An independent foundry is dependent only on themselves for reaching the market.

# What is an “independent” foundry?

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- Designer owned

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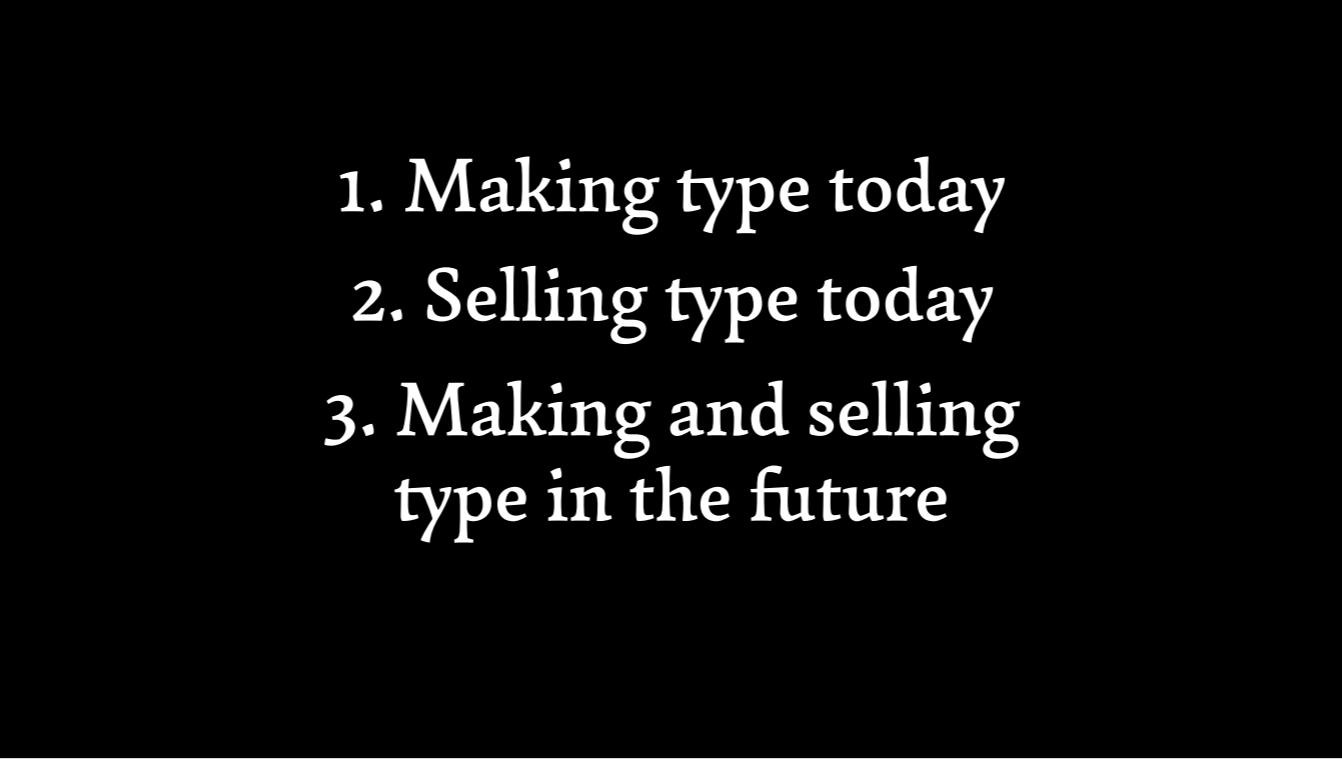
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## What is an “independent” foundry?

- Designer owned
- Not dependent on a single external company for their livelihood

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- 
1. Making type today
  2. Selling type today
  3. Making and selling type in the future

So, now that we've got all the disclaimers out of the way, let's get going. I've divided this talk into three sections. First, how fonts are made and sold now, and how that affects both the makers and the users. And then a bit of forecasting, including some warnings and advice and cautionary tales, as well as some hopeful developments.



## Fonts

**Retail licenses for  
Desktop, Web, Mobile, E-books  
and other apps & devices**

First, some definitions. I'm very sorry to the type design veterans in the room. Bear with me. Some of this will be elementary, but there are also a lot of people in the room that are new to the industry and I want them to be on the same page. I also know from many discussions I've had here and elsewhere that it helps to speak a common language.

So, some definitions. When I speak of buying and selling fonts I mean, of course, selling licenses to use fonts, and offering those on the retail market. As opposed to custom work. BTW, this is not what fonts look like.



## Font Maker

AKA Type Designer, Font Producer,  
Rights Holder (in most cases)

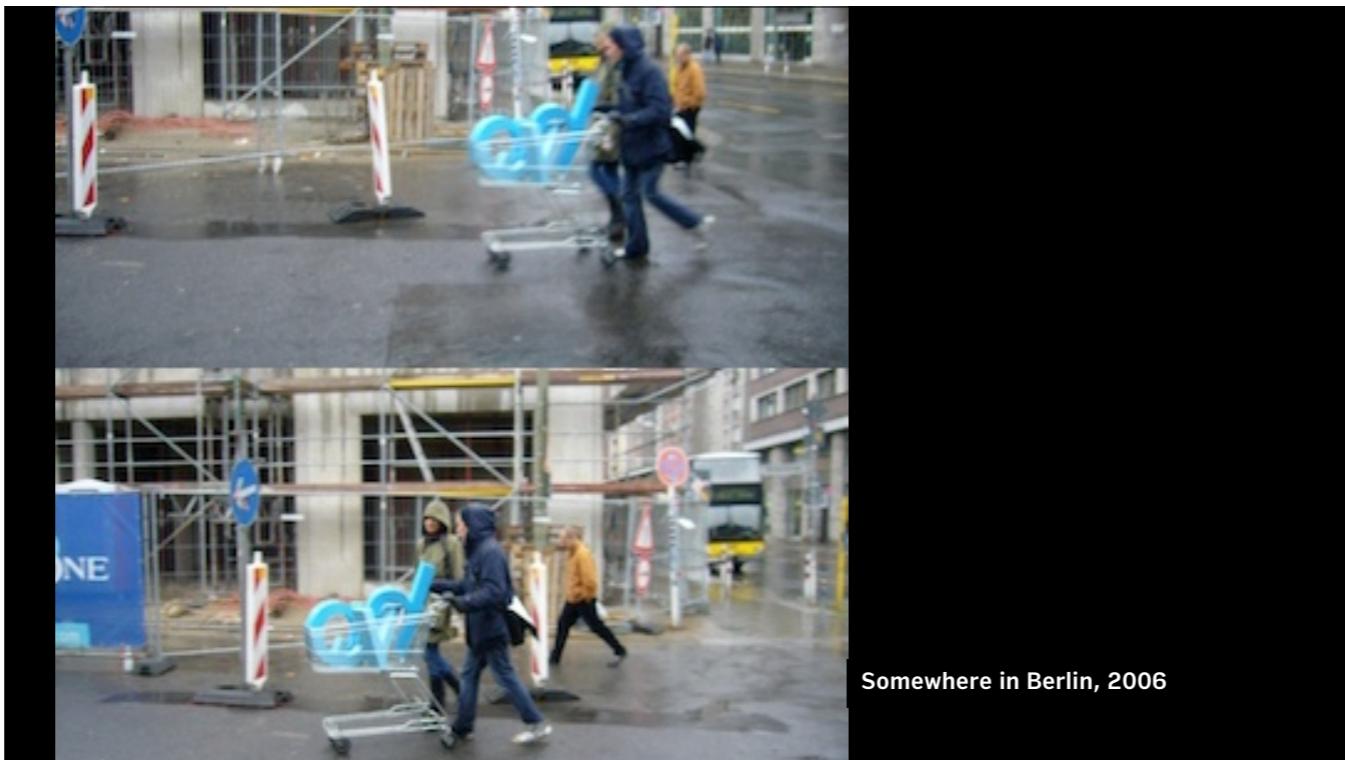
And this is not how fonts are made.

I asked Laura Serra to draw some pictures, because it can get boring to look at the same old font file icons and diagrams. And we might as well enjoy some lighthearted pictures while we talk about this serious stuff. Otherwise things get too dry.



And this is not how people shop for fonts. A shopper pushing a shopping cart.

Although ... I once saw this very thing ...



Somewhere in Berlin, 2006

... randomly, on the street in East Berlin.

So a shopping cart full of letters is not so crazy.



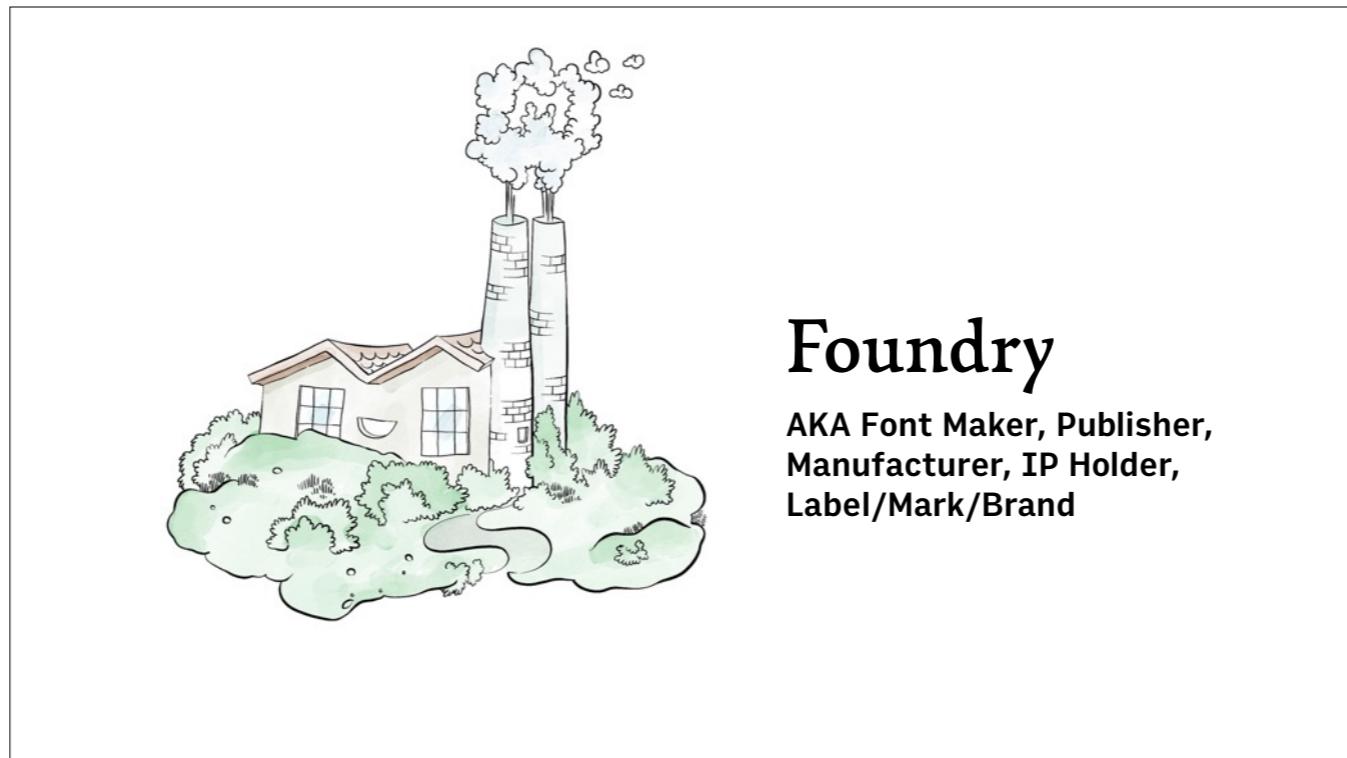
## Font Buyer

& Font Users

**Graphic Designer, Ad Agency,  
Web Developer, Device Manufacturer,  
Startup, Megacorp, Church Newsletter,  
Mom**

But yes, we know now that the font market has expanded way beyond professional design agencies and designers. Font buyers now include those consumers, amateur designers, hobbyists, who have no connection to the professional design world and no experience picking type or licensing fonts.

The font buyer is much more than they used to be. And that continues to change.



## Foundry

**AKA Font Maker, Publisher,  
Manufacturer, IP Holder,  
Label/Mark/Brand**

Here's a small type foundry. The word comes from metal type, of course: a factory that produces metal castings. And that term has stuck around up to a digital age when "founding" doesn't really have the same meaning. But it works. And it's kind of nice to have a word for manufacturer that is specific to our industry.

For our purposes a foundry is a company that manufactures fonts.

Foundries can be small studios with 2 or 3 people. Or even, as is very often the case, a single person working at home on fonts in their spare time.



## Midsize Foundry

**Examples:**  
**Commercial Type, Font Bureau,  
House Industries, OurType,  
Parachute, TypeTogether**

Or medium sized. A full-time operation with several employees.



## Large Foundry

Examples:

Dalton Maag, Hoefler & Co,  
FontFont, Monotype, URW++

Or, in a few cases, a large company, relative to most foundries, with dozens of employees.

Foundries can sell fonts from one designer or hundreds of designers, whether or not they are people who regularly contribute to running the company. But to the customer, a foundry is often seen merely as a marketing label, a mark, a brand, but not necessarily a company — and the person or people behind the foundry are sometimes forgotten or invisible. To me, the best foundries do a good job of showcasing the designers behind their brand.



One more definition: retailer. This is known by many terms: reseller and distributor are used as often. For our purposes, this is a store where someone can buy fonts from a variety of foundries. I like the word retailer over the other terms here because that describes their primary role in this particular chain: to offer fonts on the retail market.

There are large and small retailers. Most of us know about MyFonts, FontShop and fonts.com. Fontspring has also had quite a run in the last few years.



## Small Retailer

AKA Boutique, Collective

Examples: Village, TypeTrust,  
Fontstand

But there are retailers limited to a few hand-picked foundries. You could think of these as boutiques like Village, TypeTrust, and Fontstand which you'll see a little later.



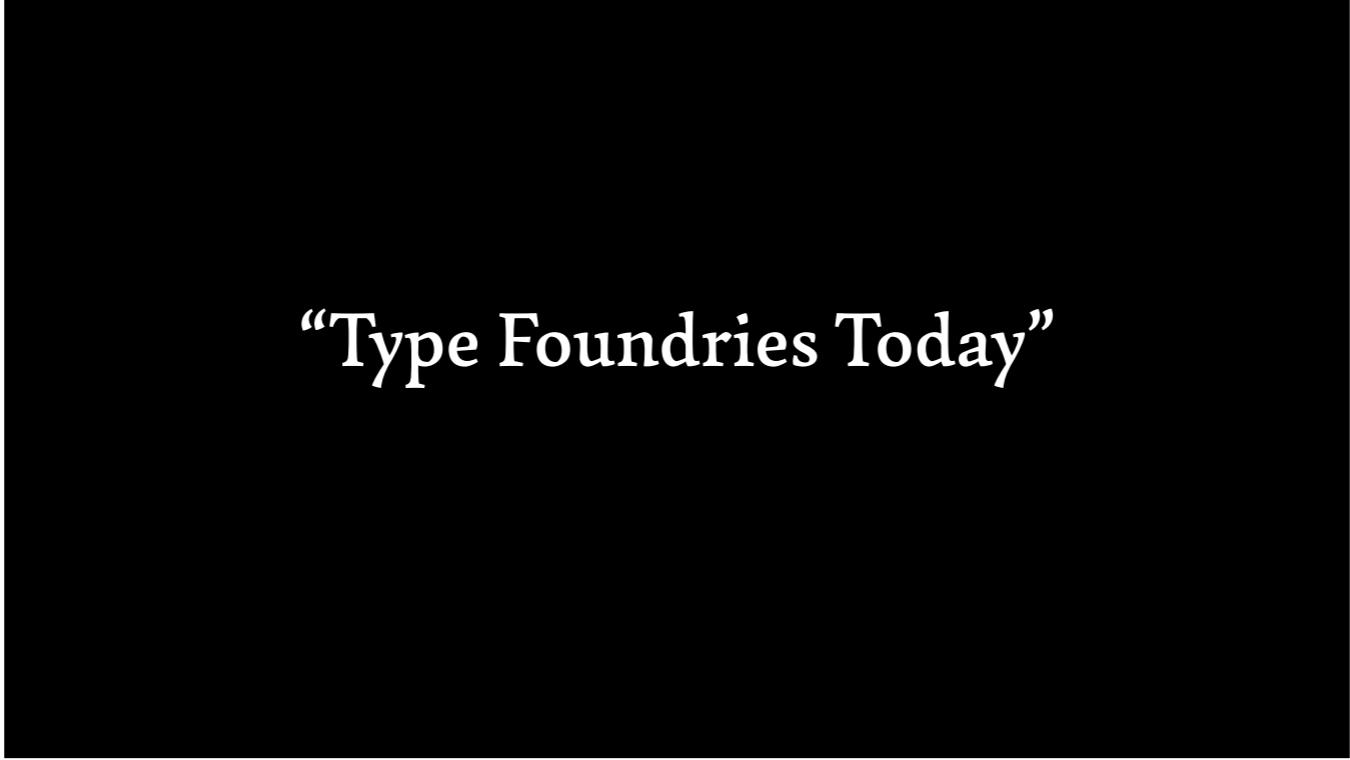
## Specialty Retailer

**Webfonts:**  
**Fontdeck, Webtype**  
**Subscription Library:**  
**Typekit, SkyFonts**

And then there are specialty retailers who have a specific offering, like webfonts, desktop syncing, or a library subscription.

# Making type today

So let's get to the current state of the market. (At least the way it has looked over the last 2 years.) And how fonts get from a type designer's head to public release.



## “Type Foundries Today”

The core of font production is the foundry. We've always had an idea of what foundries are like and how they've changed, but that hasn't really been quantified until recently when this report was produced.

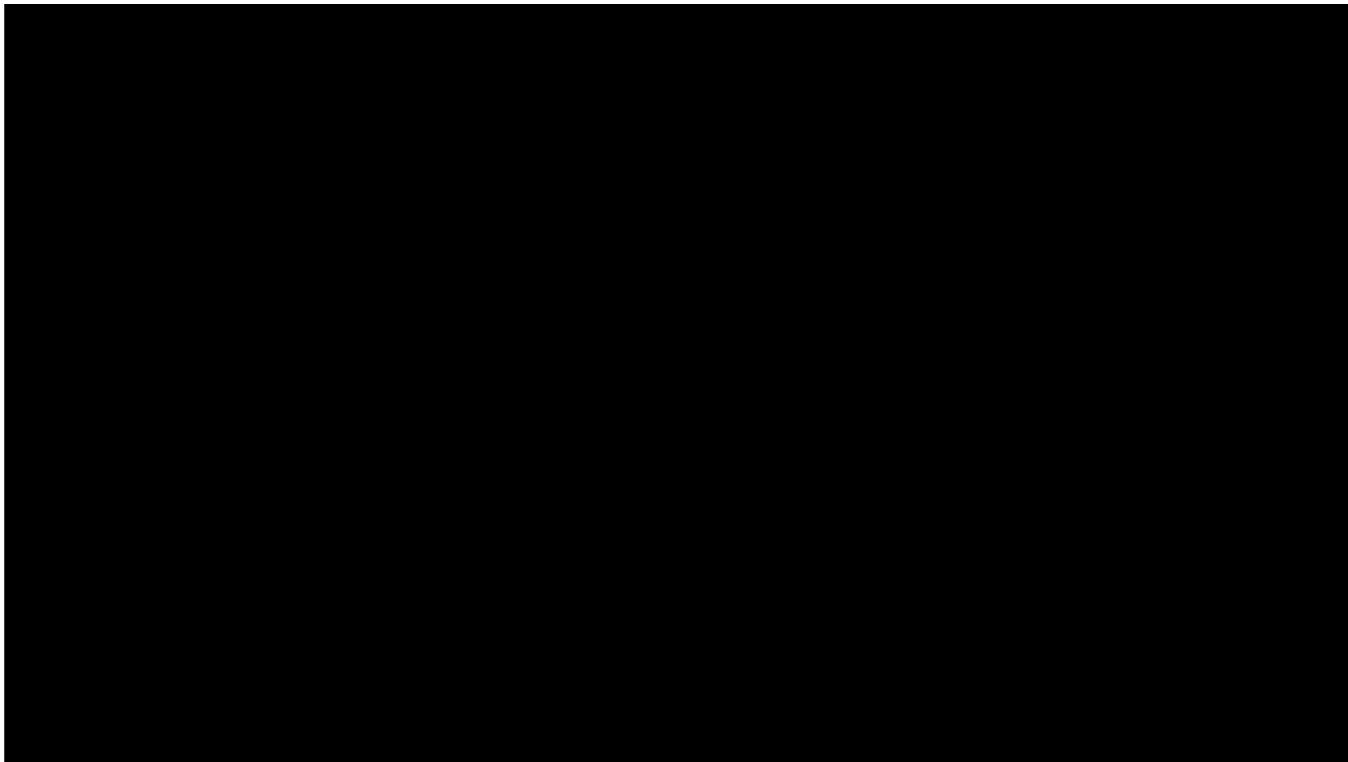


# Ruxandra Duru

Barcelona, Spain

Ruxandra Duru is a graphic designer in Barcelona, currently designing book covers at Penguin Random House.

In 2011 she was attending the EINA Center of Art and Design for a Master's in Advanced Typography.



Her thesis project was “Type Foundries Today”, a self-described “study of independent type foundries”. She researched the history of digital type, examined most of the current players in the western world, and interviewed a group of them to get a sense of what it’s like to make and sell fonts in 2011, resulting in some revealing data about what occupies their time as a business, how often they collaborate with other type designers, and where they choose to distribute their fonts.

Her report was distributed as a PDF, and it got a little bit of attention, but not as much as it deserved, and when I discovered it a few months later I thought it could have a larger audience on the web. So I asked her if she’d like to update the survey and analysis and publish it on Typographica. She agreed, and after a lot of hard work from her, our web designer Chris Hamamoto, and co-editor Caren Litherland, we finally published the report a few weeks ago.



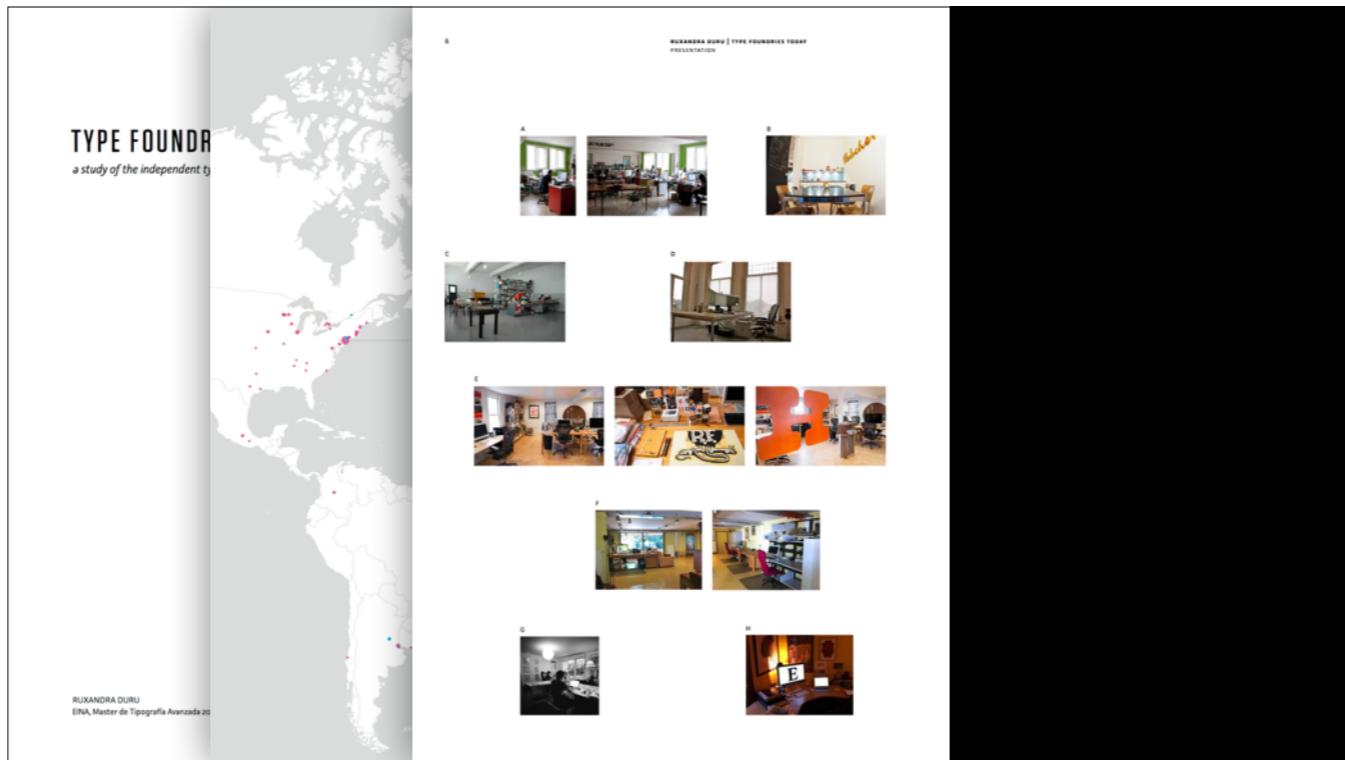
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**PART IV: IN-DEPTH ANALYSIS**

**Criteria for analysis foundry selection**

Communicating with the people who run an independent foundry was in my opinion the best manner to obtain specific information and compare it between the foundries. The following criteria was chosen for the foundries to be included in a more in-depth analysis. I aimed at trying to portray the general state of the industry. I chose criteria that would result in a variety of types of foundries.

- popularity in quality and marketing (Facebook, Twitter, Meetups, interviews in magazines...)
- relevance (foundry website)
- variability in structure, geographic location, visibility strategies, year of establishment, number of families offered.
- proximity, for the benefits of a direct interview
- include foundries that went from custom to retail

**Questionnaire**

In order to obtain specific information, I used a specific set of questions that could provide me with insights on various aspects of the industry I believed were interesting to expand. The type foundry industry being an industry still, I started by looking at general industry analysis questions.<sup>10</sup> However, they were significantly guided by the theoretical writings on the subject. The questions asked were adapted to each foundry. Roughly, they resembled the following:

- What does a "regular day" look like, running a foundry? How are tasks divided?
- Do you carry out external collaborations? Please give a few examples.
- What proportion of time and energy does the foundry currently dedicating to custom type design versus speculative type design for retail?
- Please elaborate on your distribution choices.
- Are you targeting specific customers with your retail typefaces?
- What are your marketing strategies for gaining visibility and sales?
- Type foundries in recent years, roughly describe the current financial state of the foundry.
- What are the current challenges faced by the foundry?
- How do you see the foundry in ten years from now?

**Foundries included in study**

I contacted 29 different foundries, of which 25 provided me with information (blue). Additionally, I was able to find some data about foundries that declined the offer or that I could not reach in existing articles and interviews (magenta). Before sending a questionnaire or starting an interview, I properly informed myself about each foundry.

System	Latitude
Az Type	Lucas Fonts
Artype	Mark Simonson
Baptiste typefaces	MotoType
BAT Foundry	Okay Type
Bold Monday (partial)	Ourytype
Brun Duet	Penscriptype
Canada Type	Parachute
Cercle	Pereira Typefoundries
Dutch Type Library	Process Type Foundry
Emigre	Relyype
Entotype	Sudtipos
The Emichedé Typ. F.	Textasis
Feliciana Type Foundry	Tigre
Font Bureau	Type @ Jones
FontFont	Typejockey
Fontsmith	Typepublic
Hartman	Typeother
HdType	Typeone
House Industries	Typepoque
Just Another Foundry	Underware
Klim Type Foundry	

**How to read the graphics of this section**

When presenting the questionnaire, it often happened that multiple answers were given for each question. Therefore, the shown percentages in this section do not necessarily sum 100%. The graphics simply reflect the most significant answers and indicate, for each answer, how many foundries out of the interrogated foundries mentioned it. For example, in the given question, 20 out of 25 foundries mention "A" in their answer. A will have a corresponding 80% underneath it.

Her thesis project was “Type Foundries Today”, a self-described “study of independent type foundries”. She researched the history of digital type, examined most of the current players in the western world, and interviewed a group of them to get a sense of what it’s like to make and sell fonts in 2011, resulting in some revealing data about what occupies their time as a business, how often they collaborate with other type designers, and where they choose to distribute their fonts.

Her report was distributed as a PDF, and it got a little bit of attention, but not as much as it deserved, and when I discovered it a few months later I thought it could have a larger audience on the web. So I asked her if she’d like to update the survey and analysis and publish it on Typographica. She agreed, and after a lot of hard work from her, our web designer Chris Hamamoto, and co-editor Caren Litherland, we finally published the report a few weeks ago.



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Foundry	Structure	Founded	Main Location	Hide Index
Treacyfaces	1	1984	West Haven, CT, USA	
The Electronic Font Foundry	1	1984	Ascot, UK	
Emigre	2	1984	San Francisco Bay Area, CA, USA	
Club Type	2	1985	London area, UK	
LetterPerfect	1	1986	Seattle, WA, USA	
Elsner+Flake	4	1986	Hamburg, Germany	
Alphabets Fonts/Semiotix	1	1987	Galena, IL, USA	
Dennis Ortiz-Lopez	1	1988	New York area, NY, USA	
LetterError	2	1989	The Hague, Netherlands	
Hoefler & Frere-Jones (now H&Co.)	17	1989	New York area, NY, USA	
Font Bureau	18	1989	Boston, MA, USA	
DTP Types	1	1989	Crawley, UK	
Type-0-Tones	4	1990	Barcelona, Spain	
Terminal Design	1	1990	New York area, NY, USA	
Stone Type Foundry	1	1990	Guinda, CA, USA	
Quadrat	1	1990	Toronto, Canada	
FontFont	23	1990	Berlin, Germany	
Dutch Type Library	NA	1990	's-Hertogenbosch, Netherlands	
Delbanco	1	1990	Ahlhorn, Germany	
Castle Type	1	1990	San Francisco Bay Area, CA, USA	
The MicroFoundry	1	1991	Los Angeles area, CA, USA	
Shamfonts	1	1991	Amsterdam, Netherlands	
MVB Fonts	1	1991	San Francisco Bay Area, CA, USA	
Fontanova	1	1991	Stockholm area, Sweden	
Enschedé Font Foundry	3	1991	's-Hertogenbosch, Netherlands	

Our first version of Type Foundries Today is a 2013 Census & Analysis of the Independent Font Industry in the Western World.

But before I dig into it, I need to acknowledge that Ruxandra should be here today to do that herself. She should be sharing this stage. We tried to get her here to give this presentation with me but unfortunately her work just didn't allow it this year.



A message from **Ruxandra Duru** in Barcelona!

Fortunately, in her absence, she did send a short message to you all.



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# Demo

So let's take a quick look at the site.

[Show the site]

# Census Criteria

What I'd like to focus on is the Census section of the report. One of the challenges came right at the beginning. How does one get a comprehensive sense of who is part of this scene? There are likely more than 1,000 font labels created at some point in the digital era. But not all of these are active or would be considered foundries. Some kind of criteria had to be set for Ruxandra to complete her study and get an accurate overview.

Producers of retail typefaces, whether selling directly to customers and/or distributing through other companies. (This includes graphic design studios that sell retail type (e.g., A2-Type). Excludes sources that offer fonts only for free or via pay-with-a-tweet, donation, or similar non-retail distribution.)

Based in Europe, Americas, Australia, and New Zealand

Any age or size. Includes one-person foundries, as well as larger and more established foundries. Foundries owned by larger conglomerates are excluded.

Active within the last five years

A dedicated web presence: own a website that presents the foundry's services and products

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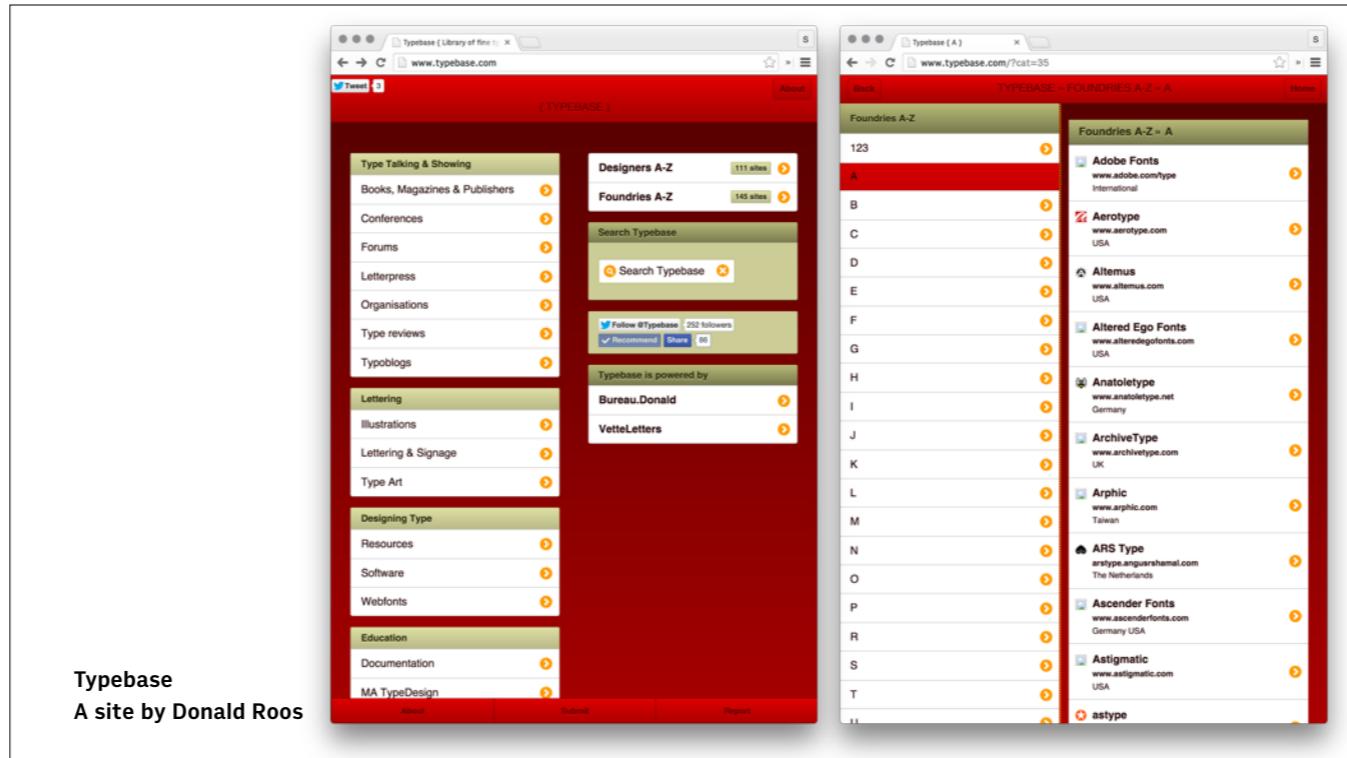
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## Sources

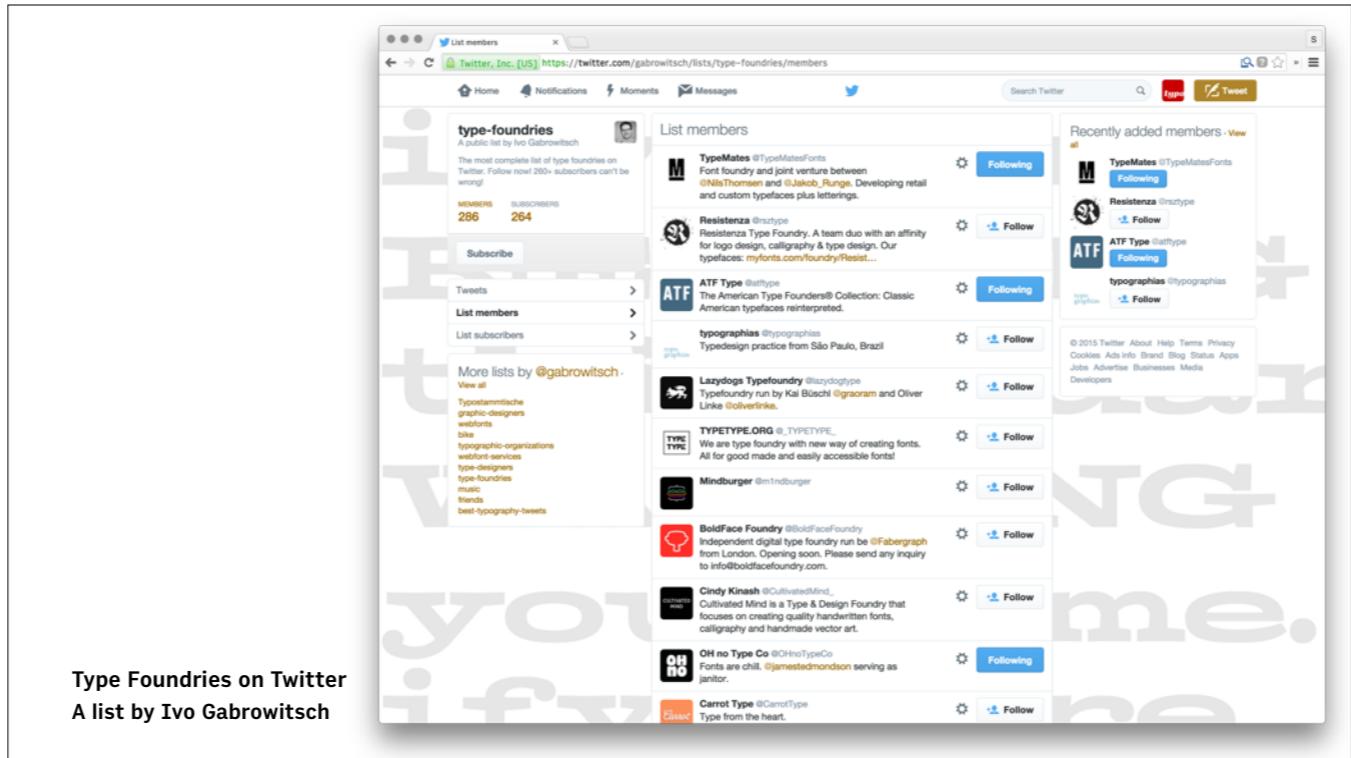
To gather a list of foundries that met this criteria Ruxandra consulted a few lists.



Jan Middendorp's Type Navigator is the most recent and thorough showcase of "independent" foundries. THANK YOU, JAN!



Typebase is an effort to catalog foundry websites. I don't know how active the database is now, but the website got a major redesign in 2012 and visitors are invited to submit updates.



Ruxandra also looked at a Twitter list of Type Foundries, collected by Ivo Gabrowitsch. THANK YOU, IVO!

"If you're reading this, you're wasting your time." Ivo, I want my 30 seconds back.

So those were Ruxandra's main sources for the 300 or so foundries included in the census.



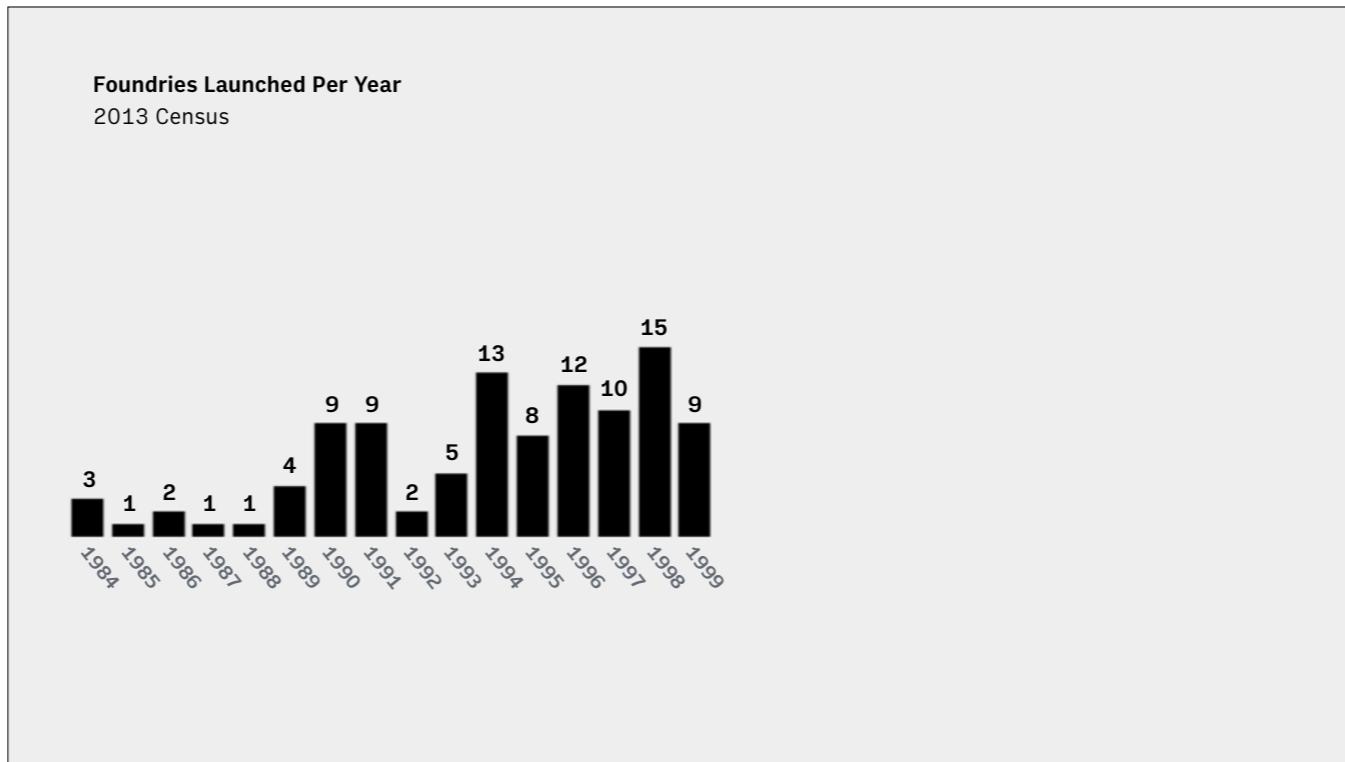
She does add that one other publication is worth mentioning, and that's the pioneering Indie Fonts series from the early 2000s. These were only specimen books, not much additional insight, but they are a good document of the explosion of small designer-led foundries from that decade and the proliferation of new fonts.

## More foundries

So what did we learn from the 2013 census? A lot of things, and I'll only cover parts of it here. But let's start with the growth of new foundries on the market.

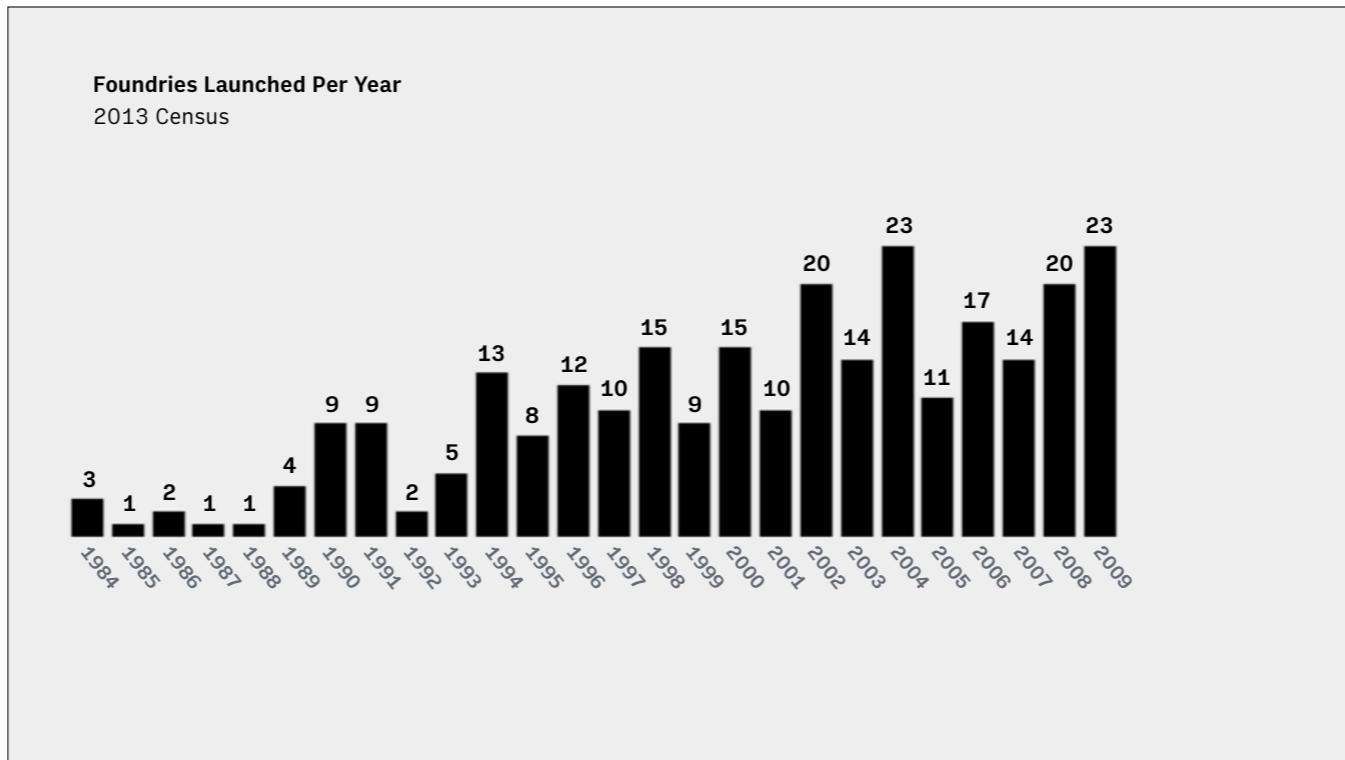


In the 1980s, digital pioneers like Elsner+Flake, Emigre, Font Bureau were born. But in those first six years, only a handful of foundries were created.

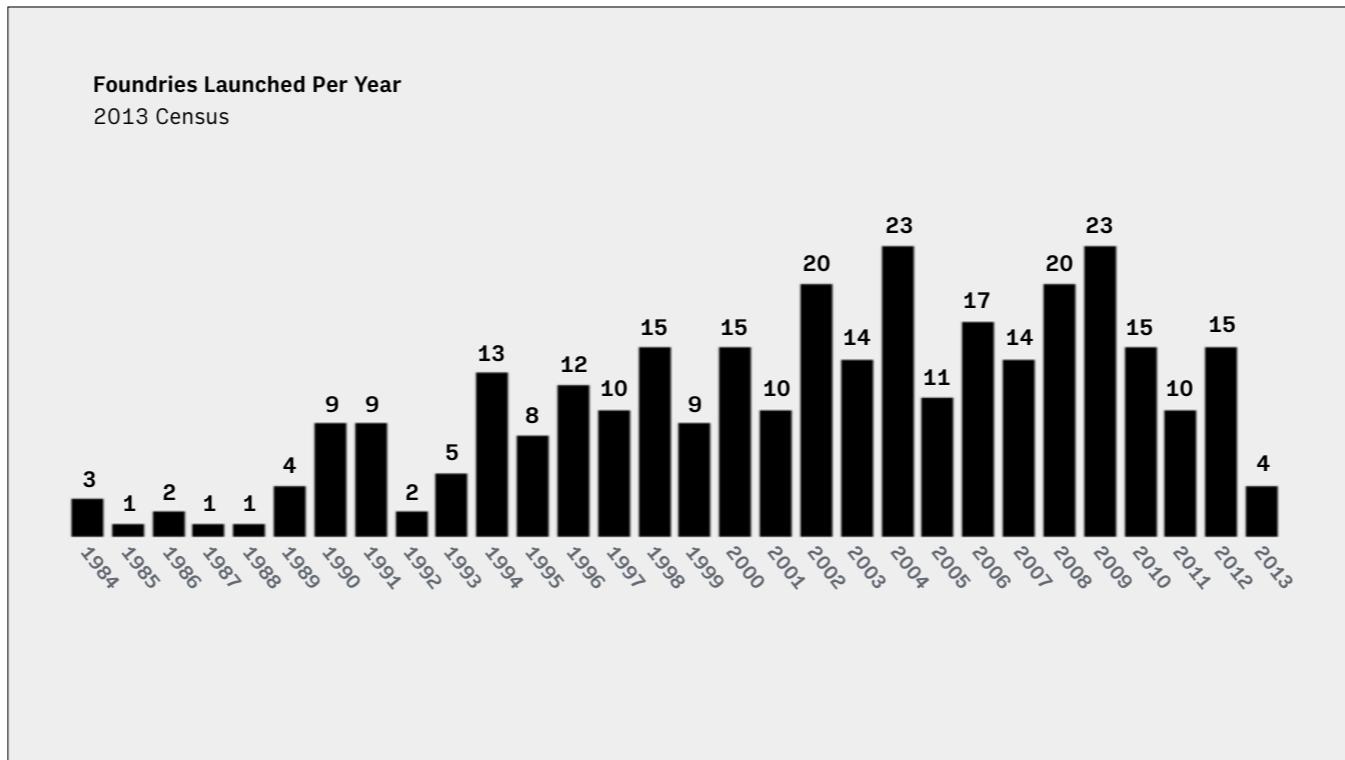


The total doubled within the first two years of the 1990s, which became a decade of massive growth as everyone got in on the action. New font formats, TrueType and OpenType, were introduced in the '90s, Ikarus for Macintosh was completed, and FontLab came along as an alternative to Fontographer.

BTW, a few foundries created during this period — mostly grunge experiments and the like — are no longer active today. These are not reflected here because we only include recently active foundries in the census.



In the 2000s, the font formats and editors matured. But more importantly, the number of sales platforms increased significantly, and the ability to sell online, either via retailer or independently, was much more accessible to small foundries.



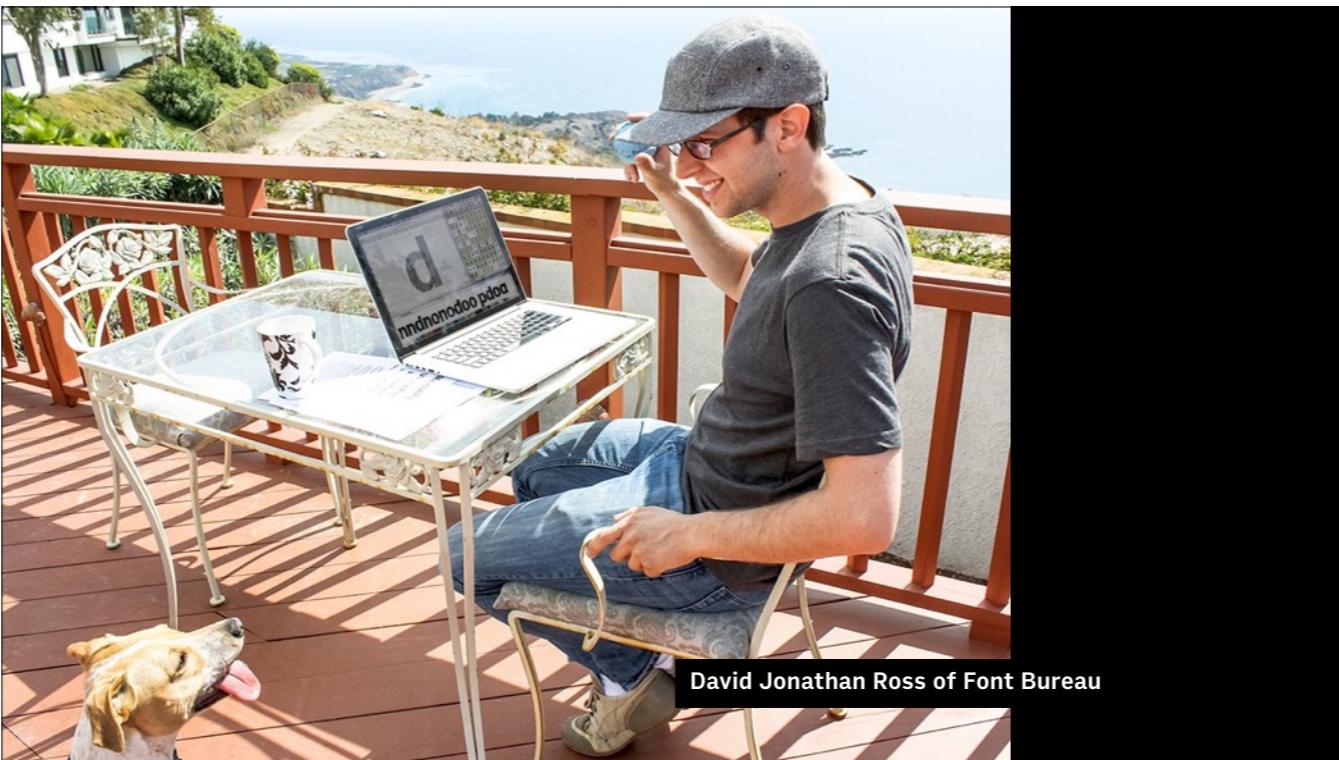
From 2010–2012 we saw similar growth as the previous decade. That low number for 2013 seems to be an outlier, and I imagine it will grow as soon as we make the next update. One major impact on this period is that sometime around 2010 many new foundries had no online presence other than on MyFonts, so if they weren't part of Jan's book or the other sources they weren't counted in the survey. We'll look at how we want to expand the definition of a foundry for the next census.

## Smaller foundries

So we learned that there are more foundries, and we learned, as we suspected, that most of them are very small.



How about a little time warp for contrast. This was type founding in 1919. This image of the Linotype factory gives a sense of what type founding looked like in the metal era: massive, industrial operations with hundreds, or, as in this case, even thousands of employees.

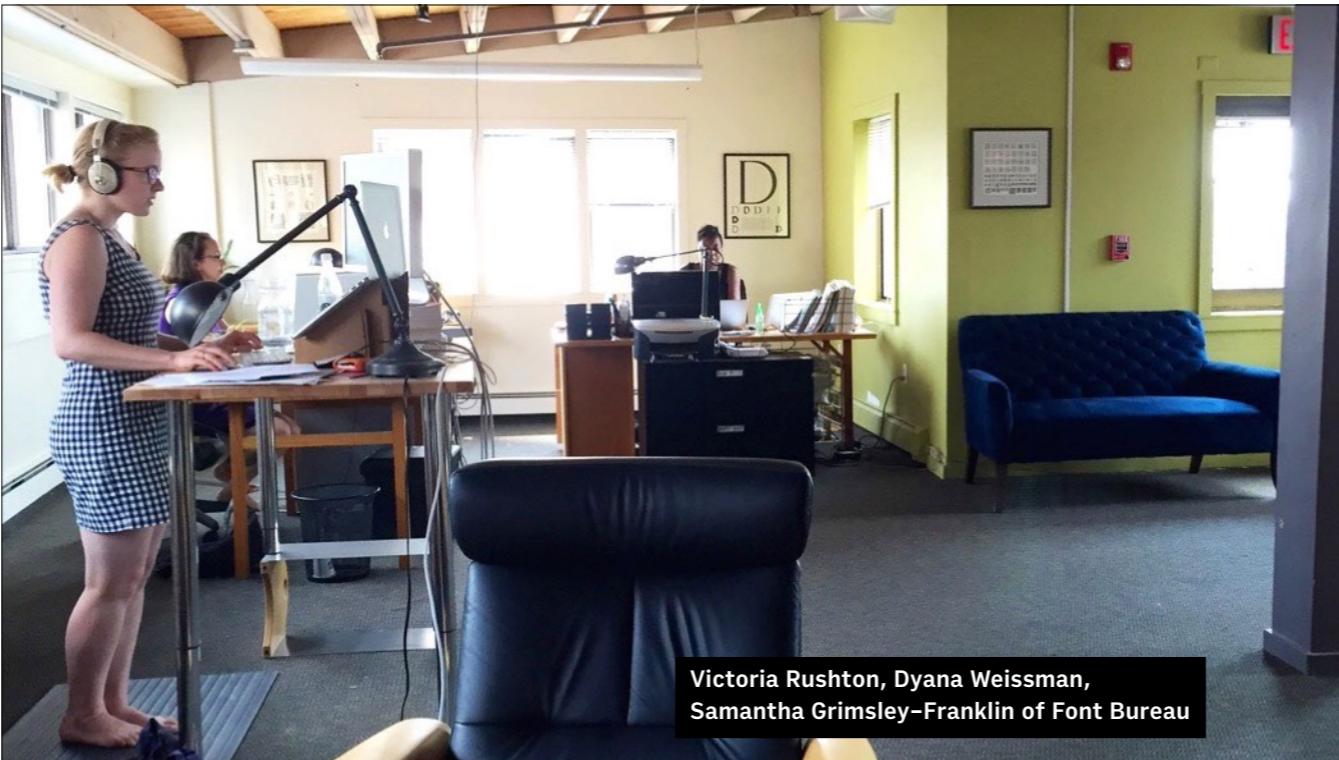


David Jonathan Ross of Font Bureau

This is type founding in 2015. It's just a guy and his laptop and his dog.

And sometimes not even a dog.

Actually, this is only part of Font Bureau's team of a dozen or so. But it demonstrates that many foundries have a decentralized staff spread around the US.



Victoria Rushton, Dyana Weissman,  
Samantha Grimsley-Franklin of Font Bureau

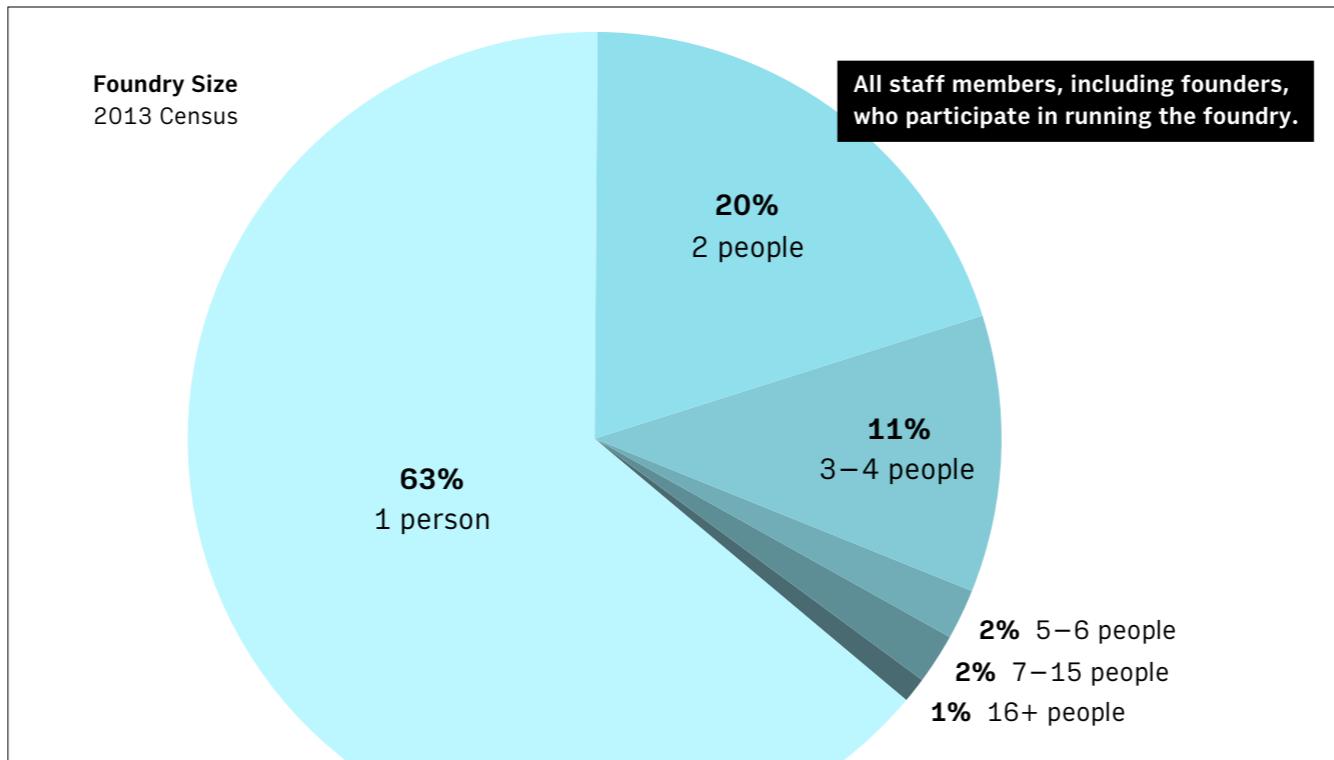
Here's another part of that distributed Font Bureau staff at their Boston office: Victoria Rushton, Dyana Weissman, Samantha Grimsley-Franklin.



Shoko Mugikura and Tim Ahrens  
Just Another Foundry

And a lot of foundries also look like this. A couple of partners in a one-room studio, often in the designers' own home.

This is really how most fonts are made today. Small shops of 1–3 designers.



And that's reflected in the numbers. At a quick glance we can see where the bulk of the industry's players lie and that's at the very small end. Roughly 95% of all independent foundries have fewer than 5 people on staff.

And there are only a handful of foundries, maybe 5 or so, with more than 15 people.

## Global foundries

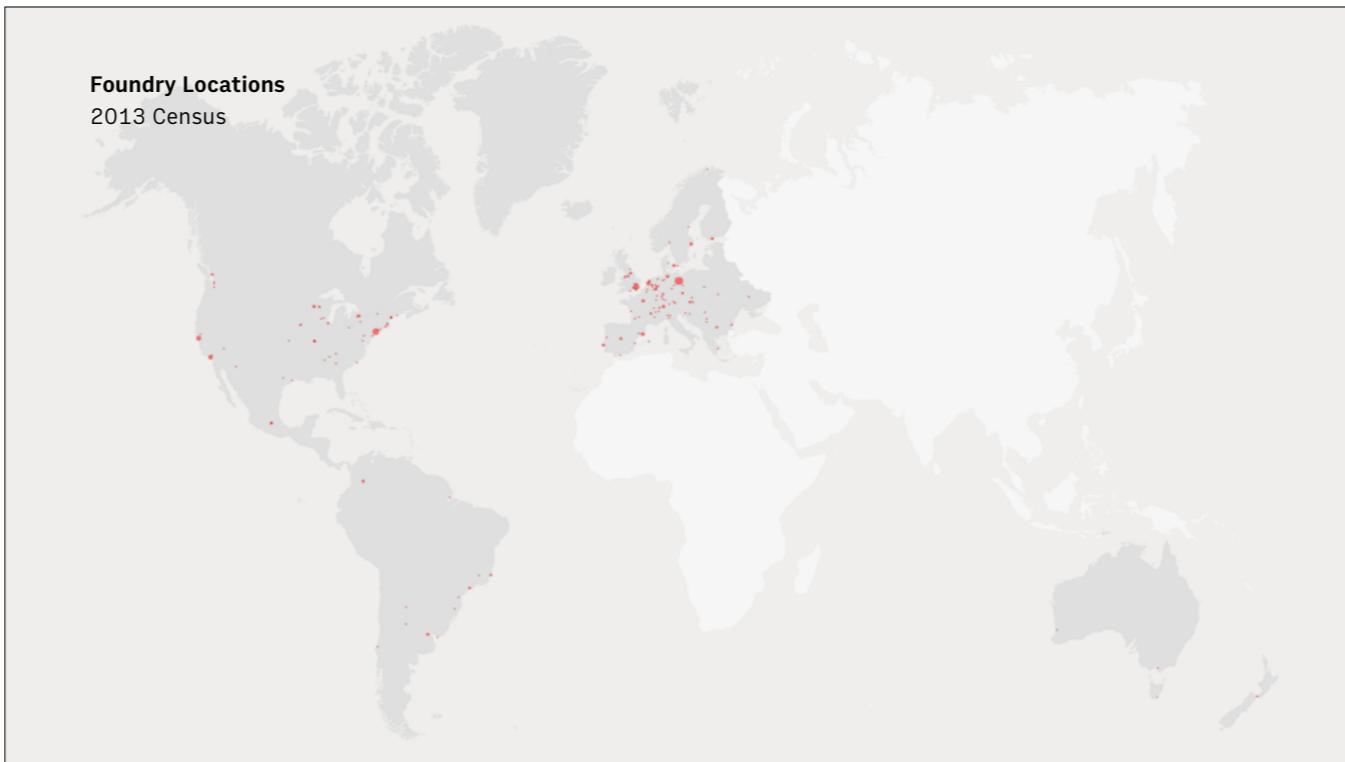
We've also always known that font production is no longer limited to specific parts of the world.



Just looking at the West. (Again, Africa, the Middle East, and Asia were not included in this version of the census.)



These are the established hotspots, most of them traditional centers for printing or design. But these are just

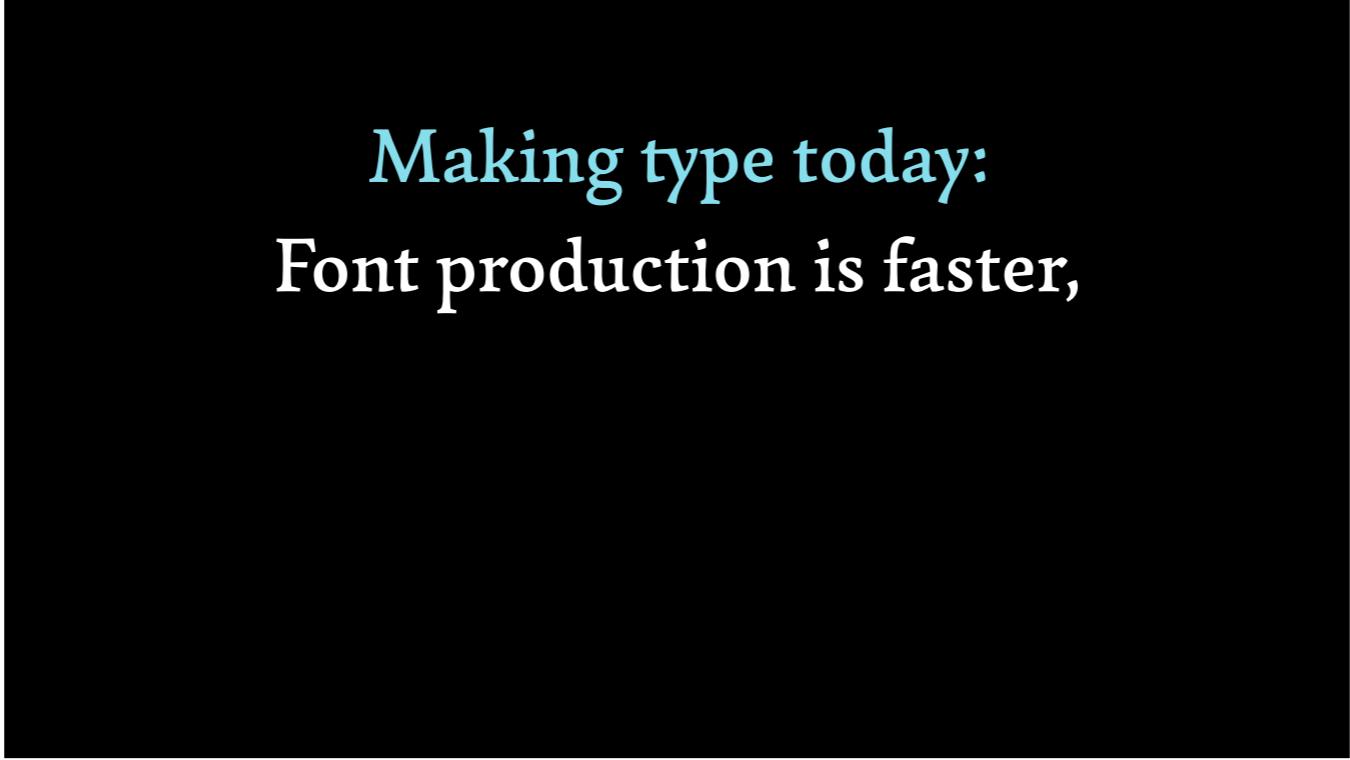


But if you look at the cities in which there are 1 or 2 foundries, there starts to be much more coverage.



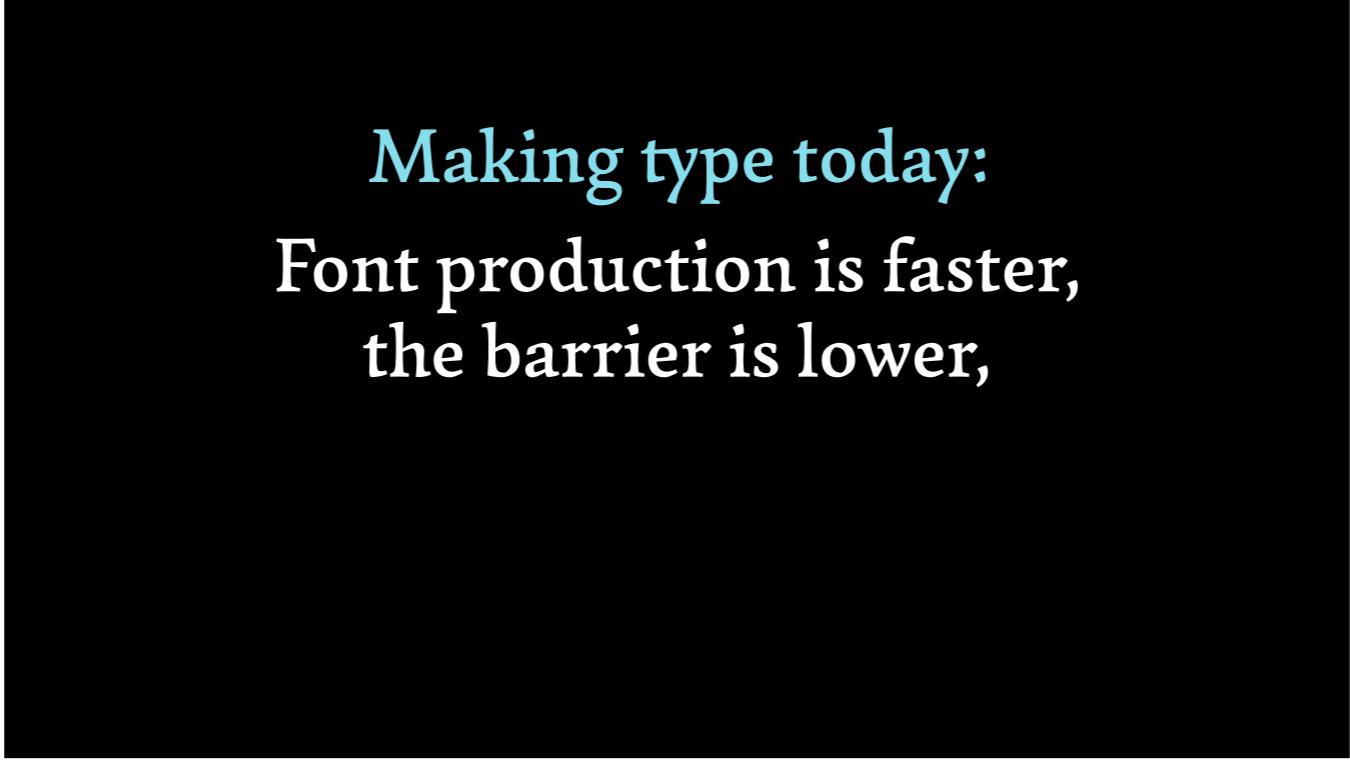
Here's South America. Of course, there are many more since the 2013 census, and Enheekee Nardi is helping us with a more complete list of Brazilian foundries, for example.

But the South American map looked nothing like this 10 years ago. It was far more barren. My hope is that a future version of the census can include an interactive slider so we can combine the date with the map and see how things changed in various regions over time.



## Making type today: Font production is faster,

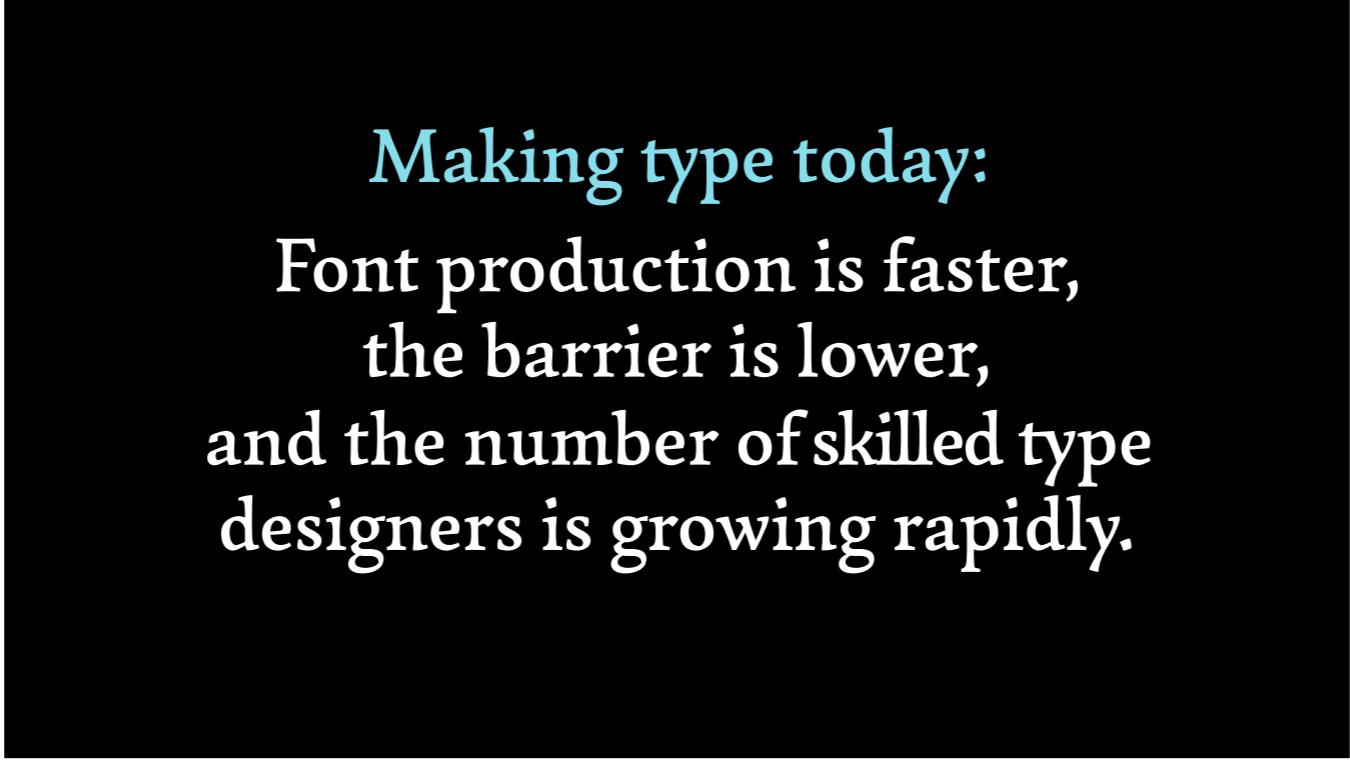
Part of this growth is also due to the vast improvement in font production tools. Type software has advanced to the point that they dramatically increase the productivity of a font maker. And I can't get into those tools now, but you've seen a few of them earlier this week. FontLab, Glyphs, Robofont, and all the plug-ins and associated tools that go with them.



**Making type today:  
Font production is faster,  
the barrier is lower,**

the qualifications for using many of these tools and for creating new fonts are much easier to acquire.

and you might think that would lead to masses of poorly made fonts — and it does — but also...



**Making type today:  
Font production is faster,  
the barrier is lower,  
and the number of skilled type  
designers is growing rapidly.**

the number of professionals is growing at nearly the same rate as the amateurs.

Many of them have degrees in type design.

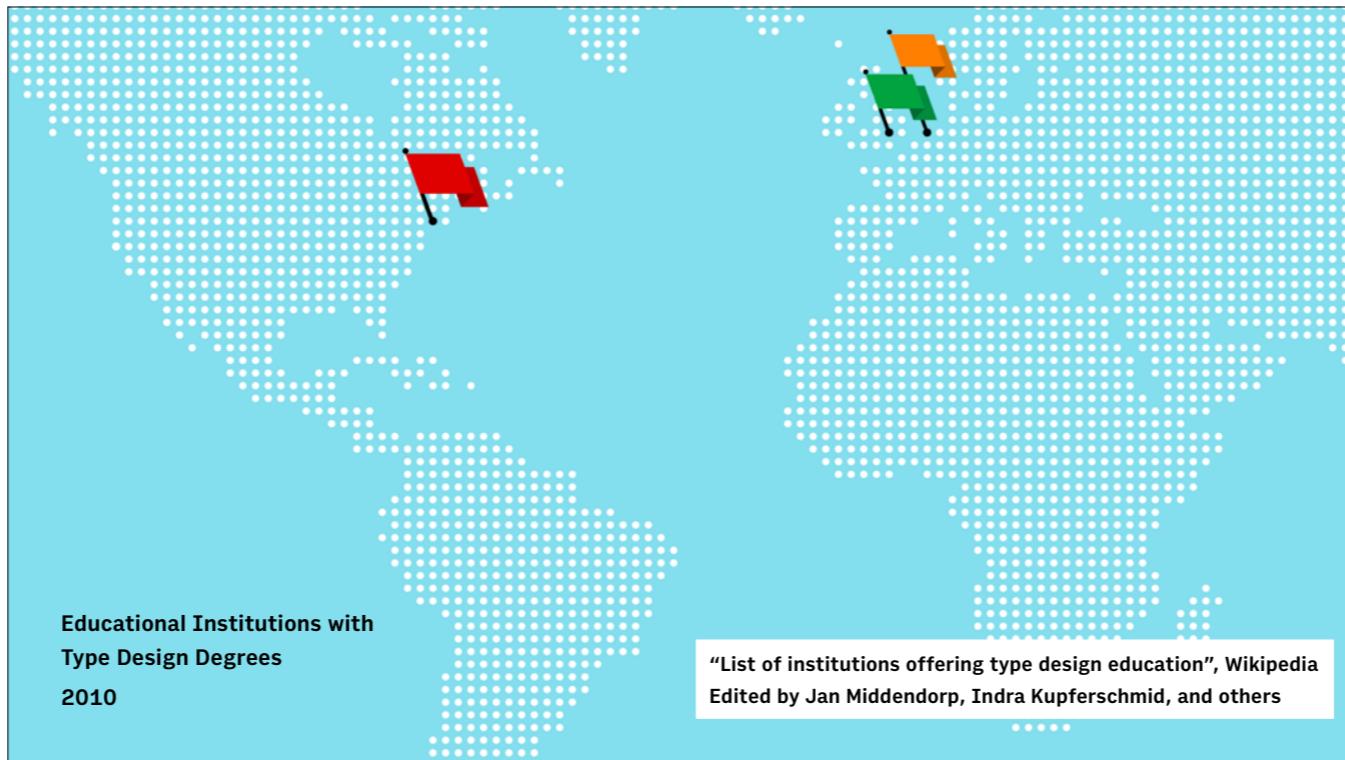
This was certainly not always the case.



About 15 years ago this is what the education map looked like. There were some type design courses taught by professionals in a few schools, but no dedicated type design program to speak of.



By the year 2000 there were two prominent post-graduate type design programs: Reading University in the UK and The Royal Academy in the Hague.



In 2010 the US got a type design certificate via the Cooper Union in New York.



And just two years later there were at least 11 institutions offering some kind of specialized degree in type design. Leipzig in Germany, Plantin in Belgium, two in France, two in Switzerland, one in Mexico, and one in Argentina.



This is roughly how the map looks today, with additions in San Francisco; Mexico City; No Si, France; and right here in São Paulo at SenacI.

We're probably missing some programs here. If you see a school missing, I encourage you to edit the Wikipedia page.

Due in part to these schools and the availability of new tools, the growth of production all around the world has been staggering in the last 5 years.

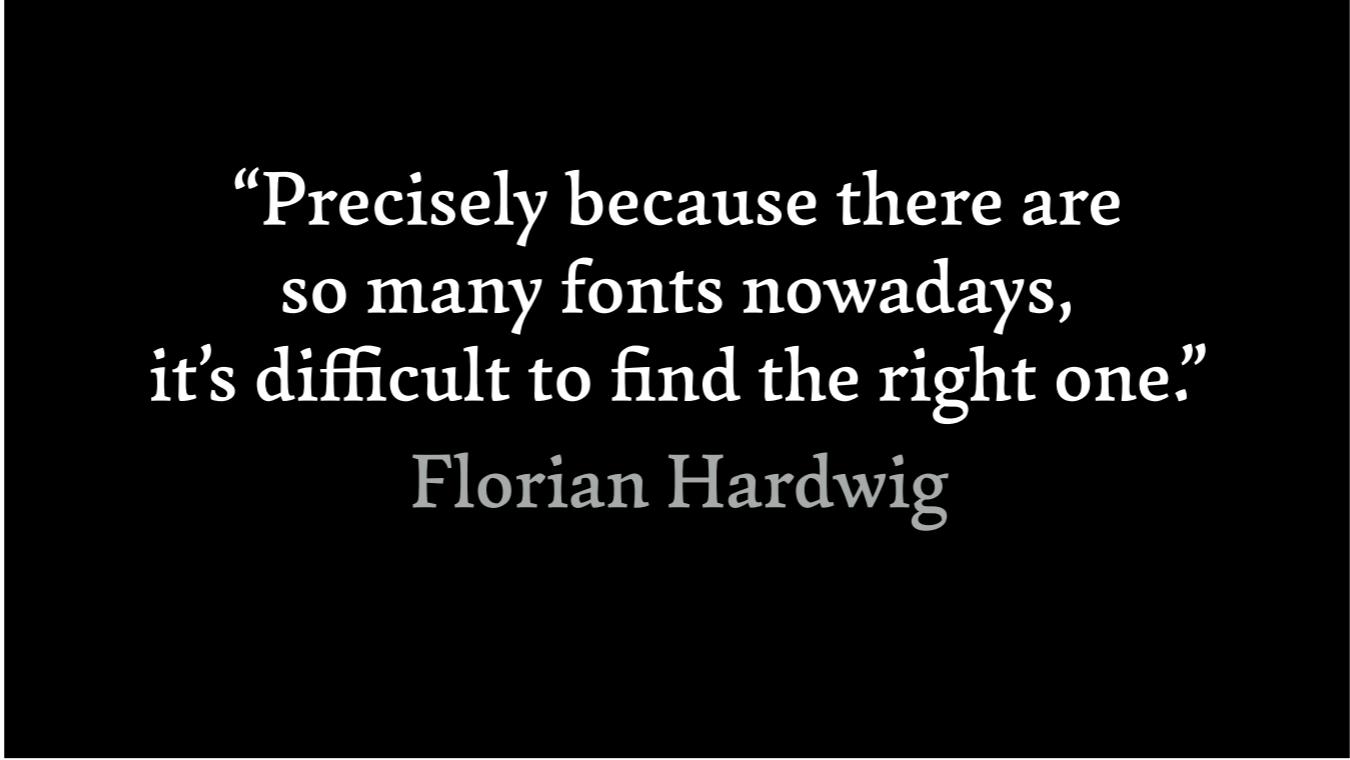
**Making type today:  
Font production is faster,  
the barrier is lower,  
and the number of skilled type  
designers is growing rapidly.**

So what does this all add up to?



## More fonts

What does this mean for type makers and users? For makers, it's more competition of course, so that's a challenge.



“Precisely because there are  
so many fonts nowadays,  
it's difficult to find the right one.”

Florian Hardwig

And for users, it means more choice. But more choice can also make it difficult to choose.

So this is why I'd like to focus on the market. On how fonts are bought and sold. How they are found. But we'll get to this question in a moment.



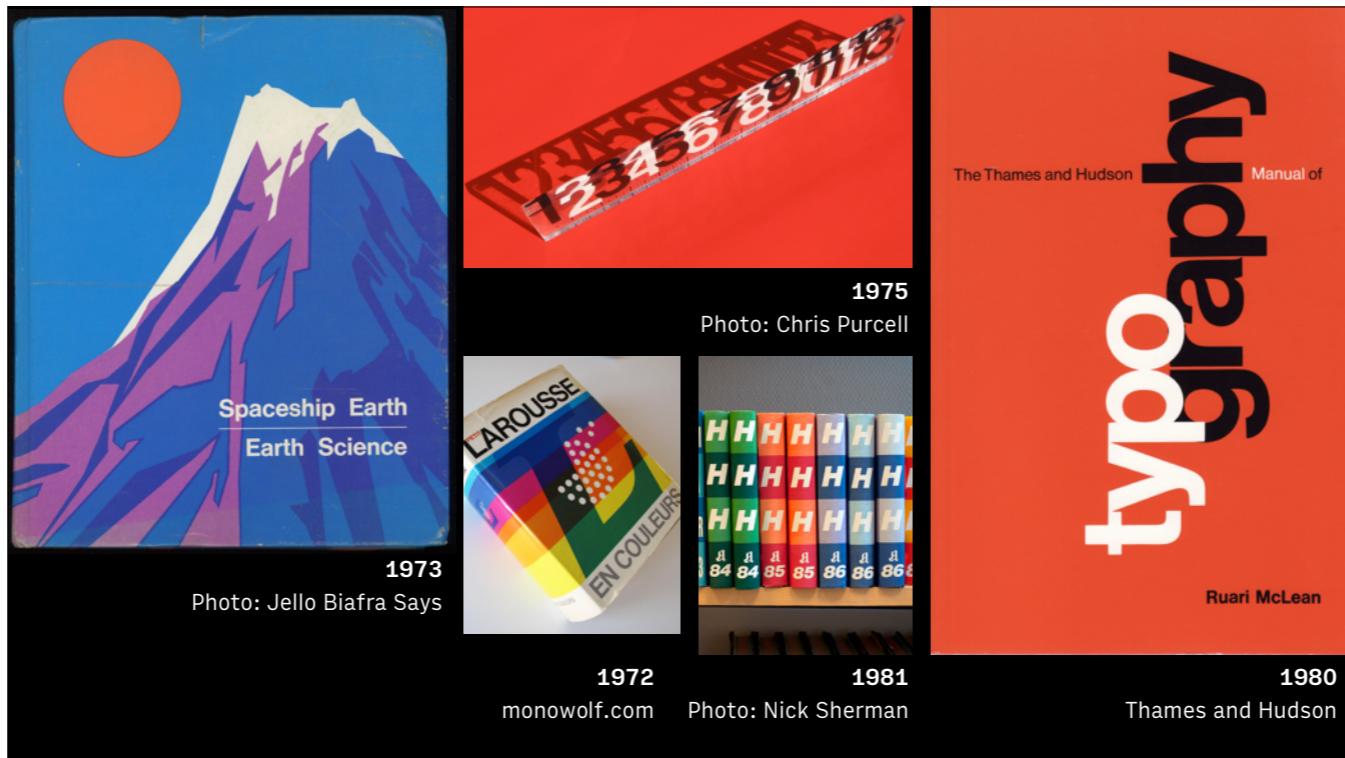
Making type today:  
Font production is faster.  
Usage trends spread faster.

Here's the other big change since the advent of the web: trends spread faster. And by trends I mean both the ways fonts are used and the style of typeface designs themselves.



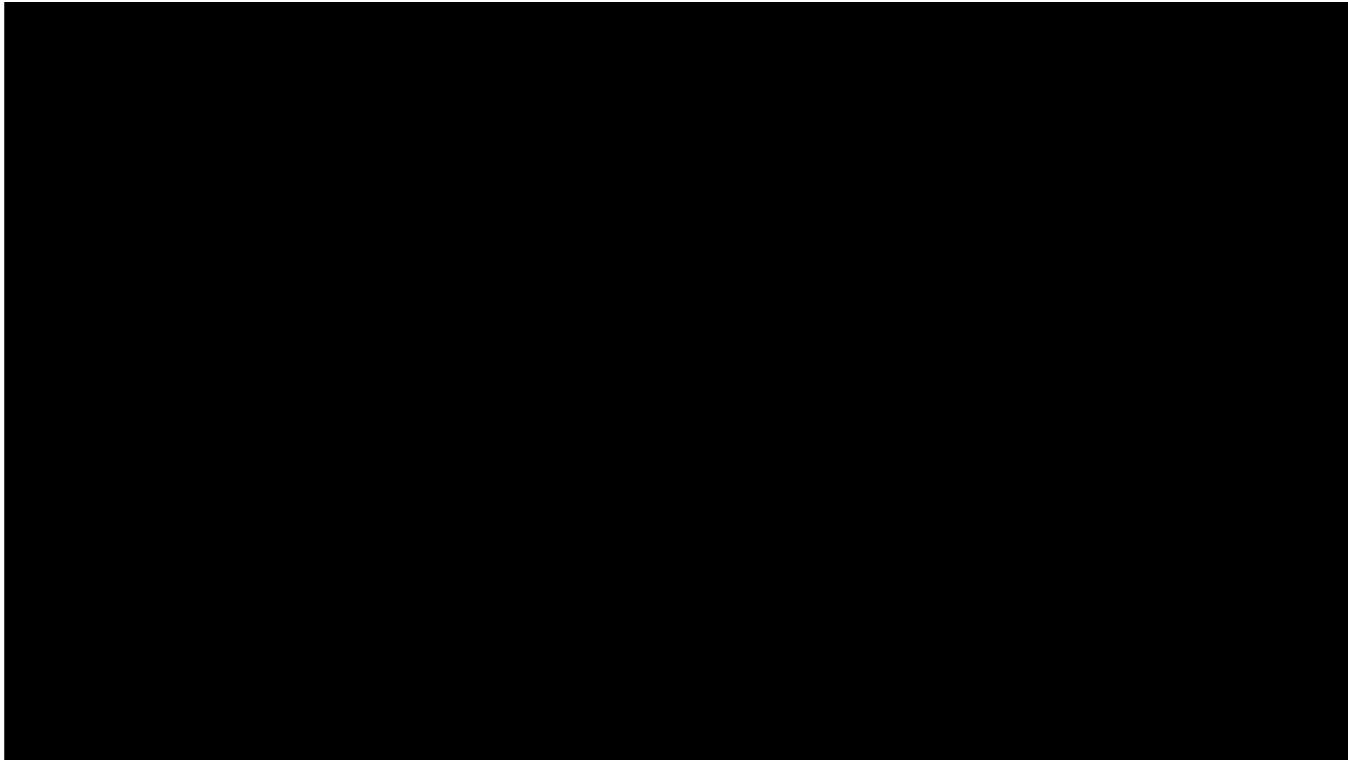
Helvetica specimen booklet  
Printed in Germany for American market  
circa 1967  
Photo: Nick Sherman

Take Helvetica as a point of comparison. It was released in the late 1950s, but it wasn't until 15 to 20 years later that it saw wide, global, mainstream use. Despite its association with 1960s modernism...



...in many ways Helvetica was a typeface of the 1970 and 80s. (And it made a comeback again in recent years, but that's another story.)

So back then, it could take a decade or two for something to catch on. Today, it takes mere weeks.

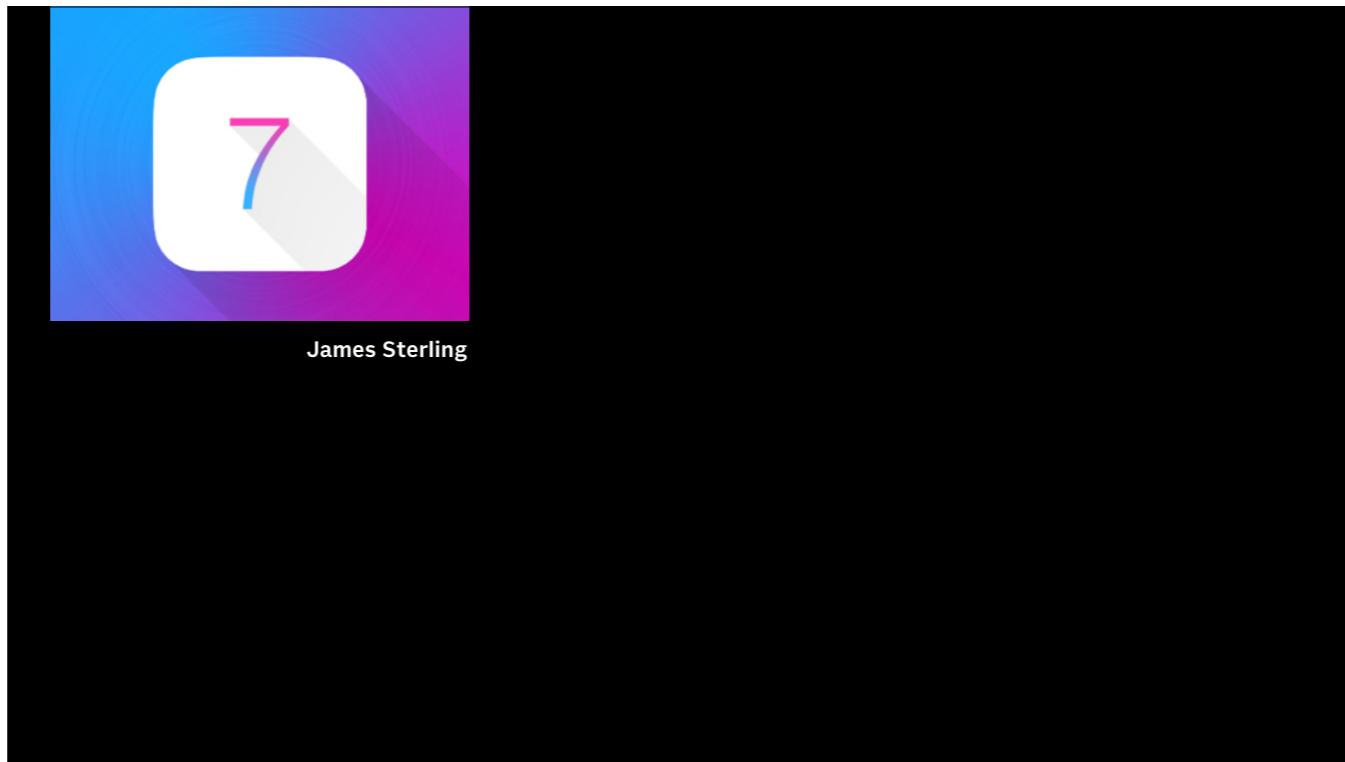


Some of you might know what trend I'm referring to just by looking at this image.

I can't verify all the details of the timeline, but the story goes something like this. A few months after Apple introduced in iOS 7 what many called a "Flat" visual style, web designers followed suit. But they just couldn't bare to keep things THAT flat, so some began to add a very long, exaggerated shadow, especially to type. Within weeks, it was a very visible trend on sites like Dribbble.

All of these I'm showing here were designed within a 3 month period. And there are many many more. Demonstrating the ability of social networks to facilitate the spread of not just kitten videos, but design trends too.

Some of these make no sense to me. Can a flip clock have raised numbers? This one — the type is pseudo-debossed into the paper background, yet it is also casting a shadow over the background.  
POST MODERN!

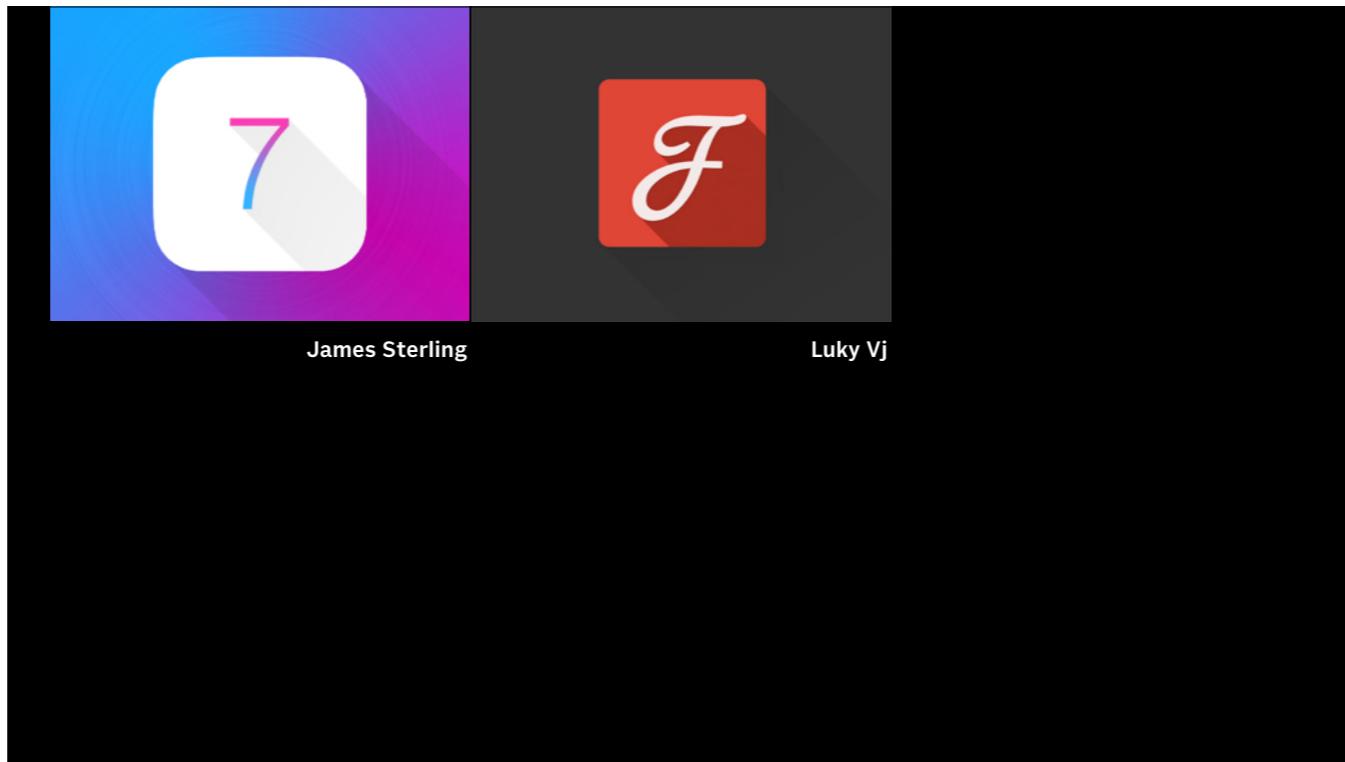


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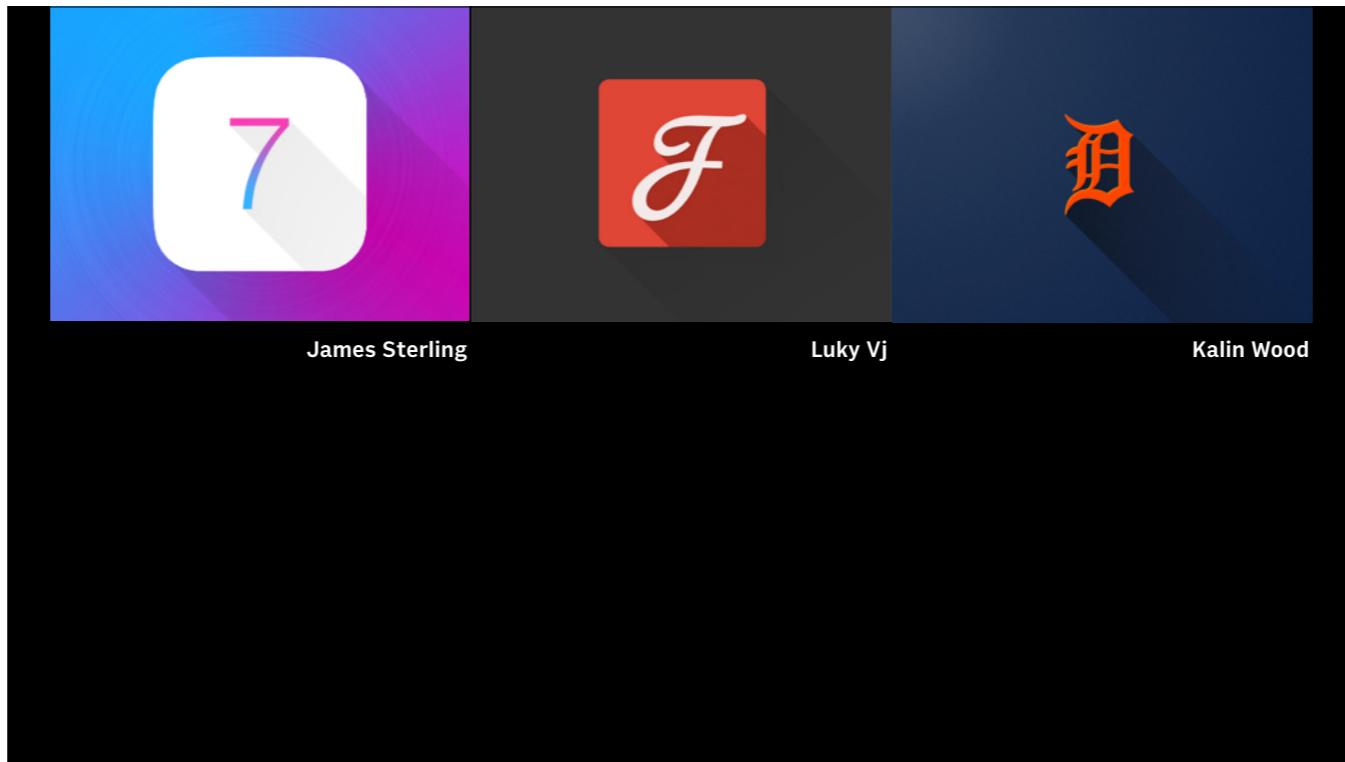


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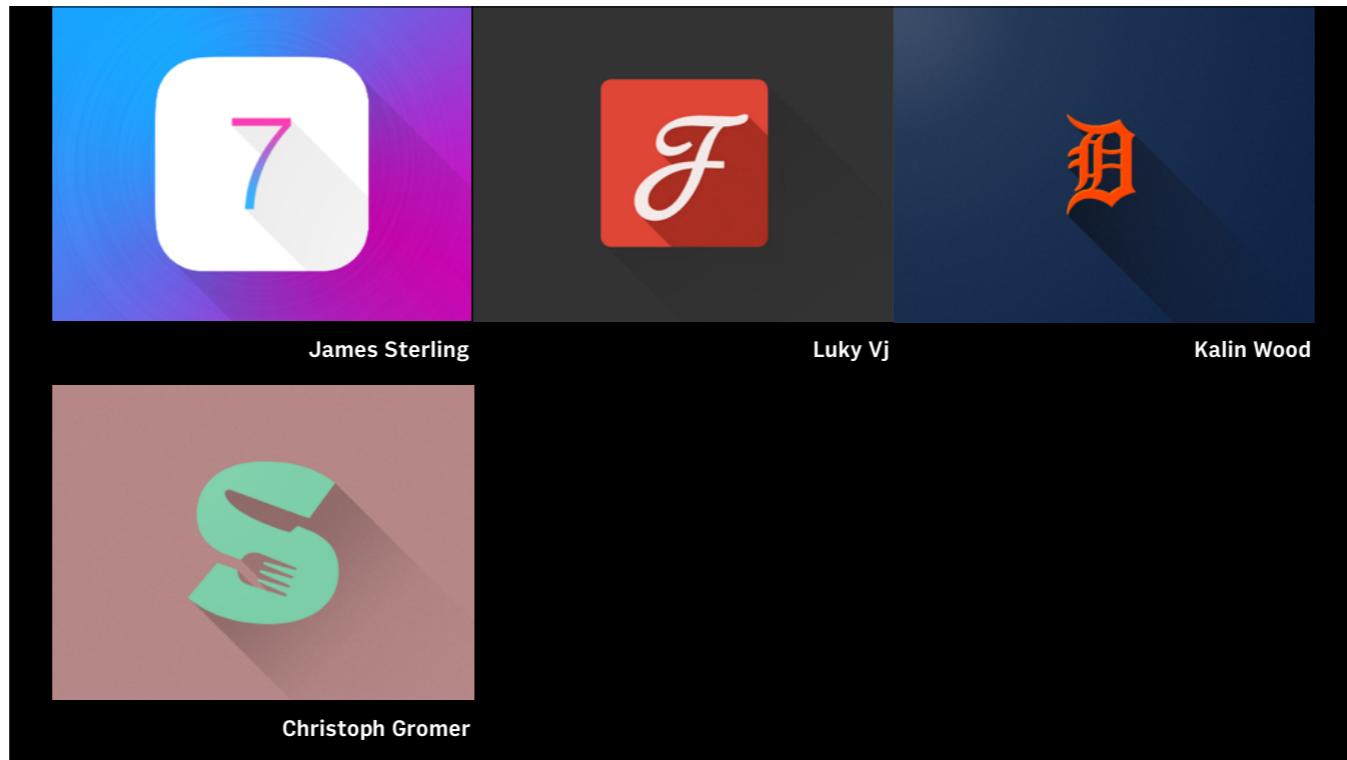


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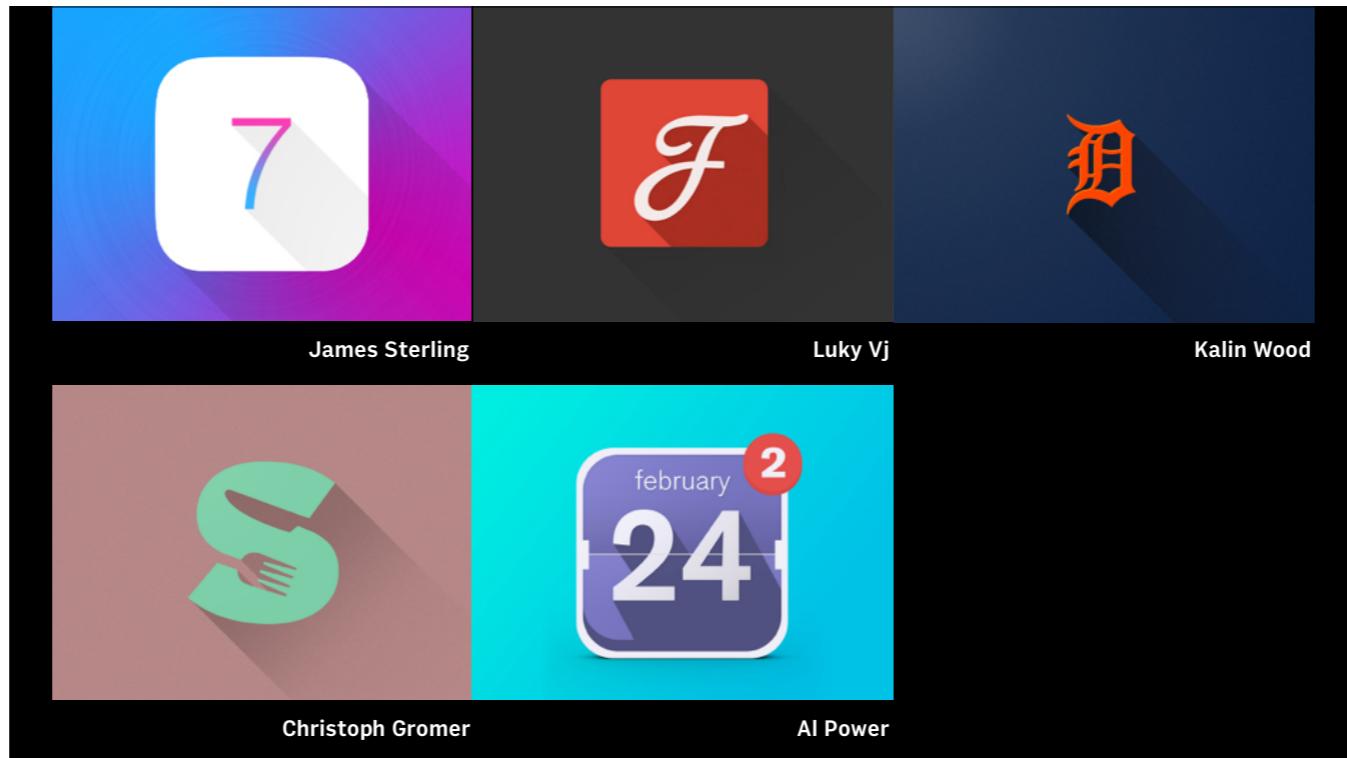


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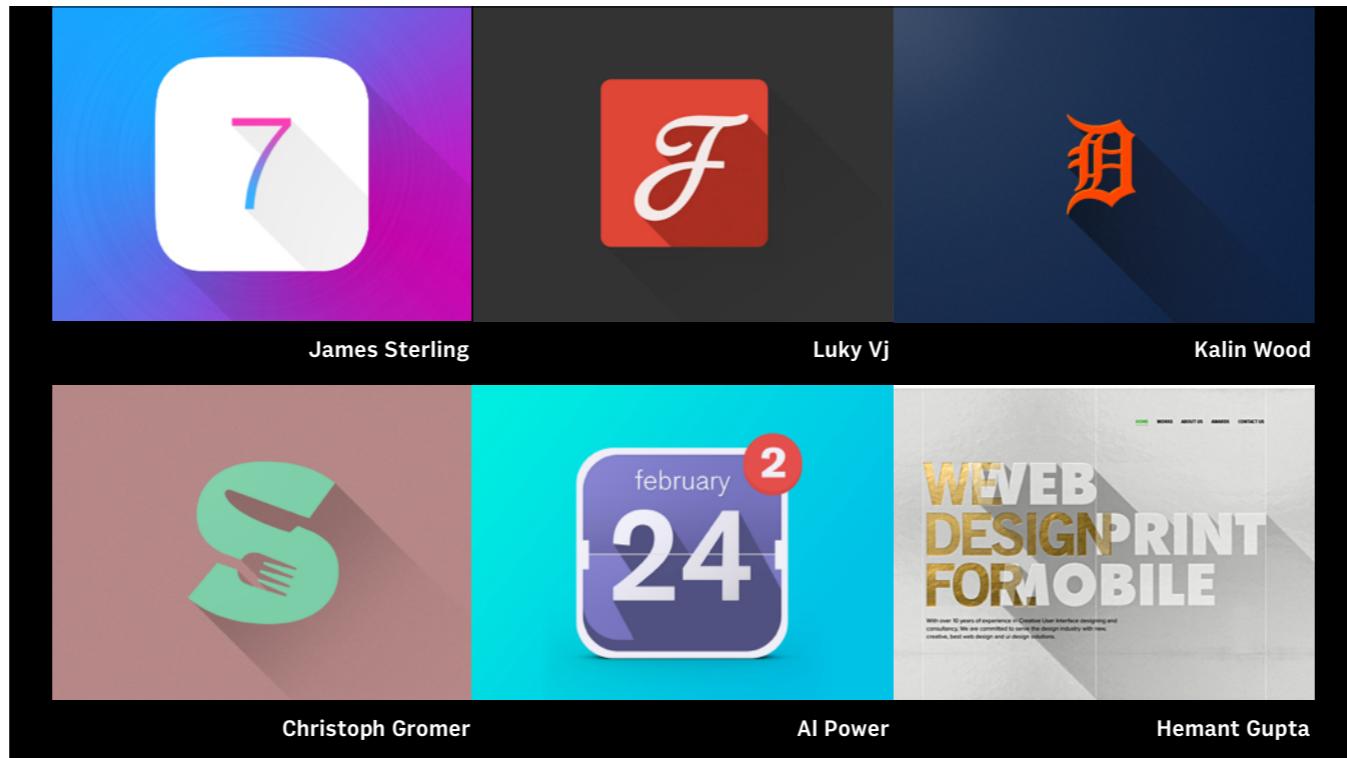


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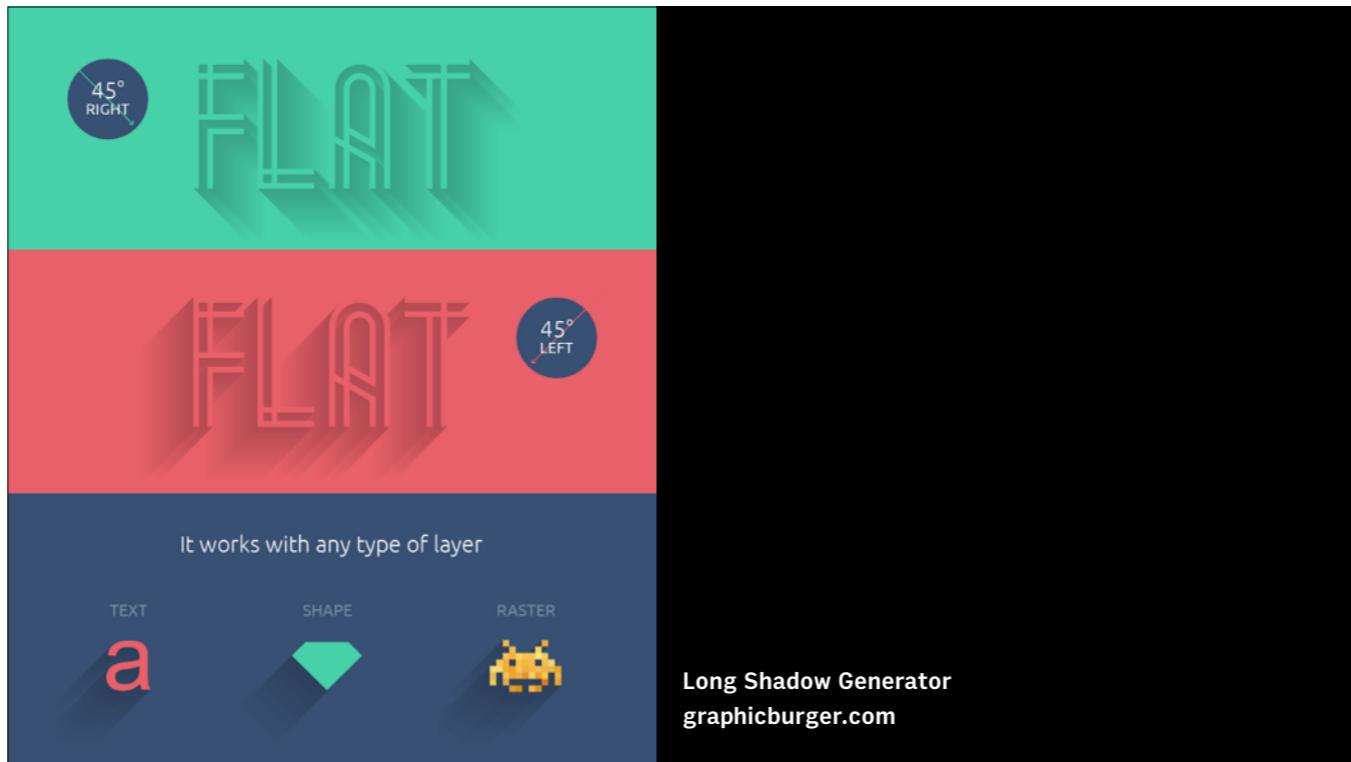


Some of you might know what trend I'm referring to just by looking at this image.

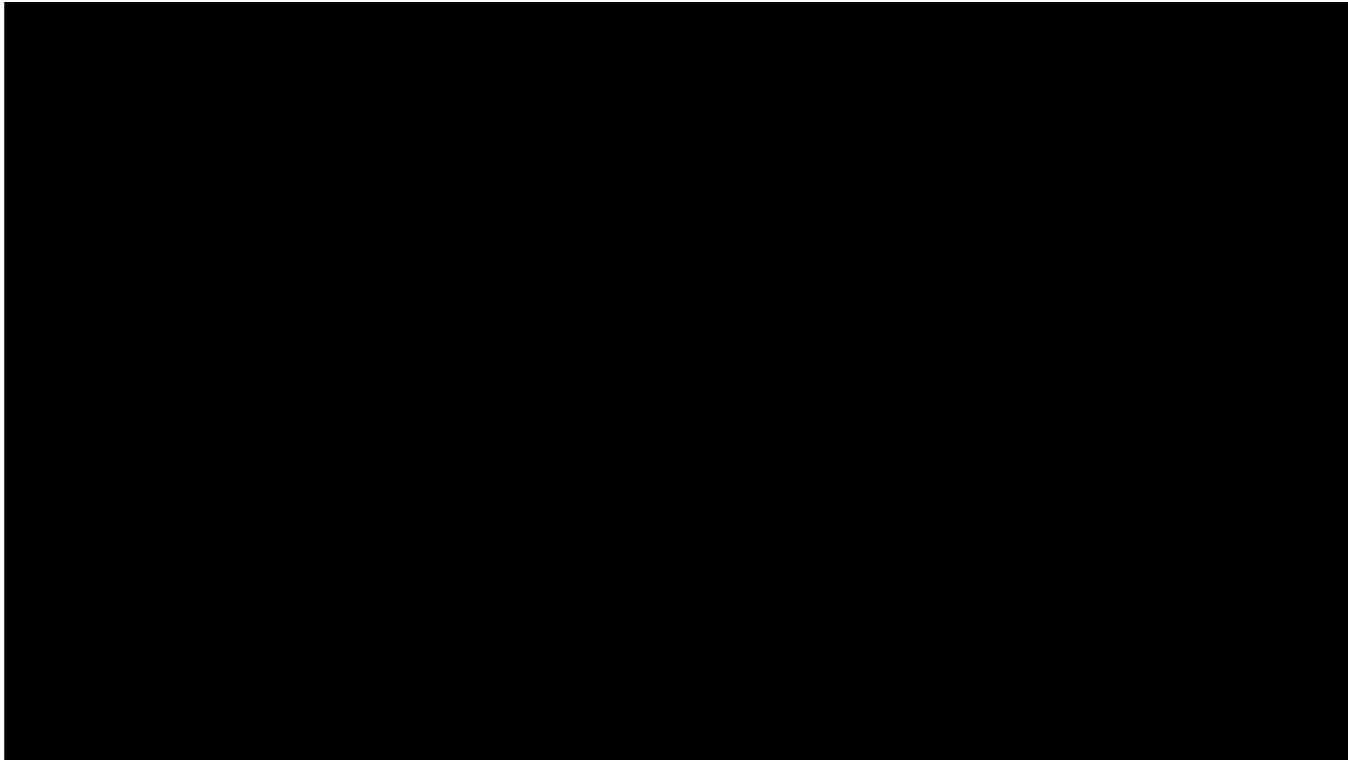
I can't verify all the details of the timeline, but the story goes something like this. A few months after Apple introduced in iOS 7 what many called a "Flat" visual style, web designers followed suit. But they just couldn't bare to keep things THAT flat, so some began to add a very long, exaggerated shadow, especially to type. Within weeks, it was a very visible trend on sites like Dribbble.

All of these I'm showing here were designed within a 3 month period. And there are many many more. Demonstrating the ability of social networks to facilitate the spread of not just kitten videos, but design trends too.

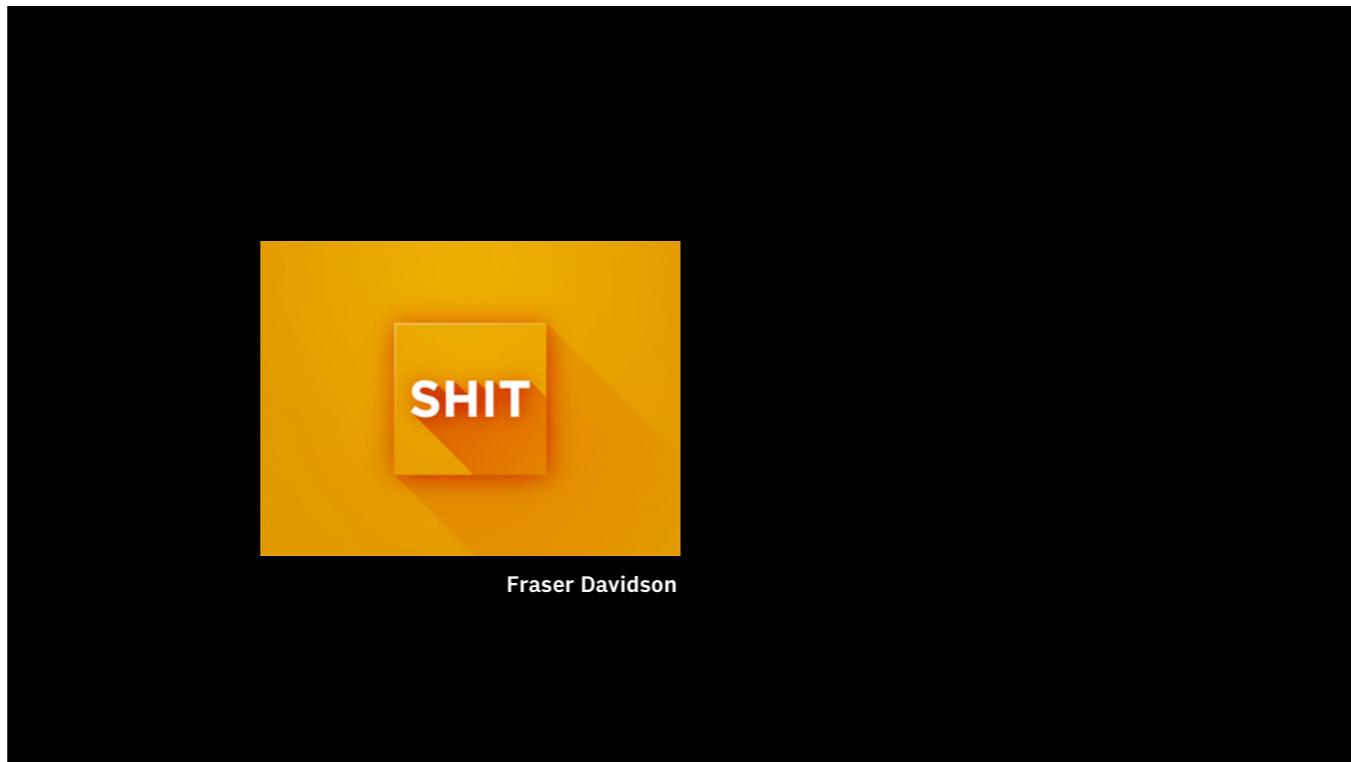
Some of these make no sense to me. Can a flip clock have raised numbers? This one — the type is pseudo-debossed into the paper background, yet it is also casting a shadow over the background. POST MODERN!



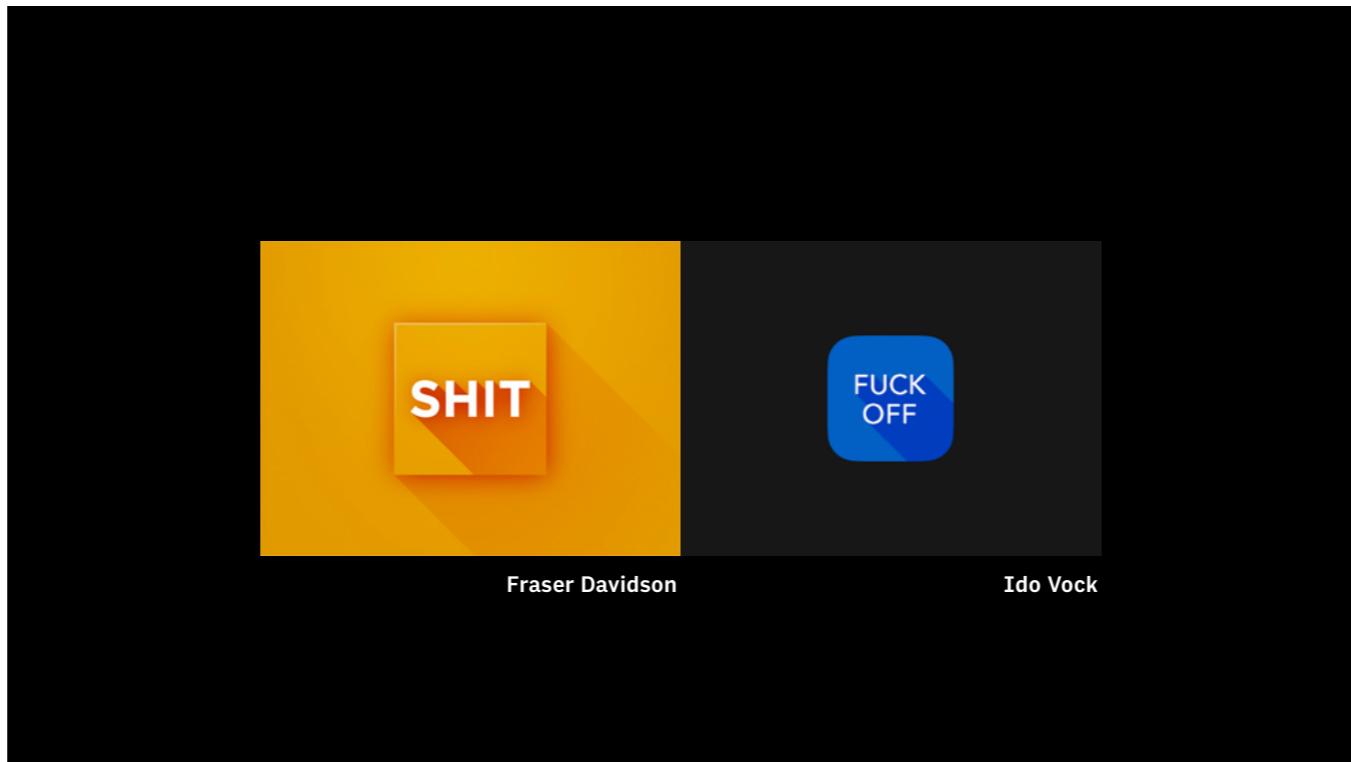
And you know something is a legitimate fad once a generator is created.



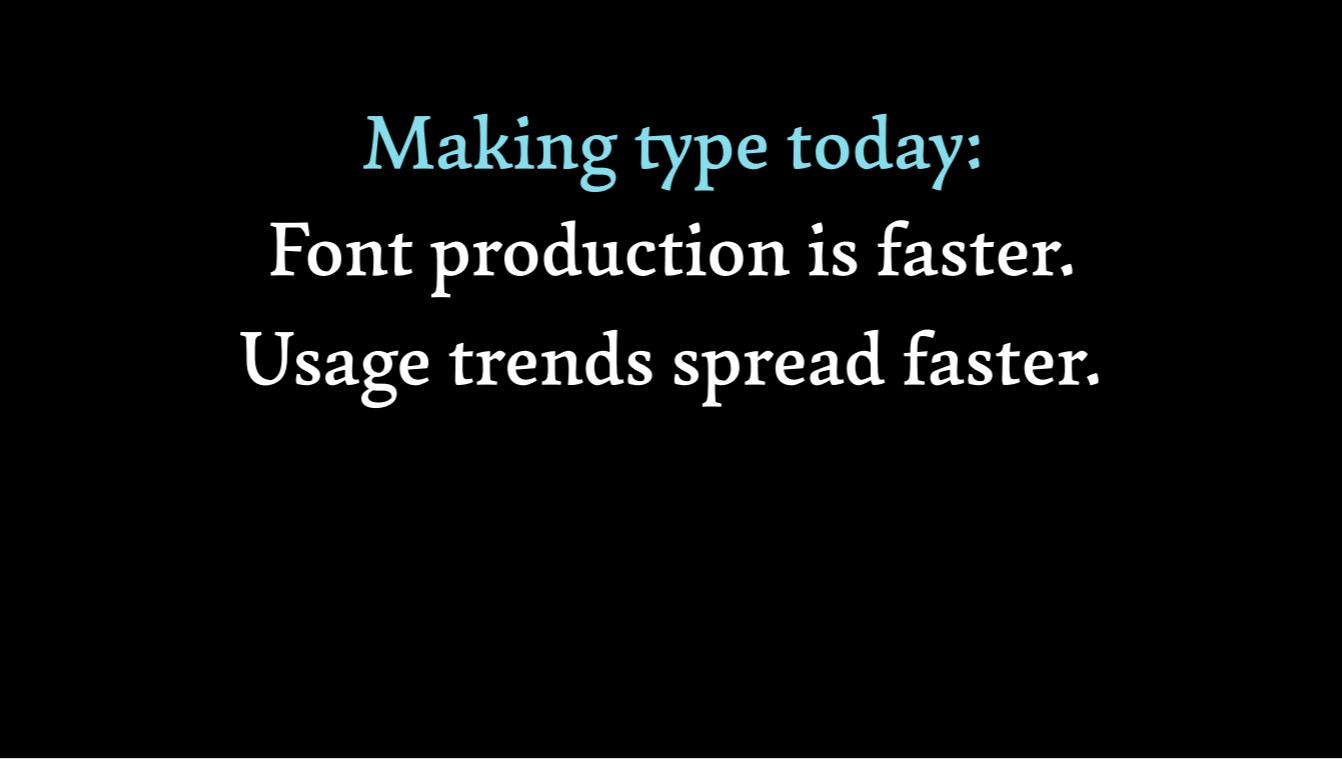
And of course there is the inevitable backlash.



And of course there is the inevitable backlash.



And of course there is the inevitable backlash.



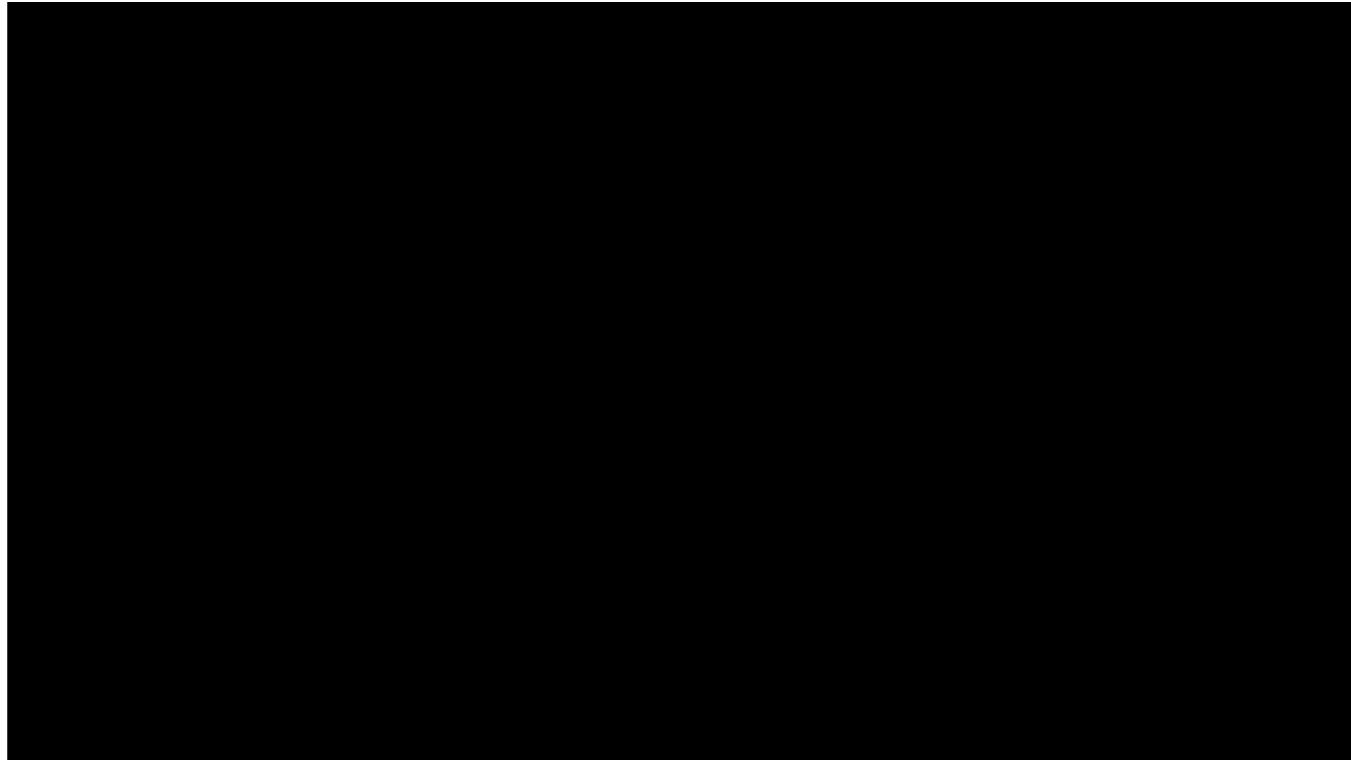
Making type today:  
Font production is faster.  
Usage trends spread faster.

So if these two things are true, something else inevitably follows...

**Making type today:**  
Font production is faster.  
Usage trends spread faster.  
Users determine what kinds  
of fonts get made.

There are obvious trends in font usage, but also in the design of type itself.

This is already the case in retail designs that began as commissions, but now it's common in type made specifically for the retail market.



Type designers respond to what is popular. This isn't new, of course, type has always followed the design zeitgeist, but what is new is how fast the font market responds to trends. Something that appears on a bestseller list or in a prominent design can be replicated in new fonts within months or weeks.

Here is a very real type design trend (perhaps related to the long shadow): chromatic fonts. Fonts that have layers that stack on top of each other for color and shade effects. All of these were released within the last 3-4 years from various foundries. Some are quite good. Some are not so good.

But there is good reason for this strategy. Respond to market demand really can work, trend-following fonts do sell, at least temporarily. But these fonts tend to be flashes-in-the-pan. They flame up and burn out quickly. I can understand why a type designer would go down this path. And there is something very practical about it, which I admire.

But I'm more interested in type that sets trends rather than following them.



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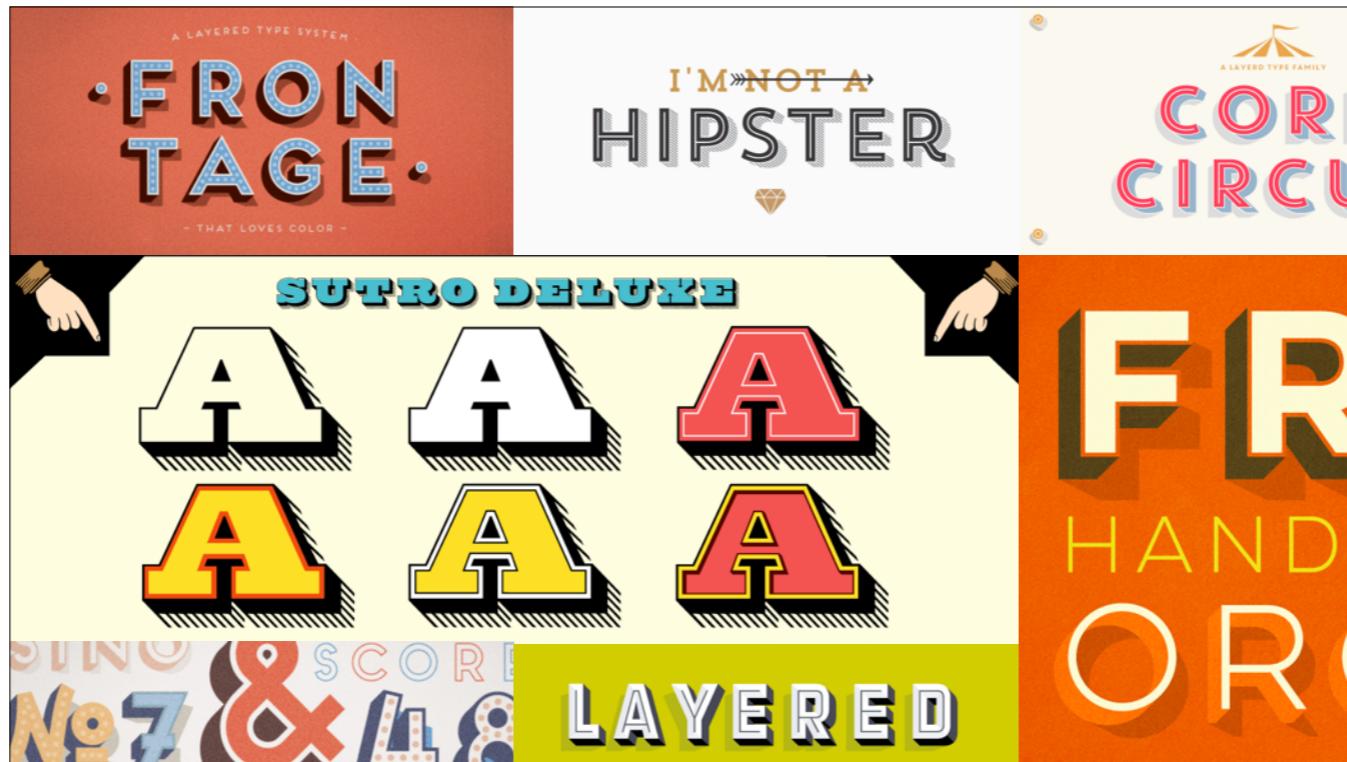


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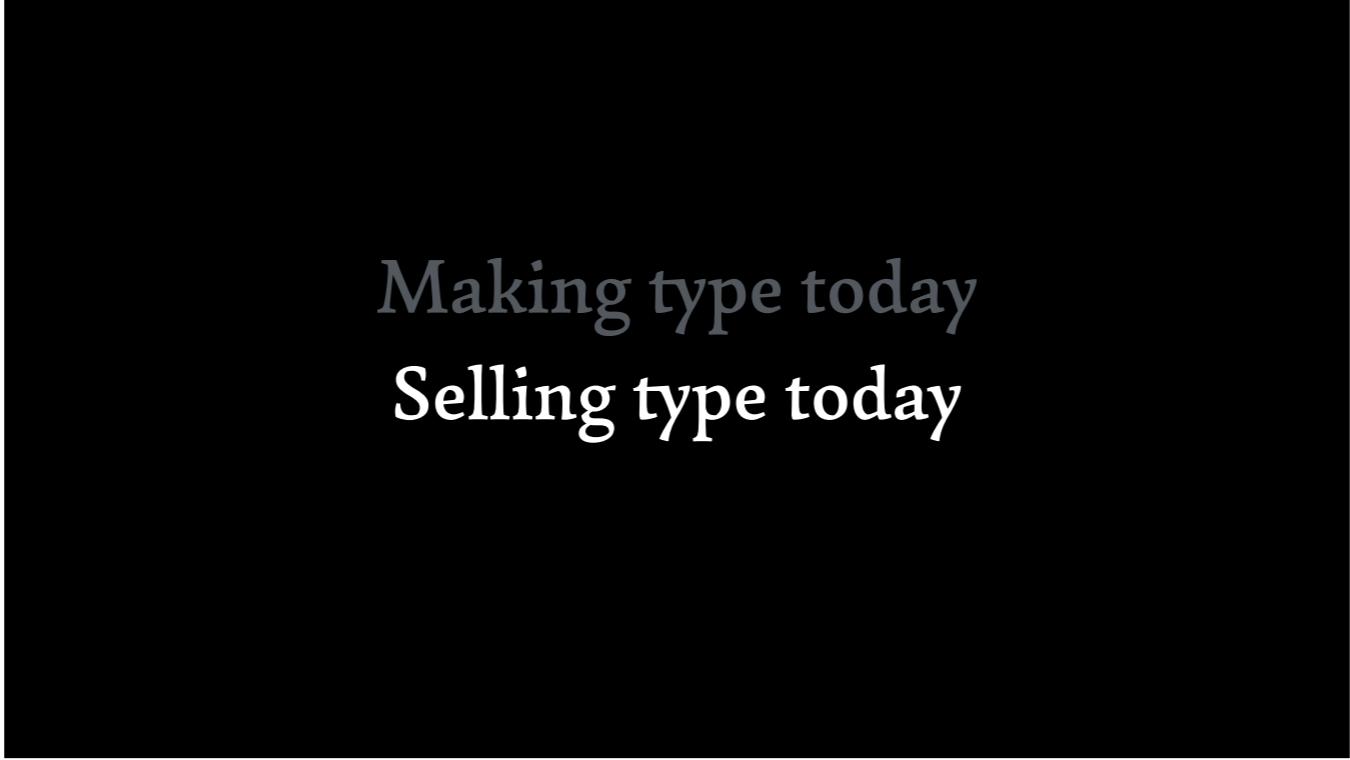


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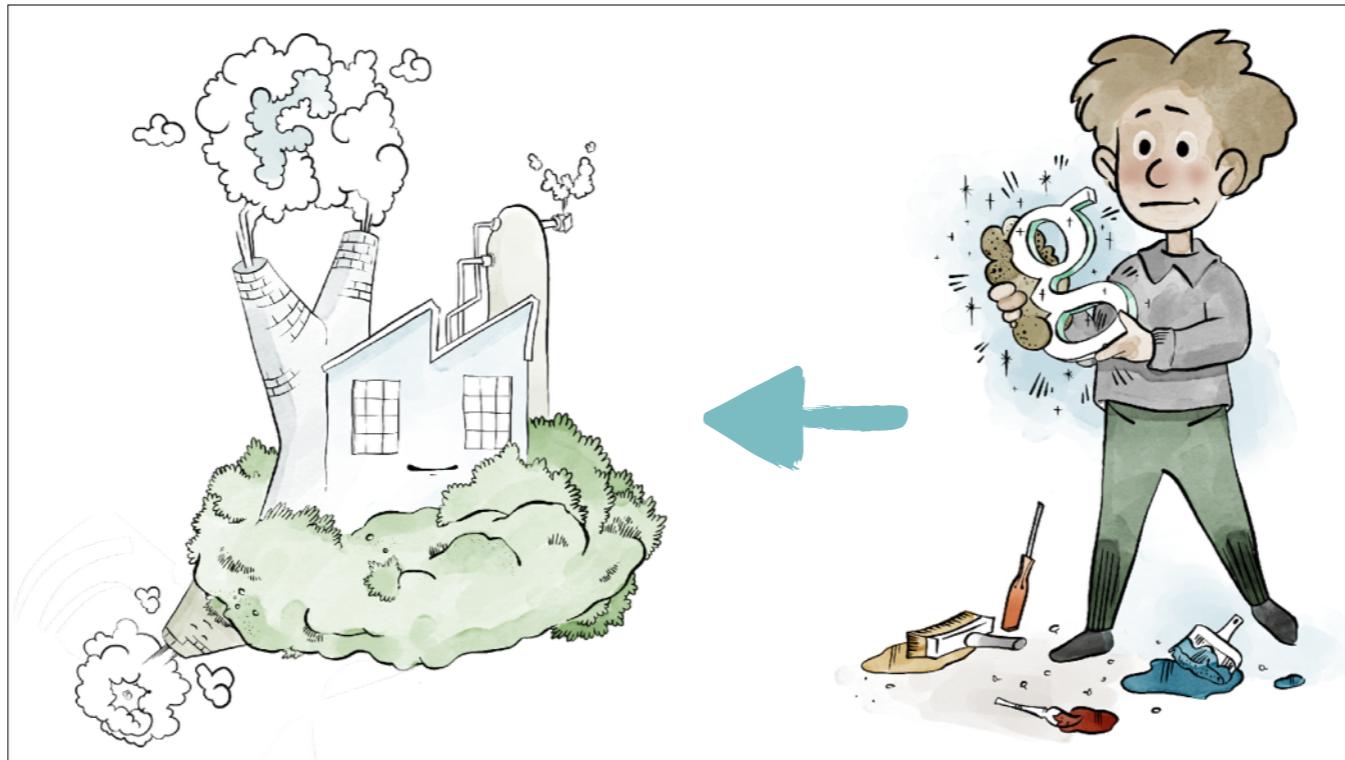
But I'm more interested in type that sets trends rather than following them.



Making type today  
Selling type today



Alright, so how do most fonts reach customers right now? Let's look at it from perspective of the type designer. If you just finished your font, what are your choices for putting it up for sale?



The most traditional way is through a foundry. When you submit a typeface to a foundry for release it is usually an exclusive deal. They will maintain the right to sell the font according to their contract. Royalties range from 20%-50%, but



there is also an important distinction: most foundries pay a percentage of the final price of the font. Foundry type can be distributed through multiple channels, such as their own web shop and the shops of their resellers. In this model, as the font goes further down the distribution chain, the designer is getting less of the retail price. Other foundries, give a percentage of the suggested retail price — no matter where or how the font is sold, the designer gets the same cut.

The biggest advantage of going this route is that a good foundry brings design and technical advice, helping you complete your font. It also lets you get to the market with the least amount of business effort, because the foundry is handling sales, tech support, retail contracts, etc. It doesn't mean you shouldn't know about the business and understand your contract with the foundry. It means you can spend less time administrating and more time drawing more type.



Another option is to skip the foundry and go straight to a retailer or reseller like FontShop, MyFonts, or Fontspring.

Resellers sign a contract with a foundry or designer and offer the fonts in that foundry's library. The foundry usually receives somewhere around 50% of the retail price of the font. A price that you set as the foundry. Each reseller has a different customer base and produces different kinds and quantities of promotional materials. Examine them thoroughly and ask about their marketing strategies. Some independent foundries (like TypeTogether and Mark Simonson) have found success in reaching a wide audience by offering their fonts through many different resellers. Others go for a more exclusive strategy, limiting to a single reseller that best represents their interests or identity.

This path requires more work on the designer's part. You're creating your own brand with its own license and policies. Which means you get to make more decisions than a foundry path, but you're responsible for completing the fonts and backing up the quality. On the plus side, most retailers will handle sales and most of the tech support for you.

Of course, the main advantage of this method is reaching a wide audience. The drawback is fighting among the other foundries in the shop for attention. The larger the shop, the more potential customers, but the greater the risk of getting buried in the catalog.



The other main option for a type maker is to create your own foundry handling everything, from production to business concerns to marketing and sales on your own shop.

Building a foundry and selling fonts exclusively on your own web shop brings you 100% of sales, of course. Exclusivity has its benefits, as Hoefler & Frere-Jones, Jeremy Tankard, and Lineto will attest. It can give your brand a certain boost in value.



But unless you are already well known, it can be a lot of very hard work to get customers to your shopfront. And for a while, your shop might be more like a stand on the side of the road. You're out there on your own hoping someone will notice you. There is also that nagging feeling that you don't know how much more you could be selling were your fonts available elsewhere.



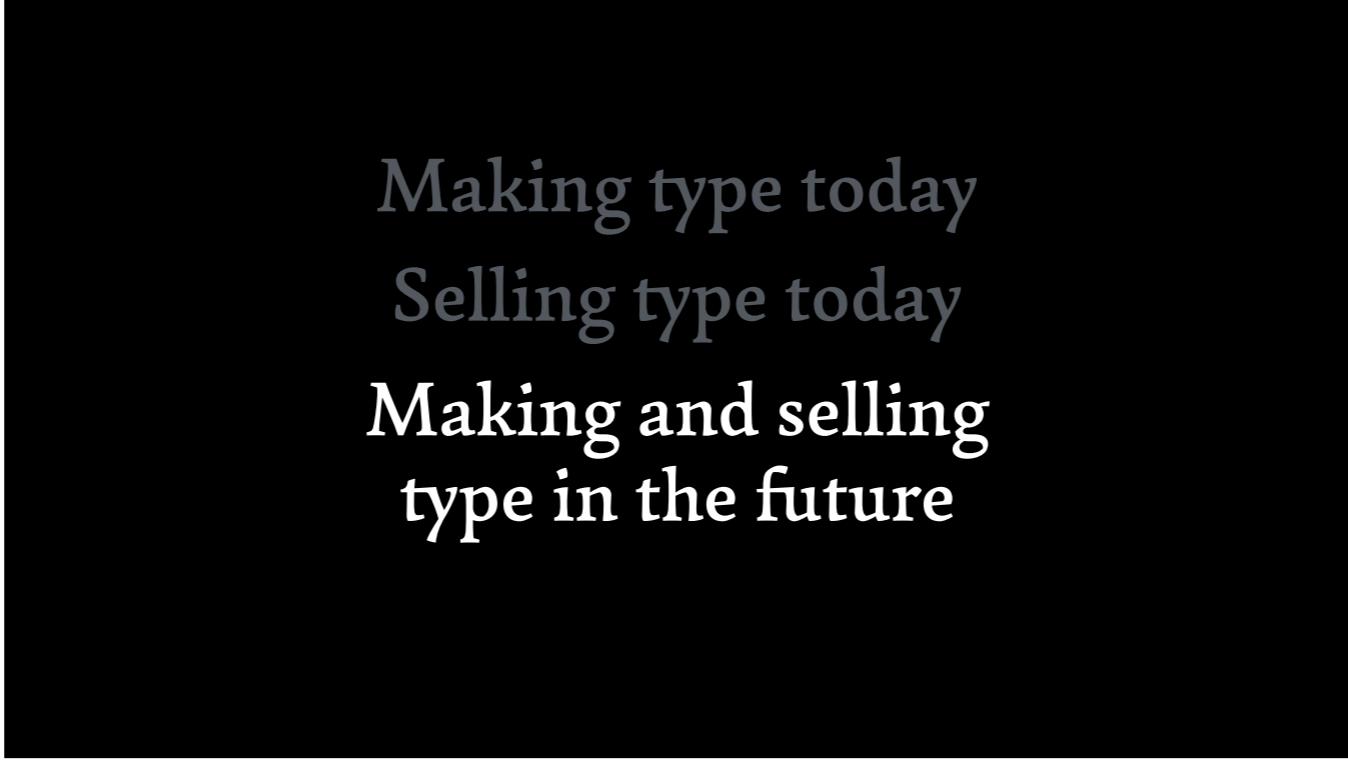
But with patience, if you're willing to stick it out and play the long game. You can build a proper shop, gain a reputation, and have complete control of your business from production to sale. This is the clearest route to independence.

Still it's not without its drawbacks. You must be business savvy. You will spend more time administrating, doing tech support, and less time drawing type. And there is potential for substantial overhead (marketing, website, e-commerce costs).



There is also one huge advantage: you maintain a relationship with every customer.

There is also one huge disadvantage: you maintain a relationship with every customer. It's up to you to decide if that's a pro or con. I argue that it's mostly a pro, which I'll explain in a moment.



**Making type today**  
**Selling type today**  
**Making and selling  
type in the future**

So these are the traditional models. But they are certainly not the only ones. We are no doubt in a state of flux. There are interesting new marketplaces and platforms opening up. There are others in the works.

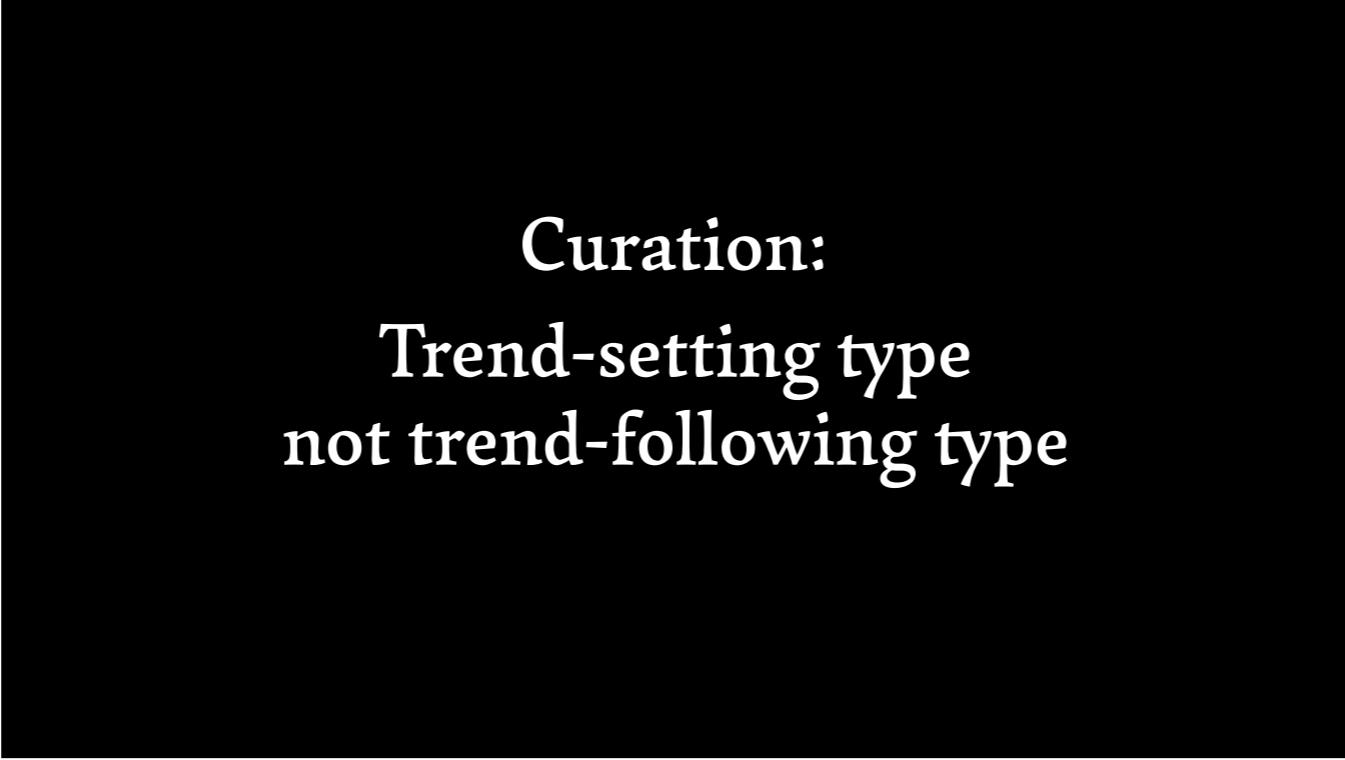
Among these, I see two things happening that could significantly improve the state of the market and the people who work in it:



## Font market of the future: 1. Retailer Curation

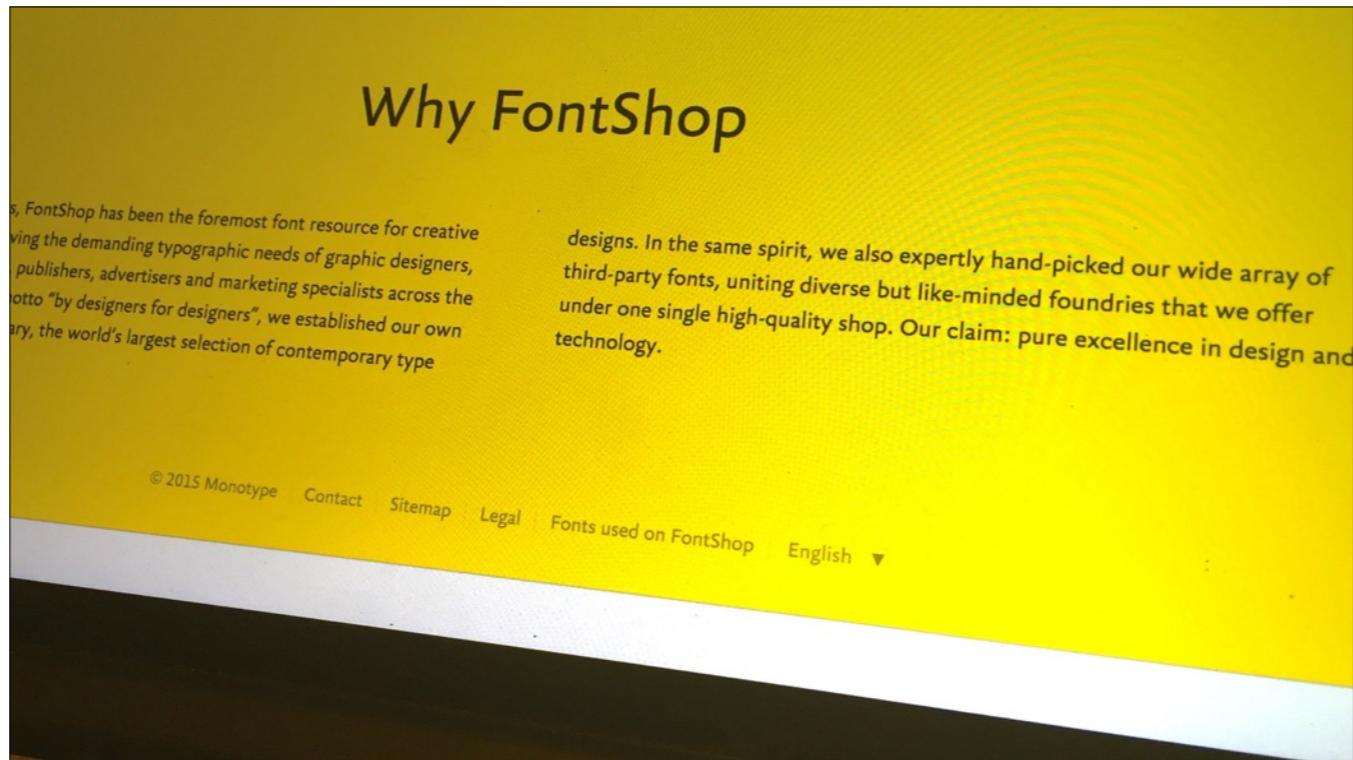
### 1. Curation, at the retailer level.

As the volume of new fonts and new designers explodes, this is increasingly important. And I don't just mean being selective on quality, on the craftsmanship of the drawing or soundness of the tech. I mean having a sense of taste, an eye for originality, a vision of the future.



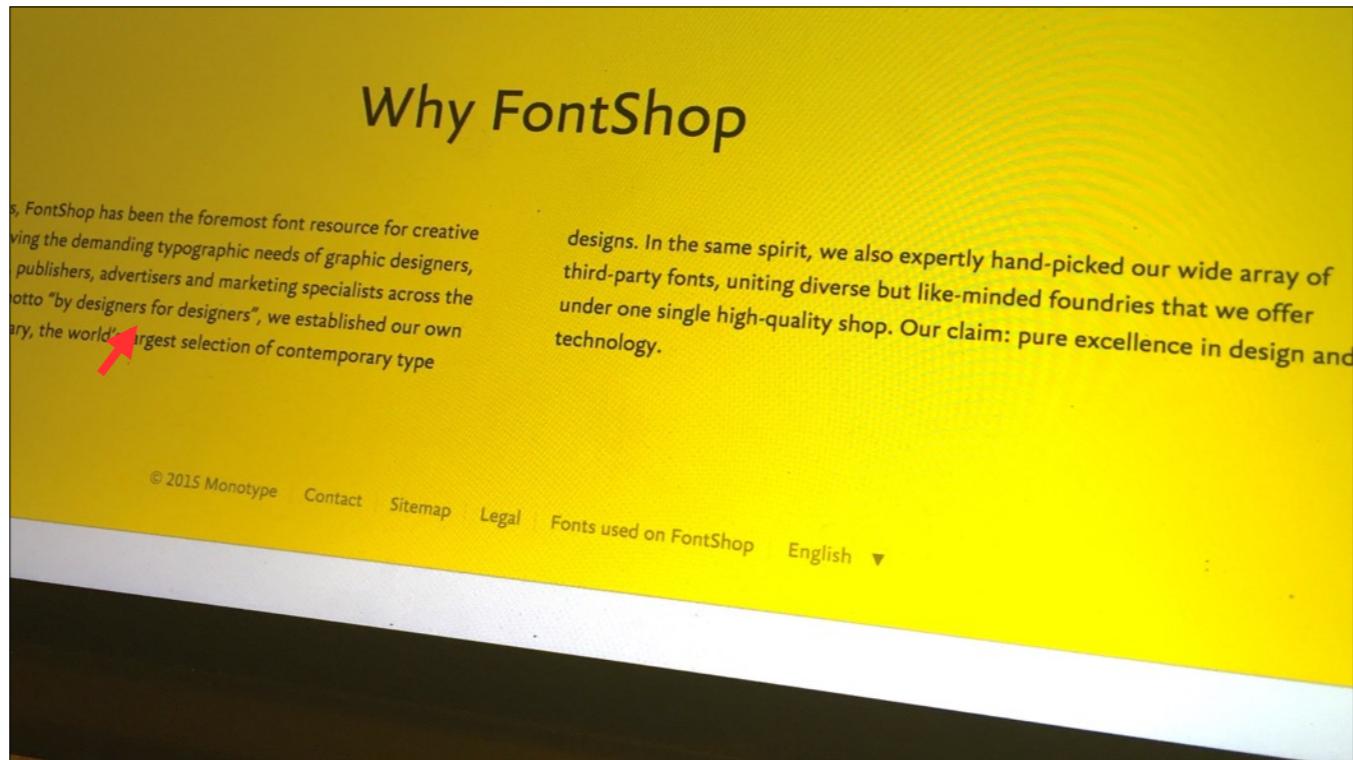
Curation:  
Trend-setting type  
not trend-following type

Curation breeds type that sets trends, not the other way around.



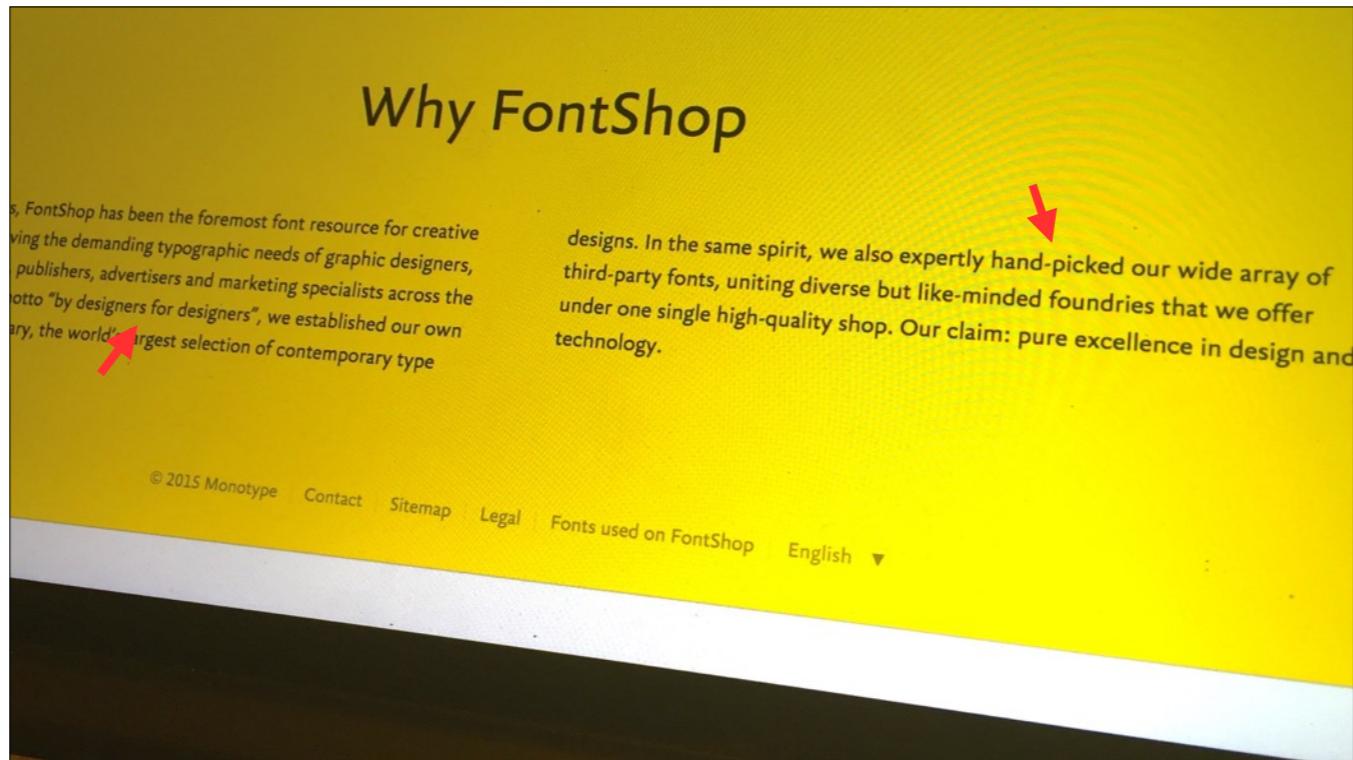
As a retailer, FontShop was founded on the basis of curation. Customers looked to FontShop for type that was well made and interesting. The FontFont slogan was “by designers, for designers”. And the FontShop brand was intended to extend that concept to a reseller, using a high standard to select foundries for inclusion in the shop.

To some observers, the brand lost a bit of that ethos along the way as its collection grew. This is one of the eternal struggles for a reseller: balancing the competing interests of a large, all-inclusive inventory with all the latest releases, without burying the best products in that inventory. I experienced it firsthand while I was there.



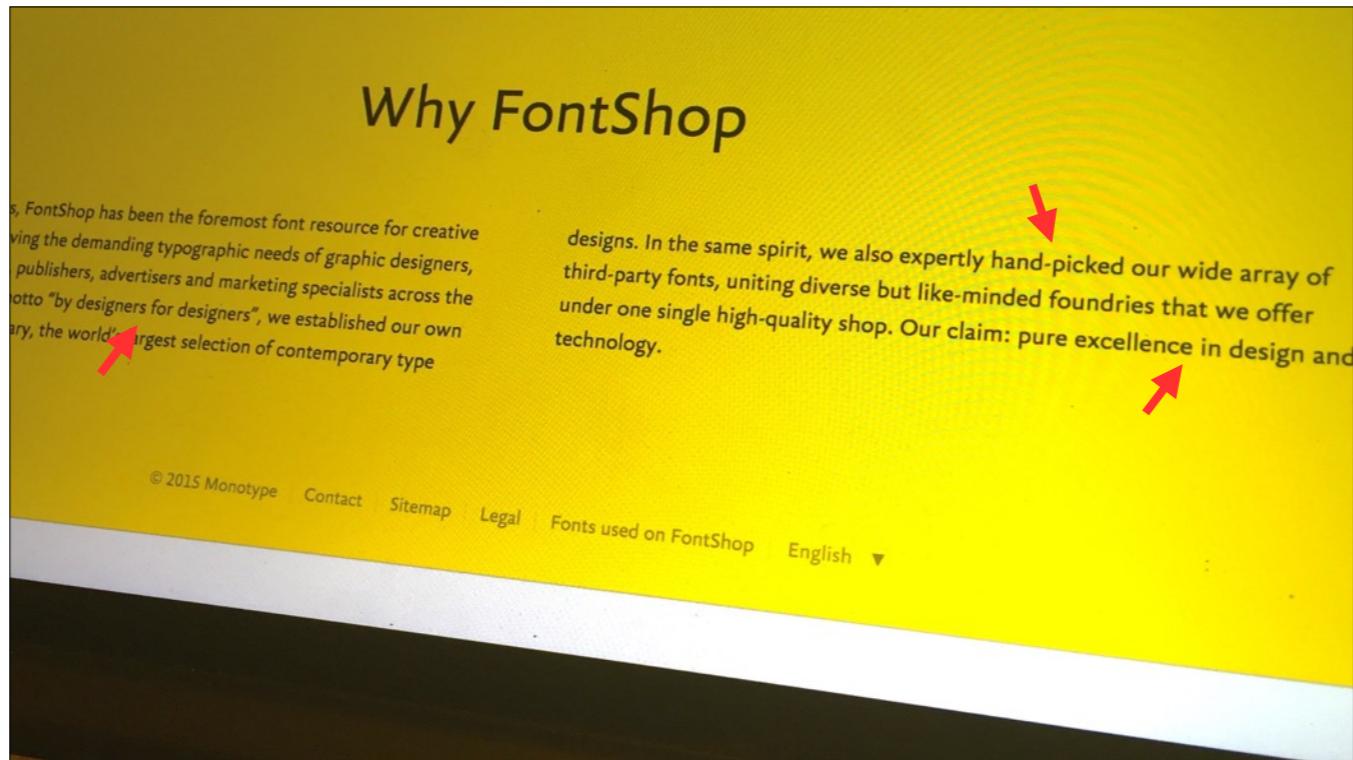
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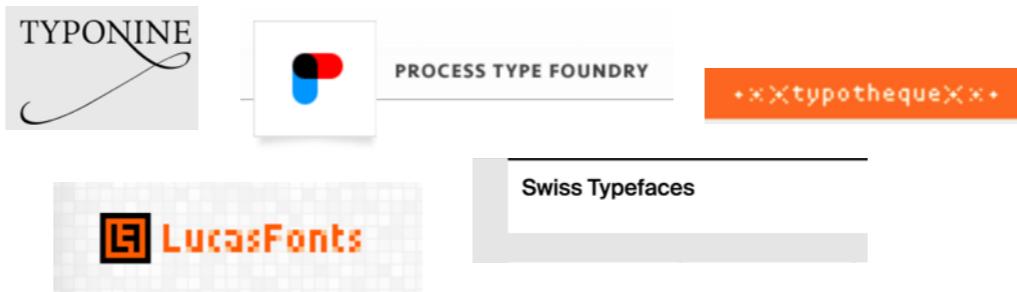
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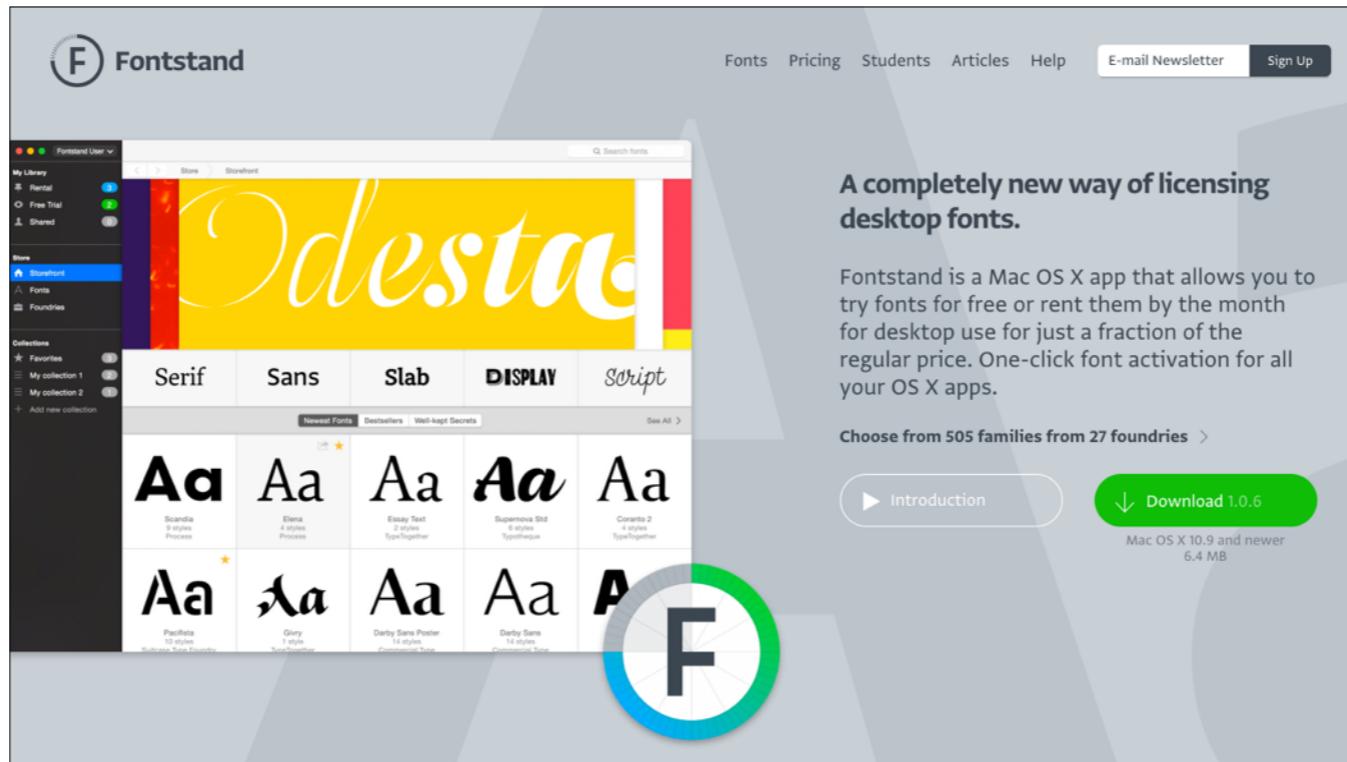
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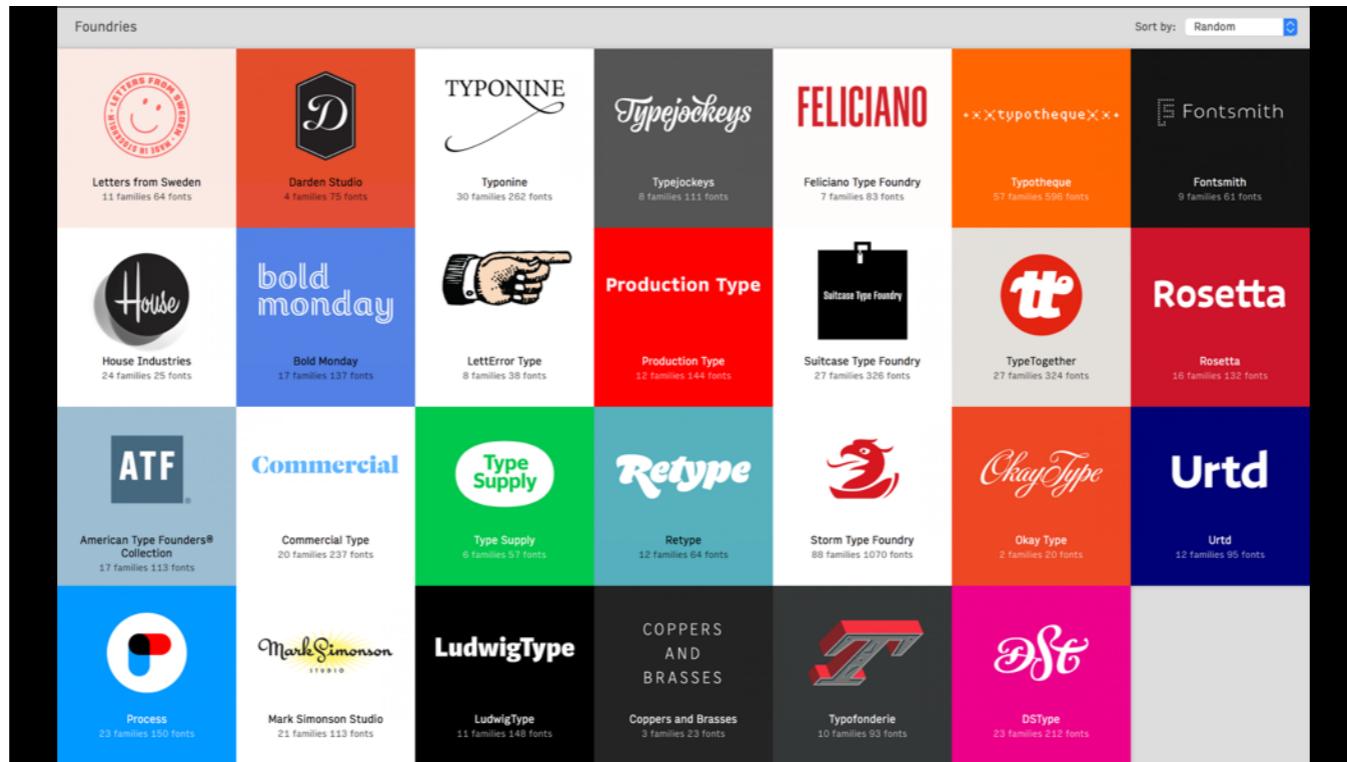
# Foundries Leaving Retailers



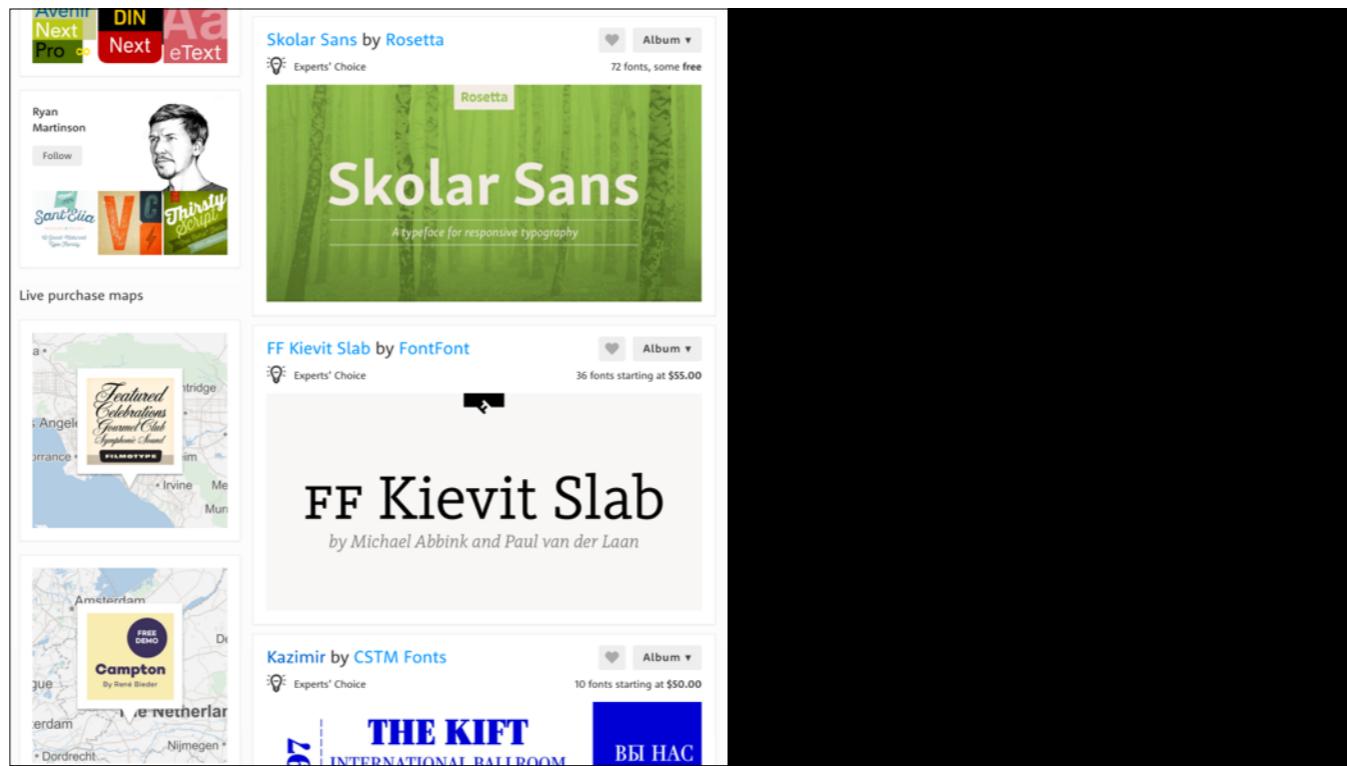
For many foundries, retailers like FontShop still do a good job of keeping these competing interests in balance, but the bar is not high enough for some. For this reason, and others, a few of the more interesting designers and foundries, who were once using retailers, have gone completely independent, selling all or most of their fonts only on their own sites. Some of this is covered in Ruxandra's analysis, so please check out the report, but just for a point of example, here are a few foundries that no longer send new fonts to distributors. I would call this a slow trickle, but the influence of these companies is important. They are bellwether foundries.



Fontstand, which launched earlier this year, is a retail platform based on an app which allows customers to try fonts for free, or rent them. This model is super handy for users, but it isn't an entirely new idea: Monotype had SkyFonts and Typekit has Desktop Syncing which are similar concepts...

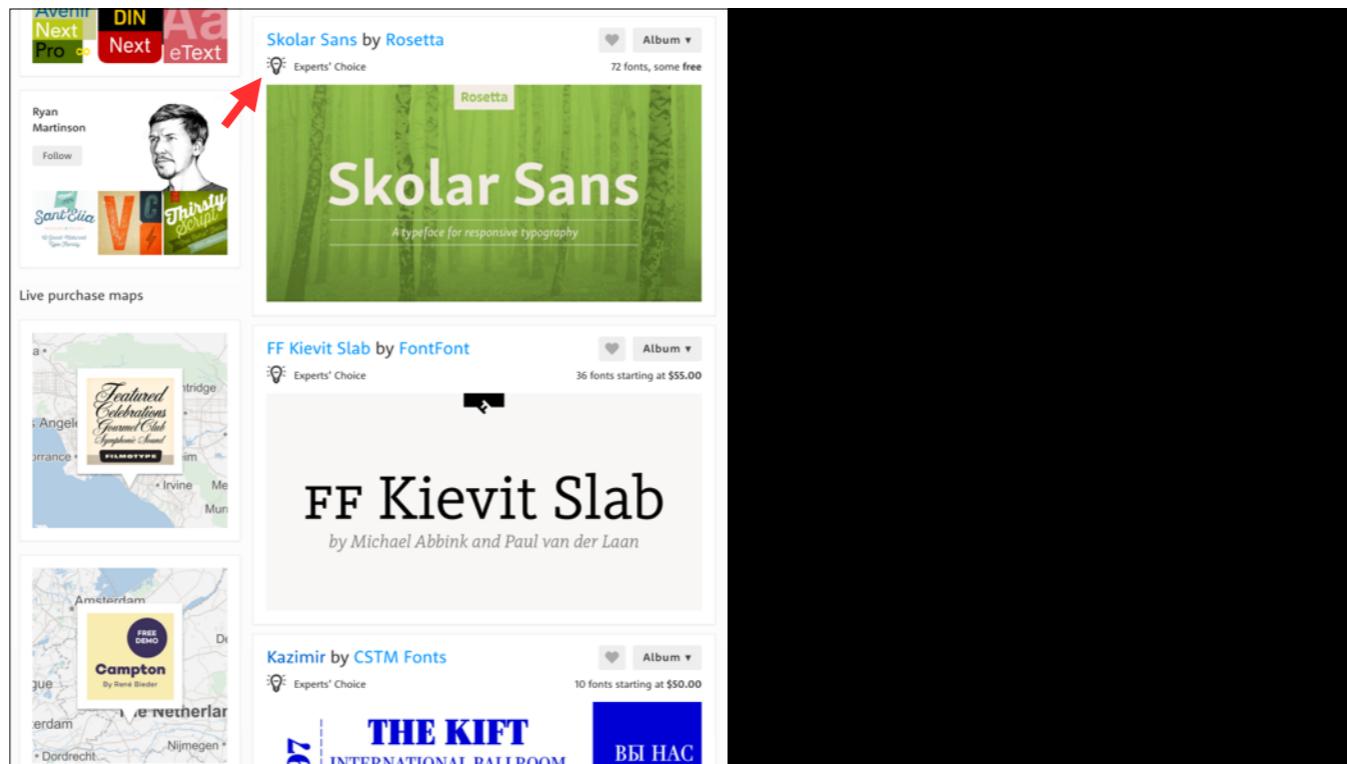


... the main thing that sets Fontstand apart is a strict curation of high quality foundries. This is attractive to buyers (they know they can rely on the products), but also to makers, because they know they will be in good company. And Fontstand has also made it clear that they will grow very slowly and deliberately, so makers know their stuff won't be buried anytime soon.



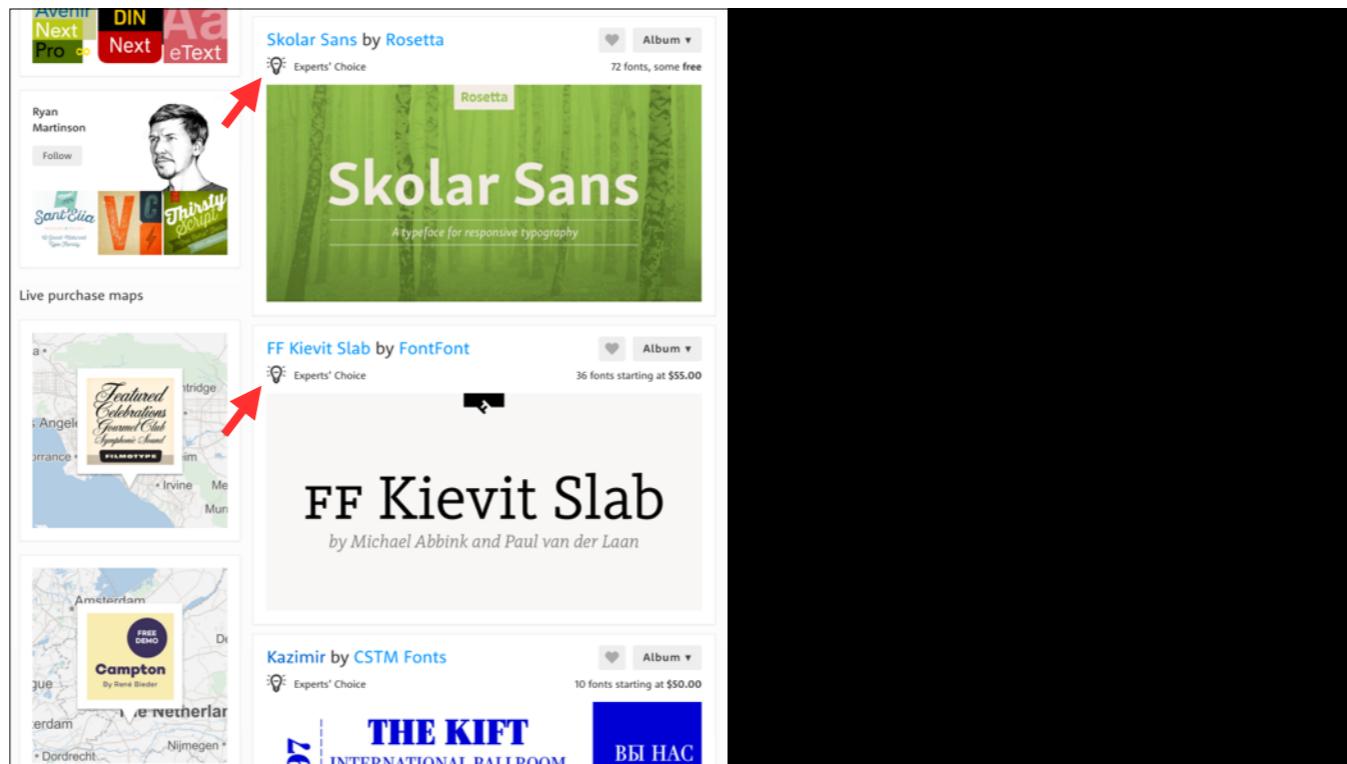
Fortunately, this idea of curation isn't entirely lost on the biggies. At MyFonts, their self-described MO is to let the market decide and until last week, MyFonts promotion (on the website at least) was based purely on sales.

But now they are highlighting staff picks! This is part of the homepage redesign from last week.



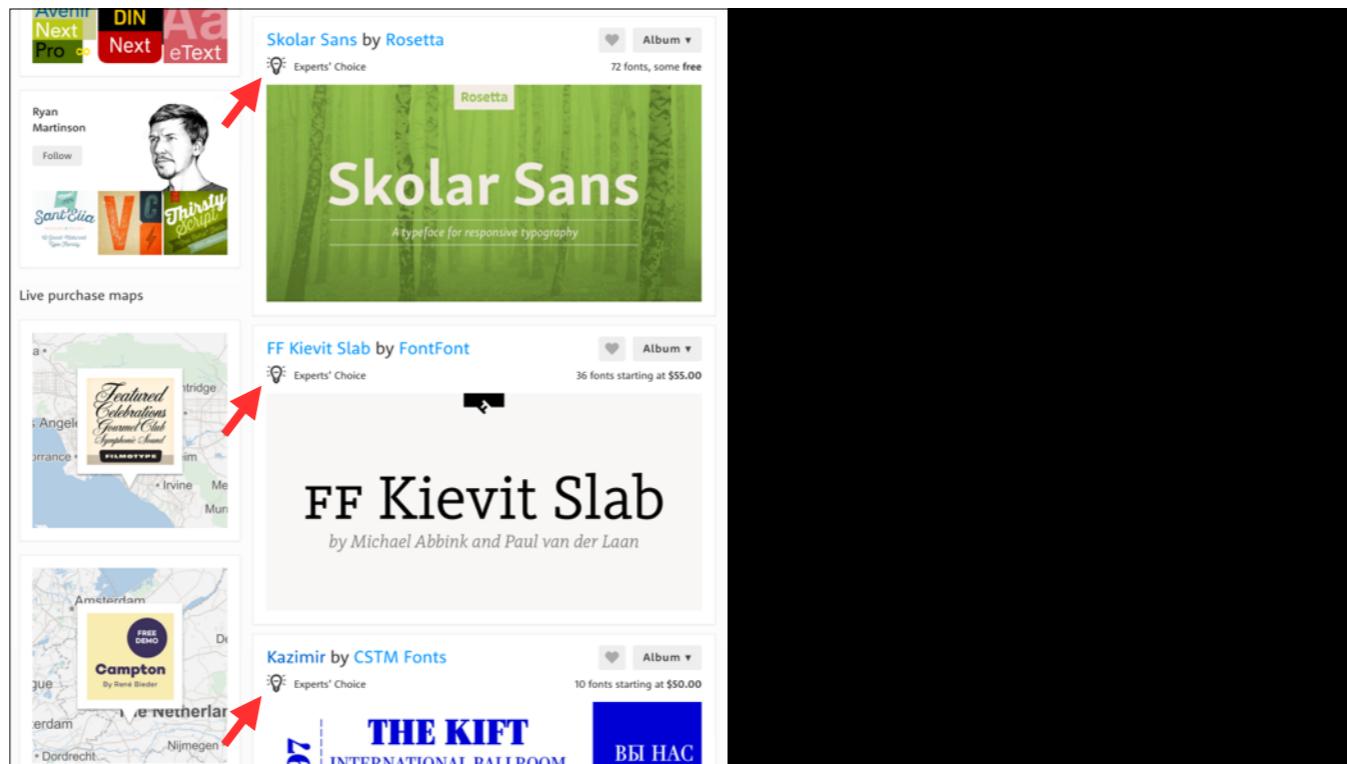
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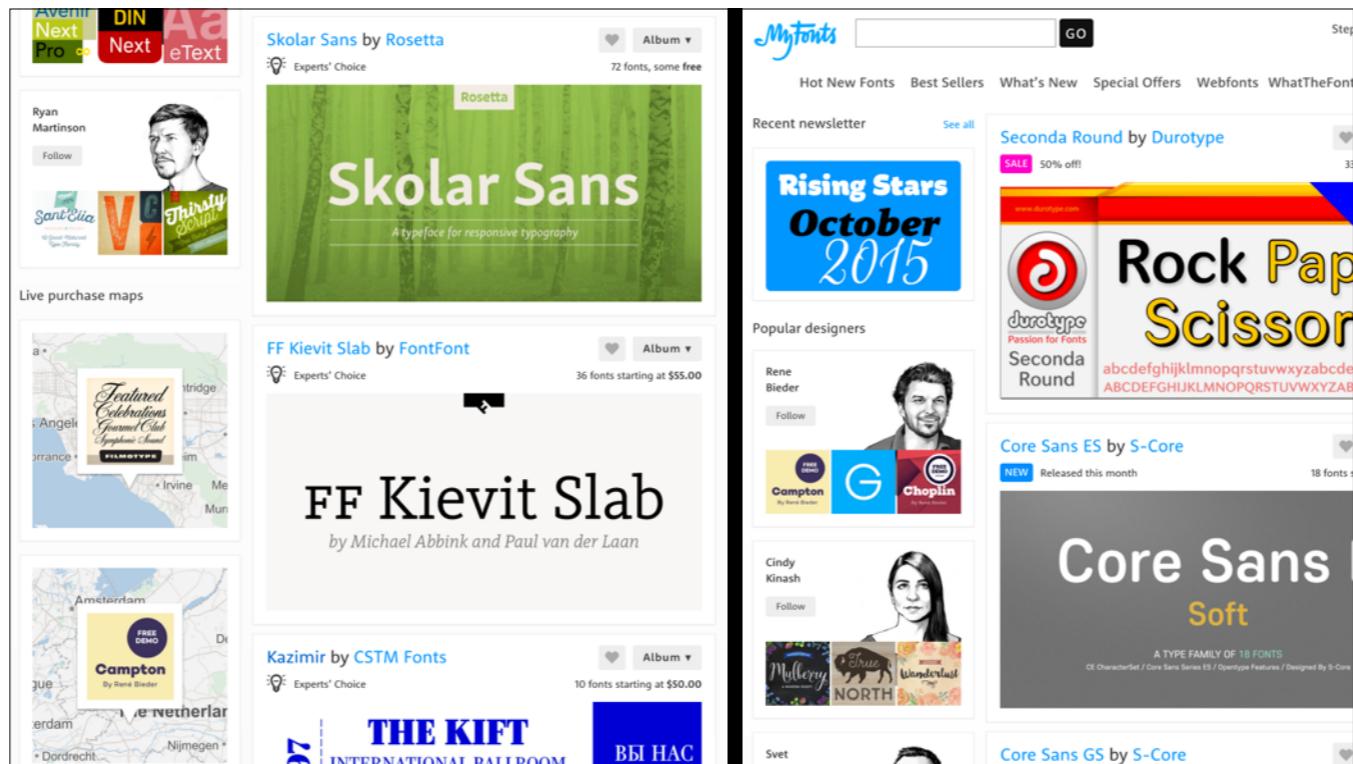
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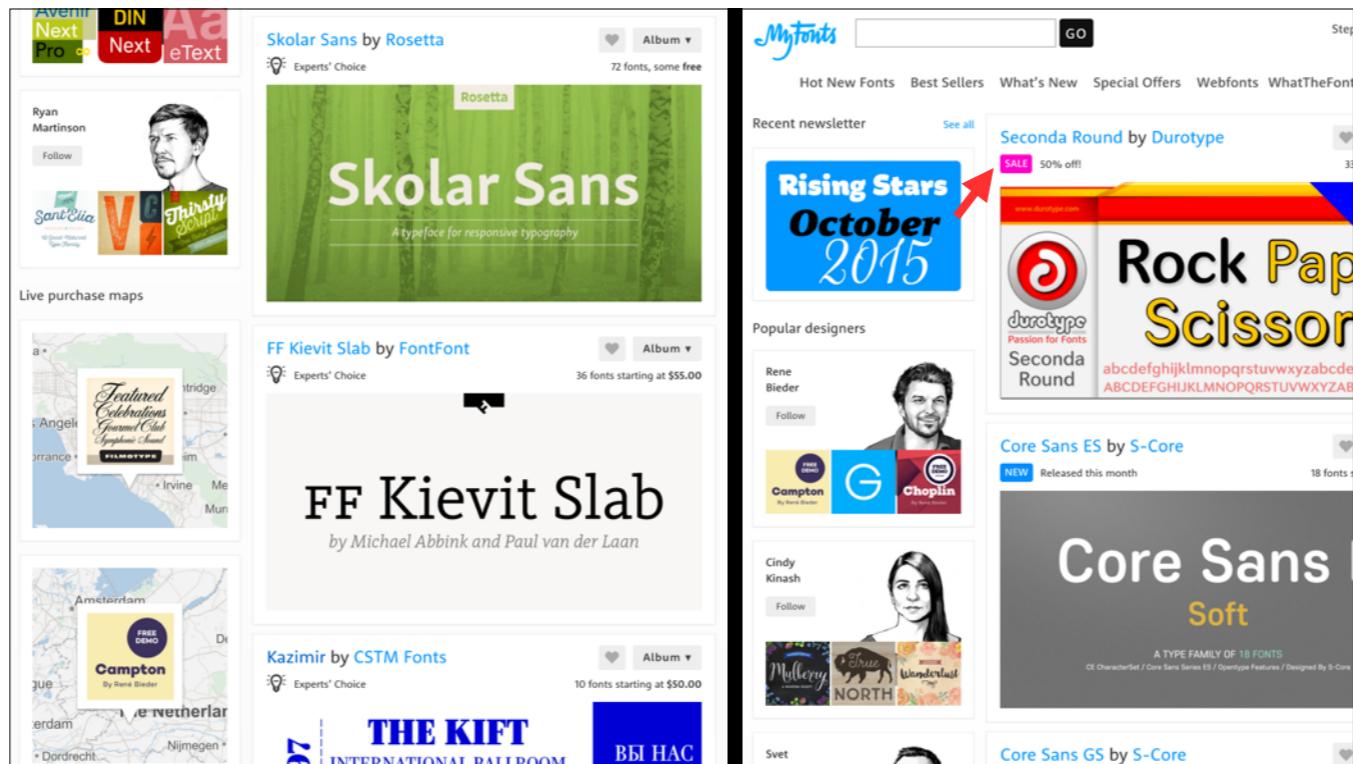
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But those big discounts still linger, promoted on the homepage.

I wonder if we could learn something from the fashion retail market. When you enter a major clothing chain like the Gap, there may be a Sale sign on the window, but the latest stuff at full price is always up front, and you check it out before you wander to the sale goods in the back.

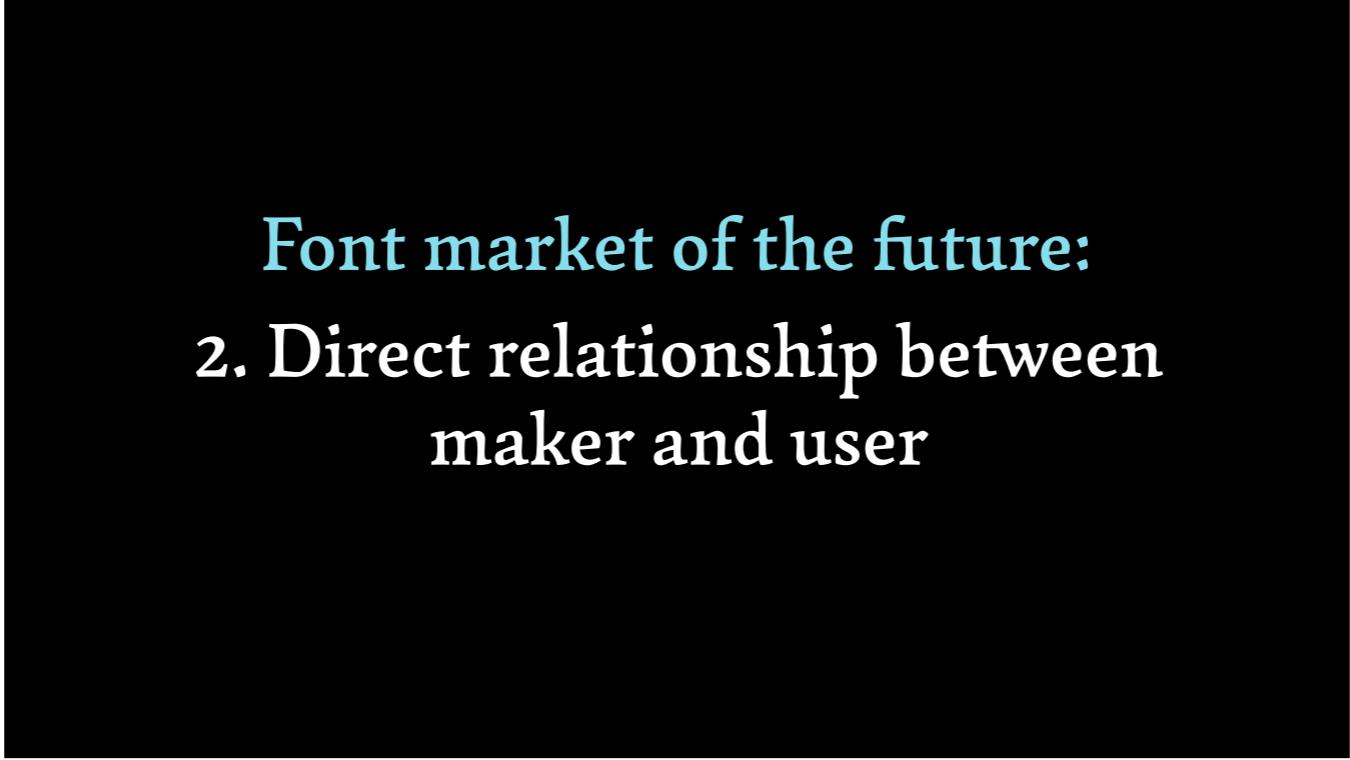
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## Font market of the future: 2. Direct relationship between maker and user

The second vital improvement needed is this. A direct connection between maker and user.

A major drawback with resellers and large foundries, is that a sense of the creator is often lost. So often I hear from graphic designers that they are really excited about this font they bought, that they got it from MyFonts, or it's a YouWorkForThem font. But who made it? People are more aware now that fonts come from humans, but when they don't get a chance to interact with that human, it's easy to forget.

This isn't to say that major retailers don't address that issue: MyFonts devotes a major part of their marketing to the Creative Characters newsletter, which is obviously focused on the individual, not the MyFonts brand. But this once-a-month spotlight can't replace the experience of a foundry-branded destination, created by the creator.

Type designers need to know their users, too. "Who are our users? What do they need? What problems do they have with our fonts?" I've heard from many type designers who say that this kind of dialogue with users improves their work, that they got interesting new ideas or commissions by hearing from customers. Unless you're selling to them directly, most of this gets filtered away.

“Precisely because there are  
so many fonts nowadays,  
it’s difficult to find the right one.”

Florian Hardwig

And let's go back to Florian's quote. How do we solve *this* problem?

I don't have all the answers, but I do know it needs to happen on both sides of the equation.

## **Buyers and sellers both need a better market**

Buyers and sellers both need a better market. One that respects both their needs. One that empowers type users to make good choices, and one that gives type designers the incentive to produce innovative and useful work.



## The Farmer's Market

A curated collective where growers sell from their own stands directly to buyers.

I don't know if you have farmer's markets here in Brazil. Your markets are much larger than the ones I know at home. But all across America, farmer's markets have grown in popularity, particularly in California where we live close to agriculture and where there is a lot of concern about where our food comes from.

The farmer's market is an alternative to the supermarket where we go every week and can buy, all in one place, most all the food we need for that week — bread, eggs, milk, fruit, meat, goodies. Of course, there are the buzzwords: organic, artisan, handcrafted etc.. But what makes this market interesting to me is that instead of a supermarket buying all the goods and reselling them to us, we are buying directly from the people who grew or baked or milked the stuff. Each vendor has a stand and many of the stands are run by the people who actually run the farm.

Each neighborhood market has a committee that chooses which farms to include in their local markets. It's a combination of retail curation (remember that?) with a direct buyer/seller connection.

That connection is a big part of what makes these markets great. We know our money is going directly to the growers. We know the quality is good because they are literally standing behind their product every week. And we get to know the growers themselves. We can give them direct feedback on their product. We have a personal relationship of mutual respect.

Are there ideas here that can be implemented in the font market?

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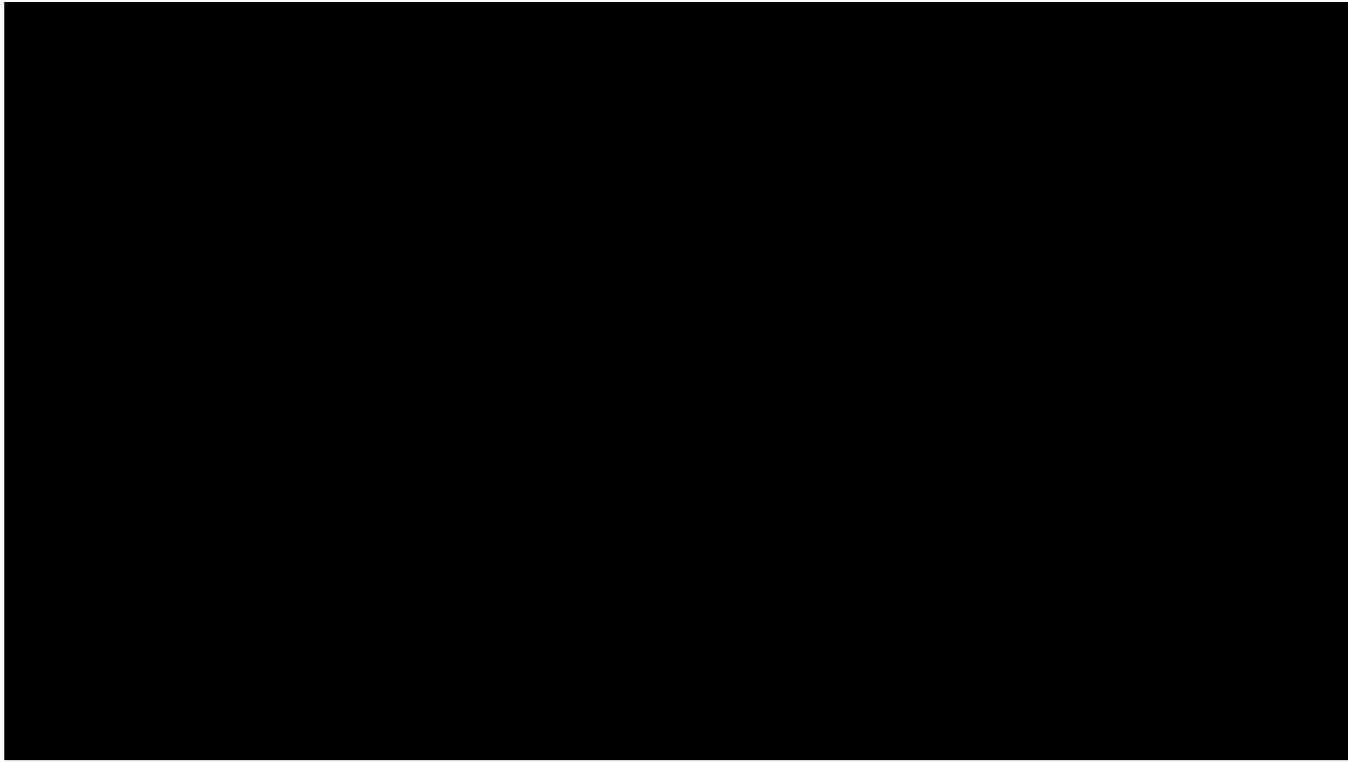
Contribute to the Collection

Adds in Use is a simple project. Create an account and upload your work or other examples of how you use fonts.

Ads Via The Deck

Your content, your voice, your market. Your ads will be built with Craft.

Sometimes the answer isn't a market at all. Fonts In Use and Typographica are editorial efforts to bring curation and direct connection between maker and user.



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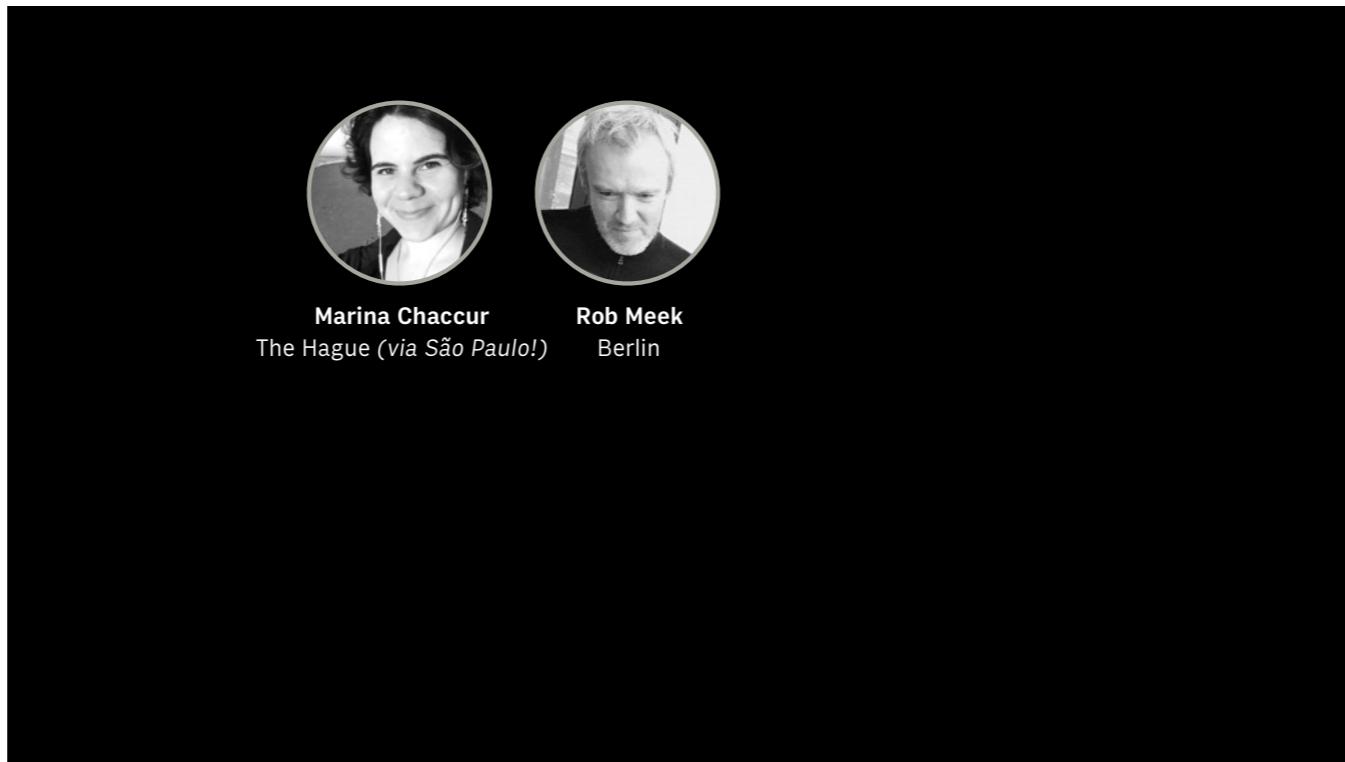
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**Marina Chaccur**  
The Hague (*via São Paulo!*)

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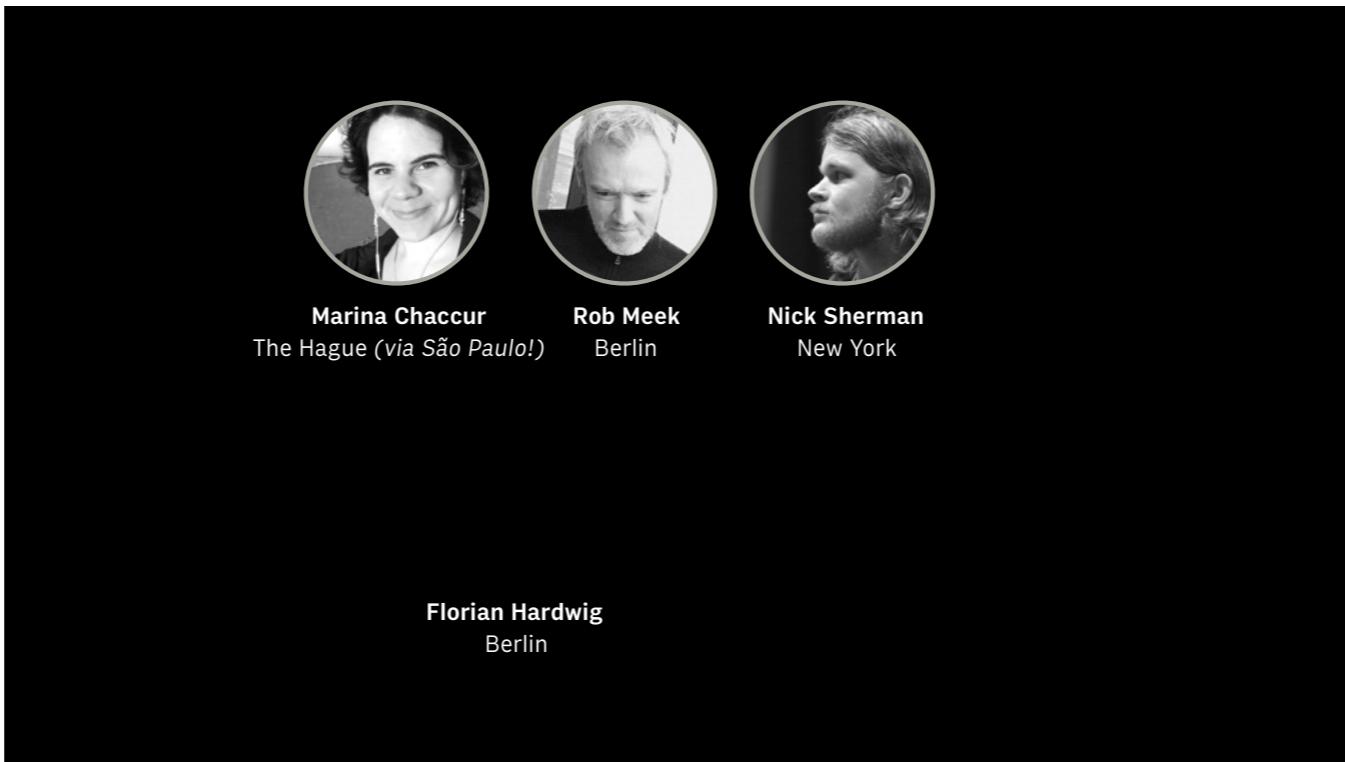
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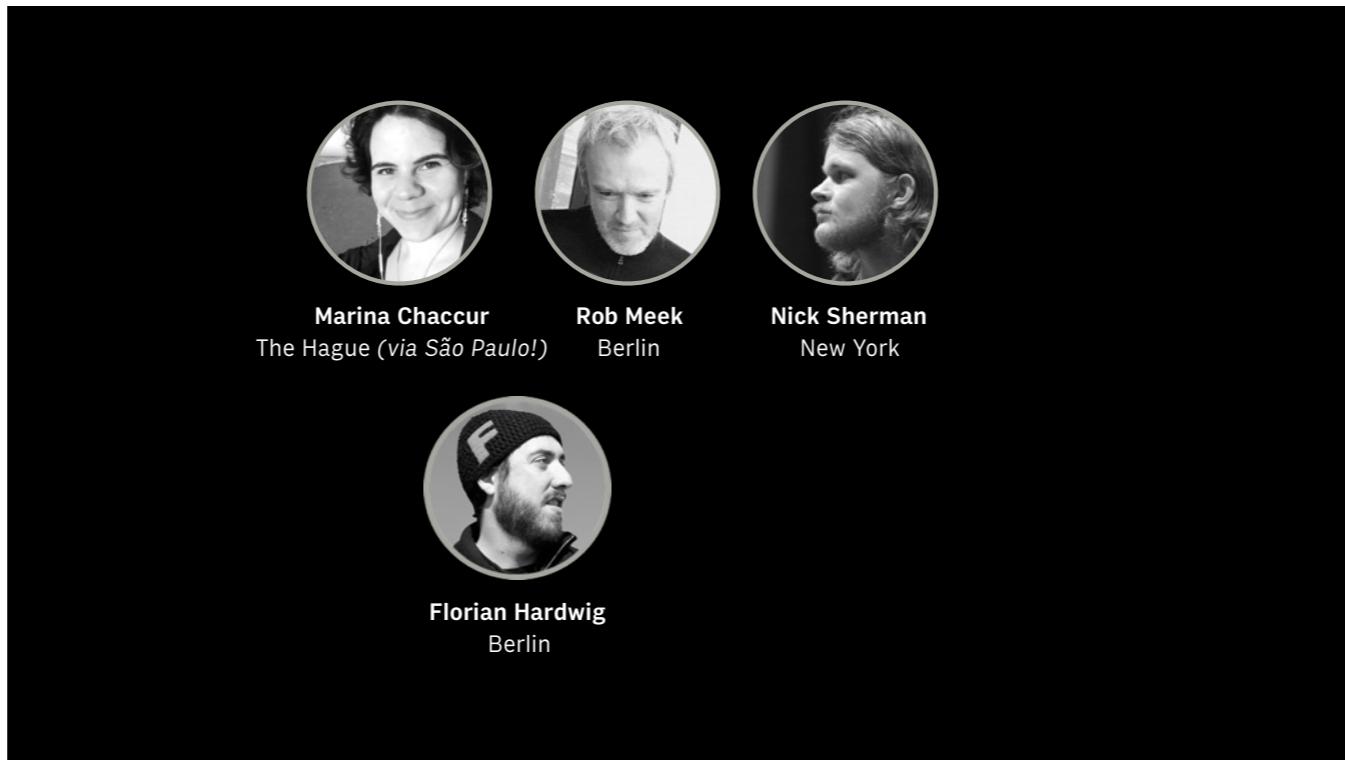
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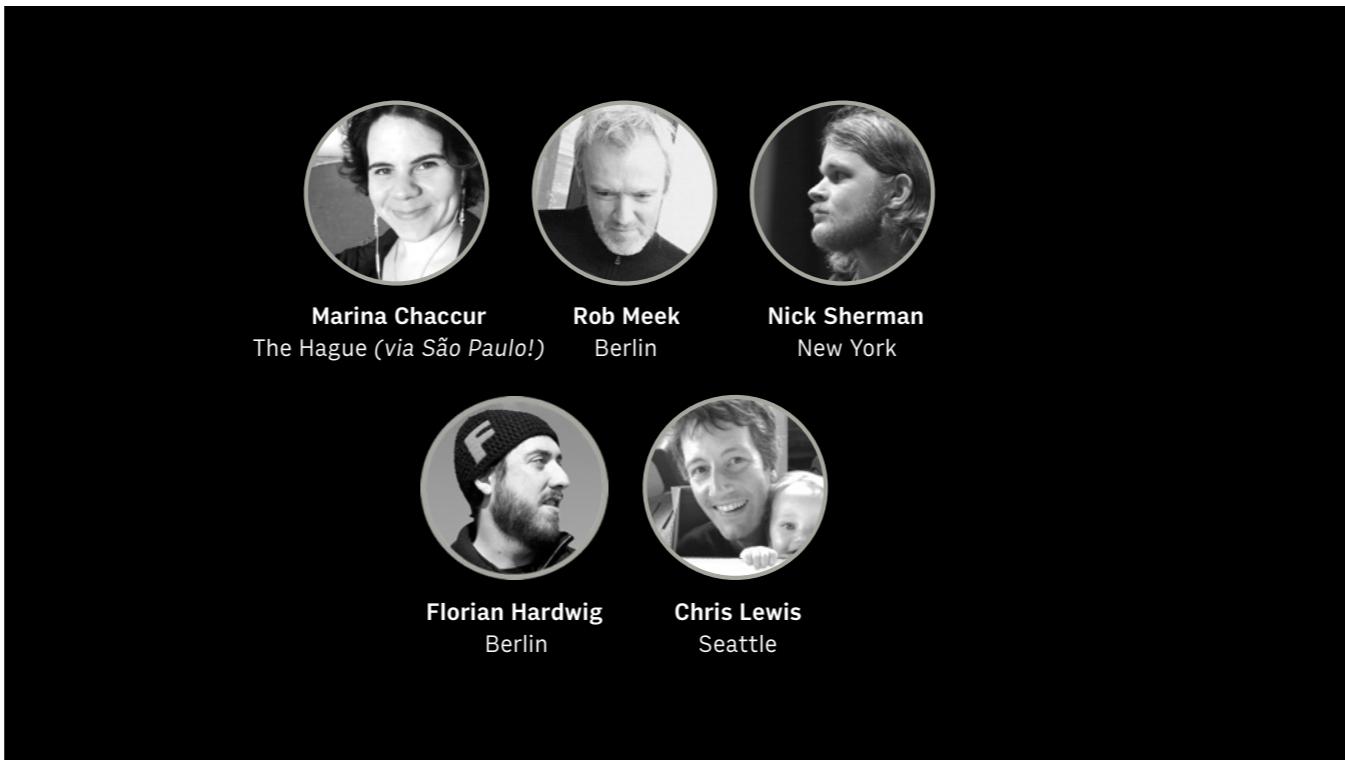
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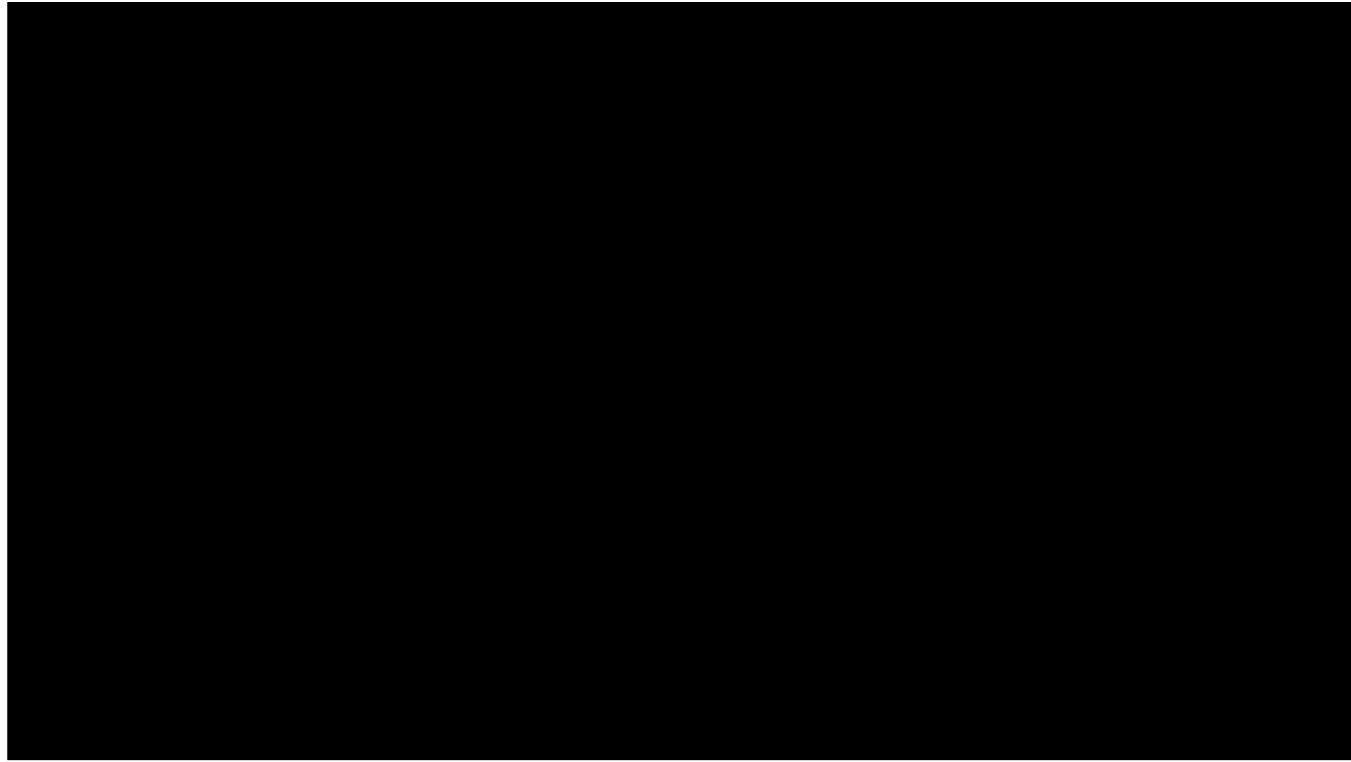
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Just kidding, it's not a MyFonts killer.

In fact, we expect our thing to coexist with MyFonts and other retailers in a healthy ecosystem.

# MyFonts Killer!

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## Something else.

What we're building is not another shop. It is a guide, a tool to help users find the right typeface, and connect them to the best place to license that typeface. And the choice for that destination starts with the people who make the fonts. So that route could lead to a foundry website or to a retailer, whatever the foundry prefers.

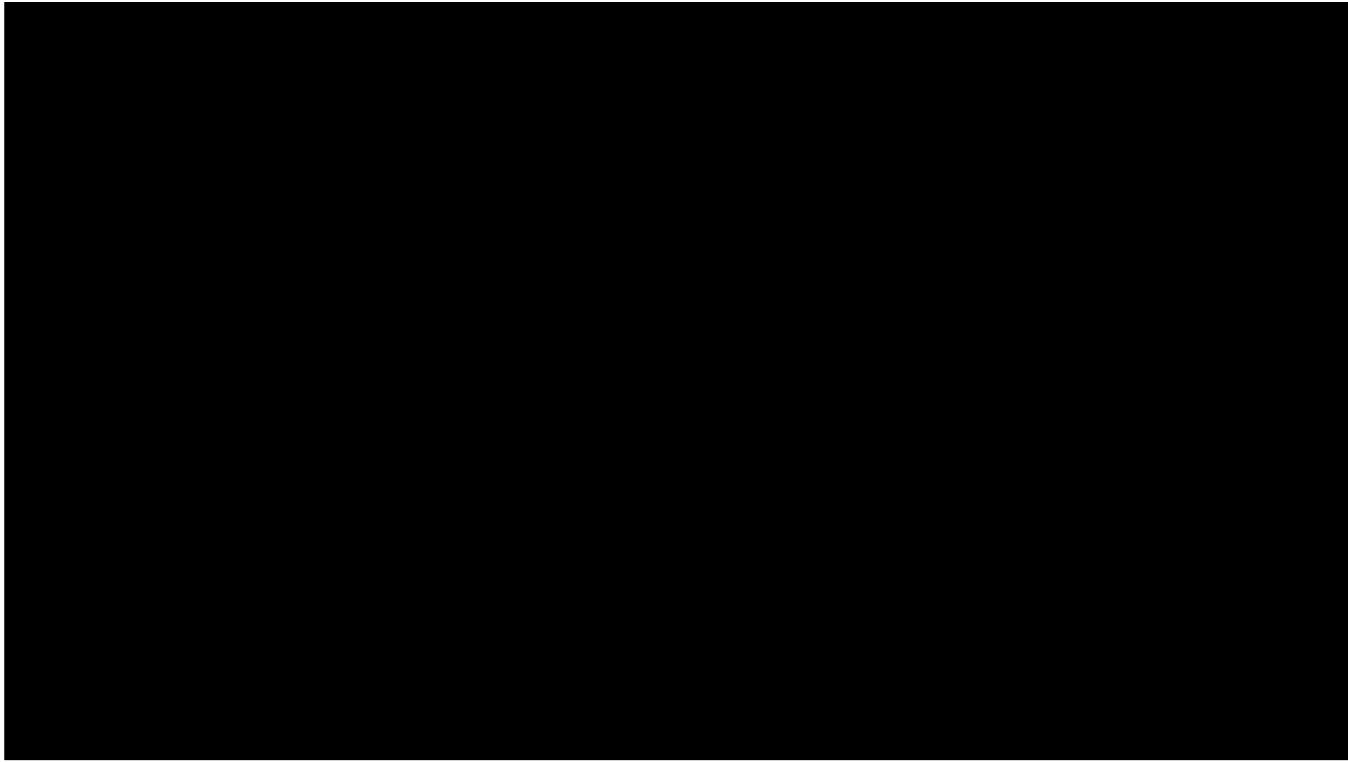
In the coming weeks we'll be talking to many of you who are type designers or who run foundries about how you can be part of this new thing. So expect a nudge from Marina or Nick or Florian or myself very soon.



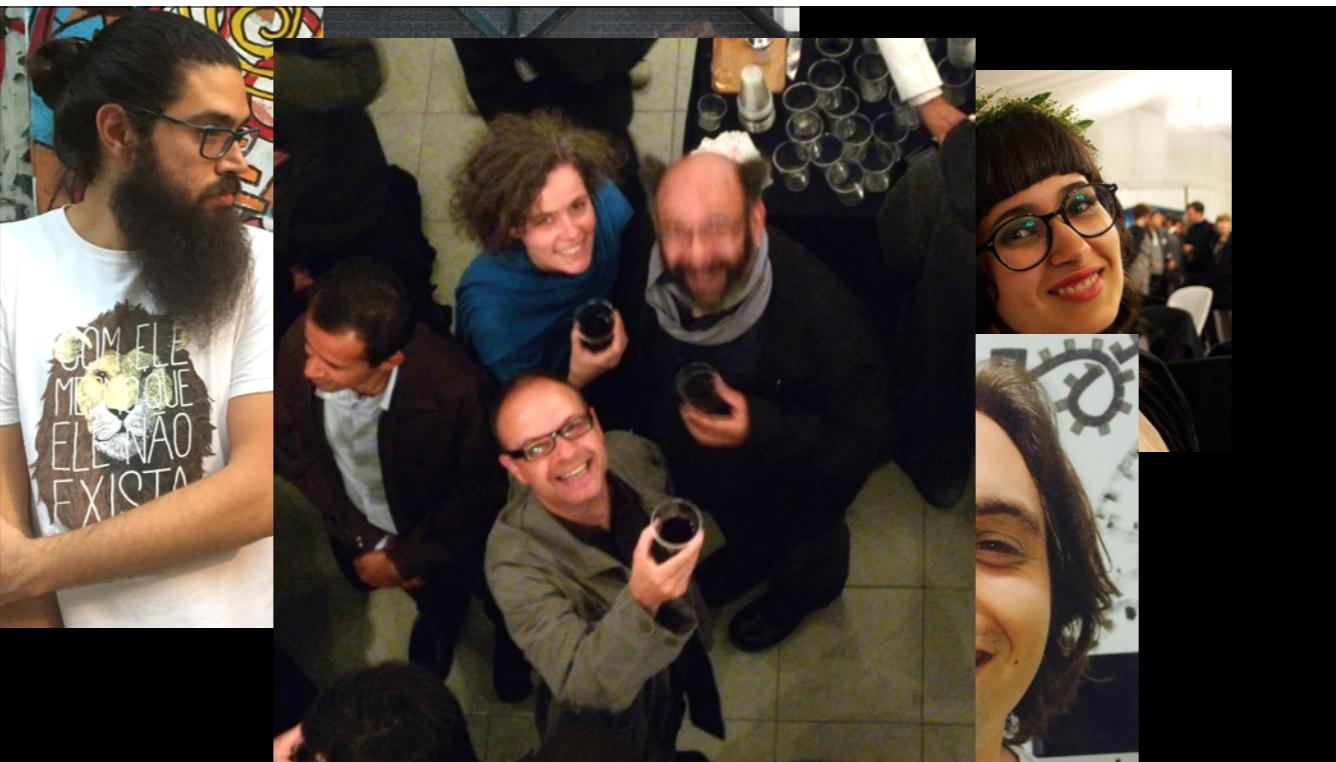
## Something new.

Our solution is an editorial and educational one at its core. But there is no single answer to these problems. There are solutions that can come from the retailers as well. Or new retail concepts. I see hope for these on the horizon.

In the end, I want is to see type designers maintain their independence. To do good work. To make good choices. To respect themselves and their colleagues.



I want this because I love this craft, but also because I love these people, and I want to see them continue to do what they love  
on their own terms.



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on their own terms.

Thank you,  
Laura Serra for the illustrations,  
Henrique Beier for GARIBALDI,  
David Jonathan Ross for Output.  
Fernando Díaz, Ivo Gabrowitsch for input.  
ATypI Board for the invitation.

StephenColes.org @typographica

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