Is Graphics, as an Industry, Dead?

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During much of my career in graphics, the question from almost every meeting, convention, and editorial was, "Why is graphics always a year away?" Today, we hear that graphics has not only come, but may have gone . . . that computer graphics is no longer an industry, but a feature instead.

As I was growing up with graphics, we often quipped that graphics was "a cure for no known disease." Today the problem—or the opportunity—seems to be that "graphics is a cure for every known disease."

Some in our industry contend that graphics' very success has eliminated it as a definable industry, that users now take graphics for granted, so the concept of a separate graphics discipline is no longer viable.

Without, at the moment, agreeing or disagreeing, the point is, what do you do with that information? Would graphics as a feature, not an industry, affect our market forecasts? Probably. It could allow some of us to consider the more popular integrated PC packages, like LOTUS 1-2-3 and SYMPHONY, as graphics packages. And when we describe the size of the graphics software market, we could include total package value and make our total markets look bigger. I don't think that is necessarily a problem. We have always had to evaluate the graphics content of mixed products. Fifteen years ago, when the first intelligent workstation began to be offered (DEC 338 and IDI IDIiom), all including fairly costly minicomputers, most forecasters had no qualms about sizing the graphics market to include the cost of these minis. In fact, when some vendors did not, some forecasters added an estimated cost.

Does the concept change the vendors' strategies? If, in fact, all companies considered graphics as a feature, it is possible end users would develop their own in-house capability for graphics features and not buy them. This becomes easier to do as some of the chip makers begin to supply chip-level display processors and other devices.

Again, that is the kind of business problem the industry has always had. When I first started, character generators were packaged in 19" racks, 6"-8" high and 12" deep. Few systems companies would consider building character generators now . . . too specialized. Today, that functionality is included in a chip a quarter the size of one's finger-nail. The structure of companies providing that device has changed. I guess I have trouble understanding why that phenomenon is different for graphics than for any other industry. There is an ebb and flow of hardware/software systems and components. The nimble members of the profession can simply view those changes as opportunities.

Does the concept affect the graphics of the future? How about the I/O device suppliers, those who make plotters, digitizers, trackballs, and joysticks? From my point of view, I think it does affect them, but only in a positive way. The more people take graphics for granted, the more market will exist for these products.

Frankly, I think the hassle right now involves the workstation issue. The question a portion of the community faces is in fact whether there continues to be a market for workstations and terminals, or whether the only way for these suppliers to survive is to move into the applications market. That is a legitimate question, and each supplier has to face it. Again, I don't really think arguing that computer graphics is no longer an industry helps you make that decision. Companies have continually faced the issue of horizontal or vertical marketing, subsystem or system sales.

I certainly don't want to be sanguine about the tasks and problems the industry continues to face. But, in spite of everything, we still seem to be booming along in most sections of our industry. We're still talking about 20 to 30 percent growths. Compared to some earlier 40 to 50 percent growths, I suppose things are tough. But if you look at retailing, the food businesses, and industries that have existed for years with growth rates less than 10 percent, it seems to me we still have a boomer.

Is computer graphics a feature or an industry? Who knows? But who cares.

For example, do we really think most users are going to build their own monitors or plotters, digitizers or automatic digitizers, trackballs, joysticks, graphic tablets, or write all their own software? The 1985-86 S. Klein Directory of Computer Graphics Suppliers has almost 100 categories of computer graphics products and services. How many of these will disappear if graphics is a feature, not an industry? Damn few.

What may be the basis of our worry is that some manufacturers are finding their business disappearing because their users are building the "features" into their product. Many users who initially needed computer-graphics-centered organizations to find out about the technology now find the technology so pervasive they don't need these organizations.

But, isn't this also an opportunity? Maybe the graphics watchword is "The king is dead . . . long live the king!"

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