



FESPA DIGITAL '09

OFFICIAL POST SHOW REPORT



12-14 May 2009

Amsterdam RAI, Netherlands

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INTRODUCTION

FESPA is a not-for-profit federation of trade associations and an organiser of exhibitions and conferences for the screen, digital and textile printing industry.

Formerly, the name FESPA stood for "The Federation of European Screen Printing Associations". Now, with the advent of digital technology, FESPA is known by its acronym, which has worldwide recognition. FESPA's objective is the promotion of screen printing and digital imaging through each of its 26 National Association members in Europe, together with its 7 Associate Members in Australia, China, India, Japan, South Korea, Philippines and Thailand.

FESPA background?

FESPA was formed in 1962 by a small international group of screen printers and suppliers to share knowledge on screenprinting technology, establish close co-operation between screen printers and suppliers and to promote screen printing in Europe.

What does FESPA do now?

Recently, FESPA has planned and promoted exhibitions and conferences for screen, digital and textile printing as well as helping its National Associations with a variety of projects and activities. Having organised many successful exhibitions in Europe, FESPA has gone on to produce world class annual events in India (*FESPA World Expo India, at Pragati Maidan Exhibition Centre, New Delhi*), the first international exhibition for screen and digital printing in the region, followed by another in Bangkok (*FESPA World Expo Asia Pacific*) and in Mexico City (*FESPA México World Expo*).

In May 2006, FESPA organised a new pan-European event, FESPA Digital Printing Europe which focused on emerging digital technologies in the areas of sign and graphics, textiles, white goods, glass ceramics, electronics and home furnishings at the RAI Exhibition Centre in Amsterdam, 16th-18th May 2006. Following the immense success of this initial event, FESPA has gone on to run a further two annual Digital Printing Europe events in Geneva, 1st-3rd April 2008, and returning to the Amsterdam RAI, 12th-14th May 2009.

FESPA's flagship event, which brings together all areas of the screen, digital and textile printing market takes place every three years. The next FESPA World Expo will take place in Germany at Messe Munich between the 22nd - 26th June 2010. Continuing FESPA's growing reach as an international events organiser, 40,000 visitors are expected to attend from over 125 countries to see and meet with over 800 exhibitors during the five day event.

The FESPA Board

The FESPA Board of directors is made up of 9 members. Each is an experienced printer and successful businessman in their own right. The board of directors give their time and expertise to the organisation and running of FESPA.

FESPA Board of Directors

- Anders Nilsson – President of FESPA
- Gyorgy Kovacs – Vice President
- Hellmuth Frey – Board Member & Past President
- Ricardo Rodriguez Delgado – Board Member
- Lascelle Barrow – Board Member
- Michel Caza – Board Member
- Christian Duyckaerts – Board Member
- Enrico Steijn – Board Member & Treasurer
- Yasar Güvenen – Board Member

Executive Team

The day to day running of FESPA falls to a team of 22 staff working under the executive team located at FESPA's head office in Reigate, Surrey UK.

Executive Team

- Nigel Steffens – C.E.O.
- Frazer Chesterman – Managing Director
- Marcus Timson – Sales & Marketing Director
- Kathering Parkhouse – PA to C.E.O. and M.D.

For more information about FESPA, its staff, directors or associate members, please visit www.fespa.com

Key Sponsors at FESPA Digital 2009

At FESPA Digital 2009 we had the support of some of the industry's key suppliers.

"Events like FESPA Digital could not take place without the continued support of our sponsors, their assistance as advisors and exhibitors helps to make our shows a success."

Frazer Chesterman, Managing Director, FESPA

Corporate Sponsor

Our Corporate Sponsor for the third year running was Hewlett Packard.

"FESPA Digital was a great success for HP, we exceeded our sales targets, confirming that the digital revolution is well underway."

François Martin, Marketing Director, EMEA, HP

Global Technology Partner

XAAR

"As FESPA Technology Partner we were thrilled to see a number of Xaar OEM partners launching seven new machines between them at the show."

Mark Alexander, Director of Marketing, Xaar

Platinum Sponsors

- EFI Vutek
- Epson
- Kiian

Other sponsors included:

- Image Reports Magazine – Revolution Theatre
- J-Teck – FESPA Digital Textile Conference 2009



FESPA Digital 2009 the largest European trade show event for the wide format digital print sector was held on the 12th-14th May at the Amsterdam RAI exhibition centre.



VISITOR ATTENDANCE AT FESPA DIGITAL 2009



The FESPA Digital show is now in its third year. Taking place for the first time at the Amsterdam RAI in May 2006 - the event returned to Amsterdam in 2009 after a brief sojourn in Geneva in 2008.

During the three day event, FESPA played host to over 300 exhibitors who attended from 125 countries around the world.

Highlights from the show included the official opening ceremony hosted by FESPA President Anders Nilsson, at which nearly 2,000 visitors were present where the traditional cutting of the tape to signify the opening of the show took place. Visitors flocked into the halls where they found exhibitors spanning 14,500m² of floor space, showing the latest in cutting-edge wide-format digital technology. The event gave printers a chance to efficiently meet hundreds of key suppliers in the sector all under one roof, enabling them to learn about the latest digital technologies and see the newest 'revolutionary' applications, to help them grow their business.

"Our pre-show indicators suggested that we could expect a strong international audience, optimistic to find out about the latest products and market developments. The 'Revolution' theme reflects the creative and dynamic community of printers that are at the heart of a revolution, eager to discover innovation, seek information and find inspiration to help them embrace new opportunities. Exciting product launches by major manufacturers and Digital show highlights will give printers the motivation and fresh ideas to help them transform their organisations."

Frazer Chesterman, Managing Director FESPA

Textile Conference and a number of industry debates to inspire and help printers reach their business goals.

Digital Revolutionary Showcase Theatre

FESPA's popular Digital Revolutionary Showcase Theatre programme spanned the three-day exhibition, comprising free-of-charge sessions hosted by world-leading authorities from print and associated industries.

The seminars hosted by companies which included Durst, EFI, Epson, HP, Mutoh and Océ, covered topics such as: maximising profit with inkjet; new opportunities in the current marketplace; interweaving print technology; profiting from sustainable printing; the practical aspects of operating UV inkjet printers; and the differences between digital and traditional printing. The Digital Revolution Debate, chaired by industry expert Sophie Matthews-Paul, featured leaders from the digital wide format sector and took place on the second day of the event. Paul Machin, specialist advisor on best practices to the EU Environmental Agency and co-author of FESPA's own Planet Friendly Guide also led a dedicated session on environmentally sustainable printing.

The Digital Textile Conference

FESPA's second Digital Textile Conference (12th and 13th May), entitled 'Rising Above the World Recession' helped printers increase their knowledge of the digital textile sector and gave them strategies to effectively deal with challenging economic conditions. Covering both commercial and technical topics, the conference sessions examined trends and market opportunities. Delegates had the chance to hear a number of digital textile printing authorities examine a range of issues, such as at the current status and future direction of the textile market, textiles as an outdoor medium, the power of digital textile printing and the environmental impact of different inks used in digital textile printing.

FESPA Digital 2009 provided visitors with a number of valuable features including a first-rate digital showcase theatre program, The Digital

FESPA's Lunchtime Debates

These interactive debates took place on the FESPA stand which provided an additional stage for industry learning and featured interviews with key digital print figures and 'revolutionaries'. The debates gave visitors a chance to engage in and discuss key issues with industry leaders. Each debate took place daily, starting with The Great Outdoor Debate on the opening day, followed by The Big Planet Friendly Debate, concluding with The Digital Signage Debate on the final day.

FESPA also announced winners of its 'Revolutionary' guitar giveaway during the lunchtime debates. The 'Nominate a Revolutionary' initiative kicked off the FESPA Digital 2009 campaign to recognise industry colleagues who have produced ground-breaking work, who have ventured into new markets or embraced cutting edge technologies, or who have differentiated themselves with radical business models or services to their clients.

FESPA Digital Print Awards

Visitors also had a chance to see the winning entries from FESPA's Digital Print Awards, which recognise outstanding examples of innovation in digital wide-format printing across a broad spectrum of real-life applications from printers in Europe, the Middle East and Africa. The six category winners were made public at FESPA Digital 2009, the winning entries

"Revolutions start with the sharing of ideas, exchanging viewpoints with peers, discussing and debating topical issues. FESPA's Digital exhibitions are an ideal platform to do this. The show is the culmination of many months of dedication and hard work by our in-house organisation team. We are confident that the event will meet our high expectations, offering printers the opportunity to see the latest market innovations as they come together to exchange ideas and continue contributing to and propagating the digital wide format 'Revolution'."

Frazer Chesterman, Managing Director FESPA

and the overall Platinum Winner were showcased in Hall 6 of the event.

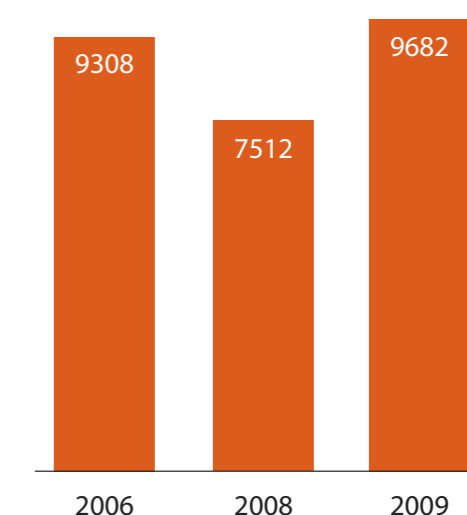
During the show we also announced the dates of the next two FESPA Digital exhibitions, taking place in Hamburg, Germany from 24th - 26th May 2011 and Barcelona, Spain from 29th February - 1st March 2012.

BREAKDOWN OF VISITOR ATTENDANCE

At FESPA Digital 2009 there was a 25% increase in visitor numbers compared with FESPA Digital 2008 in Geneva.

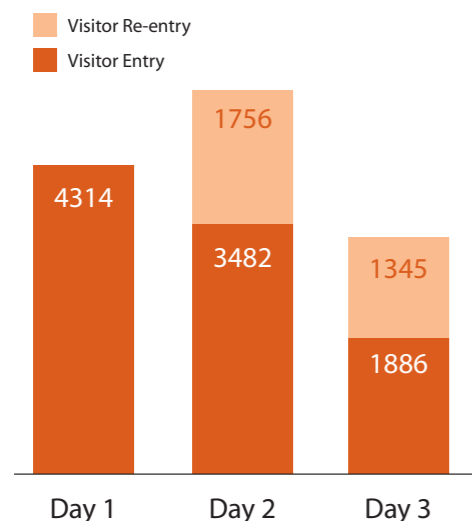
The growth in attendance can be attributed to the compelling nature of the FESPA brand and the strength of the FESPA Digital 2009 marketing campaign. The return to an EU member state also played a part in the rising numbers, as did the popularity of the city of Amsterdam.

The increase in visitor numbers is particularly impressive given the current global economic climate, where many other exhibitions in the market sector are experiencing a downturn in visitor numbers.





Over 73% of visitors at The Digital Revolution show had not previously attended a FESPA event.



Breakdown of visits to FESPA Digital 2009 across all three days

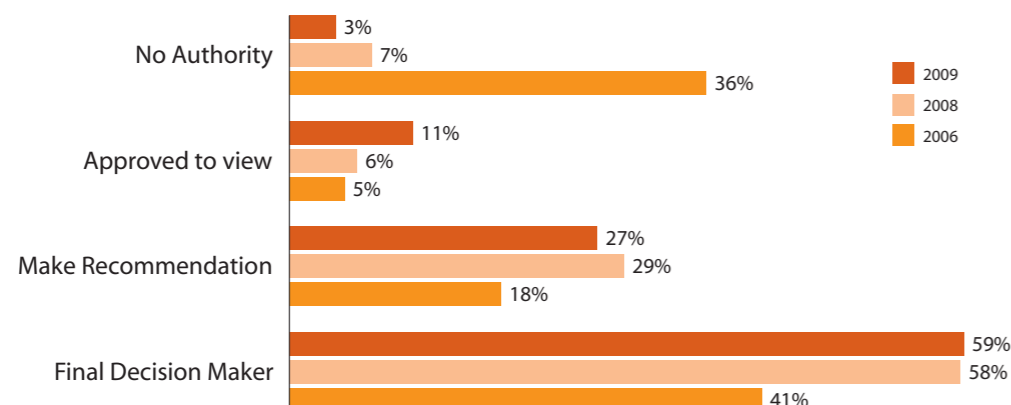
While the numbers at FESPA Digital events have been higher at both Amsterdam events, the trend for all events is a *tailing off* of new visitors over the three day period. There has however been a significant number of re-entry visitors on both the second and third day affecting the overall number of 'visits' to each show.

In each case the number of re-entry visits means the second day has the highest number of visitors. The first day has the second highest number of visitors, followed by the third day. This trend remains consistent across all FESPA Digital events.

Rise in the number of visitors who are key decision makers

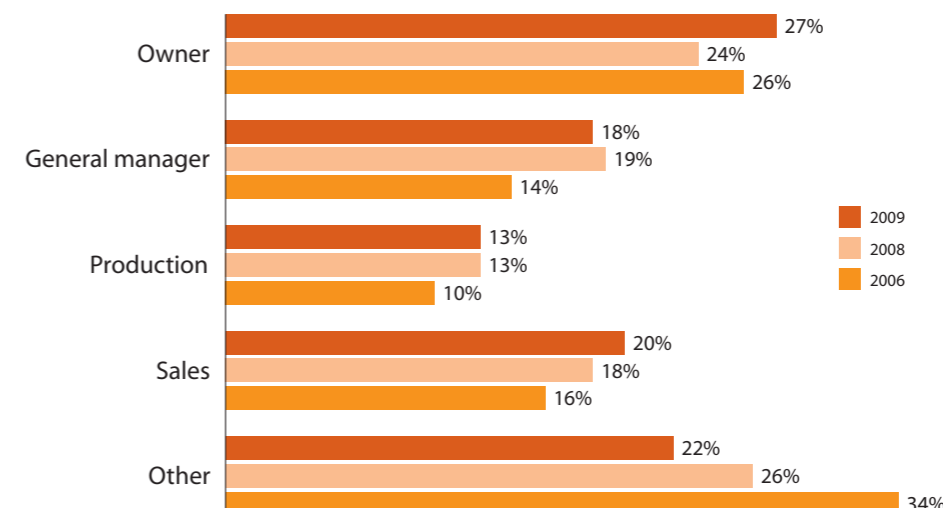
Between 2006 and 2009, there was an increase in the attendance of visitors who are directly responsible for purchasing decisions within their organisation.

There was also an increase in the numbers of visitors who were approved to make recommendations on new product purchases. These figures are in line with FESPA thinking that the quality of visitors will improve as FESPA events become more business critical.



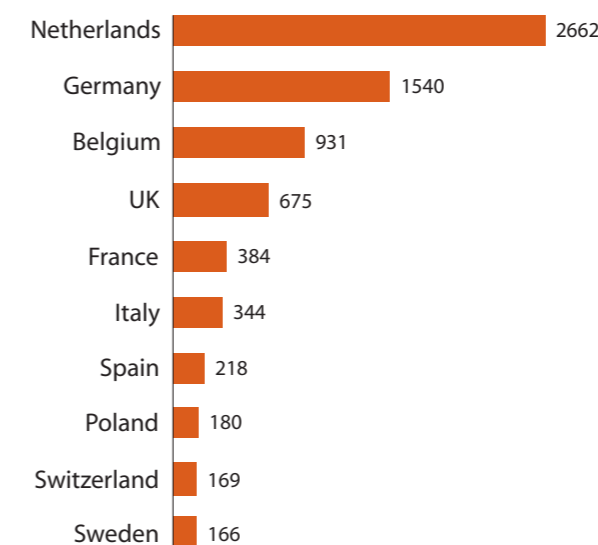
Primary Job Function

The increase in the number of visitors with purchasing authority is reflected in the dramatic growth in the number of visitors who are business owners or general managers. There is also an increase in the number of sales staff and general production staff and a fall in the level of 'other' attendees.



Top 10 Attending Countries

The top ten countries from which visitors attend FESPA Digital events are listed below. It is worth noting that Poland have consistently increased their visitor numbers since 2006 to equal Sweden for tenth place in 2008, beating Switzerland and Sweden for eighth place in 2009. This reflects a general growth in visits from Eastern European countries and the Baltic states - a key growth area for FESPA.





Visitor Breakdown by Region

Visitors to FESPA Digital 2009 came from across the globe. The highest numbers came from Europe (over 8,000 people), with the Middle East, Africa, the Americas, Australasia and Asia making up the rest.

Region	Area	On-Site	Pre-Reg	Total
Europe including EU and non EU members	Albania	0	16	16
	Austria	15	130	14
	Belarus	1	9	10
	Belgium	87	844	931
	Bosnia	1	12	13
	Bulgaria	3	32	35
	Croatia	3	28	31
	Cyprus	2	15	17
	Czech Republic	23	124	147
	Denmark	25	125	150
	Estonia	2	32	34
	Finland	5	123	128
	France	41	343	384
	Germany	262	1,278	1,540
	Gibraltar	0	1	1
	Greece	18	86	104
	Greenland	0	1	1
	Hungary	6	54	60
	Iceland	0	4	4
	Ireland	21	51	72
	Italy	43	301	344
	Latvia	0	31	31
	Liechtenstein	0	2	2
	Lithuania	0	20	20
	Luxembourg	4	26	30
	Macedonia	0	8	8
	Malta	1	14	15
	Montenegro	0	14	14
	Netherlands	375	2,287	2,662
	Norway	15	102	117
	Poland	19	161	180
	Portugal	9	74	83
	Romania	6	66	72
Russia	10	47	57	
Serbia	11	22	33	
Slovak Republic	10	47	57	
Slovenia	7	51	58	
Spain	17	201	218	
Sweden	12	154	166	
Switzerland	12	157	169	
Turkey	16	108	124	
Ukraine	0	11	11	
United Kingdom	71	604	675	
Total Europe		1,153	7,816	8,838

Region	Area	On-Site	Pre-Reg	Total
Middle East & North Africa	Algeria	0	10	10
	Bahrain	1	1	2
	Egypt	4	9	13
	Iran	2	5	7
	Israel	10	54	64
	Jordan	0	2	2
	Kuwait	1	7	8
	Lebanon	4	11	15
	Libya	1	1	2
	Morocco	3	38	41
	Oman	0	1	1
	Qatar	0	3	3
	Saudi Arabia	2	12	14
	Syria	0	3	3
Tunisia	3	34	37	
United Arab Emirates	2	18	20	
Total for Middle East & North Africa		33	209	242
North America	Canada	6	21	27
	USA	15	91	106
Total for North America		21	112	133
Central & South America	Antilles	0	1	1
	Argentina	2	8	10
	Belize	0	3	3
	Bermuda	0	2	2
	Brazil	1	42	43
	Costa Rica	0	1	1
	Dominican Republic	0	2	2
	Jamaica	0	1	1
	Mexico	0	1	1
	Nicaragua	0	1	1
	Puerto Rico	0	1	1
	Surinam	0	1	1
Venezuela	0	1	1	
Total for Central & South America		3	65	68

"It was good to finally visit a busy exhibition especially in the current economic climate!"

Visitor comments, FESPA Digital '09





57% of visitors say that FESPA Digital is the best Wide Format event they have attended.

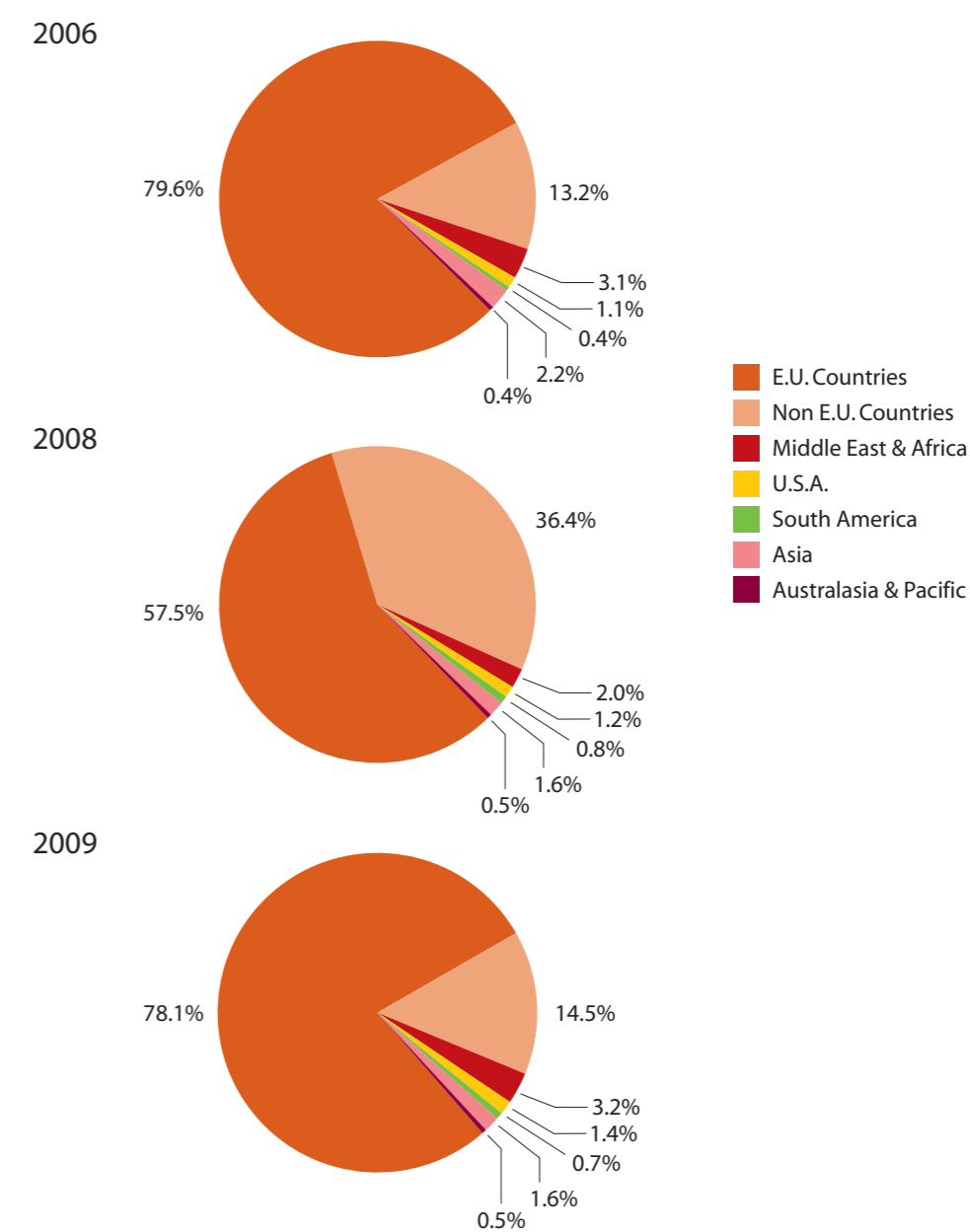
Visitor questionnaire, FESPA Digital '09

Region	Area	On-Site	Pre-Reg	Total
Africa	Benin	1	2	3
	Cape Verde Islands	0	1	1
	Djibouti	0	1	1
	Ghana	0	1	1
	Guinea	1	0	1
	Ivory Coast	0	2	2
	Kenya	0	4	4
	Mali	0	1	1
	Mauritius	0	2	2
	Mozambique	0	1	1
	Niger	1	1	2
	Nigeria	2	4	6
	Saint Helena	0	1	1
	Senegal	2	2	4
	South Africa	2	36	38
Total for Africa		9	59	68
Asia	Afghanistan	1	0	1
	Bangladesh	0	1	1
	Georgia	1	2	3
	India	8	15	23
	Pakistan	1	3	4
	Turkmenistan	0	1	1
	Total for Asia		11	22
South East Asia	China	5	11	16
	East Timor	0	1	1
	Hong Kong	0	11	11
	Indonesia	0	13	13
	Japan	8	29	37
	Korea	2	26	28
	Malaysia	0	3	3
	Singapore	0	4	4
	Thailand	0	3	3
Total for South East Asia		15	107	122
Australasia & Pacific	Australia	6	27	33
	New Calodonia	0	4	4
	New Zealand	0	7	7
Total for Australasia & Pacific		6	38	44
Exhibition Total		1,251	8,431	9,682

Visitors by Geographic Area

As expected, the highest number of visitors to FESPA come from Europe, accounting for almost 75% of all visitors.

It is interesting to note the growth in European visitors from outside of the Economic Union in 2008, reflecting the geographica re-location of the event to host country Switzerland, a non-EU country.





EXHIBITOR ATTENDANCE AT FESPA DIGITAL 2009

FESPA Digital played host to over 300 exhibitors from 33 countries around the world.

Companies who exhibited at FESPA Digital 2009

3P InkJet Textiles AG	Fletcher-Terry Co	Matan Digital Printers (2001) Limited	Screen Europe
A. Adkins & Sons Limited	Folex AG	MaxiMedia	Screen Products Benelux
A. Berger GmbH & Co. KG	Forever Digital Transfer Appl. Tech. GmbH	Mecanumeric SA	SEI-Deutschland GmbH
Achte Ausstellungssysteme GmbH	Forsstrom High Frequency AB	Megacom A/S	Seiko Instruments Europe SA
Afford Industrial SA	Fotoba International Srl	Mehler Technologies GmbH	Sensient Imaging Technologies
Agfa Graphics NV	Fraser Anti-Static Techniques Ltd	Membrana	Sentec International BV
Alcan Composites - Alcan Singen GmbH	Fujifilm Sericol UK Limited	MetaStyle BV	SETeMa B.V.
ALGROUP International GmbH	Galuflex	Miller Weldmaster Corporation	Shanghai DER New Material Co.,Ltd
All American Supply	Gandi Innovations	Mimaki Europe B.V.	Shanghai Hanker Plastics Co.,Ltd
Alphachem Europe GmbH	GBC Films Group Europe	Molco N.V.	Shanghai Inkwin Inkjet
Alur trussing and rigging solutions s.r.o	GCC Europe BV	Monti Antonio S.p.a.	Shanghai NAR Industrial Co.,Ltd
AMC Pancke AG	GCS Benelux	Moorim Chemtech Co, Ltd	Shanghai Teckwin Development Co. Ltd
American Biltrite Inc.	GEL4U	MS Srl	ShenZhen Runtianzhi Image Technology Co.Ltd(Flora)
AnaJet Inc	Glass Worldwide	MSK	Shock Line SAS
Arlon Inc.	Grafityp Self-Adhesive Products N.V.	Muellersohn Digitaltechnik GmbH	SiDream
ASCO B.V.	Grafko-Caspar d.o.o.	MUTOH	Sign O the Time BV
Atlantic Zeiser GmbH	Grapo Technologies, a.s	Nauta Signs BV	Nazdar
Atp Adhesive Systems GmbH	Great Sun Europe	Neolt Spa	Sign Top BV
Atrium Centrum Plotterone SP.ZOO	Guandong Italia srl	Neschen International B.V.	SignPro Europe
AXYZ Automation Inc	Haas & Co Magnettechnik GmbH	New Classics International	Signs of Korea
Azonprinter d.o.o	Hangzhou International Exhibition Co Ltd	Ninestar Image Int'l Ltd	Signtrade GmbH
Bakker Magnetics b.v.	Hanky & Partners (Taiwan) Ltd	Nite Industrial Co.,Ltd	Sihl GmbH
Bannergear/Teippinet	HESTO	Novachrome UK	SILIPA GmbH
BARBIERI electronic snc	Hewlett-Packard Espanola SL	Obeikan Technical Fabrics	Sinclair Equipment Company
Basic Technical Paper	Hexis	Oce Display Graphics Systems	Sioen Chemicals
Beaver Paper	Hilord Chemicals Inc	One Solution S.A.	SJ-D5 Inc
Bergstein B.V.	HJE Systembau Eickhoff GmbH & Co. KG.	Hoff & Korbel Stickmaschinen-Vertriebs GmbH	Smart Color Ink Technology
Biedermann GmbH	Hollanders Printing Systems BV	Huntsman Advanced Materials GmbH	SMI Corporation
Bordeaux Digital Printink	I - Cut Vision	Imprimerie Grand Large	Sorim
Brother Internationale Industriemaschinen	Ibena Technische Textilien GmbH	Inedit Software S.L.	Sosa Dias S.A.
C.S. Costruzione Macc. Spec.	Imaging Postprocessing Solutions GmbH	Ingllet SLU	Soyang Technologies Co.,Ltd
Caldera Graphics	Impression Technology Europe	Ink Technologies UK Ltd	STAHL S Europe GmbH
CFP Print & Sign	Imprimerie Grand Large	InkTec Co. Ltd	Star Coating AG
Cgate Solutions Ltd	Inabata Europe S.A.	INPRO Silkscreen Solutions BV	Star Flex
Chemica Company	Inedit Software S.L.	Integre Technology	Stiefelmayer-Contento GmbH & Co KG
Chimigraf Iberica SL	Intelicoat Technologies	International Printer & Inks Ltd	Stork Digital Imaging BV
Coldenhove Papier Holland	International Printer & Inks Ltd	ISM Open House Publishing Ltd	Summa
Color Concepts	Italian Sublimation S.r.l.	Itali Graphics Incorporation	Sun Chemical
Comhan Holland BV	Itochu SysTech GmbH	Itolux S.r.l.	Sun LLC
Continental Grafix Ltd	IVM SignTex GmbH	J-Teck3 S.r.l.	Superwide Solutions GmbH
CPS Globe (China Printing Sources, Ltd)	Jansen Display Deutschland GmbH	Julius Heywinkel GmbH	swissQprint AG
Cruise GmbH	Jetbest Corporation	JUTU Technologies Ltd	Taiwan Calcom International
d.gen Inc	Jin Kwang Chemical Co Ltd	K.A.A.P. International Ltd	Taya Canvas (Shanghai) Company Ltd
Danish Sign Export A/S	J-Kem 3 S.r.l.	Kala SAS	Technotape International B.V.
Dataplot GmbH	Keencut Ltd	Kammann Spezialmaschinen und	Tecna Display
Dickson Coatings	Kernow Coatings Ltd	Keencut Ltd	Teknotan Ltd/Mac Digital
Digital Graphics Incorporation	Ketele NV	Kernow Coatings Ltd	Terumi Enterprise Inc
Dipl.-Ing. R. Matai e.K.	Kiian Spa	Ketel NV	Texo Trade Services B.V.
Dirotul I' Alcudia S.l.	Klieverik Heli BV	Kiian Spa	The Magic Touch GmbH
Dollfus & Muller	Konica Minolta IJ Technologies Inc	Konow Coatings Ltd	Tider Import & Export
DPL Industri A/S	Kornit Digital Ltd	Korek Coatings Ltd	Transfair Spezialpapiere GmbH & Co KG
Dr. Höhle AG	Kunstdunger GmbH	Kornit Digital Ltd	Transmatic s.r.l.
Drucktech Kft	La Meccanica Costruzione Machine Tessili SPA	Kunstdunger GmbH	Triangle Digital INX Co
Drytac	LG Chem, Ltd	La Meccanica Costruzione Machine Tessili SPA	Trifibre UK Ltd
Duo Display	Liquid Lens Europe Ltd	LG Chem, Ltd	Triple Sign System AB
Durafos Inc	M Print Morlock GmbH & Co KG	Liquid Lens Europe Ltd	Trisco
Durst Phototechnik Digital Technology GmbH	M.T.L. PRINT LTD	M Print Morlock GmbH & Co KG	Tromark SAS
Easy Screen Display Stands	Man Print & Sign BV	M.T.L. PRINT LTD	Ultima Displays Ltd
Eckart GmbH	Marabu GmbH & Co. KG	Man Print & Sign BV	UNIFOL Self Adhesive PVC Films
EDP	Mark Bric Display AB	Mark Bric Display AB	Union Technology Int'l (M.C.O.) Co., Ltd
EFI- Vutek			Verder
Eisma Businessmedia bv			Verseidag - Indutex GmbH
Elitron IPM S.r.l.			Vista Gorsel Cozumler Ltd. STI
Encres Dubuit			Vivid Laminating Technologies
Endutex-Revestimentos Texteis SA			Walter Schulze GmbH
Epson Europe			Wonpoong Corporation
ERAY Crystal			World Textile Publication
ErgoSoft AG			WP Digital AG
Esco-Graphics			Xaar plc
Etitecnic			X-Media
Eurodrop			Yupo Europe GmbH
Expand International AB			ZSO
FESPA			Zünd Systemtechnik AG
Flagz Group Limited			

Exhibiting at FESPA Digital 2009

Australia	5
Belgium	21
Canada	2
China	16
Croatia	2
Czech Republic	2
Denmark	5
Finland	1
France	21
Germany	50
Holland	3
Hong Kong	2
Hungary	1
India	2
Israel	6
Italy	22
Japan	1
Macau	1
Netherlands	48
New Zealand	1
Poland	2
Portugal	1
Russia	1
Saudi Arabia	1
Slovenia	1
South Korea	18
Spain	11
Sweden	4
Switzerland	12
Taiwan	4
Turkey	6
United Kingdom	31
USA	21

Exhibitor sectors at FESPA Digital 2009

Associations	3
Digital Signage	1
Digital Printing Inks	18
Distributors	6
Screen Dryers	1
Embroidery Machine	2
Exhibition Organisers	2
Finishing Equipment	31
Digital Garment Decorators	5
Heat Transfer	24
Laser Cutters	6
Print Media Substrates	73
Narrow Format Digital Print	2
Pad Printing	1
Print Factory - General	12
Screen & Digital Printing Inks	6
Screen Manufacturers	1
Screen Print Supplies	1
Screen Print Machinery	1
Display Signage	25
Sign Making	1
Trade Magazines	10
Wide Format Digital Printers	41
Wide Digital Text	8
Other	44

“This has been a successful show for AGFA. The attendance and the quality of visitors have been better than expected in this climate. FESPA is the most important gathering place for the wide format industry and we certainly won't miss FESPA 2010 and 2011.”

Ronald Marien, Director Marketing Communications, AGFA Graphics



MARKETING CAMPAIGN

Understanding the revolution which is taking place in the world of digital print was vital in bringing FESPA's Digital Revolution to life and making it relevant to the industry.

FESPA's theme for the 2009 show was Revolution. Lauding not only the continuing technical revolution in an industry where new products enter the market on an almost daily basis, but also celebrating the revolutionary nature of both printers and manufacturers within the wide format digital sector.

In bringing an understanding of the Digital Revolution to our client base, we understood that we had to fire up the print community's imagination.

To do that, we first had to understand how the revolution in the digital print market was affecting printers, manufacturers and print consumers.

The 'Revolution' is being pushed by technology owners and manufacturers, and pulled by the demands of an informed, empowered and financially concerned consumer.

The days of 'easy business' are over.

Across the established and developed economies of the world, the demise of historic household brands is proof that the customer is brutal, demanding and incredibly sophisticated.

The 'good old days' are gone forever. What we are experiencing is a redefinition of the landscape inhabited by today's print service provider. Ours is an agile, fast, creative and dynamic business. The victims of this revolution largely have themselves to blame. They did not evolve, adapt or listen to the most important person, the leader of this revolution: the customer. They remained distant, they did not engage and they differentiated themselves through price alone.

The Digital Revolution is not just about the latest amazing technology. Speed and performance is vital in the Revolution. But it is expected. The new agenda is also about fresh concepts, business models, ideas and actions.

People, Practice, Process and Products

The Revolution demands digital technology, but it is the man behind the machine that will make a difference in this competitive new world. The ability to communicate and command attention in this noisy, fast-moving environment is vital. The digital race is on, and the smartest, most creative and engaged will win.

The successful print service provider will be able to combat the economic downturn with innovative equipment that produces outstanding, high quality print. But more importantly, they'll give customers creative products that deliver measurable outcomes for their brands within the scope of their budgets. To secure a profitable future, the print service provider will be as good at marketing as their customers, understanding that strong brand values will lead their business through the mire of economic difficulty. In tough times, customers go to those they trust. The value of those relationships will position the printer to prosper and grow when the market recovers and there are more plentiful pickings. When the Revolution has overturned the marketplace, digital technology will be commonplace amongst all modern printers and it won't be only the technology that delivers the value.

At FESPA, our mantra is change or die. There's no place for the 'establishment' in this new economic order. In fact, there is no 'establishment'. The tectonic shift in the consumer-supplier relationship has created a different landscape - traditional business dynamics have been turned on their head and nostalgia is pointless.

"The revolution is not an apple that falls when it is ripe. You have to make it fall."

Ernesto "Che" Guevara, Revolutionary



MARKETING ACTIVITY

Direct mail

We produced over 40,000 pieces of direct mail, including invitation tickets and personalised mailings for exhibitors.

Our direct mailing campaign was supported by a regular email campaign backed up by the FESPA Digital website. The mailing was consistently branded with the revolution message. Mail was sent to our international database and was received during February 2009, four months prior to the event.



Target-specific mail

Throughout the campaign a number of target-specific mailings were produced to highlight the awareness of particular events within the FESPA Digital show. These mailings were sent to both exhibitors and potential visitors to FESPA Digital.

Target-specific mailings sent out by FESPA included pre-show newsletters highlighting key products and events which would be launched at FESPA Digital. Other mailings included the 'Revolution Toolkit' which contained a number of event branded items designed to support exhibitors at the show.

Advertising

The advertising campaign for FESPA Digital ran from October 2008 until May 2009.

The advertising campaign was executed in six languages; English, French, Italian, German, Spanish Polish, Turkish and Dutch, across a number of worldwide trade press titles. The aim of the campaign was to build an awareness of the FESPA Digital show at the Amsterdam RAI. Advertising often ran in conjunction with loose leaf inserts and editorial content within publications. Where possible, banner advertising on publication websites was undertaken.

Many adverts were paid for from within the FESPA Digital marketing budget. A large number of publications took advantage of contra deals with FESPA to take shell scheme booths at the Digital show.





FESPA has built a broad internet presence ranging from our home site www.fespa.com to The Wide Network www.widenetwork.ning.com our own business networking website, which formed the backbone of our 'nominate a revolutionary' campaign.

Email

Our email campaign started in December 2008. Over 500,000 emails were sent encouraging potential visitors to pre-register for the event, enticing them to save €20.00. The emails also highlighted the key initiatives at FESPA Digital.

All emails were published in six languages. The content of the emails varied depending on the focus of the marketing campaign. All emails carried a strong call to action and were branded in accordance with the revolution theme.

Website

The FESPA Digital website www.fespadigital.com was an integral part of the marketing campaign. It formed the central point at which all show specific information could be accessed, from exhibitor listings through to Amsterdam flight and hotel information.

The majority of content appeared in English although landing pages were produced in French, German and Dutch.

A new feature this year was the launch of the Exhibitor Zone, where exhibitors at FESPA Digital could upload company profiles and press releases about their business. The Exhibitor Zone also gave access to the online exhibitor manual.



The Wide Network

As part of FESPA's commitment to building an international community of printers, print buyers, marketers and consumers within the wide format industry, we launched the world's only online community for wide format digital print professionals, The Wide Network in June 2008. Since then, the network has gained over 1,200 members who regularly use it as a place to meet and discuss upcoming events and topics of interest.

During the marketing campaign for The Digital Revolution we turned to The Wide Network to sound out creative ideas and as a launch pad for events taking place at the show.

One such event was the 'Nominate a Revolutionary' campaign, which included three live industry debate sessions which took place on the FESPA stand every lunchtime. The events were marketed directly through the wide network community, who joined us



in the audience and helped to nominate the FESPA revolutionaries.

SMS

SMS text messaging was used for the first time at FESPA Digital 2009. Seen by many as an alternative to email, our SMS campaign gave an effective return.

Over 47% of customers contacted by SMS responded to the campaign.

FESPA research.

As a highly effective route to contact visitors, SMS text messaging was used to inform existing customers about the benefits of pre-registration for FESPA Digital.

Although the campaign was small, targeting only 3,000 customers who had opted in, the conversion rate was over 47%.

Onsite events

FESPA ran a full series of onsite events at the Digital show. These included the Revolution Showcase Theatre, the FESPA Digital Textile Conference, the Digital Print Award Winners showcase, the Lunchtime Debates featuring the winners of the Nominate a Revolutionary campaign.

The show's onsite events have proven to be very successful. There was a full programme of seminars running at the Revolution Theatre, from 10.00am until 4.00pm daily. Topics included: *Revolution - Increasing Your Profit* by Marco Roos; *Is digital printing cheaper than traditional printing?* by Kilhun Lee; and *Price isn't an issue! At least not if you innovate and create!* by Andreas Skantze.

FESPA's Lunchtime Debates ran daily from 1.30pm each day covering topics from Outdoor Signage to the Big Green Debate. Each debate ended with the awarding of a guitar prize to the Nominated Revolutionary of the day.



Bill Baxter receiving his award as a nominated revolutionary from Xaar's own Elenor Knight.

Website traffic	
Visits to website	128,253
Unique visitors to website	81,147
Pages viewed	519,906
Average number of pages visited	4.05
Highest daily total visits	4,764

Website pages visited	
Home Page	85,796
Exhibitor List	39,695
Registration Page	30,935
Interested in Exhibiting?	27,670
Why visit FESPA Digital?	18,190



PR STRATEGY

In developing the integrated communications strategy for FESPA Digital 2009, FESPA worked with specialist international communications agency AD Communications, which has supported FESPA through five major European exhibitions.

FESPA 2009 Integrated Communications Strategy & Implementation

The combined team devised an integrated marketing campaign on a 'Revolution' theme, comprising run-of-paper and online advertising, media relations, direct and viral marketing, online and social media, and event activity. The campaign departed radically from the 'destination' marketing of previous shows. The strategy was to be edgy and provocative, visually and in tone and content, to distinguish the show from competitive events and to attract printers who have not yet embraced digital wide-format technology.

The objective was to stimulate debate around the ongoing technological revolution, while conveying the point that the real change is in the way print businesses have to adapt their offering to thrive in difficult times. The campaign was designed to motivate exhibitors and visitors, emphasising the importance of innovation, and highlighting the value of exhibitions in sourcing practical solutions and inspiration.

Editorial media activity included a FESPA-Fest 2009 press event in Amsterdam involving 40 international editors and opinion-formers. By coupling the event with FESPA's '100 Club' summit, editors had the opportunity to network freely with major exhibitors, and to discuss the topical agenda, in addition to receiving formal presentations from the FESPA team about the development of the show, and hearing from major sponsors.

The event was an important exercise in reinforcing FESPA executives' relationships with key media and analysts. It also provided an international platform to articulate the Revolution campaign, convey event messages, and give overseas journalists an opportunity to see the host city. The involvement of sponsors also ensured that the pre-show media relations activity of major brands such as HP was heavily FESPA Digital 2009 branded.

FESPA also offered attending journalists early insights into research findings from its Worldwide Survey, emphasising FESPA's credibility in the market, and providing evidence of optimism among printers.

The pre-show coverage equated to advertising value of £929,000, a calculable ROI of 1460% to date on the FESPA PR spend for the campaign.

In addition to the event, a range of Revolution-themed news and feature content was syndicated through printed and online titles, including a 'Revolutionary Address' from FESPA's marketing director, and bylined articles summarising the timeline of technological development in digital wide-format print. Exhibitors were invited to contribute opinions on key developments that had driven the Digital Revolution, and predictions as to how the Revolution might continue. Media welcomed this approach as it provided credible independent comment on the industry's progress, with which to supplement specific information about the event, venue etc. Media were provided with a comprehensive 'stand-by-stand' guide to secure prominent preview coverage, resulting in multi-page previews in many international publications.

The pre-show media relations campaign for FESPA 2009 achieved 425 individual pieces of coverage in print and online between August 2008 and the start of the show on 12/05/2009. Post-show coverage can be expected to continue throughout 2009. The pre-show coverage equated to advertising value of £929,000, a calculable ROI of 1460% to date on the FESPA PR spend for the campaign.



FESPA ASSOCIATIONS RE-INVESTMENT MODEL

Unlike any other exhibition organiser in the print industry, as a not-for-profit organisation FESPA actively re-invests its revenues back into the market.

We do not operate to a business model whereby dividends from exhibition profits go to shareholders. FESPA, as a not-for-profit organisation, deploys any surplus income from its exhibitions within the screen and digital community, benefiting both printers and suppliers alike.

Where does FESPA re-invest?

Over the past four years, from 2005 to 2009, FESPA invested over €1.6m on projects to support our industry. The table below illustrates examples of worldwide projects that have benefited the printing community.

FESPA Re-investment Programme 2005-2009		
2005/06 Examples from 32 projects approved		€439,000.00
Netherlands	Symposium on Standardisation in Screen and Digital printing during FESPA Digital 2006 Amsterdam.	
FESPA	Sensations: Screen printed special effects specifier targeted at printers, designers and print buyers.	
Spain	Seminar on Business Management (both technical and general), targeted at screen, pad and wide format digital printers.	
UK	E-learning Course: screen printing, subsequently translated into 11 languages.	
Czech/Slovakia	International seminar covering technical screen printing issues.	
Netherlands	Lectures on 'Future of the Industry' by international speakers.	
2006/07 Examples from 48 projects approved		€245,000.00
China	China Summit: Global speakers present on issues relevant to screen/pad and digital printers, concurrently with ASGA show.	
Various Countries	Translation of FESPA's 'Planet Friendly' environmental guide into Italian, Polish, Romanian, Slovakian and Spanish.	
Poland	Two day conference with international speakers covering screen and digital print topics.	
FESPA	'BREF Update' on surface treatment: Updates on information for printers.	
FESPA	REACH, WEE and RHoS: Updates on information for printers.	
India	Screen printing workshops held in Mumbai.	
2007/08 Examples from 59 projects approved		€486,000.00
Italy	Recruitment and Education Roadshow: Series of regional membership recruitment events.	
Slovakia	Screenprinting Workshops for graphic arts students in Trencin, Slovakia.	
Slovenia	Adriatic Print Forum: Featuring the first FESPA 'webinar' broadcast to universities across Europe and China with Dr. Nicholas M. Hellmuth.	
Germany	To define quality parameters for Screen Printing machines to produce high quality prints with minimum trouble-shooting.	
UK	Market Survey - Screen and Digital Printing: Up-to-date information on the state of trade and the statistical numbers for the UK.	
Netherlands	Screen and Sign conference for Dutch and Belgian printers.	
Thailand	15 th anniversary conference, exhibition and awards programme.	
2008/09 Examples from 73 projects approved		€456,000.00
Belgium	Creation of Colour Management standards to improve quality and efficiency to aid Screen Printers.	
Spain	Technical Seminar 2008: Presentations on colour management and textile printing at the AEDES General Assembly.	
Finland	Organisation of new SERPA Event (exhibition and seminar programme) for printers from Finland & Baltic area.	
Turkey	Seminar: Presentation to printers for future of the industry & to have a better understanding of printing 3D objects.	
FESPA	Planet Friendly revised: Collating guidelines on environmental requirements and obligations for Screen and Digital printers.	
Norway	Screen Printing Wave competition: Encouraging youth to be innovative with screen printing techniques.	
Grand Total		€1,626,000.00



This investment is designed to ensure that members' customers and prospects broaden their service offering and increase their profitability and cash position, making them better able to pursue capital expenditure plans.

Who are FESPA's Association Members?

In each of the countries below, every screen printer and wide format digital imager can become a member of their FESPA National Association. In countries where there is no National Association affiliated to FESPA, an individual company can join FESPA. This is known as 'Individual Membership'.

European National Associations

Austria	Belgium
Croatia	Czech Republic
Denmark	Finland
France	Germany
Greece	Hungary
Italy	Netherlands
Norway	Poland
Portugal	Romania
Russia	Serbia
Slovakia	Slovenia
Spain	Sweden
Switzerland	Turkey
Ukraine	United Kingdom

National Associations Outside of Europe

The Screenprinting and Graphic Imaging Association of Australia (SGIAA)

China Screen Printing & Graphic Imaging Association (CSGIA)

The Screen Printer's Association of India (SPAI)

The Japanese Screen Printers Association (JSPA)

The Screen Printing Association of Korea (SPAK)

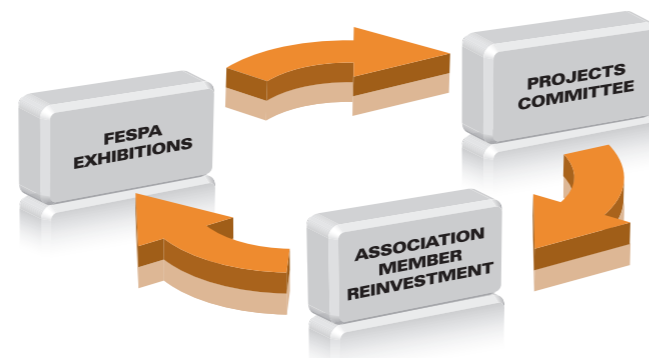
Screen Imaging & Digital Graphic Association of the Philippines (SIDGAP)

Thai Screen Printing & Graphic Imaging Association (TSGA)

FESPA is by far the best show for our industry, personally I feel that Amsterdam is a great location!!!"

Visitor questionnaire, FESPA Digital '09

The FESPA Re-investment model is hugely successful in supporting the industry through valuable initiatives.



Case Study: The Planet Friendly Guide

In 2009 FESPA embarked on a re-write of the hugely successful Planet Friendly Guide.

Originally written by Michel Caza, with assistance and updates from our environmental consultant, Paul Machin, this FESPA-produced guide is a must for every screen and digital printer.

The guide provides all the information a printer will need particularly if they want to achieve an environmental accreditation such as ISO 14001 or EMAS. The guide is continually updated with the latests developments and regulation changes affecting printers.

With more environmental regulations likely to be introduced, FESPA has made a long-term investment in bringing this information together within a single publication, one that is freely available to association members.



FUTURE EVENTS



FESPA MEXICO
27-29 August 2009
Centro Banamex, Mexico City



FESPA INDIA
7-9 December 2009
Pragati Maidan, Delhi



FESPA 2010
22-26 June 2010
Messe Munich, Germany



FESPA Digital Europe
24-26 May 2011
Messe Hamburg, Germany

**FESPA
GLOBAL
EVENTS**

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