IPEX 2014

Explore

Developing an Event for a changing global print media & communications industry

White Paper

Prepared by Informa Exhibitions
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1) EXECUTIVE SUMMARY

Since Ipex 2010, our industry landscape has changed significantly. Rapid evolution – even revolution – in communications media, combined with a prolonged global economic crisis, has altered the dynamics of the global graphic arts market. These changes are not unexpected, but the speed with which they are taking place has been far quicker than envisaged.

These fundamental shifts make it vital for Ipex 2014 to reflect the new realities for the supplier community, their customers, and their customers' customers. Ipex's exhibitors and visitors are moving their business in new directions, and Ipex must mirror that change so that it can provide printers around the world with solutions and ideas that address the challenges and opportunities their businesses currently face.

This White Paper is informed by the findings of a substantial piece of research commissioned by Informa with strategic market research specialist AMR International, which emphasises seven key trends impacting the industry and the events that serve it:

- Consolidation in the PSP (Print Service Provider) community in developed economies
- Decline of offset in developed markets
- The rise of digital
- Printers offering non print-related services
- Growth in printed packaging
- Growth in emerging markets
- Interest in cross media / multi-channel marketing

Our research shows that visitors still consider landmark industry events such as Ipex to be the most effective means of researching and evaluating new products and suppliers, and to be on a par with supplier sales visits for making purchasing decisions.

It also affirms that printer visitors view Ipex as the show for researching ready-to-buy product. 42% of PSP respondents (rising to 46% for digital printers) say that they attend Ipex to research the newest ready-to-buy innovations. 74% of visitors believe live events to be the best form of marketing, while 65% of potential customers believe that 'experiencing a business first hand makes it more memorable'.

OUR FOCUS NOW

In response to our research findings, Ipex has developed a strategic plan for the 2014 Event, which will shape our thoughts, dialogue and actions:

Differentiate with digital: The medium-term future for graphic communications in developed markets is digital, while digital is also set to grow rapidly in emerging markets over the coming years. Ipex will place a clear emphasis on digital and cross media technologies.

Acknowledge market reality: The re-focus to a digital landscape means that Ipex doesn't have to focus on the historical needs and expectations of the offset litho exhibitor. Instead, focus will be placed on the ROI for its digital and cross media exhibitors. As a result, the duration of Ipex will now be six days, which brings it in line with other major international b2b events.

Informa will right-size Ipex for the market it serves to deliver a focused, 'must-attend' Event that meets the needs of time-sensitive senior decision makers.

Focus on delivering high calibre international visitor audience: With the emphasis from exhibitors on reaching customers in emerging markets, Ipex will maintain and increase its focus on a global audience.

The move to London, a major global centre, creates a clear opportunity to attract overseas visitors and position Ipex 2014 as a vital business destination for PSPs from key emerging markets.

Informa has announced two major visitor promotion initiatives:

- **International Delegation Programme:** For the first time in the graphic communications industry, Ipex will offer an International Delegation Programme for buyers to meet with new and existing suppliers. It will entail a significant investment from Informa.

- **International Roadshows:** The scope of the 2014 roadshow programme will double to 16 countries and include a series of UK roadshows.

These initiatives will be supported by our proven marketing campaign, 75% of which will be focussed on attracting international visitors.

Invest in quality/depth of visitor experience: Ipex 2014 will focus on thought leadership for high calibre senior decision makers. In addition to educational features, we will introduce a **World Print Summit,** a congress for the leaders in print.

The Summit's theme will be "Strategies & Practices of Outstanding Leadership in the Challenging Business of Offline and Online Marketing".

Integration of cross media content to reflect print's role in a multi-channel mix: The growing interest in blending print and digital media chimes with Informa's established focus on cross media, as highlighted by the launch of Cross Media 2012 in London. The integration will also attract new visitors from the marketing and creative communities.

Initiatives are also underway to create an applications showcase to highlight print's powerful potential as a communications medium.

These findings, combined with our new initiatives, are discussed at length in this White Paper. This leads us to the conclusion that Ipex is on track to deliver a world-class print-centric multi-channel event that will reflect the industry in 2014, and meet the needs of exhibitors and visitors alike.

"These initiatives will be supported by our proven marketing campaign, 75% of which will be focussed on attracting international visitors"

2) INTRODUCTION

Innovation
Profitable
Un-missable
Industry Voice

Since the last Ipex event took place in 2010, our industry landscape has changed significantly. Rapid evolution – many would argue revolution – in communications media, combined with a prolonged global economic crisis, has substantially altered the dynamics of the global graphic arts market. These changes are not unexpected, but the speed with which they are taking place has been far quicker than the stakeholder community envisaged.

The global print industry was expected to be worth c. $655bn in 2011 and projected to grow at 1.0% CAGR (Compound Annual Growth Rate) to 2014. Declining print revenues in the two largest markets (Western Europe and North America) are offset by growth in emerging markets. Although recovering from the depths of the global economic downturn, the industry has not returned to its 2008 size and is not expected to do so even by 2014. The value of the global print industry declined from $691 billion in 2008 to $654 billion in 2010 (-5%), with forecast recovery by 2014 restoring the market to a value of $676 billion (-2%), little better than its position in 2009. (Source: Pira International)

The industry is undergoing what many would argue to be necessary, fundamental structural change to address overcapacity in mature markets. This overcapacity has long been putting downward pressure on price and - consequently – profitability for many PSPs.

These fundamental shifts in the marketplace served by Ipex make it vital for Ipex 2014 to be shaped to reflect the new realities for the supplier community, their customers, and their customers' customers. Ipex's exhibitors and visitors are moving their business in new directions, and Ipex must mirror that change.

This White Paper is designed to help all stakeholders in the Ipex community – confirmed and prospective exhibitors and their channel partners, visitors, industry media, analysts, trade associations, conference contributors and so on – understand the industry backdrop that will frame Ipex 2014.

It also aims to leave the reader with a better understanding of how Informa proposes to develop the event to meet the needs of all of the participants in today's rapidly evolving print value chain.

To that end, this document offers:

- a summary of the key changes in the marketplace served by Ipex since 2010
- insights into some key trends driving the industry and implications for Ipex and its exhibitors
- suggestions of the key opportunities for Ipex and its exhibitors
- information on how Informa is embracing these opportunities for the 2014 event

This White Paper is informed by the findings of a substantial piece of research commissioned by Informa with strategic market research specialist AMR International in November/ December 2012. The research set out to fully understand how the Ipex community is impacted by the macro economic climate, and by overall trends in media production and consumption.

N.B. All statistical figures quoted are from the AMR International survey unless a specific third party information source is identified.

3) SEVEN KEY TRENDS IMPACTING IPEX AND ITS STAKEHOLDERS

The research brief was framed by discussions with the Ipex team and the exhibitor steering committee. Following desk research and analysis of publicly available market data, together with data and information provided by Ipex, AMR International proceeded with phase one of its research and carried out **114** qualitative telephone interviews with Ipex and Cross Media visitors and exhibitors to examine market trends more closely. During phase two, AMR delivered an online survey, which elicited **1600** international qualitative visitor responses.

The results and comments were analysed by AMR International and summarised in a detailed report, which has an **executive summary** that is available from Informa.

Visitors interviewed represented the full range of print media businesses, including print and marketing service providers, agencies, corporate print departments, publishers, packaging printers, print management companies and prepress and finishing specialists. Supplier participants represented conventional print, digital print production, prepress, consumables and post press.

The geographical spread of responses closely matched that of the 2010 event attendance, representing the UK, Europe, Asia, and the Americas.

The research emphasises **7 key trends** impacting the global graphic arts industry and the events that serve it, including Ipex:

- Consolidation in the PSP community in developed economies
- Decline of litho in developed markets
- The rise of digital
- Printers offering non print-related services
- Growth in printed packaging
- Growth in emerging markets
- Interest in cross media / multi-channel communications

We will briefly look at each of these trends, the impact on Ipex, and – where appropriate – the opportunities it brings.

A) CONSOLIDATION IN THE PSP COMMUNITY

Our research underlines the extent to which the graphic communications industry at large has experienced structural decline in developed markets in recent years, fuelled by the shift to online content delivery in many segments traditionally served by print.

The global economic crisis since 2008 has accelerated a long term reduction in the number of printing companies operating in the EU, with a decline of 10% between 2006 and 2010 (Source: Eurostat).

This is reflected in declining attendance for generalist print media events, including Ipex and drupa. drupa 2012, for example showed a reduction in visitors of 75,500 compared with the 2008 edition. In its post show release, the drupa organisers commented: "This drop does not come as a surprise for us and the sector as a whole. In Germany alone the printing industry lost some 3,900 operations with over 61,000 employees between 2000 and 2011. In the USA over the same period more than 7,700 printing operations closed."

Ipex has likewise shown gradual decline in overall attendance since 2002, reflecting industry consolidation and a trend for smaller, more focused groups to attend trade shows, compared with the larger company delegations, including operational personnel, often seen at trade exhibitions a decade ago.

The positive aspect of this is more focussed attendance by senior decision makers, trending upwards. drupa reported that the proportion of top managers amongst visitors has grown significantly since 2008 (50.8% compared with 44.4% in 2008), while Ipex 2010 attracted 77% senior managers (74% in 2006).

How Ipex 2014 intends to deal with the impact of these seven key trends is dealt with through a series of new initiatives detailed in section 4: Our Focus Now, found later in this document.

B) DECLINE OF OFFSET IN DEVELOPED MARKETS

Offset lithography is a mature technology in developed markets. While it still accounts for significant production volumes, it is rapidly losing share to digital. Digital printing revenues are forecast to have increased by 56% to $131bn by 2014 (from $84bn in 2009). Offset will have experienced a 7.3% decline over the same period. (Source: Pira International)

The trend towards adoption of digital output at the expense of analogue processes has been accelerated by the economic downturn and the rapid rise of digital media distribution and consumption. On the whole, new capital investment in developed markets is focused towards digital output and supporting technologies.

Historically, offset printing technologies dominated events such as Ipex. However, the long term decline of this technology has been visible at Ipex since 2002, with floor space reduced by 35% from 2002 to 2010, primarily as a result of this.

Simultaneously, economic conditions in developed Western economies have prompted many PSPs to review their investment plans, impacting significantly on equipment sales for the major offset suppliers.

The commercial impact of this in the offset supplier community is well documented, with sustained and dramatic financial losses at several key offset press manufacturers forcing business re-engineering, including plant closures and widespread layoffs.

Looking forward, it seems clear that the offset vendor community will focus sales and marketing efforts on reaching customers in emerging markets, where there is still an appetite for investment in upgrading offset equipment, based on the different market dynamics of those regions.

Forecasts indicate that for the foreseeable future, offset printing revenues will only continue to grow in Asia, Latin America and Eastern Europe, and then only in very low single figures, while all other regions show sharp decline. (Source: Pira International)

C) THE RISE OF DIGITAL

The decline of offset has been balanced by enthusiastic adoption of digital output technologies for most print applications, and this is forecast to continue. In fact, digital is far outpacing global industry growth, while all other methods are in decline apart from flexography (Source: Pira International).

The reasons for this trend are clear to most. Digital press technology is proving more efficient than conventional methods for short, quick turnaround print runs, and it is this type of run which is increasingly in demand from end users.

In marketing, shorter runs are being driven by the trend towards improved targeting and personalisation. In publishing, the trend is towards more niche titles published in smaller volumes and print on demand/self publishing in the book market. Naturally, cost management and inventory reduction are also drivers for both end user groups.

Until relatively recently, digital press technology has been less efficient for long run lengths, and for colour-accurate printing. However, supplier technological development means that digital is becoming more efficient for these types of printing.

This has already markedly reshaped the floor plan of the major print media events, with digital suppliers beginning to dominate with substantial stands. Our research shows that, for the Ipex audience, digital is already the leading print method (76%). The majority of respondents also anticipate digital to increase in importance for their businesses.

24% of survey respondents are not currently offering digital print services. Of these, a third see digital becoming more important, pointing to a clear business opportunity for digital vendors. 26% of respondents do not currently offer post press or finishing services, highlighting another tangible opportunity for exhibiting companies in this area.

Visitors who print specialist, short-runs in advertising, commercial and publications are key targets for digital equipment vendors; these PSPs are well represented at Ipex. 75% of visitors are using digital for publishing work (catalogues, books), rising to 81% for promotional print (short run marketing collateral, personalisation/variable data, direct mail) and 83% for business print (corporate stationery, transpromo).

D) PRINTERS OFFERING NON PRINT-RELATED SERVICES

Our research highlights a substantial trend of PSPs looking to diversify. One major global PSP offered this comment: "The requirement from our customers for printed products is reducing so we have to rapidly adapt and offer alternatives to traditional print. We are moving more in the direction of online and digital, whilst also maintaining very high quality for our traditional printed products."

Printing companies are becoming increasingly involved in the distribution of printed products. As printed media continues to face competition from electronic media, printing companies are also seeking to provide services in other channels. For example, publication printers are offering electronic publishing, while printers of marketing materials are evolving into full marketing service providers which offer end-to-end, cross-channel marketing to corporate clients.

25% of our survey respondents already offer non print-related services, while 21% plan to, either through development of their own service portfolio or though partnership. A further 21% are undecided with regard to diversification, highlighting a significant opportunity for vendors offering solutions that can help PSPs pursue opportunities beyond print.

Diversification may refer to one or several of the following services: graphic design (53%), data management (32%), web design (30%), email marketing (23%), social media marketing (23%), campaign management (19%), and copywriting (11%). Some of these strategies require investments in specialist software, as reflected by the predominance of software vendors at Cross Media 2012.

> **“As printed media continues to face competition from electronic media, printing companies are also seeking to provide services in other channels”**

E) GROWTH IN DIGITAL PRINT ON PACKAGING

Insulated from the shift to e-media, packaging is the only print product segment forecast to grow to 2014. Packaging is forecast to grow by 3.4% from 2009 to 2014, with the market value rising from $178 billion in 2009 to $209 billion in 2014. Labelling is also demonstrating sustained single figure growth, with forecasts of a market value of $29 billion by 2014. (Source: Pira International)

In contrast, forecasts for commercial print and advertising are flat, while publications and security printing continue to decline as digital alternatives impact these segments.

Packaging print service providers are already among the customer base of 61% of Ipex exhibitors, though suppliers identify packaging producers are the hardest target customers to achieve exposure to. Of the 61% of exhibitors targeting packaging print service providers, more than half expect there to be an increase in sales to this sector.

Our research indicates that over half of Ipex's PSP visitors offer print on packaging, and this proportion is expected to increase. 12% of Ipex visitors cite packaging as their most important print product and a further 7% indicate it as their sole product offering. Of PSPs not offering packaging product, 9% say it will become more important. Among the PSPs that do offer packaging, 35% say it will become more important. Smithers Pira stated that the greatest penetration of digital is in labels, followed by corrugated and cartons, flexible packaging, metals and rigid plastics.

Our research points to profound interest in the potential of digital print for packaging applications. 82% of PSPs operating digital equipment and delivering packaging products expect digital print for packaging to become more important. Digital print packaging is expected to grow at 21% CAGR to 2016. (Source: Pira International)

The key drivers for this are two-fold:

Personalisation: Brand-owners are increasingly versioning packaging to make it more relevant to individual customer segments. Digital is a versatile method more suitable for versioning than traditional packaging print methods.

Printing at the point of use (Print on demand): In order to reduce stock in the supply chain, brand owners are increasingly seeking to stock less printed packaging inventory. This entails shorter runs, for which digital is the leading print process.

F) GROWTH IN EMERGING MARKETS

The combined value of the Asian, Middle Eastern, Latin American and other emerging print media economies is forecast to grow in value from $273 billion in 2011 to $303 billion in 2014. That will represent close to half of the global print economy, compared with just 37% in 2007. (Source: Pira International)

Finding new international customers is the key priority for suppliers according to our research, with 38% of respondents saying that this is becoming a more important objective for participating in exhibitions. Specifically, suppliers mention Latin America (36%), India (36%) and Eastern Europe (35%) as key target geographies, followed by China (28%) and the Middle East (24%).

G) GROWING INTEREST IN BLENDING MULTI-CHANNEL

Our research reinforces that underlying shifts in consumer preference mean that publishing and marketing professionals are now required to operate across both print and electronic media channels.

If they are to meet the full breadth of their clients' needs, PSP and agency suppliers must also operate across both channels. As a result, a class of PSPs is evolving to become marketing service providers (MSPs) with multi-channel capabilities. Print media focused suppliers are not sufficient for this evolved class of PSPs – they must also build relationships with electronic media suppliers, and the class of software vendors who straddle the print/electronic media divide.

Print is part of an ever more integrated marketing value chain, which makes it increasingly important for PSPs to speak the language of the marketing decision makers and be able to promote the role of print in the mix.

Our research shows that even exhibitors who do not sell to 'the customer's customer' (still two-thirds of the exhibitor base) are nevertheless interested in interacting with them. The main reasons cited for this are that end users affect R&D cycles and that they influence printers' purchasing decisions: "End users are the real change agents, they drive everything. But as a manufacturer, we're quite insulated from them", said a spokesperson for one leading digital print vendor.

Another respondent commented: "Agencies are important. Even if we don't sell directly to them, it is very important to market to them. We can excite the agency about what is possible for them to do for their clients."

4) THE ROLE OF THE EVENT

Much has been written about the changing role of the trade event in an environment where suppliers have a rich mix of channels with which to communicate and engage with customers and prospects. Certainly many exhibitors do comment on exhibitions as just one strand of an increasingly multi-channel approach, with many referencing cost-per-lead as a tool for comparing ROI.

Despite this, our research shows unequivocally that visitors still consider landmark industry events such as Ipex to be the most effective means of researching and evaluating new products and suppliers and to be on a par with supplier sales visits for making purchasing decisions.

In the context of this feedback, it is also interesting to note that finding new suppliers scores as printers' second biggest challenge after technical problem solving.

Trade events also score significantly higher than any other platform for peer to peer networking, with 30% saying they visit trade shows for this purpose.

Our research affirms that printer visitors view Ipex as the show for researching ready-to-buy product. 42% of PSP respondents (rising to 46% for digital printers) say that they attend Ipex to research the newest ready-to-buy innovations.

The research suggests that Ipex offers an edge in terms of giving visitors access to senior executives from vendor companies, with 17% of visitors saying that they come to Ipex for this.

The results from the AEO 2010 FaceTime initiative supports our belief that there is no better direct or more effective way to develop business contacts, explore the market and discover new opportunities than at live events. According to the study, when questioned after the event, 74% of visitors believe live events to be the best form of marketing, while 65% of potential customers believe that 'experiencing a business first hand makes it more memorable'

"Our research shows unequivocally that visitors still consider landmark industry events such as Ipex to be the most effective means of researching and evaluating new products and suppliers"

5) OUR FOCUS NOW

Using this in depth research, combined with our own analysis of Ipex's key strengths and opportunities, and discussions with the market through the Ipex Advisory Committee and Ipex Vendor Marketing, UK Focus and Brands groups, we have developed a strategic plan for the event which will shape all our thoughts, dialogue and actions from now until the show.

A) DIFFERENTIATE WITH DIGITAL

It is clear that the medium-term future for graphic communications in developed markets is digital, while digital is also set to grow rapidly in emerging markets over the coming years. Ipex will place a clear emphasis on digital and cross media technologies, while drupa remains the key event for the global offset printing community (67% of visitors to drupa cite offset/flexo as their primary area of interest compared to 16% at IPEX 2010).

Ipex has already established a strong digital focus, with 41% of floor space in 2010 occupied by vendors of digital solutions (compared with only 27% of the total drupa 2012 footprint). Among the top 20 Ipex exhibitors, digital has evolved from accounting for 35% in 1998 to 70%+ in 2014.

In 2010, 40% of Ipex visitors planning to invest at Ipex were focussed on digital output, a clear distance ahead of all other technologies.

For 2014, 20,000 sqm is already committed to digital suppliers. Half of the top 20 stand holders for Ipex 2014 are first time entrants, and only two have been at the last four shows. This reflects the significant level of change in the industry.

With this commitment to differentiate Ipex as a digitally focussed show with a strong cross media element to meet the needs of tomorrow's PSP and their customers, the senior Informa team will work energetically towards ensuring that all the major digital vendors – including those currently not committed – are represented at Ipex 2014.

The industry research and resulting refocus of Ipex 2014 offers Ipex the opportunity to present its new strategy to traditional print show exhibitors and a host of multi-channel entrants. As a result, Ipex foresees a number of significant names engaging with the event e.g. while Landa will not be exhibiting for strategic business reasons, Benny Landa will be engaged with Ipex 2014 in delivering a keynote address on nanotechnology at the World Print Summit.

"In 2010, 40% of Ipex visitors planning to invest at Ipex were focussed on digital output"

B) ACKNOWLEDGE MARKET REALITY

The re-focus to a digital landscape means that Ipex doesn't have to focus on the historical needs of the offset litho exhibitor. Instead, focus will be placed on the ROI and time-poor issues for its current digital and cross media exhibitors. As a result, the duration of Ipex will now be six days, from Monday 24th March 2014 – Saturday 29th March 2014. This brings it in line with other b2b events and enables Ipex to incorporate a content rich programme, which will run alongside the exhibition for the duration of the event.

With this industry backdrop, it is appropriate for Informa to right-size Ipex for the market it serves. We will reduce the total footprint of Ipex to deliver a focused, 'must-attend' event that meets the needs of time-sensitive senior decision makers.

C) FOCUS ON DELIVERING HIGH CALIBRE INTERNATIONAL VISITOR AUDIENCE

With the emphasis from exhibitors being on reaching customers in emerging markets, Ipex will maintain and increase its focus on attracting a global audience.

The move to London, a major global transport hub and commercial centre, creates a clear opportunity to attract overseas visitors. As a global event located in London, Ipex 2014 is well placed to position itself as a vital business destination for PSPs from key emerging markets.

This emphasis on an international audience will build on the trend observed at Ipex 2010, which saw overseas attendance increase by 8%, driven by a substantial uplift in new visitors from Europe, Middle East and Africa.

The international audience at Ipex is fresh; 14,000 senior international visitors in 2010 had not previously attended an Ipex event. Of this visitor group, 48% were from Asia and 25% from the Middle East.

Ipex's event portfolio in India and Brazil creates obvious opportunities to attract visitors from these regions who have affinity with the Ipex brand, while the global community addressed by Ipex World potentially gives Ipex a strong and sustained online connection with PSPs in many markets.

Informa has announced two major visitor promotion initiatives which reinforce our commitment to attracting a high calibre international audience. This will be supported by our proven international marketing campaign, 75% of which will be focussed on attracting international visitors.

INTERNATIONAL DELEGATION PROGRAMME

For the first time in the graphic communications industry, Ipex will offer an International Delegation Programme as a structured and highly effective way for buyers to meet with new and existing suppliers.

The International Delegation Programme will entail a significant investment from Informa over and above the event marketing budget. This reinforces Informa's commitment to deliver a world-class event with top international buyers. We believe that the presence of so many industry buyers will make Ipex a key international meeting point.

The hosted buyer format is proven in other markets. Hosted buyers spend an average 12 hours on the show floor, compared to less than half that time for trade visitors. This delivers a meaningful and highly engaged buying audience for vendors, supporting ROI from participation.

Our intelligence suggests that top-class VIP campaigns by vendors are declining, so there is a clear opportunity for the event organiser itself to create a structured, vendor-neutral programme. Our aim is to attract pre-qualified global buyers, with an emphasis on those of high decision making calibre meeting clear budget criteria. The programme will specifically target key emerging markets, the wide format printing community, packaging producers and print specifiers. Applicants will be vetted on purchasing authority, budget, the amount of business conducted internationally and their reasons for attending.

Participants will attend Ipex with a complete package including flight, accommodation, concierge services and VIP benefits on site.

For this programme, Ipex is working closely with associations, major vendors and key publications in target territories to identify and target these key decision makers.

Prospective delegates will also be targeted using the existing Ipex database (direct marketing, telemarketing), as well as working with influential intermediaries such as the trade media, regional trade associations and travel companies. Key exhibitors will also be given the opportunity to suggest prospects to be targeted for the programme.

INTERNATIONAL ROADSHOWS

Ipex 2014 will build on the roadshow programme conducted for 2010, while shifting the focus towards visitor engagement.

Reinforcing Ipex's commitment to delivering a truly international visitor audience, the scope of the 2014 roadshow programme will double to 16 countries, with the overseas events taking place in 2013, culminating in the final UK roadshow in February 2014.

The international roadshows are designed to promote Ipex to potential visitors in key geographies and to attract support from the leading trade associations in the target countries. The events will serve to highlight the Ipex brand in countries where awareness is lower, and build awareness in countries where the brand is established.

The message of the roadshows will be to emphasise the business benefits of attending, while also highlighting London as the host city and addressing accessibility, case studies about the value for PSP's to attend Ipex, venue, accommodation, travel and visas.

The events will attract visitors with keynote speakers and networking opportunities, as well as market intelligence delivered by a respected regional media outlet or association.

Validated by the research highlighting interest in emerging markets, we will reach out to prospective visitors in several key growth markets for graphic communications, including the Middle East, China, Brazil, South Africa, India, UAE, Turkey and Poland.

The tour will also cover mature markets including Australia, Japan, USA, Germany, France, Italy, Benelux and Sweden.

Where relevant the roadshows will be aligned with established regional events to maximise attendance.

In Q4 2013, the roadshow will go to 10 major UK cities – London, Birmingham, Leeds, Manchester, Glasgow, Exeter, Southampton, Norwich, Cardiff and Edinburgh.

The roadshows will be promoted using conventional and social media and through direct marketing to the Ipex database and trade association member databases.

D) INVEST IN QUALITY/DEPTH OF VISITOR EXPERIENCE

Ipex 2014 will be focused on delivering a meaningful and informative experience for high calibre senior decision makers across the target visitor audiences, providing critical incentives for VIPs to attend the event.

55% of our survey respondents are looking for Ipex to provide thought leadership in print and other communications media, demand which mirrors the trend towards diversification in the visitor base.

Our research also reinforces the value marketing decision makers place on educational content. In addition to educational features on the show floor, the focus of our content strategy will be the introduction of a World Print Summit, a congress for the leaders in print, with the mission to establish Ipex as a source of authority, direction and leadership for business owners and managers in the print and communications value chain.

The World Print Summit will draw on Informa's unrivalled and proven experience in delivering must-have B2B event content. Informa has assigned a dedicated conference programmer to the development of this feature.

The Summit will take place for the duration of the event in the ExCeL Centre's Platinum Suites. The format will be mornings to enable buyers to spend their afternoons on the Ipex show floor, with delegates also able to attend sponsored workshops and 1-2-1 meetings, breakfast briefings, networking lunches, a champagne reception and gala dinner.

The Summit's theme will be "Strategies & Practices of Outstanding Leadership in the Challenging Business of Offline and Online Marketing", and will address key industry issues and topics, including looking at how to make to most out of digital investments and the future of nanography.

E) INTEGRATION OF CROSS MEDIA CONTENT TO REFLECT PRINT'S ROLE IN A MULTI-CHANNEL MIX

The growing interest in blending print and digital media chimes with Informa's established focus on cross media, as highlighted by the launch of Cross Media 2012 in London.

Three quarters of visitors to Ipex indicate interest in an event that blends digital print and communications media, confirming that the integration of the Cross Media concept at the heart of Ipex 2014 will appeal to the interests and evolving needs of printers.

The integration will also attract new visitors from the marketing and creative communities, the elusive 'customer's customer', which vendors see as so influential in the adoption and promotion of digital print.

End users only made up 6% of attendance at Ipex 2010, creating a significant opportunity for Ipex to use educational and inspirational content to attract marketing decision makers and increase this figure to 20% in 2014. The move to London, one of the Europe's major hubs for marketing and creative professionals, makes this a realistic objective. Informa will commit a separate marketing budget to address the marketing decision maker community.

Informa has already made inroads with this community. More than half of visitors to Cross Media 2012 were brand owner or agency professionals, indicating clear interest in optimising the effectiveness of print within multi-channel campaigns. Visitors to Cross Media place a high level of emphasis on seminar content, with 21% citing seminars as their primary reason for attending.

A clear synergy exists between the cross channel focus of Cross Media and the traditional print focus of Ipex. Ipex already attracts a diverse visitor audience including PSPs, agencies, marketers, publishers and packagers, all of whom, by their nature, have an interest in how print can be integrated with other marketing channels to engage audiences and drive response.

The Ipex team is proactively working to diversify the exhibitor base to reflect this increasingly complex multi channel marketing environment, in which print plays such a critical role.

Initiatives are also underway to use the flexible space afforded by ExCeL - in particular the central boulevard - to create an applications showcase to highlight print's potential as a communications medium, and to re-engage influencers further up the marketing value chain with print's effectiveness.

Informa will establish a 'Brands' group in Q1 2013 to finalise the full integration of Cross Media into Ipex 2014.

6) CONCLUSION

The industry research provides a clear picture of how Ipex needs to evolve, and the trends it must address. The visitor initiatives in which Informa is investing are designed to provide content and deliver key international buyers to optimise ROI for exhibitors.

These new programmes are of course underpinned by a significant commitment to global multi channel marketing, which aims to build brand awareness throughout 2013/2014 and maximise visitor engagement and registration.

Based on this fresh market intelligence, Informa remains committed to delivering a successful, innovative event that meets the evolving business needs of the global print supply chain.

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