

FESPA Print Census Q&A with Graeme Richardson-Locke, Head of Associations and Technical Lead, FESPA

- **What is the FESPA Print Census?**

The Print Census is an international survey hosted by FESPA. Its aim is to update our understanding of trends, recognise challenges and explore opportunities within the global speciality print, signage and textile industries, based on direct feedback from printers and signmakers around the world.

The Print Census is a pillar of FESPA's Profit for Purpose reinvestment programme. The findings help us to support the FESPA community by providing insights that can inform their business decisions.

This year's Print Census was launched at FESPA Global Print Expo 2022 in Berlin and in conjunction with our international associations, we'll be collating responses until early 2023.

From then, our expert research partner Keypoint Intelligence will analyse the responses and produce a report of the findings.

An initial overview of the results will be shared with visitors to FESPA Global Print Expo 2023 (23 – 26 May 2023, Messe Munich, Germany) with a complete executive summary to be published shortly after.

The full report will only be made available to members of a FESPA Association or FESPA Direct.

- **What areas does the survey explore?**

This is the third iteration of the Print Census, the last having been published in 2018. Now, we're looking to delve further into the six core areas identified in the last report. These included optimism within the market; how customer demands are evolving and the impact this has on their buying behaviours; the growing wide format product mix; the importance of digital technology and the investment decisions print providers are making; the rise of textile printing; and the influence of environmental pressures.

By expanding on these trends, we aim to identify how long-term trends are progressing, in the context of the broader commercial and economical backdrop. We will also look to identify new drivers impacting the industry, such as equipment, software and workflow trends, automation, supply chain challenges and how pricing and margins are changing.

Lastly, given the issues affecting businesses in recent years, we're seeking a full picture of the impact of the global COVID-19 pandemic on print and signage businesses.

- **What results are you expecting to see? How do you anticipate these will vary from the 2018 survey?**

It's always hard to make exact predictions of what we're going to see because the market is so fluid. That's the value of the Census!

The picture in 2018 was a positive one and, despite the challenges of the past few years, we hope that the overall mood is still upbeat.

It's reasonable to expect optimism to have dipped as a result of the pandemic but, our routine conversations with printers and signmakers show that they're focused on moving forward, future-proofing their business by taking hold of new opportunities to diversify, streamline their processes and drive growth.

I do think a big trend we will see is around market and application diversification, as many print and signage businesses have had to look to different revenue streams in recent years due to the downturn in business because of the pandemic.

In 2018, almost all respondents reported that customer demand for fast turnaround, the trend to shorter runs, and expectations of 'Just in Time' delivery were increasing or stable. These consumer demands remain, but we'd also expect printers to have adapted, as they're not new challenges.

In the face of these trends, it's clear why digital wide format technology – optimised as it is for flexible, short runs and quick job turnaround – has been so instrumental

in business growth over the last decade. And in recent years we've seen so many innovations in digital wide format technology and software which have helped PSPs to simplify production from start to finish. We're looking forward to hearing about the impact these have had on print and signage businesses.

One of the other strong themes we're expecting to see is the growing importance of sustainability. In 2018, 76% of respondents stated that they were being influenced by sustainability. We expect that this would have increased, as we've reached a point where demonstrating environmental credentials has now become business critical for most service and manufacturing businesses.

- **How will the Print Census results benefit the industry?**

Fundamentally, our purpose at FESPA is to deliver education and inspiration to our communities to help them grow and prosper. By gaining a clear and up-to-date picture of the commercial reality for printers and signmakers around the world, and a deeper understanding of how the market is diversifying, we can develop our FESPA events and information products to ensure that, in conjunction with our local associations, we're enabling our members to succeed.

The findings of the FESPA Census will then help us to develop new products and evolve our existing ones. For example, after the 2018 survey we developed our *Print Make Wear* feature to reflect the textile printing trend and at FESPA 2019, our Trend Theatre programme centred around the key topics highlighted in the survey. We've also recently launched the Sustainability Spotlight at FESPA Global Print Expo 2022 and we'll continue to evolve this in line with the identified focus on sustainability.

The most prevalent issues highlighted by the Census will help us to ensure that the articles we share on FESPA.com and our member-only Club FESPA platform are providing relevant guidance and inspiration in areas where our support is needed.

Above all, the Census findings help our community of business decision makers to benchmark themselves against similar businesses globally, and to make informed choices for their future.

- **Why should a printer or signmaker take part in the Census?**

Firstly, it's easy and doesn't take long! This year, the survey can be completed in 24 languages, including French, German, Italian and Spanish, and it can be filled in online or in person at a FESPA event.

All respondents will receive a copy of the executive summary ahead of it being published to the broader community. Plus they will be entered into a prize draw to win free entry to FESPA Global Print Expo 2023 in Munich, with two nights' accommodation included.

The unique value of the FESPA Print Census is that it reflects the reality 'on the ground' and allows printers to have their say in the industry's future. So we'd love for printers and signmakers to take the time to answer the questions and share their experiences.

Delivering relevant services and educational content is more vital now than ever. With valued input from our community, we can develop a clear view of the industry and help print and signage businesses to recover and grow. We look forward to seeing the full results in 2023!

To have your say, complete the survey online here: www.fespa.com/census/survey.