



FESPA/InfoTrends Wide Format Stakeholder Survey on Economic Impact

July 2009



English

Survey Objectives & Methodology

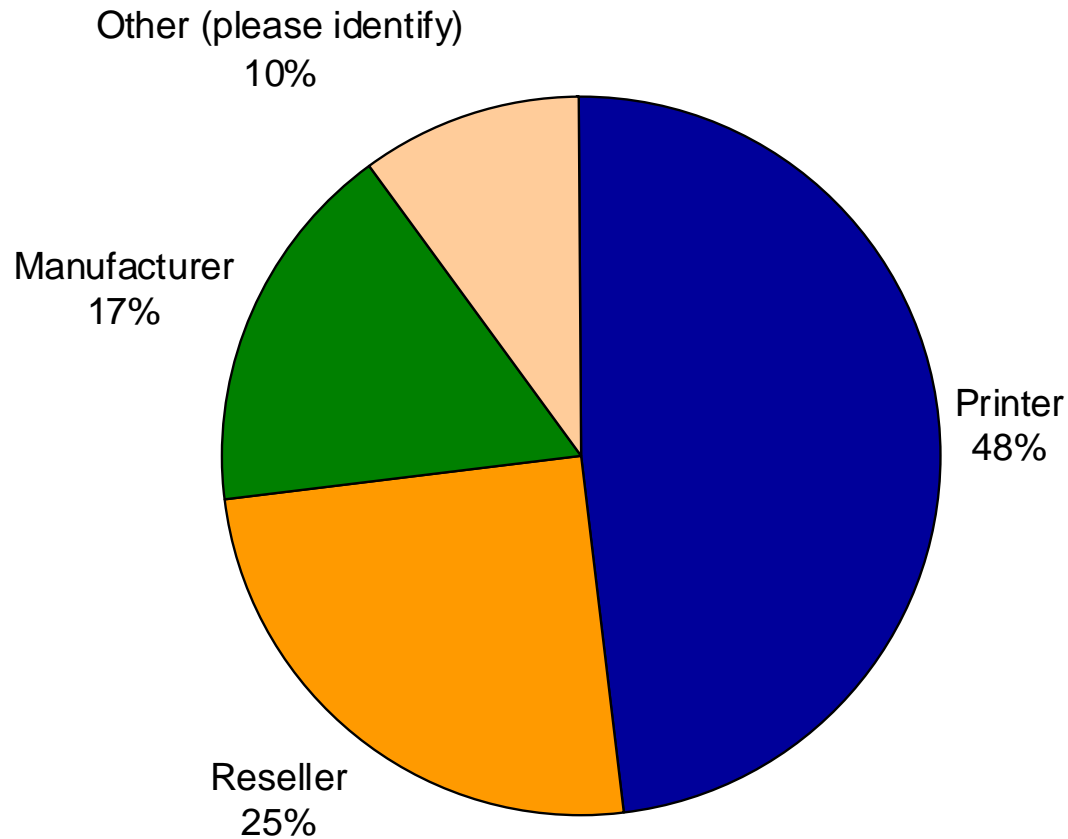
- Objectives

- Measure impact of economic downturn on stakeholders in wide format print market
- Understand operational and selling strategies employed to deal with downturn
- Determine outlook for recovery
- Develop comparable data in different regions

- Methodology

- Electronic surveys
- Worldwide (English) & Mexico (Spanish)
- July 2009

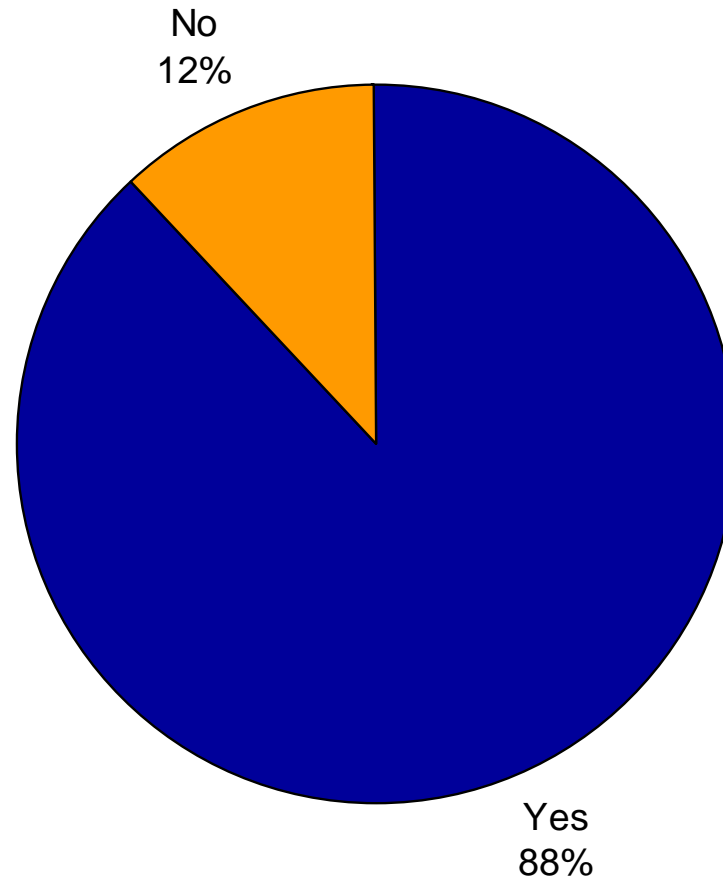
Are you engaged in wide format printing as a printer, manufacturer, reseller or other?



N = 320

Source: InfoTrends/FESPA Economic Survey 2009

Do you believe that there has been a recent economic downturn that has impacted many businesses, including wide format printing?

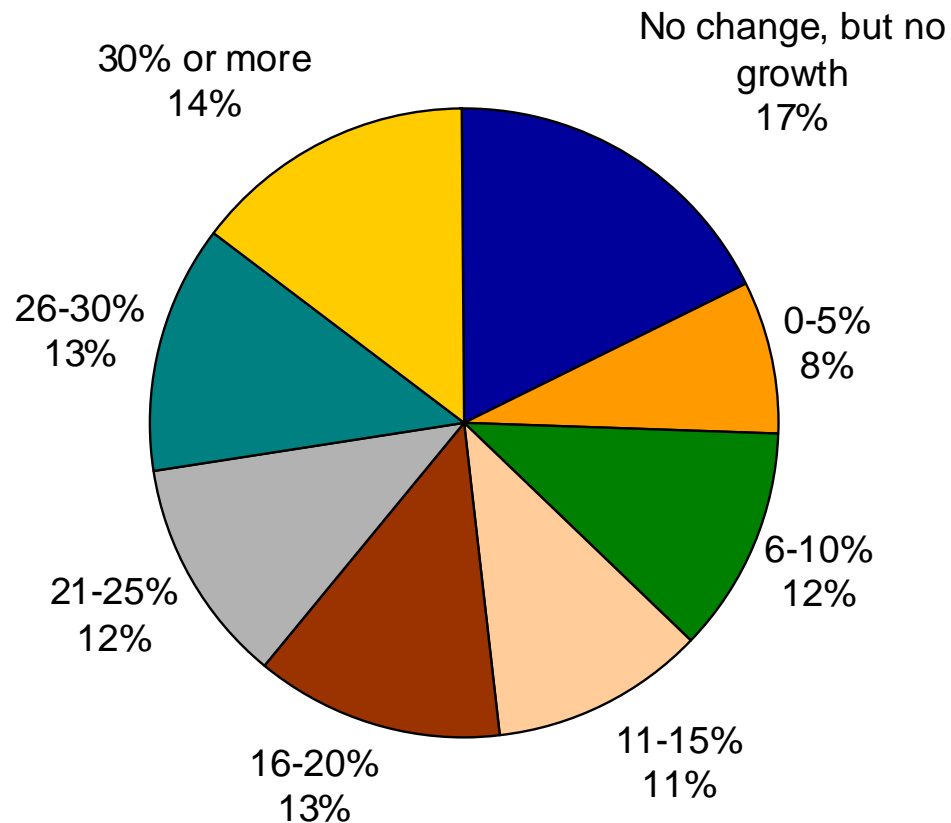


N = 320

Source: InfoTrends/FESPA Economic Survey 2009

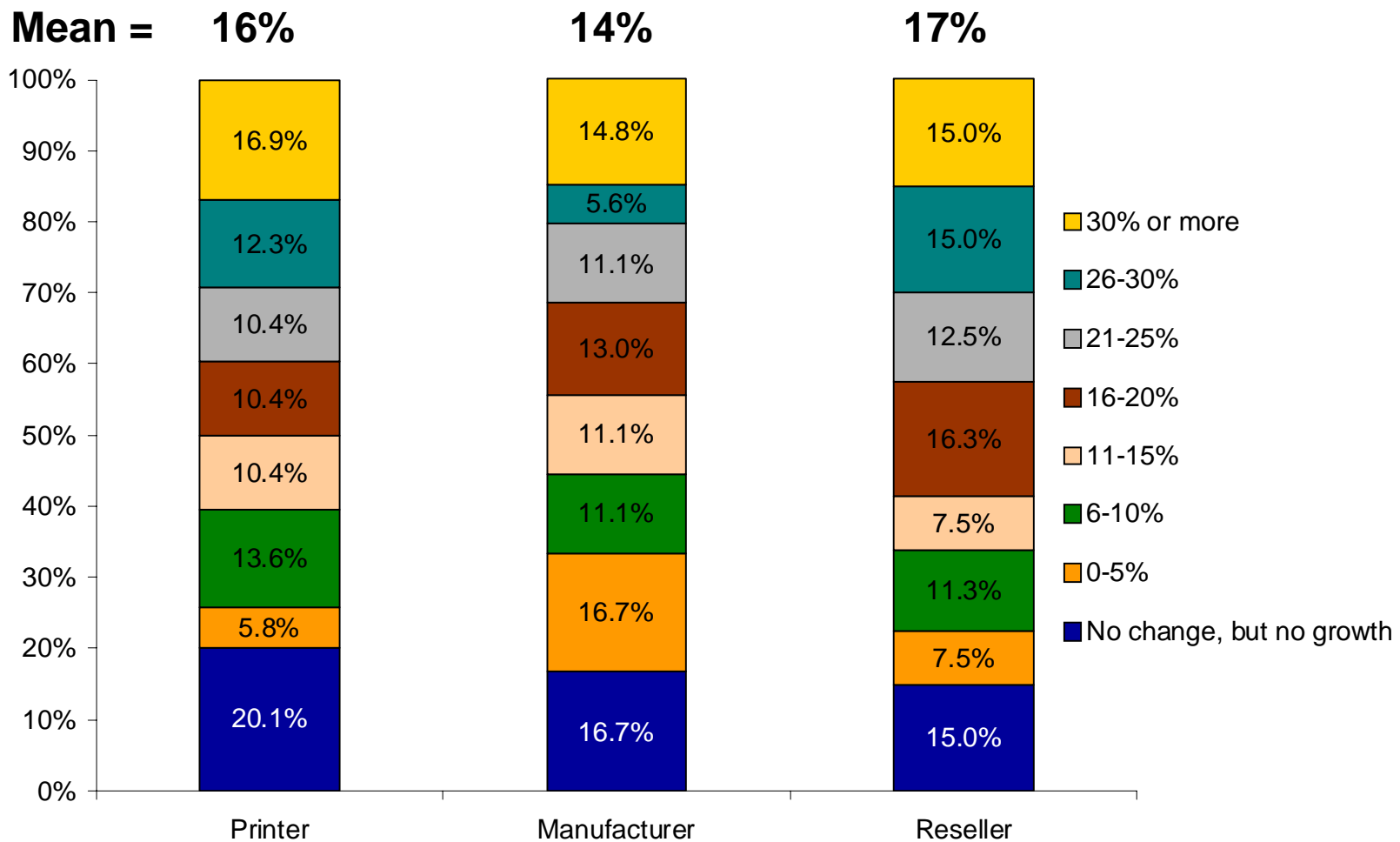
How much has the economic downturn impacted your business?

Mean = 16%



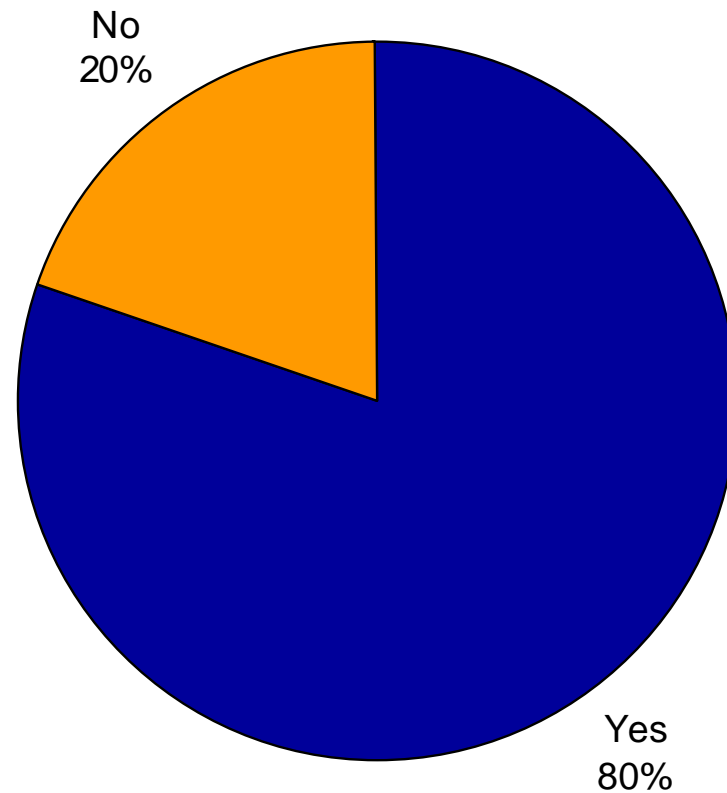
Source: InfoTrends/FESPA Economic Survey 2009

How much has the economic downturn impacted your business?



Source: InfoTrends/FESPA Economic Survey 2009

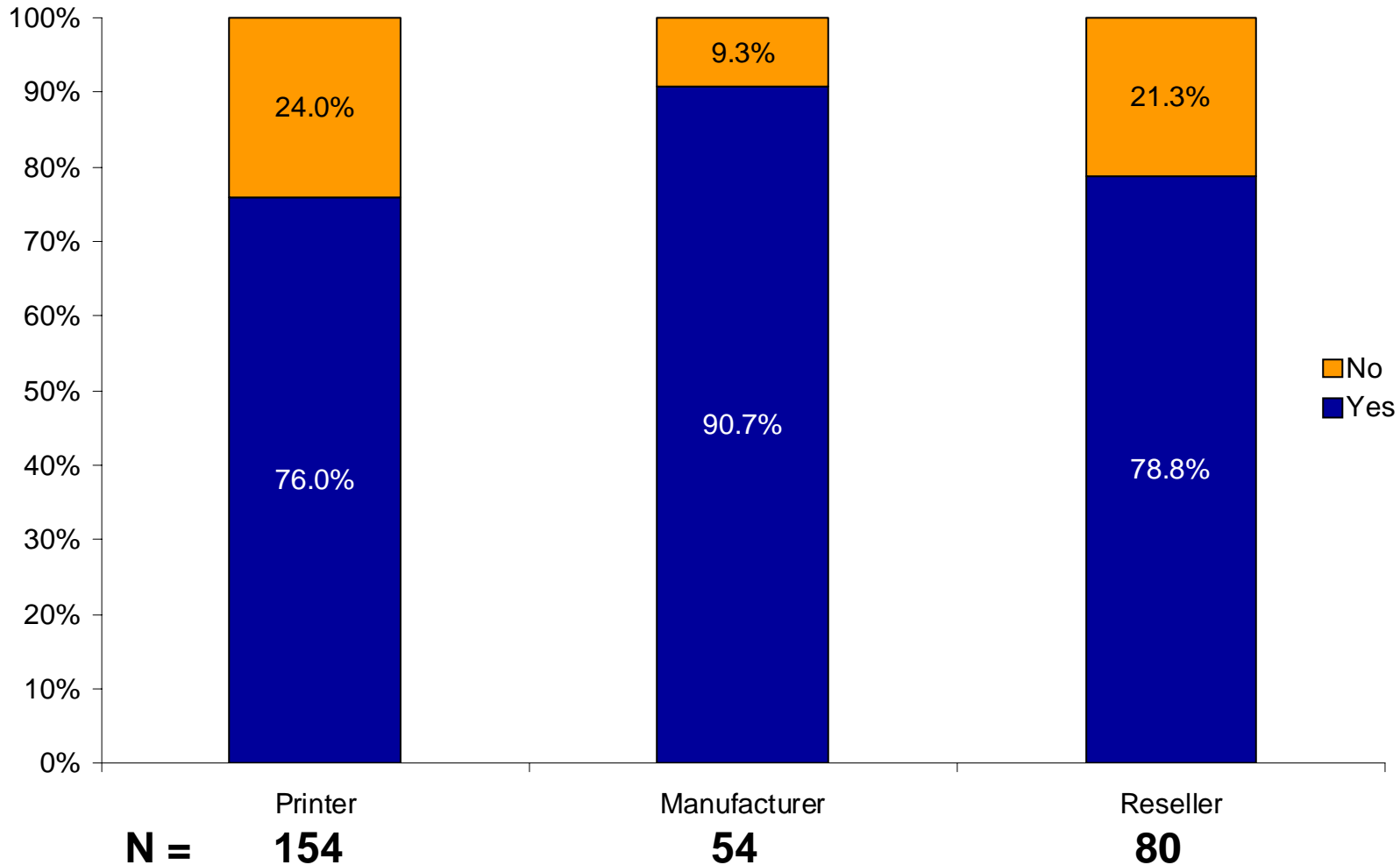
Have you developed any production/operational strategies to help you compensate with this loss of business?



N = 320

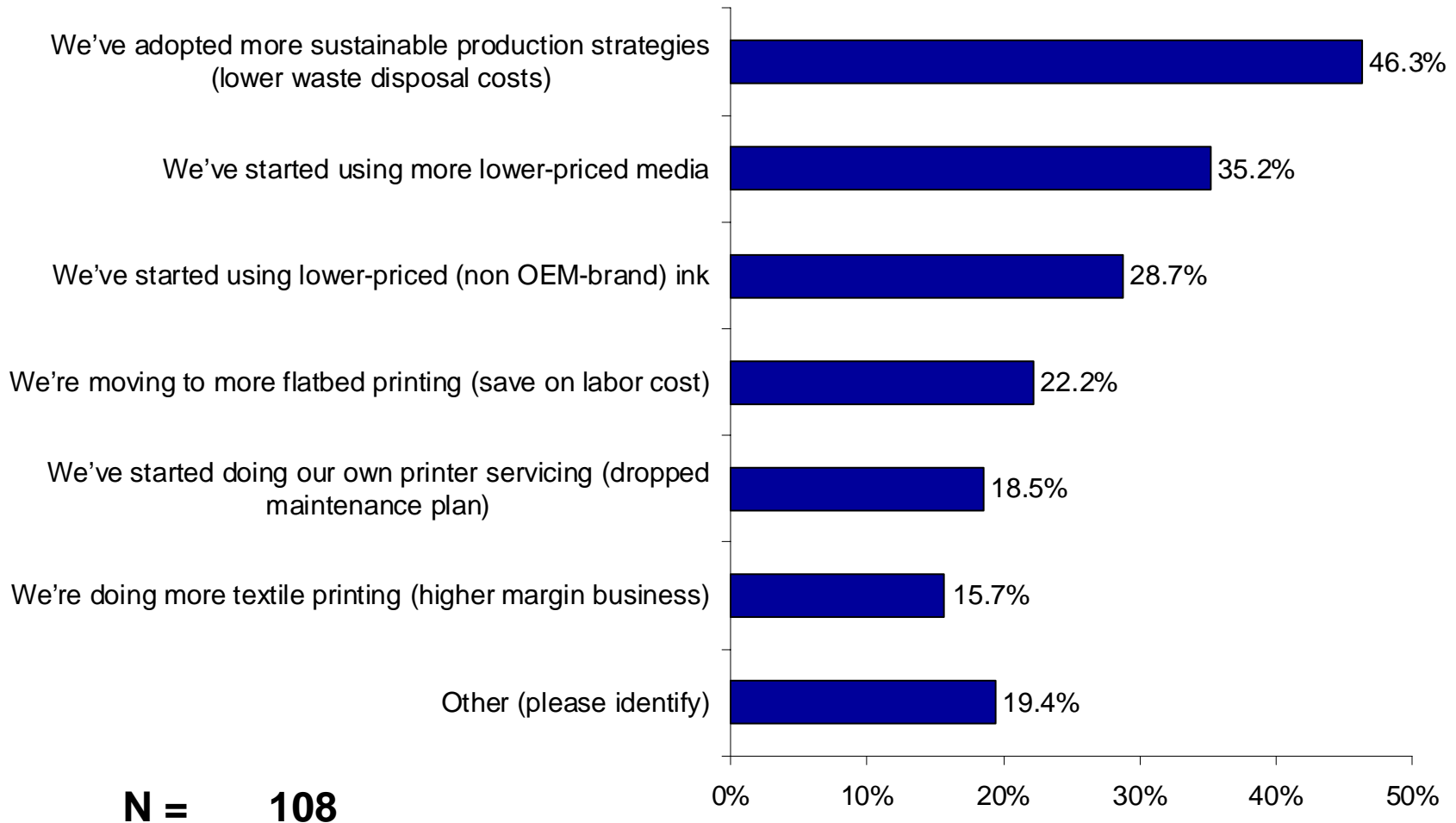
Source: InfoTrends/FESPA Economic Survey 2009

Have you developed any production/operational strategies to help you compensate with this loss of business?



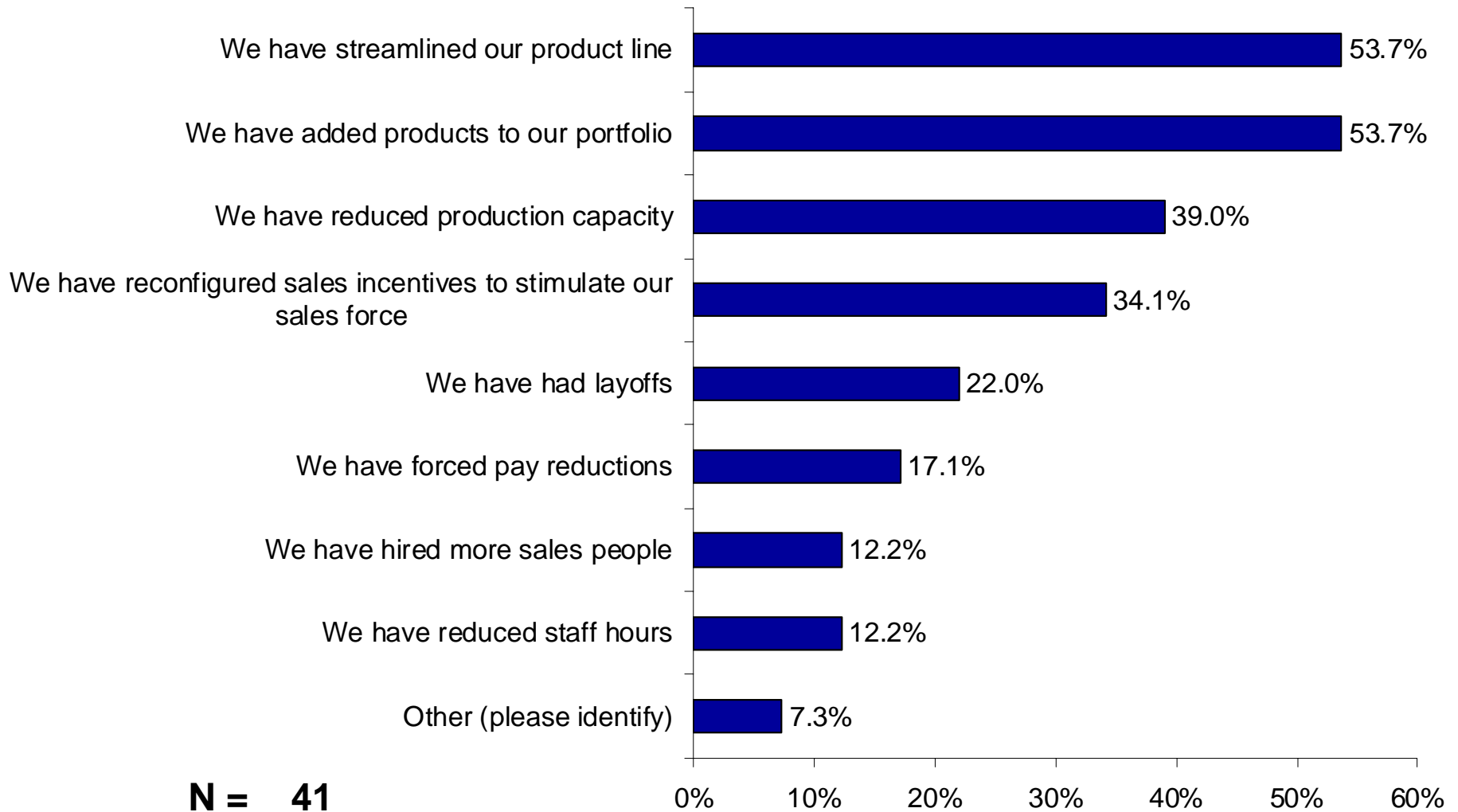
Source: InfoTrends/FESPA Economic Survey 2009

What production/operational strategies have you developed to help you compensate with this loss of business? Printers



Source: InfoTrends/FESPA Economic Survey 2009

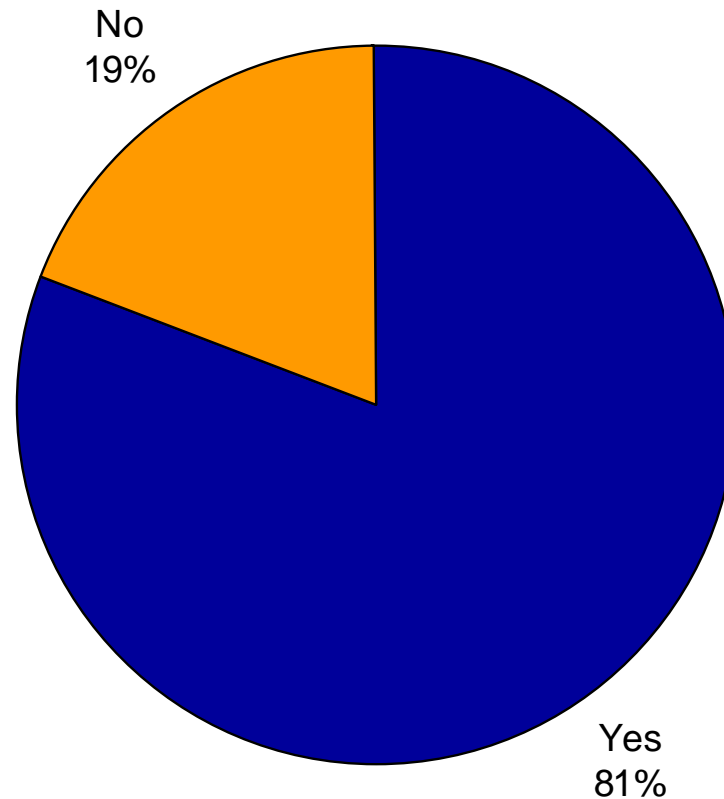
What production/operational strategies have you developed to help you compensate with this loss of business? Manufacturers & Resellers



N = 41

Source: InfoTrends/FESPA Economic Survey 2009

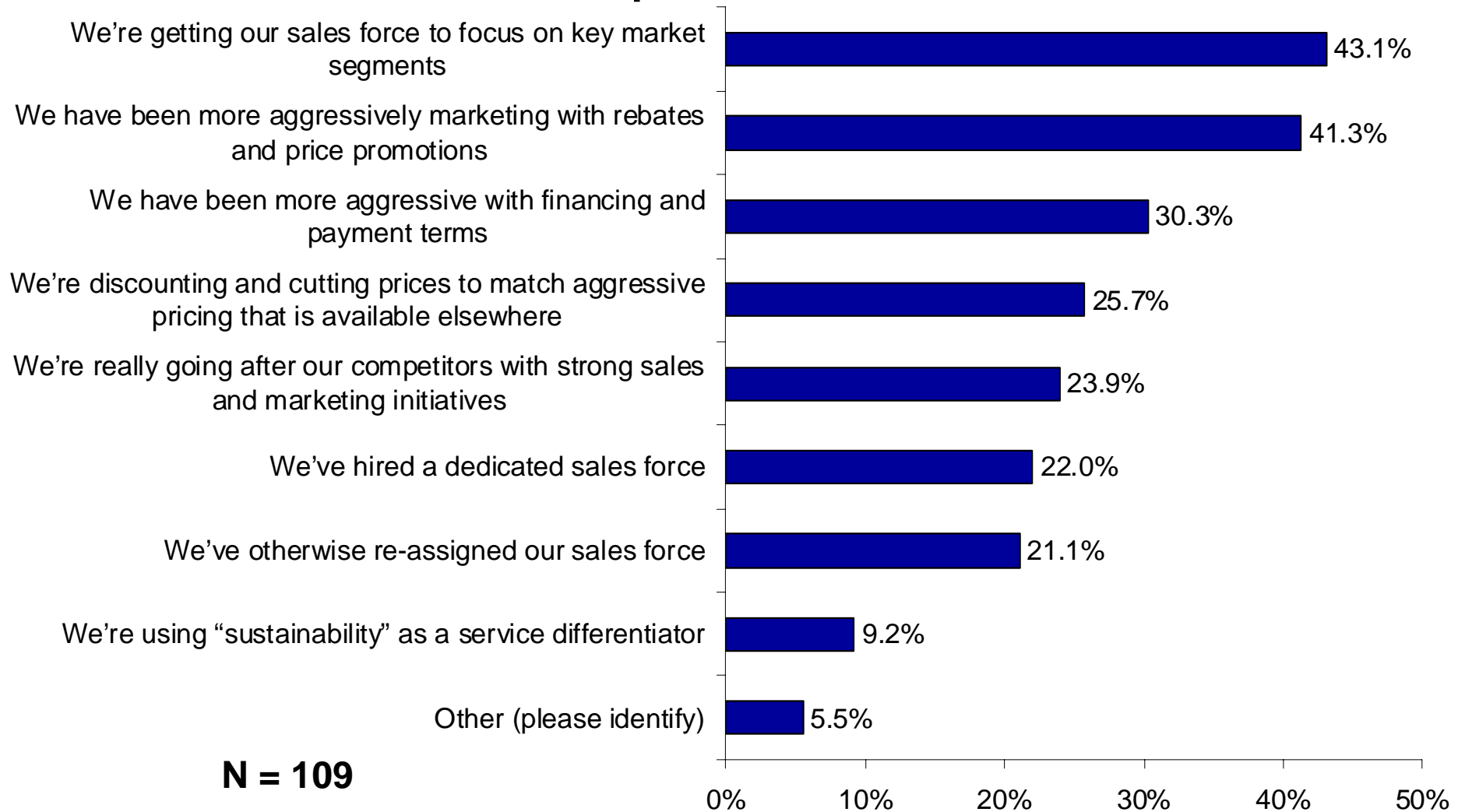
Have you developed any selling strategies to help you compensate for this loss of business?



N = 320

Source: InfoTrends/FESPA Economic Survey 2009

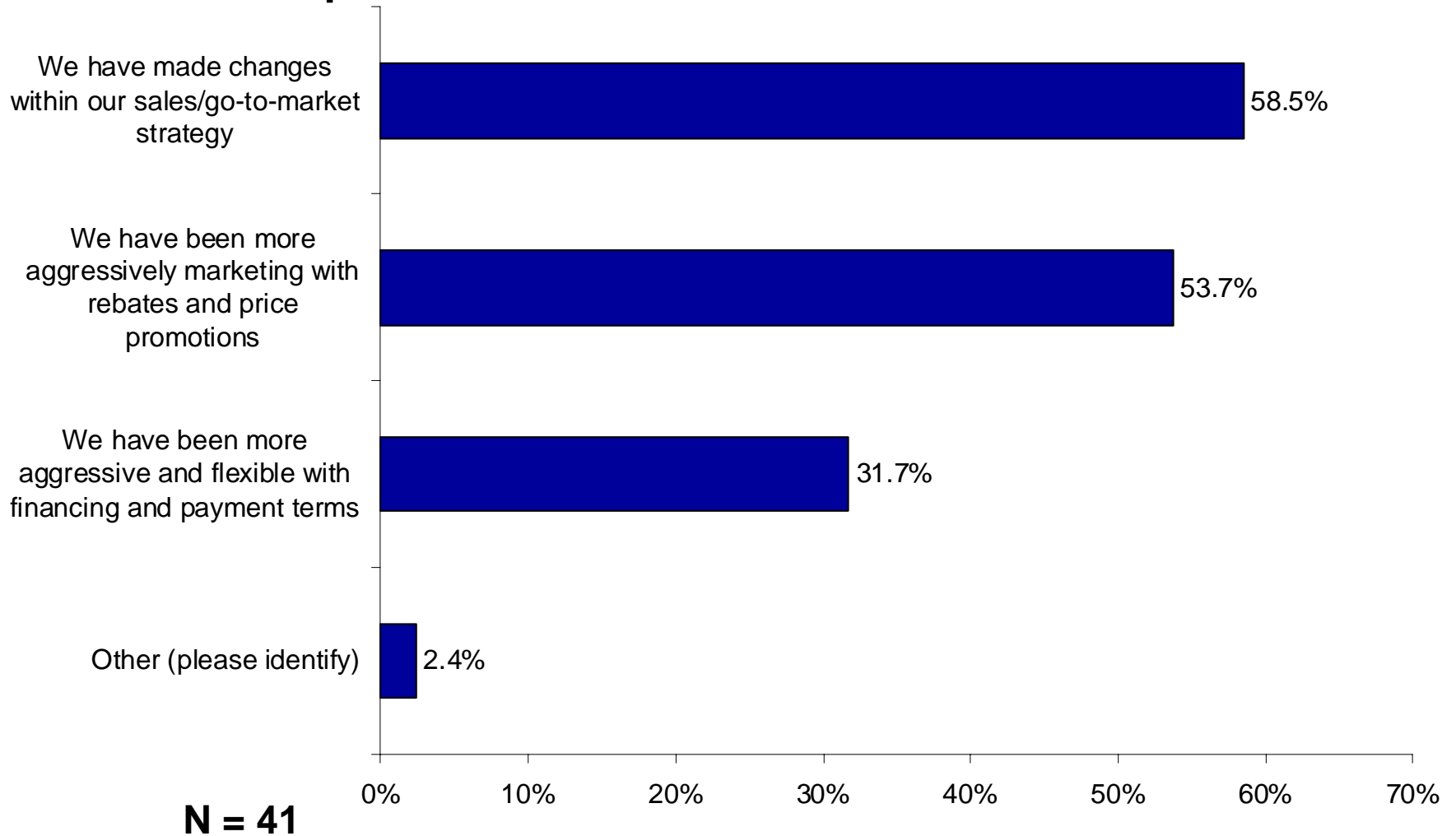
What selling strategies have you developed? Printers



N = 109

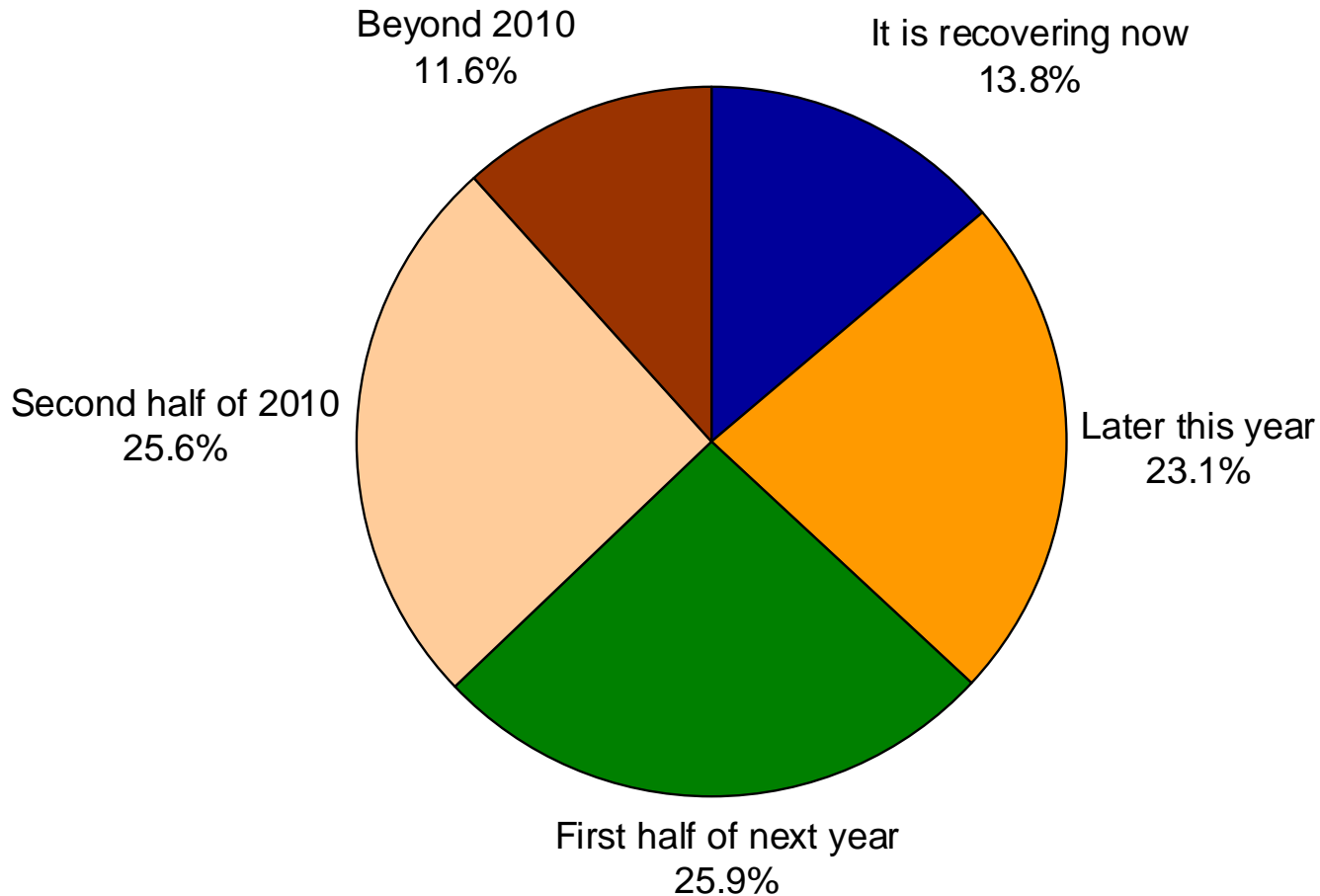
Source: InfoTrends/FESPA Economic Survey 2009

What selling strategies have you developed? Manufacturers & Resellers



Source: InfoTrends/FESPA Economic Survey 2009

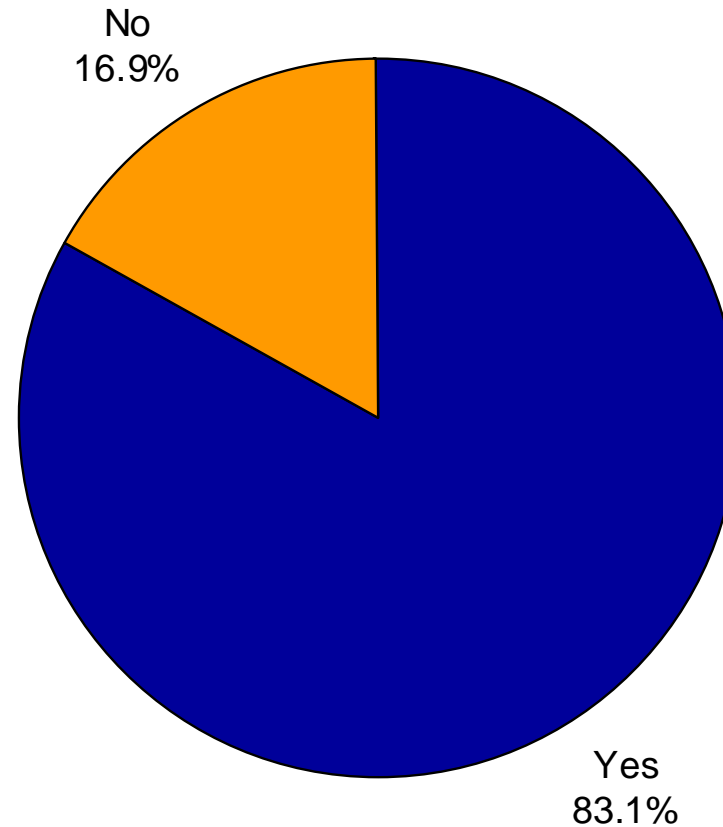
When do you expect the wide format digital printing market to return to its higher levels?



N = 320

Source: InfoTrends/FESPA Economic Survey 2009

Do you think you are well positioned to take advantage of the conditions if the market rebounds?



N = 320

Source: InfoTrends/FESPA Economic Survey 2009

Conclusions

- Economic downturn has had a significant impact on worldwide wide format market
- Stakeholders have been actively adopting operational and selling strategies to offset declines
- Rebound is anticipated for 2010 and stakeholders believe they are well positioned to take advantage of it.