

Afera Marketing Committee (MKC) Meeting Minutes

Date: 14 February 2017

Time: 09.00 – 12.30

Venue: DoubleTree by Hilton
Hotel, Amsterdam, The
Netherlands

Present: Michael Punter (Afera MKC Chairman, Parafix Tapes & Conversions Ltd.)
Sharon Boyle (Advance Tapes International Ltd.)
Jacques Geijssen (American Biltrite Inc.)
Aris Venetis (Atlas Tapes SA)
Annegret Lange (Evonik Industries AG)
Alberto Loro Lamia (Dow Europe GmbH)
Evert Smit (Afera TC Chairman, Lohmann GmbH & Co KG)
Florian Heller (Mondi Group)
Suresh Subramanian (Organik Kimya SAN. Ve TIC. A.Ş.)
Louise Vincent (Parafix Tapes & Conversions Ltd.)
Sonja Santhiram (Sekisui Alveo AG)
Carles Andreu (tesa Western Europe B.V.)
Matthias von Schwerdtner (tesa SE)
Beverley Weaver (TSRC (Lux) Corporation S.a.r.l.)
Bert van Loon (Independent Strategist), guest
Astrid Lejeune (Afera Secretary-General, Lejeune Association Management)
Bathsheba Fulton (Afera Editor)

Excused: Ryan Miller (3M Europe)
Jean-Philippe Ponté (Ahlstrom Specialties)
Melanie Lack (H.B. Fuller Deutschland GmbH)
Stefan Neuner (Neehan Performance Materials)
Stefan Meirsman (Nitto Europe N.V.)
Tom Garcia (Scapa PLC)
Matthias Renka (Synthomer Deutschland GmbH)

Chairman: M. Punter
Secretary: A. Lejeune
Date of Next Meeting: **Tuesday, 3 October 2017 (13.00-17.30)** at the Starhotels Majestic, Turin, Italy, before the Annual Conference. Lunch will be included.

Agenda

1. Opening/Agenda/Competition Law Compliance
2. Minutes and Actions of Meeting of 5 October 2016
3. Update on Creative Concept for "Ideas that Stick" Initiative
4. Annual Conference 2017
5. Afera Media Tools
6. Other Matters (submitted prior to the Meeting)
7. Next Meeting, Closing.

Note:

- Refer to the **Afera MKC Presentation 14 February 2017** slideshow for information co-ordinating with these Minutes.
- **Bolded, highlighted** names denote expected actions. Unless otherwise stated, **all actions are to be completed by the next MKC Meeting on 3 October 2017.**

1. Opening/Agenda/Competition Law Compliance

- 1.1 MKC Chairman Mike Punter opened the meeting, discussing the importance of every single member's contribution on the MKC. A short round of introductions took place.
 - Beverley Weaver of TSRC, Florian Heller of Mondi, Sonja Santhiram of Sekisui Alveo and Jacques Geijsen of American Biltrite Inc. were present as new MKC members.
 - Mr. Punter announced that this would be his last meeting as Chairman. He noted the positive developments in the MKC in promoting Afera, its functionality and recognising its purpose. There is still a lot to be done, however, and he said that going forward, each member should commit himself to a working group (WG). This should not be a meeting for networking but for contributing to the success of Afera through the strategies that have been agreed upon. If members don't choose a WG, they will be assigned to one.
 - Secretary-General Astrid Lejeune explained that over the past few months that she had advertised within the MKC for a replacement chairperson (see **Seeking New Marketing Chairman Emails**). After receiving no response from the MKC, she opened up filling the position to the general membership. Mr. Geijsen, who has a marketing role at American Biltrite, had expressed interest. Ms. Lejeune noted that although Mr. Geijsen was new to Afera and the MKC, there were MKC members with many years of experience on the committee who could support him in getting up to speed and leading the group. The MKC agreed unanimously that Mr. Geijsen should take up the position of MKC Chairman as from the end of this meeting. This means that he will also take up a corresponding seat on the Steering Committee (SC).
- 1.2 Afera's Competition Law Compliance Policy was reviewed by and confirmed by all present.

2. Minutes and Actions of Meeting of 5 October 2016

- 2.1 The minutes were approved and signed as a true record of proceedings, with the following edits:
- Matthias von Schwerdtner noted that on page 3, second bullet point, "2016" should be "2017".

Progress on MKC topics which adds to Afera's mission to "grow the pie" for all companies in the European adhesive tape value chain: (All WG leaders are responsible for reporting back to the MKC on their progress at every meeting)

MKC Working Groups	
Website Management	Louise Vincent, Leader Sharon Boyle <i>Possible tesa colleague (Matthias von Schwerdtner to provide contact details)</i> Bert van Loon Astrid Lejeune Bathsheba Fulton
Education Awareness Initiative	Mike Punter, Leader Sonja Santhiram Annegret Lange Florian Heller Carles Andreu Jacques Geijsen Evert Smit
Annual Conference Programme	Astrid Lejeune, Leader Ryan Miller Jacques Geijsen Matthias von Schwerdtner Evert Smit Bert van Loon
Member Recruitment	Stefan Meirsman, Leader Melanie Lack Stefan Neuner Beverley Weaver Alberto Loro Lamia Mike Punter Astrid Lejeune Bathsheba Fulton

2.2 Social media programme: See agenda item 3.1.

2.3 Website management: See agenda item 3.1.

2.4 Education awareness initiative:

- Mr. Punter explained that the adhesive tape industry has never before gotten adhesive tape technology into formal education for engineers. In 2009, Afera commissioned [a market study into the engineering of consumer electronics](#). General awareness of adhesive tape used as a joining method in consumer electronics was relatively low at 63%. Only 30% of those who were familiar with adhesive tape actually used tapes for joining applications. The PSTC recently commissioned an in-depth research report in an effort to identify the underlying biases, behaviours, and decision-drivers influencing tape usage (see agenda item 4.3). Only 27% of the people they spoke to in a range of industries in North America appreciated the capability of adhesive tape. Mr. Punter has spoken to a number of tape manufacturers who say this isn't true. Nevertheless, it is disappointing.
- There is a clear need to raise awareness of adhesive tape for use as a joining method in many different segments in order to grow the market for tape. Mr. Punter said this is a really important priority for Afera. The Association would like to add its information about the functionalities of tapes into the curricula of existing educational programmes in Europe and must do this on an individual country basis. The content already exists in the Afera website's *Why tape?* section, as well as the websites of many tape manufacturers. Mr. Punter feels very passionate about this project and wants to drive it forward.
- Mr. Punter volunteered to kick off Afera's programme with a pilot project in the U.K. Because universities write their own curricula, he was advised by the Institution of Mechanical Engineers (IMechE) to work through Pearson, the largest technical and professional education awarding body in the U.K., on apprenticeship qualifications. Pearson own the NVQ and BTEC (incl. HNC and HND) brands. The other U.K. players in the apprenticeships market are City & Guilds and EAL.
- Bryony Leonard, responsible for the engineering, manufacturing and automotive sectors within Pearson, has spoken by phone with Afera Technical Committee (TC) Chairman Evert Smit and Edwin Eve 3M UK, in which she explained how Afera needs to produce input to her, and she has provided examples. Louise Vincent and Parafix's apprentice have been through every BTEC course and identified where adhesive tape technology would be relevant. Ms. Leonard also said Afera could provide a general paper just on adhesive tape.
- Mr. Smit reported that a TC WG (Edu-WG) consisting of Uwe Maurieschat (Fraunhofer Institute IFAM), Jeff Burrington (HB Fuller U.K.) and Michael Raidt (Neenah Gessner GmbH) has identified the same units where adhesive tape content can be added, specifically in level-3 degree courses of national education in engineering (see **Tapes in BTEC Structure of Qualification** doc). As the content about adhesive tape technology already exists within Afera between *Why tape?* and Tape College papers, they just need to deliver it to Pearson in a form they can use. The Edu-WG will determine this from the sample curriculum Ms. Leonard has provided and prepare Afera's contribution on adhesive tape technology ready to be delivered to Pearson before the TC's next meeting on 4 October 2017 in Turin. The first step will be having Ms. Leonard evaluate Afera's material. Once the content has been finalised, it can be easily convertible to other institutions.

- Mr. Punter noted that he had also found out that there are centres of excellence in the U.K. called “catapult centres” where they run their own apprenticeships. They also bring in big, market-focussed groups. The centre in Midlands is focussed on automotive, while the centre in the West Country near Bristol, the focus is on aerospace. Afera has established that it cannot send delegates to teach seminars at colleges and universities, but we could think about presenting at one of these centres. Mr. Punter said he knows people who do this and that **Mr. Smit** should consider this within the TC’s Edu-WG.
- Mr. Punter asked MKC members to focus on bringing Afera’s educational development initiative to their home countries, beginning with studying and enquiring about the most practical starting point (level) for higher education or apprenticeship. His initial goal is to get Afera’s programme started in 5 countries.
- The following delegates form the MKC’s **Edu-WG** and will focus their enquiries on these countries:
 - **Mr. Punter > Hungary**
 - **Sonja Santhiram > Switzerland**
 - **Annegret Lange and Florian Heller > Germany**
 - **Carles Andreu > France, Italy and Spain**
 - **Jacques Geijsen and Mr. Smit > The Netherlands and Belgium**
 - The WG members will be contacted by **Mr. Punter** with a general plan/guidelines on going about their country projects.
- If you can sensibly pick your way through the system, it should not take that many hours to find the local contact you need for this project.
- Mr. Punter would like to reach out to Afera’s general membership to recruit people to work on this project in (their) countries which are not represented above. This could include a breakout on education as part of the Annual Conference programme.
- It was decided that Afera’s participation in design/engineering/industry fairs in order to promote tape technology was expensive and questionably beyond our current role as an association. Mr. Punter said he thinks Afera should gain exposure to adhesive tape technology by submitting editorials into trade journals.

2.5 Membership satisfaction and membership recruitment:

- See slides 5-6.

--Discuss Membership satisfaction survey (MSS) results in more detail. Identify any issues for deeper discussion:

- The MKC were satisfied with the purpose of the survey and the response rate of 60%. They agreed that MKC members should also seek out feedback at Afera events and feed it back to the Committee at its meetings.
- The MKC agreed with the results that members value **regulatory affairs** and **networking** the most out of Afera membership.
- The MKC agreed on the following ideas for taking action on the above member values:
 - Formulate the Annual Conference programme with these two topics in mind
 - Make sure one of the presentations covers regulatory affairs
 - Create more interaction among General Assembly and/or Conference presentation audience
 - Create larger networking spaces at the Conference hotel

- Create breakouts on adhesive tape technology higher education curricula and other hot topics; perhaps create a breakout theme with a moderator.
 - The next survey will be based on an even-numbered scale.
- Status of potential member/converter master lists
- Both the potential members and converters master lists/databases have been in the development stage for two years. They are currently almost finalised – awaiting feedback from one or two people. A **Member Recruitment WG** consisting of Melanie Lack, Stefan Neuner, Bathsheba Fulton, and headed by Stefan Meirman was set up at the last MKC meeting. **Beverley Weaver** and **Alberto Loro Lamia** joined the group at this meeting. **Mr. Punter** will cover converters. It was agreed that the WG would hold a conference call to agree on a strategy going forward once the lists were finalised.
- How do we approach potential members? What are our recruitment goals?
- Should we expand our *Afera News* subscription list through this WG?
 - Our most recent goal was set at recruiting 20 new members.
 - The MKC agreed that Afera members' fees are considered to be reasonable, except perhaps at the converting level, which feels they are high.
 - Afera must sell its content very well. Our current corporate sell sheet, which is sent at the beginning of every year with member invoices, should be used. **Ms. Lejeune** will send this to all MKC members.
 - A focused introduction letter should be sent out to both lists, and then MKC members, perhaps according to country/region, must be responsible for following up by making personal contact.

2.6 General communications: Ongoing.

2.7 Annual Conference: See agenda item 4.

3. Update on Creative Concept for "Ideas that Stick" Initiative

- 3.1 **Website Management WG** (Sharon Boyle, Louise Vincent, Bert Van Loon, Ms. Lejeune and Ms. Fulton) activities status and way forward:
- See slides 7-25.
 - New WG Chairperson Ms. Vincent reported on the WG's activities, highlighting:
 - afera.com section [Why tape?](#) content and layout has been finalised and is currently being added and tweaked online. Editing and reorganising of links will be ongoing. **Ms. Fulton** and **Ms. Vincent** will work on ensuring that *Why tape?* includes a call to action. Its launch will be linked to the next newsletter (and/or a separate news flash encouraging feedback from members), Twitters accounts, etc. Before any external action is taken, the **Website MGMT WG** will hold a review of the finalised section. **All MKC members** will review the section, which is unofficially live, and submit their feedback to Ms. Lejeune.
 - Website technical elements
 - Social media tools and reporting, including stats charts
 - Among other things, development and followers continue to

move forward on Afera's two Twitter accounts:

<https://twitter.com/ProductDesign> (3,307 current followers of "Design that Sticks" with a touch of tape, product design topics and news) and https://twitter.com/Afera_Tape (135 current followers of "Afera Adhesive Tape", member and potential member tape network).

- Mr. Smit introduced the MKC to [Flipboard](#), an app which aggregates content from social media, news feeds, photo sharing sites and other websites, presents it in magazine format, and allows users to "flip" through the articles, images and videos being shared. He could do this for just one site, such as Afera's Product Design Twitter page. **Mr. Smit** will look into whether he can put just the *Why tape?* section of afera.com into reader form.
- 2 outstanding actions from the last MKC meeting: **all MKC members** will provide their company social media contacts to Ms. Lejeune. This should include the people who are tweeting and driving your digital strategy. Mr. Van Loon also created a LinkedIn group which **all MKC Members** are requested to join.
- **Ms. Fulton** and **Ms. Vincent** will look at further increasing the number of persons per member company which follows the Afera_Tape Twitter account, starting with contacting all member companies to establish their press/website/social media internal contacts. We can then request them to determine who in their companies are active on social media for their companies and request that they follow the Afera member account.
- Website statistics
 - **Ms. Vincent** will find a dashboard tool which aggregates analytics, email results, etc. for clearer reporting.
 - **All MKC members** will submit their company news to Ms. Lejeune as it becomes available for publication on Afera's website and the member Twitter account.
- The Website MGMT WG would like to recruit one more member. **Mr. von Schwerdtner** will provide the name of a contact in this area in tesa who might be able to join.
- Mr. Van Loon introduced his "Integrated marketing approach 2017-2020" in a 2-pager marketing strategy format (see **Afera Integrated Marketing Plan 2017-2020**) and **Afera Integrated Marketing Plan 2017-2020 Presentation Slides**, highlighting:
 - Activities, results, challenges to date
 - Objectives and channels per scope
 - SEO, social media possibilities
 - SEO efforts will be reduced to internal execution just on the *Why Tape?* section and educational scope of afera.com.
 - **Mr. Van Loon** will include XING in the plan, creating an account for Afera's future use.
 - **Mr. Van Loon** will also look into [lynda.com](#), the education domain of LinkedIn. Perhaps highlights of Afera's Tape College could be leveraged as educational materials?
 - Short editorial mission statement and content
 - For the purpose of generating original website/social content

and providing another benefit to members: **Ms. Fulton** will create an example of a business case (template, format, criteria, scope, no sales pitches, branding or too much company information) for approval of the MKC in March, that members can submit once per year at cost. This will be edited by Afera's editor for consistency of tone and style. If every member has this opportunity (as they do in sharing their news via Afera News, afera.com, and Afera's member Twitter account, they will respect the level playing field. **Ms. Fulton** will reach out to the correct company contacts to build this initiative.

- Next actions include drafting a content style manual and a cloud-based content calendar.
- Organisational issues
 - Next actions include setting up monthly report with activity, KPI progress (starting with selecting a few key metrics and attaching a goal of $\pm 10\%$ relative increase; realising that we are still in the phase of evaluating what does and doesn't work); reviewing tasks, roles of WG members and co-operation between MKC and TC.
- Actions, topics TBD
 - Requesting feedback, approval of the above 2-pager
 - **All MKC members** will provide their feedback on this plan if they didn't do so in the meeting. **Mr. Van Loon** will integrate this into the 2-pager and produce version 1.0.
 - Allocating resources/budget (in progress)
 - A general budget has already been allocated for this activity. **Ms. Lejeune** will draft a budget of costs, subtracting some external SEO work (as it will be reduced and performed internally now) and blog work, adding a fee for Mr. Van Loon, etc., according to this plan going forward.

4. Annual Conference 2017

- 4.1 Look at Conference feedback – discuss evolving needs of members in terms of event format and content – older versus younger generation – specialty versus commodity: Due to time constraints, this item was not specifically discussed.
- 4.2 Set theme, identify topics and leads:
 - Ms. Lejeune reviewed the results of an online survey conducted among the 3 committees (26 responses received) on establishing the theme for Afera's upcoming Turin Conference (see **Afera Turin Conference Programme Theme Survey**).
 - The MKC decided on the theme, to be rephrased: "The Next Generation" customers, workforce, business models, technology – integrating – "The 4th Industrial Revolution" Industry 4.0.
 - Final suggestion: "Exploring new frontiers in customers, workforce, business models and technology"
 - Where do we see the future? What are the different aspects of our industry's future, and how will we get there?

- How you convert, distribute, communicate, recruit/develop organisational skills, manage intellectual property, join the 4th generation, etc.
- Possible lecture topics:
 - Tape market trends – **Mr. von Schwerdtner**
 - Regulatory affairs
 - New bonding techniques – Bosch, one of the biggest tape users in the German home appliance market: **Mr. Smit** will pursue a contact he has, who said they would present if we are clear about what we would like to hear from them.
 - E-Commerce distribution channels and how it will impact the way we do business in the adhesive tape industry – subject of disruptive distribution channels – e.g. Amazon BISS visiting Afera’s Marseille Conference – link this to where knowledge sits – affecting both sides, end users and converters.
 - General business subjects easily attached to “The Next Generation” theme as we are a slow industry to adopt
 - How equipment in the adhesive tape industry is evolving – given by machine supplier(s) – coating or converting – avoid a sales pitch and boring videos.
 - Developments in converting machinery, e.g. laser cutting, what substrates work and what ones don’t.
 - Afera’s education awareness initiative – by Bryony Leonard – **Mr. Punter**
 - Buyer behaviour today – an enlightened buyer.
 - Packaging/masking tape – deliveries that require closures – drone delivery – new developments.
 - 4th Industrial Revolution – someone from the PSTC?
 - PSTC tape usage report – have someone from PSTC, such as Dr. Roan, present the process and findings of their latest market study, as members would find this very interesting.
 - Motivational/lifestyle story
 - Breakout sessions/speed dating workshop – would we require end users? – interactivity and networking opportunities. General business techniques and developments are easier for manufacturers to discuss than specific technologies and business models. Communications and content marketing could be reinforced here, as these subjects are new to almost everyone. The adhesive tape industry is slow to adopt. If you start with breakout sessions, you can put up key words in the room, and the keynote speakers can refer back to these. The leaders of the sessions could lead the content knowing what’s coming in response to the questions. – **Mr. Von Schwerdtner**
- **Annual Conference Programme Working Group (ACP-WG)** will consist of **Ryan Miller, Jacques Geijssen, Matthias von Schwerdtner, Evert Smit (and possibly with support from TC members), Bert van Loon** and **Astrid Lejeune**. They will be contacted by **Ms. Lejeune** shortly and will agree on the theme title (above) and presenting criteria and provide support to Ms. Lejeune on all programme content, including scheduling a maximum of 10 presentations.

- 4.3 From a list of options submitted at the meeting by all MKC members, choose a study of interest to Afera members for purchase and presentation at the Turin Conference:
- Ms. Lejeune explained that only Mike Watson of Synthomer had followed up on the action for all MKC members to come to the meeting with a market study of choice. Yesterday a number of MKC members had sat in on a conference call with Mr. Watson and Dr. Graeme Roan, business development director at PSTC, regarding a recent study he had commissioned on behalf of PSTC's marketing committee. In 2016, a consulting firm surveyed the design/architect community re: opportunities to replace liquid adhesives with tapes. The report revealed that within the building and construction industry, there are low levels of familiarity (27%) about the benefits of using tape as opposed to using the more traditional methods of bonding found in that industry. The report also identified the underlying biases, behaviours, and decision drivers influencing tape usage. **Ms. Lejeune** will distribute the report to the MKC. The presentation format was good and could be used as an example for other presenters. **Mr. Punter** will follow up with PSTC on how they are moving forward in this area when he meets with them in March (perhaps asking if Dr. Roan would present their market study at our Turin Conference), after which he will report back to the MKC. In general, however, Mr. Punter felt that Afera is ahead of PSTC in both market research and awareness and communications. **Ms. Fulton** will mention the PSTC's study along with Afera's past market study in a short article in *Afera News* and at afera.com, reminding our member audience of what we've done and why we're on our current path.
 - Freedonia's study *World Pressure Sensitive Tapes* was updated and released in October 2016. **Mr. von Schwerdtner** will plan with Astrid on taking the template of [the 2014 slideshow](#) of Afera's Dubrovnik Conference and updating the 36 slides according to the latest results of the study. The MKC agreed that it would be most desirable to have a member such as Mr. Von Schwerdtner present the study update.

5. Afera Media Tools

- 5.1 Afera's digital newsletter – Mail Plus *Afera News* click-through stats – and resulting editorial programme changes which have already been put into place:
- Ms. Lejeune presented email statistics and a new content calendar which is being phased into the newsletter programme.
 - **Ms. Lejeune** will check if she can track whether recipients forward *Afera News* to others. This may also be detectable through individual opening rates (whether they open the item multiple times).
- 5.2 Afera's website: See agenda item 3.1.

6. Other Matters (submitted prior to the Meeting)

- 6.1 No other matters were discussed.

7. Next Meeting, Closing

- 7.1 Next Afera MKC Meeting will take place on **Tuesday, 3 October 2017 (13.00-17.30)** at the Starhotels Majestic, Turin, Italy, before the Annual Conference. Lunch will be included.
- 7.2 The Chairman closed the Meeting.

Astrid Lejeune
The Hague, 4 March 2017

Disclaimer

Afera operates within the regulatory framework of competition law as set out by the European Union and national legal systems and respects all rules thereof. Afera actively raises awareness about competition law among its Members and encourages its Members to comply with these rules. The purpose of discussions within Afera is to identify general trends and market developments without identifying individual company data. Afera does not accept responsibility or liability for any type of restrictive agreements concluded by its individual Members during Afera Meetings or within the context of Afera events, in spite of the aforementioned precautionary measures.
