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**Marketing Committee
14 February 2017
09.00 – 12.30 hrs.
DoubleTree by Hilton
*Room London 4***

MEMBERS COMPLYING WITH COMPETITION LAW

In order to protect the interests of individuals and member companies, while active within Afera (in the broadest sense), the Competition Law policy should always strictly be followed.

- 1) Do not agree on nor discuss prices, (including price increases and pricing methods), discounts, terms of sale, the refusal to deal with another company, or profit margins with any representative of any Afera member company;
- 2) Do not make announcements about your prices or those of competitors;
- 3) Do not talk about the plans of individual companies (yours or competitors') regarding specific geographic or product markets or regarding particular customers;
- 4) If in doubt consult the Associations' staff or legal counsel.

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|---|--------|
| 1. Opening / Agenda / Competition Law Compliance | MP |
| - Succession MKC Chair position | |
| 2. Minutes and Actions of 5 October 2017 Meeting | |
| Progress Marketing Committee topics which adds to Afera’s mission to ‘grow the pie’ for all companies in the European adhesive tape value chain: | |
| 2.2 Social media programme (<i>status report under Agenda item 3</i>) | |
| 2.3 Website management – <i>under agenda item 3</i> | |
| 2.4 Education awareness | MP |
| - Status educational curricula programme and actions addressed to Afera’s TC | |
| 2.5 Membership satisfaction and membership recruit | |
| - Discuss MS Survey results in more detail. Identify any issues for deeper discussion | All |
| - Status potential member/converter master list | BF |
| - How do we approach potential members? What are our recruitment goals? | |
| 2.6 General communications – <i>ongoing</i> | |
| 2.7 Annual conference – <i>under agenda item 4</i> | |
| 3. Update on Creative Concept for “Ideas that Stick” Initiative | |
| 3.1. Website Management WG activities status and way forward | LV/BvL |
| 4. Annual Conference 2017 | All |
| 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 | |
| 4.2 Set theme, identify topics and leads | |
| 4.2 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 | |
| 5. Afera Media Tools | |
| 5.1 Afera’s digital newsletters – <i>MailPlus Afera News click-through stats – and resulting editorial programme changes which have already been put into place</i> | AL |
| 5.2 Afera’s website (<i>already discussed under item 2.2</i>) | |
| 6. Other Matters (please advise on any items for inclusion prior to the Meeting) | All |
| 8. Next Meeting, Closing | MP |

Education Awareness – Status

Mike/Evert

- Status education curricula programme and actions addressed to Afera's TC
- Meeting Mike with Pearson on introducing adhesive tape into the Syllabi of engineers – they agreed to support the initiative
- Mike and Evert had a conference call, the TC WG will work on a training module to be presented
- Meeting notes of Mike to Pearson:
 - Pearson employ 40,000 globally, 3k in the UK, 10k in both the US and China
 - You are responsible for the Engineering, Manufacturing and Automotive sector
 - You confirmed the advice given to me by Edward Hansom , Professional Development advisor of the Institute of Mechanical Engineers to promote this activity through Apprentices is the best route for us.
 - Pearson is the biggest Technical and Professional Education awarding body in the UK
 - Pearson own the HNC , HND and Btec brands
 - Afera should focus on Btec level 3
 - Bryony to supply me with Content documents both essential and indicative
 - We will use these to add bonding etc to various modules
 - We will also create an Adhesive Tape module
 - You are happy to participate in a telecom/video discussion with the Afera Technical team to ensure they provide you with what is needed
 - In the UK I will point Afera to the various catapult centres for example The Advanced Manufacturing Centre at Coventry , Composites Bristol etc
 - Finally I have attached a copy of our Why Tapes Presentation

2.5 Membership satisfaction and membership recruit

- Discuss MS Survey results in more detail. Identify any issues for deeper discussion All
- Status potential member/converter master list BF
- How do we approach potential members? What are our recruitment goals?

Afera conducted a Membership Satisfaction Survey in 2016. See **Afera Membership Satisfaction Survey (MSS) Results 2016** attached to these minutes. Ms. Lejeune and the MKC members discussed the following results, which indicate that Afera is on the right track in meeting its mission to add the greatest value possible to our members' businesses:

- 66 of 110 members (60%) responded.
- Adhesive tape manufacturers (33) and raw materials suppliers (20) made up the largest groups of respondents.
- “Networking within the Association is important” and “the adhesive tape industry needs representation” were the most heavily weighted statements.
- 94% of respondents rated membership in Afera a 3 or 4 out of 4.
- “Networking possibilities with important industry players” and “Information, co-operation and representation on matters of European and global standardisation” were confirmed as very important aspects of membership. The next most important items were attendance of Afera events and access to market research data. Next time, for question 6 we will ask respondents to rate their preferences in order of importance (assigning a number value to each item).
- 20% of respondents have attended more than 20 Afera events.
- Most respondents want Afera’s Annual Conference to be held in Italy in autumn. The highest-rated cities for holding events were Barcelona, Munich, Amsterdam, London, Rome and Brussels. (Next year’s Conference will be held in Turin in October; 2018’s International Technical Seminar will be held in Munich.)
- Market data, technology (products, applications, innovation, test methods), raw materials, economic trends and environmental regulation are the most popular subjects for papers at events.
- More than half of respondents indicated that they would be willing to invest time in one of Afera’s committees.
- 78% gave Afera’s website a 3, 3.5 or 4 out of 4 for content and user-friendliness.
- Many respondents are also members of FEICA, PSTC and IVK.
- As most respondents included their contact information, we could follow up the survey by contacting them to ask for more detailed points of view.

All MKC members will review the MSS results and prepare to discuss them at the next MKC meeting in February 2017. **Ms. Lejeune** will add this item to the MKC meeting agenda for discussion.

2.5 Membership satisfaction and membership recruit

- Discuss MS Survey results in more detail. Identify any issues for deeper discussion All
- Status potential member/converter master list BF
- How do we approach potential members? What are our recruitment goals?

Because of M&As, Afera members are disappearing along with their member fees. There are also many potential industry members who should be approached. The MKC agreed to create a Member Recruitment WG consisting of Melanie Lack, Stefan Neuner, **Mike Watson** (to assign this task to a colleague), Bathsheba Fulton, and headed by Stefan Meirsman. Mr. Smit volunteered to approach potential members personally but will not sit in the WG. **Ms. Lejeune** will send an updated *current* and *past* Afera member lists to all WG members and schedule the first conference call once both the **Afera Potential Members Master List** and **European Converter Master List** have been adequately updated by **the entire MKC**. See attached.

o Possible goals:

- 20 new members within the next year
- expand *Afera News* subscriber base
- discuss/resolve active and associate fee differences depending on size/location of companies and subsidiaries (**Ms. Lejeune** can put together an annual study/chart since 1999 of membership breakdown according to type, size and location to judge the fairness of charging active members according to size and suppliers a flat fee). Could a sliding scale be used based on sales to the industry?

o Methods:

- email campaign?
- personal (call or face-to-face) approach by a member of the WG/MKC and TC in parallel
- Divide the potential member lists over individuals who are responsible for making contact?
- warn members that fees will increase if they don't actively participate in this initiative?

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1. Update on Creative Concept for “Ideas that Stick” Initiative

3.1. Website Management WG activities status and way forward

LV/BvL

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**Update Report
February 2017**

**Website Management
Working Group**

Contents

- Actions completed since the last meeting
- Statistics
- Further marketing integration
- What next?
- What do we need from you?



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Actions completed since the last meeting

Website content:

- The “Why Tape” content was reviewed and required some amendments and reorganising.
- Bathsheba completed this huge task, growing the document to 52 pages / 8,200 words / 180 images.
- Stephanie has begun to add the content to the website.
- Once live, the design Twitter account will link into this section of the website.



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Actions completed since the last meeting

Website technical elements:

- Gated pages – the technical restriction has been fixed.
- 404/broken links – to be completed following “Why Tape?” completion
- SEO work – covered in Bert’s slide on new marketing approach.

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Actions completed since the last meeting

Social media tools and reporting:

- Work has progressed on the @_ProductDesign and @Afera_Tape Twitter accounts.
- A professional version of Buffer (a content sharing tool we use) has been trialled.
- Social tools have been linked with Google Analytics and each other.



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Actions completed since the last meeting

Social media: @_ProductDesign:

Target audience - Designers and Engineers who may or may not use tape.

- Twitter users with target audience related terms in their bios are followed.
- Tweets continue to be posted throughout the month (1-2 posts per day).
- Tweets consist of latest developments in design, materials and anything of interest relating to product design.
- Posts linking to the Afera website are to the designer interviews.

Design that Sticks
Scanning the web for Next Product Design



Actions completed since the last meeting

Social media: @Afera_Tape:

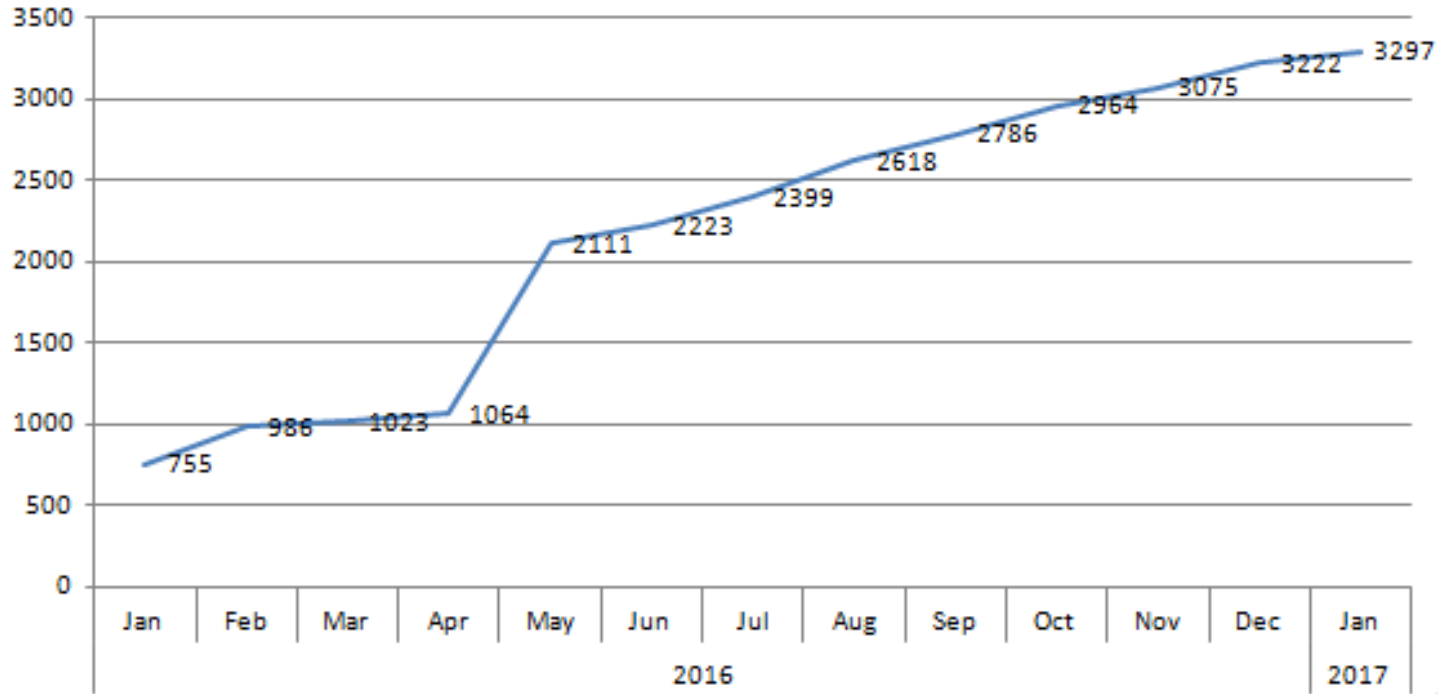
Target audience - Members and potential members

- Afera members and potential members followed (Afera list).
- Twitter users (with target audience related terms in their bios) followed.
- Tweets posted throughout the month.
- Tweets consist of industry developments, insights and member related items.
- Posts link directly to the content owner's page, not the Afera website.



Social media statistics

Design account followers



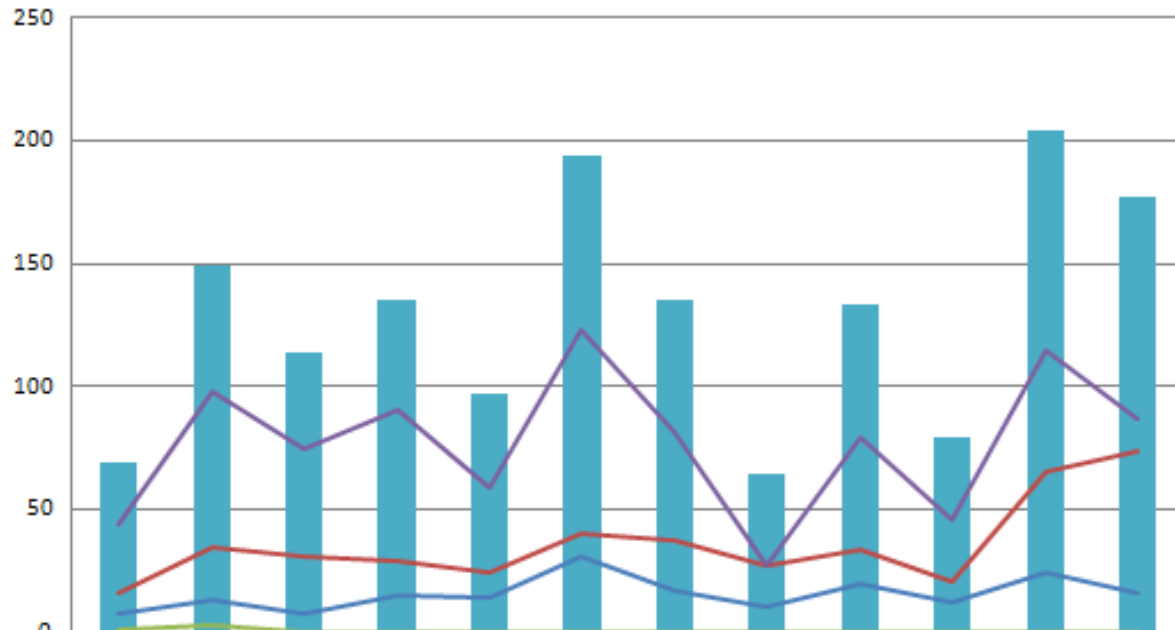
Design that Sticks

Scanning the web for Next Product Design



Social media statistics

Interactions - Design Account



	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan
Total interactions	69	149	114	135	97	194	135	64	133	79	204	177
Retweets	8	13	8	15	14	31	17	10	20	12	24	16
Likes	16	35	31	29	24	40	37	27	34	21	65	74
Mentions	1	3	0	0	0	0	0	0	0	0	0	0
Clicks	44	98	75	91	59	123	81	27	79	46	115	87

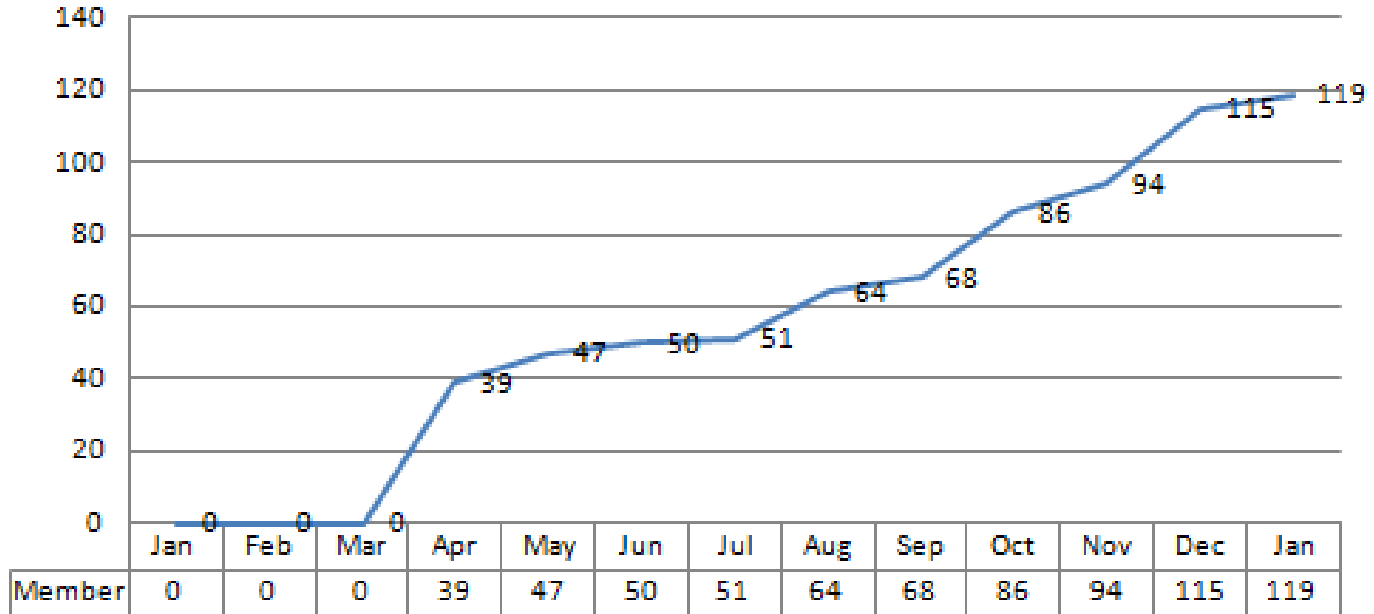
Design that Sticks

Scanning the web for Next Product Design



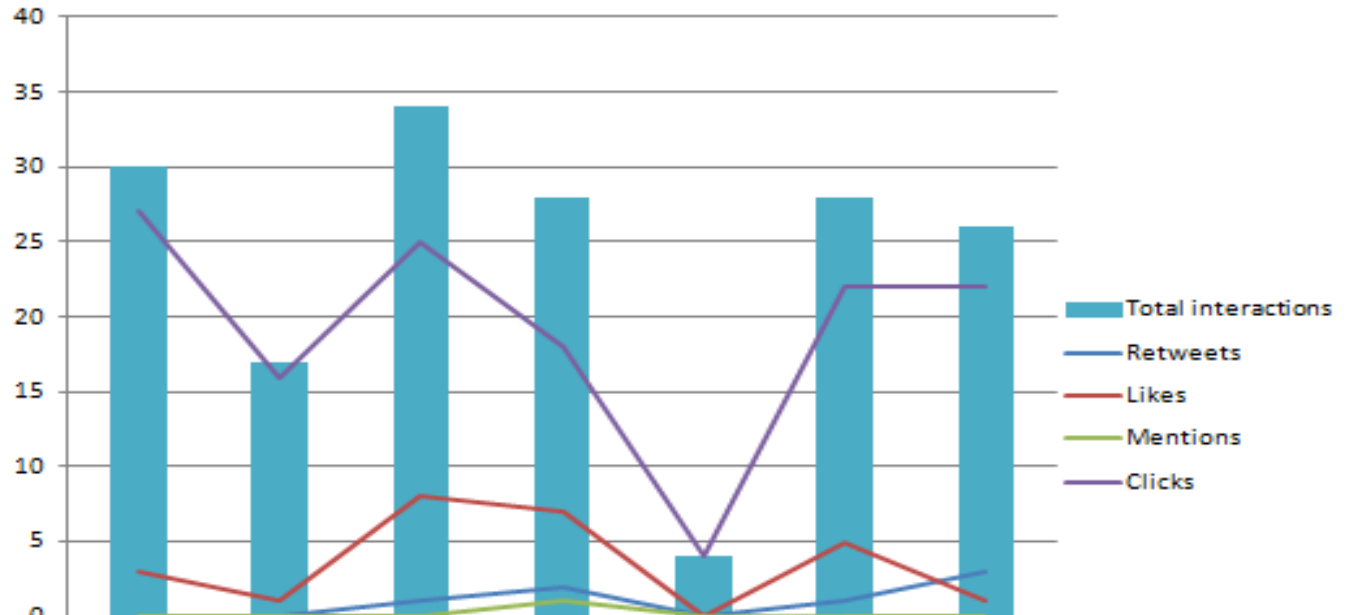
Social media statistics

Member account followers



Social media statistics

Interactions - Member Account

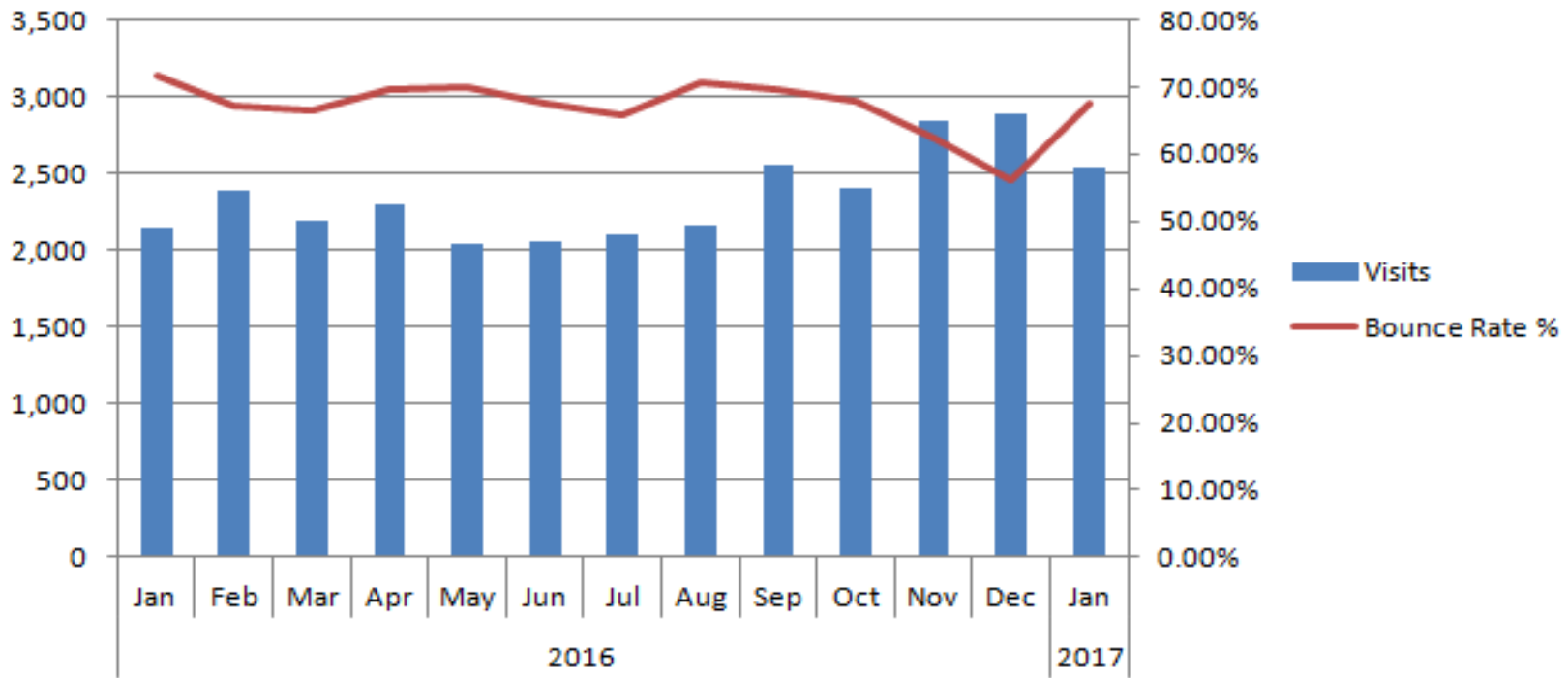


	Jul	Aug	Sep	Oct	Nov	Dec	Jan
Total interactions	30	17	34	28	4	28	26
Retweets	0	0	1	2	0	1	3
Likes	3	1	8	7	0	5	1
Mentions	0	0	0	1	0	0	0
Clicks	27	16	25	18	4	22	22



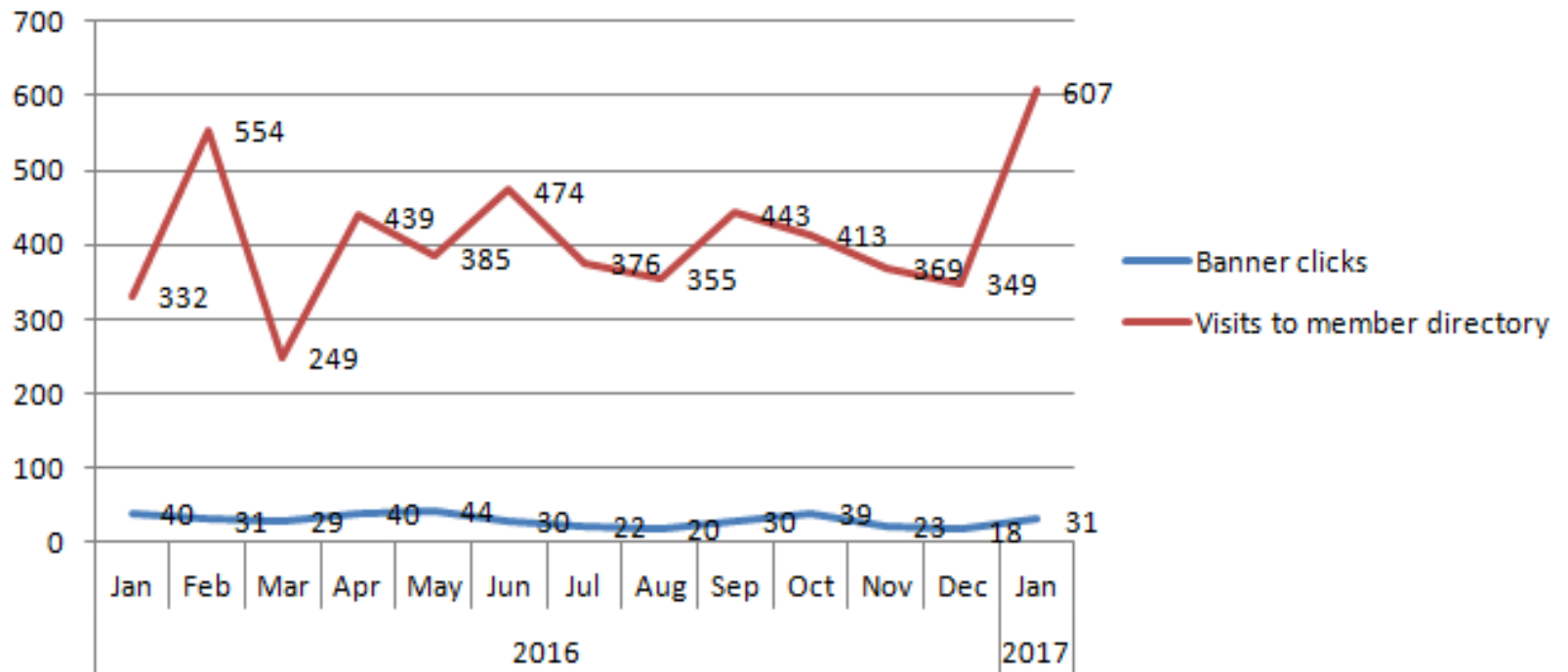
Website Statistics

Visits and Bounce Rate



Website Statistics

Banner Clicks and Member Directory Visits



Further marketing integration

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Further marketing integration

Actions/Topics TBD

1. Reduce further SEO efforts (as long as main technical structure is right) to the why tape section and educational scope (executed internally) as a 2017 test
2. Create a cloud based content calendar (newsletter, social content etc.) in order to work from/with one single document (free dedicated solutions available, or xls in Google)
3. Review tasks, roles, governance and reporting to enable everyone to work autonomously and effectively while maintaining centralised control by Astrid
4. Cooperation between tech and mkt committee
5. Request (conditional) approval for this integrated approach
6. Resource/budget allocation TBD (in progress), but within budget range.

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What next?

- Complete “Why Tape” section and link to from Twitter.
- Continue to target social media contacts within existing member companies.
- Continue to target new members.
- Consider/approve integrated marketing approach.
- Find a dashboard tool which aggregates analytics, email results etc for clearer reporting.



What do we need from you?

- Feedback
- Social media contacts within your organisations
- Latest company news to share on Twitter
- Additional group member



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Thank you for your time

Afera Website Management Working Group

4. Annual Conference 2017

All

- 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
- 4.2 Set theme, identify topics and leads

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4.2 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

Brainstorm optimisation market data and trends update to Afera members:

- Do studies on mechanical fastening exist? For the February meeting, **all MKC members** will draft a list of options of studies that Afera could invest in for presentation to members. Send these to Ms. Lejeune by 1 February 2017. **Mr. Watson** in particular will bring a shortlist of studies of interest to the industry. This may entail asking research companies that you are in contact with what relevant topics they offer. **The MKC** will then choose one for purchase and presentation at the Turin Conference in October 2017.
- The MKC could explore adding a discussion and polling function to Afera’s website, asking market research companies such as AWA and Freedonia to provide 10 times a year, for example, a piece of information from one of their studies. This item would then be subject to a poll and discussion of Afera/industry members, attracting traffic. This could also be promoted through Afera’s social media programme.

the PSTC has been working on a "Grow the Pie" initiative as well. Their marketing committee (has hired a consulting firm in 2016 to survey the design / architect community on where there are opportunities to replace alternative bonding technologies with Tape. their initial conclusion was to replace liquid adhesives.

Dr. Graeme Roan present the study findings to the marketing committee (via webinar; I would join as well) to share the PSTC commissioned study and the potential next steps. This may be lead to a few options:

1. AFERA could engage a similar (the same) firm to get an European opinion on the best path
2. Some joint effort to "Grow the Pie" with PSTC - specifically vs liquid adhesives across regions
3. Give AFERA a new idea of how to approach the topic; AFERA may still focus on fastener replacement or some different conclusion

5. Afera Media Tools

5.1 Afera's digital newsletters – *MailPlus Afera News click-through stats – and resulting editorial programme changes which have already been put into place*

AL

5.2 Afera's website (*already discussed under item 2.2*)

Afera News 2017	Copy deadline	Issue date	Contents	Notes
January	25 January	31 Jan at the latest	<ul style="list-style-type: none"> Final Insiders Conference Debate article (long form)(use Jean-Loup's slides) Reardon (Smit) market data Conf. presentation (long form) review Crichton Conference pres. on purchasing/suppliers review (short form) Afera Committee Meetings schedule Short article about Afera Website Management WG progress? Short article about education initiative? Sponsorship and advertising opportunities in 2017 mention Member news article: Avery Dennison signs wind power purchase agreement Member news article: 	
February	21 February	28 Feb at the latest	<ul style="list-style-type: none"> Launch of <i>Why tape?</i> at afera.com Momper Conf. pres. on raw materials review (short form) Röbeling Conf. pres. on coating and drying in R2R processes review (short fom) 8th Tape College programme 	
March	22 March	31 March at the latest	<ul style="list-style-type: none"> Launch of <i>Why tape?</i> at afera.com Puls Conf. pres. on Airbus delivering faster review (short form) Masson Conf. pres. on innovation methodologies review (short form) 8th Tape College reminder 	
April	26 April	30 April at the latest	<ul style="list-style-type: none"> Macaré Conf. pres. on regulatory affairs review (short form) Caltabiano Conf. pres. on building customer relations review (short form) 	
May	17 May	31 May at the latest	<ul style="list-style-type: none"> 8th Tape College review/Gerstenberger editorial? Link to updated industry events calendar Annual Conference programme 	
June	21 June	30 June at the latest	<ul style="list-style-type: none"> Annual Conference registration deadline 	
July	14 July	31 July at the latest	<ul style="list-style-type: none"> Annual Conference reminder 	
August	16 August	31 August at the latest	<ul style="list-style-type: none"> Annual Conference reminder 	
September	20 September	30 September at the latest	<ul style="list-style-type: none"> Annual Conference reminder 	
October	18 October	31 October	<ul style="list-style-type: none"> Annual Conference 2017 editorial Short article about Conference participant feedback General Assembly 2017 Minutes General Assembly 2017 Report 	

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- 6. **Other Matters** (please advise on any items for inclusion prior to the Meeting) All
- 7. **Next Meeting, Closing** MP

MKC meeting Tuesday 3 October 2017 – afternoon, Starhotel Majestic, Turin

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