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FACTSHEET

EEAA MARKET MONITOR #5 INSIGHTS 2013 Annual Report and July – December 2013 Six Months

The Exhibition and Event Association of Australasia (EEAA) capture insights from Members about the health and performance of the exhibition and events industry. The data is from Organisers, Venues and Suppliers who are members of the Association. Independent research company, Micromex Research produces the Market Monitor. The following results cover the period of July to December 2013 with consolidated results for the 2013 calendar year.

The EEAA Market Monitor captures key facts and trends that demonstrate the health of the industry and its significant economic impact.

This latest sample consisted of 76 unique respondents – including 16 organisers, 42 suppliers and 18 venues. This sample size represents 57% of total EEAA members and provides a low sampling error.

KEY OUTCOMES: FOR SURVEY PERIOD – 2013 CALENDAR YEAR

EXHIBITIONS GENERATING PAID CONFERENCES AND SEMINARS

- Overall, 45% of shows had a paid conference or seminar program alongside the event
- 47% of trade events had a paid conference program
- 22% of consumer events had a paid conference component
- This is trending upwards and shows the growing importance of seminars and conferences within exhibitions.

EXHIBITION NUMBERS

- EEAA Member Venues hosted 485 events, including 100 new events in 2013
- 22,285 exhibitors participated in events organised by EEAA members in 2013
- EEAA Organiser members organised 129 events in 2013
- 1.05 million visitors attended EEAA member events in 2013
- The average visitors per event in the Jul-Dec 2013 period was 9,786 which is well up on the Jan-Jun 2013 average of 6,164
- In the reporting period approximately 423,000m² of exhibition space was sold utilising over 1.12 million m² of venue space
- 8% of organisers' overall shows were new, whilst 21% of venues' overall shows were new
- 3,509 full time staff were employed, 5,684 part-time staff and 5,578 contractors
- The Lifestyle sector is the predominant type of show operating, representing 18% of all shows, followed by Homewares (14%), and Retail/Wholesale (12%)



NEW EVENTS

- 13 new events are expected to be held in 2014
- New events cover industries including Lifestyle, Health, Homewares, Energy & Resources, Manufacturing and Business
- 56% of organisers are expecting to hold at least one new exhibition in 2014
- New South Wales dominates new events with 54% of all proposed new events to be held in NSW
- Western Australia represents 23% of proposed new events

TRADE AND CONSUMER EVENTS

- Trade events had the largest exhibitor base with 14,695 participants and attracting 308,720 visitors
- Consumer events drew 709,015* visitors with a total of 6,517* exhibitors
- Retail/wholesale sector dominates trade events, accounting for 12% of all events (or 22% of trade events)
- Lifestyle dominates consumer events, representing 13% of total events (or 29% of consumer events)

* Please note that the cancellation of the International Motor Show, as well as previous variations in participants over the reporting periods has contributed to significant changes to the numbers reported for Consumer events.

ANNUAL TURNOVER

- Total approximate 2013 turnover for EEAA member Suppliers is \$329.5 million
- On average, Suppliers' annual turnover for 2013 calendar year was \$3.9 million
- Venues attribute 31% of their turnover to the exhibitions industry
- 67% of Suppliers stated their average turnover for 2013 exceeded one million dollars
- On average, the exhibitions industry accounts for 61% of Suppliers' 2013 turnover
- On average, the exhibitions industry accounts for 26% of Venues' annual turnover, with 46% of venues attributing over 25% of their 2013 annual turnover to the exhibitions industry

MARKETING MEDIUMS

- Event websites continue to be the single most important marketing medium for exhibitions
- EDM was cited as the next most important marketing medium for Event Organisers
- Public Relations was cited as an important marketing medium for Venues
- Social Media was an important marketing medium for Suppliers
- Traditional above the line advertising like TV, magazines, newspapers and radio are now rated of low and very low importance

INDUSTRY OUTLOOK AND IMPACTS ON FUTURE BUSINESS

- Members identified decreasing exhibitor budgets, domestic economy, cost of doing business and competitor activity as the most frequently cited industry impacts



- Decreasing exhibitor budgets, access to skilled staff, domestic economy, cost of doing business, and competitor activity were the most strongly emerging issues that will impact the industry in the future
- 57.5% of organisers surveyed indicated they would present new events in 2014
- Overall, suppliers report positive business growth, with 40% stating turnover had increased from the previous financial year and 21% reporting a decrease

The full report can be purchased from EEAA for \$400. Contact: memberservices@eeaa.com.au

ABOUT EEAA

The Exhibition and Event Association of Australasia (EEAA) is the peak association for the exhibition and event industry, representing organisers, venues and suppliers. As a not-for-profit organisation, EEAA's primary objective is to maintain high industry standards and ensure industry growth by promoting the professionalism of EEAA members and unique benefits offered by exhibitions.

www.eeaa.com.au

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