November 2011

ACETA TRADE SHOW SURVEY RESULTS - DELEGATES

Demographics

A total of 251 show attendees or delegates completed and returned the online ACETA trade show survey.

While no figures for the three key events (ENTECH, Integrate and SMPTE) exist in aggregate our sample size on an estimated attendance base of 7,500 delegates means that our survey confidence level is at 95% is +/-5%. That is to say that we can be 95% confident that the figures quoted are accurate to within 5% on all questions.

Respondents nominated their area of business as 50% pro audio, 40% production, 40% lighting, 27% AV display, 21%, staging, 20% hire and 15% broadcast.

The sectors they indicated they were involved included:

Education	Performing arts venues
Venue management	Theme park management
Consulting (acoustic/building,	Technology journalism
theatre/education/AV)	Nightclub
Worship	Radio
AV conferencing	Film and TV
Event management	Local Government
Recording studios	Systems consultant
Theatre	Post production
Acoustic/lighting design	Freelance producer
Installation	Acquisitions
Retails sales	

The majority of the respondents were the business owner or a senior manager of that business (70%). The other significant group were technical staff (16%).

The largest group of attendees came from the Sydney area (40%). A similar number visited from other Australian cities or towns outside NSW. International visitors made up less than 6% of the delegates and the majority of these were from New Zealand.

Regional NSW contributed 12% of the delegates.

Who pays…..

Entry and travel costs were funded through two primary means - self funded and employer funded (both 46%).

Which shows…..

Our survey respondents' attendance was heavily weighted toward the three key shows being ENTECH, Integrate and SMPTE. Relatively few respondents had attended AMAC (12%) or CEDIA (16%)

Of the remaining shows:
- 79% sometimes or always attended ENTECH
- 68% sometimes or always attended Integrate
- 52% sometimes or always attended SMPTE

Satisfaction……

Overall the level of satisfaction for all five shows was above the mean (3.50 using a seven point scale). So overall more attendees were satisfied with these shows than dissatisfied.

The results showed that of the three key shows SMPTE had the most satisfied visitors (69%). This compares favourably to the satisfaction levels from ENTECH (42%) and Integrate (55%).   In effect, this means that around half of the delegates to each show weren't satisfied with the experience . Bearing in mind that 46% say they paid from their own pocket and for those who are self employed they also lost income-generating time, this raises issues about the sustainability of these shows. How often will you return to a show that you weren't satisfied with last year, or the year before? In aggregate, delegate satisfaction is only marginally greater than exhibitor satisfaction.

And of further concern is that satisfaction levels are trending down. Only 11% of respondents indicated that their satisfaction with these events over the past few years has increased whereas a significant 44% of respondents say their satisfaction levels have fallen. This also further raises issues about sustainability.

The respondents views demonstrate that all shows have their supporters and detractors, but that there is a lot of dissatisfaction based around duplication, scheduling and cost.

These are some comments from the surveys:
- SMPTE remains consistently good. ENTECH lacks critical mass. Integrate is all about AV installations and signage, and bugger all to do with the entertainment industries. It's involvement with film/tv/theatre/music etc is purely to exploit our "market" from the outside; and it really shows!
- Too many shows and always in Sydney.
- Same stuff different year.
- the split between ENTECH and Integrate has divided the industry and I cannot afford time or expenses to attend both shows separately.
- SMPTE 2011 was very well presented and as good or better than previous. ENTECH was a bit disappointing and would have been more so if there wasn't SMPTE to compensate.
- Never really been 'wow-ed' by anything I've seen. Format and layout stays the same.
- Very little of interest.
- Fallen - AMAC specifically has taken a direction over the last few years to serve consumers and educators, at the expense of a useful show for retailers.

- There's usually nothing to see that's not easier to see on the web.
- The fragmentation and infighting is an embarrassment to our industry. At a time when the technological world is changing so rapidly, we truly look like a regional outpost, more than a leader. Get it together. One show, once a year, do it when it is summer here so the internationals want to come, include MI, get it going now.
- Less Exhibitors
- Fewer exhibitors
- It has fallen - there are too many poorly attended shows! I want to see ONE show for the sector!
- As shows in technology get bigger overseas, they seem to have completely disappeared here in Australia, there is a lack of excitement and certainly timing of the shows has been terrible for audio and DJ markets. Little or nothing worth seeing that we can't view online and get MUCH better advice.
- Focus seems to be for only the high end users.
- Integrate – Risen, SMPTE – Risen, ENTECH – Fallen.
- Appeared to be less suppliers at ENTECH that suited my specific industry. Integrate appeared to have more general sound/lighting suppliers.
- Fallen. Too many shows doing too similar activities.
- ENTECH has gone downhill and we won't be attending any more but Integrate is definitely worth attending.
- Too many shows in too small a market. Seriously, why can't CEDIA, Integrate, ENTECH (and SMPTE) have the exhibitions at exactly the same time in exactly the same venue; then each have their conference/training?? Vendors would only have to display once, we only need to find funds - including the days of unbillable time - to attend one show. Just needs to be a single larger show with four names over the one door...
- Too many shows with not enough exhibitors.
- There is still a lack of high calibre presenters for the industry sessions.
- Sick of hearing sales pitches day in day out.
- Very disappointed with this year's ENTECH, due to the stupidity of the organisers in trying to kill of Integrate. As soon as the ENTECH organisers wake up to themselves and stop being BLOODY stupid and go back to their original bi-annual FEBRUARY/MARCH date then they might be able to POSSIBLY get the exhibition back to where it once was, but it will be a major struggle. Without SMPTE being held next door and at the same time as ENTECH, this year's ENTECH would definitely have been the last. Forget the published attendance figures, as they were false - I was there for the entire event and the numbers through the ENTECH main door, were definitely not equal to those published in certain (I suspect, associated media releases). I have no association with Integrate apart from being a visitor (as I am with ENTECH) and I can definitely say that Integrate killed ENTECH (note: ENTECH not ENTECH/SMPTE) in relation to the exhibitors present and the knowledge gained from attending.
- Fallen since many years ago as the range of products and attendees seems to have reduced. There may be a proliferation of shows causing a loss of focus and division of interests/focus from the exhibitors. There is also significant direct competition from direct connection from electronic sources via internet. This is regrettable though as a large part of the show is the networking and meeting at the personal level.
- Got to attend too many to cover the products we are interest in.
- Some gear I'm interested in hasn't been displayed, some has. Always good to network.
- There were less distributors at this year's ENTECH show however its still better than Integrate which is smaller.
- Too many shows, partial overlap of products/brands at shows so you have to go to all. One with everything would be much better.

- Australian market is too small to attract the cream of the northern hemisphere's production exhibitors with some of their top products.
- Fallen because less of the people in the industry who have a say on the money being spent are turning up because it's at the wrong time of year. A show should be timed so the people who attend can check out the equipment and have time to put what they are looking for into their budgets for the following financial year.
- Too much emphasis has been put on lighting LED tech, yes it is new but as a production company we are just as interested in hydraulic staging systems rope access production management tools and audio equipment including wireless mic tech, color, scenic companies, paints and supplies, drape providers etc.
- All too much the same little engineering all about spin and glitz.
- Apart from SMPTE (only my second attendance in 10 years), the shows seem to be getting smaller with many 'key players' not exhibiting.
- Less exhibitors.
- Integrate was a heap of crap.
- Integrate has grown to be a worthwhile exhibit due to the good range of professional dealers exhibiting.
- Minimal exhibitors, lack of relevance.
- Like the new format of ENTECH. Especially ENTECHTV.
- Too many shows that are basically promoting the same products and featuring the same manufacturers or distributors.
- Both... The demise of ENTECH was ultimately played out with the half-baked attempt at a 'show' in August. I had actually registered for both ENTECH + SMPTE, but attended through the SMPTE doors. The ENTECH hall was empty - both people + exhibition stands. I typically attend a trade show to network and discuss new product - quite often attending for several days. With ENTECH this year, I left after 5 hours - most of this time was actually spent talking with audio suppliers at the SMPTE show. I spent more time travelling to the show, than what I spent within the halls of Darling Harbour! On the up-side, the Integrate show a few weeks later, was far better attended and provided significantly more opportunities to network and discuss new product. I went on two separate days from start to close!

The themes are:
- Questionable cost benefit, in particular opportunity cost. If I'm at a show, I'm not earning/doing my job.
- Fragmentation of the exhibitors across three shows, means there's no one show where everyone is there, which means an inability to meet all their suppliers and do all their business at one event.
- Relevance: most product information is now on the web long before the product is at an Australian show.
- Sense of a lack of respect from the show organisers. Why are they making us have to make these changes and compromises?

Why do visitors visit?

In summary market intelligence is the key reason people attend. *Keeping up with what is changing* (6.00 on a seven point scale) and *Checking out what's new* (5.89) were the two major motivators. Access to technical experts and visiting the companies that are existing suppliers also rated highly (5.41 and 5.27 respectively).

Less important but still scoring above the median were training sessions (4.41) and finding out about deals (4.21).

If these are the drivers for delegate attendance then this is a major challenge for exhibitors and show organisers alike. Satisfying delegates requires breadth of product, a full complement of exhibitors and an attractive information/education program. Failing to achieve this seriously undermines their likelihood of returning and so the shows' sustainably.

The delegates comments included:

- It's often the only networking and social contact we get all year. This is a major attraction for attendees, which in turn feeds into good attendance rates, which in turn rewards exhibitors with more traffic through their stands, and they are the ones paying for the whole circus.
- Look for business/work opportunities with other delegates/exhibitors.
- Networking with other people trying to learn or create music in the same area, I feel that there is nothing for these guys, such as we see at Messe, BPM etc...
- Networking in general
- Perhaps the sessions could have a different focus or title. I would like see information sessions giving rise to debate about technical or other matters influencing the industry.
- New stuff, please, not same old.
- But it is important that the show covers everything. At least everything for a given market. A small and piecemeal show is almost useless as it doesn't give a good sense of what it in the market and what developments there are – it's almost better just to use Google and the phone.
- Most important is seeing new product across the board so we can offer new ideas into artistic development processes as a professional company we can get hold of specialised technicians easily and most of the training courses are aimed at such a low level. All in my game think they are just for amateurs it is stuff you should learn in your first 1 to 2 years in the industry and at this point in your career you are not in a position to be purchasing the equipment that is on show. While as those more experienced are in positions to actually make large purchases are not getting anything except some shiny products we need product demonstration on large scale show us what is new and what it can do.
- To network with my local clients and those that come from other cities to find out what they are looking to spend their budgets on. Unfortunately most of my clients (regional theatres) can only attend during their quiet period which is in the early part of the year.

Training needs…..

The need for training over all other events was considered important but not critical (average 4.24 on a seven point scale). Delegates attending SMPTE, ENTECH and Integrate rated training as more important than did those who attended either AMAC and CEDIA.

The comments offered by delegates suggests that the training they are seeking is more related to changes in the industry and new trends as the following data shows.

Technical innovation (not product or brand specific)	81.4%
Legislative changes (such as wireless audio, integration of A Tick and C Tick)	60.2%
Future development previews	57.5%

Comments:

- The problem is that you cannot attend the training and go buying at the same time there isn't enough time. Some stall holders want you to book a time to see them.. this doesn't really work as you are not aware of how much time you need to spend with each person. there should be a video of all training sessions available so that one can view it after the event as a backup of the memory but also if you didn't get time to go to that event you can watch it at your leisure, people would pay for this DVD.
- How to? What is happening in my area of the market, who else is doing things in this area and how can we communicate together to help create a community.
- General training on OHS. Rigging safety, cabling. tips and tricks. Basically training for industry guys that don't have specific qualifications.
- Identification of, and implementation strategies for standards.
- The training sessions are generally limited in time as a part of the greater trade show. They may fill various needs such as impart of information to a wider gathering at a specialist level, or introducing other more intensive (longer) training opportunities. The validation of the training from a trade show may not be appropriate due to the restrictions of time etc.
- Professional industry panel discussions

Generally the need for training with a view to external validation (such as a certificate) was split in two. One group saying it was important for ongoing development, especially for entry level staff, with the other group saying that there was little interest or relevance.

Future attendance

Comparatively few of the respondents have taken the view that any of these events is a must attend when they are next staged. The event that has the strongest return response is Integrate where 44% of respondents said they would definitely return when the event is next run. This falls to 30% and 32% for ENTECH (Sydney) and SMPTE respectively. Those saying that they definitely won't return for the next staging of these events total 7%, 15% and 19% respectively for Integrate, ENTECH and SMPTE.

Of the proposed ENTECH Melbourne event in 2012 39% said that they would definitely not attend. By coincidence this just happens to be the percentage of delegates completing this survey from Sydney.

In summary

There is work to be done by exhibitors and show organisers to ensure that the delegate experience better matches their expectations and needs. In particular in relation to cost, fragmentation of the exhibitors across three shows and relevance in the worldwide web connected 21st century. If these aren't resolved, then the sustainability of the shows has to be seriously questioned. Like the exhibitors, many delegates see the solution to the current issues is co-location.

There are many opportunities here, such as improved networking and social activities, a greater focus on new products and informing about how to deploy them to the benefit of *their* customers or work (and not just selling), and co-location.