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Public Events Council Survey Report:
Public Events Industry 2011

Supplemental Report: How the Public Event/Consumer Show Engages With the Younger Generations/Professionals

International Association of Exhibitions and Events™
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Public Events Industry Report 2011
May 2012

Introduction: *In 2009, IAEE's Public Events Council prepared a survey report,* Public Events in 2009: How They Fared During the Worst Economy in Fifty Years*, based on a survey of public event organizers across 22 public events industry sectors, to examine overall industry performance in 2009. The report identified which public event industry sectors fared well, which sectors struggled and their expectations for the future. As a follow-up to that report, the Public Events Council repeated the study in 2010 and 2011. This report of findings provides individual statistics for 2011 as well as comparative results using the 2009 benchmark data and 2010 and 2011 data.*

OVERVIEW BY SECTOR:
Existing Event Expectations

Public events organizers were asked to indicate their general expectation for outcomes for 2011 events conducted in each of the 22 identified sectors. (Figure 1)

In comparing specific industry sectors for existing events from 2010 to 2011, many sectors such as **Automobile, Business-Franchise-Entrepreneur, Fairs-Festivals** and **Food-Beverage** remain virtually the same, meeting or exceeding expectations.

Sectors showing substantial improvement from 2010 are **Arms-Guns-Knives,** the **Miscellaneous category** and the **Women's** sector**.** The **Education-College-Career** sector had no event data submitted in either 2009 or 2010, however, for 2011 three shows reported 100% meeting or exceeding expectations.

Sectors that should be encouraged due to a slight improvement in the 2011 expectations as compared to 2010 include **Boating-Marine, Home-Garden, Kids-Family-Lifestyle-Pets, RV** and **Sportsman-Hunting-Outdoors.** It should be noted that the Boating-Marine and RV industries are fairly accurate indicators of economic change (positive or negative). Although the improvement is slight, it is still a move in a positive direction and is encouraging for the industry and the economy in general.

Those sectors reporting a slight decline from 2010 expectations include the **Antiques-Collectibles** and **Bridal** sectors. Both sectors still reported 75% meeting or exceeding expectations in 2011; but both were at 100% in 2010. The **Gift-Gem-Jewelry** sector dropped from 67% meeting or exceeding expectations in 2010 to 50% in 2011.

The **Agriculture-Farm-Ranch, Computer-Electronics, Craft-Hobby-Woodworking** and **Travel** sectors showed a more substantial decline from 2010. It is unclear if there is any commonality or connection between these four sectors' results.

When comparing 2010 and 2011 to the benchmark data in 2009, the signs continue to point in a positive direction. In 2009, five different sectors were 100% below expectations*.* In both 2010 and 2011, only two sectors reported in at 100% below expectations. Approximately 30 more events have been reported during each subsequent year since 2009, with the majority reporting meeting or exceeding expectations.

EXISTING EVENTS COMPARISON; 2009-2011

EXISTING EVENTS INDUSTRY SECTOR	2011 EVENTS	EXPECTATIONS		2010 EVENTS	EXPECTATIONS		2009 EVENTS	EXPECTATIONS	
		% Met or Exceeded	% Below		% Met or Exceeded	% Below		% Met or Exceeded	% Below
Agriculture-Farm-Ranch	4	33%	67%	2	100%	0%	13	100%	0%
Antiques-Collectibles	14	75%	25%	13	100%	0%	5	0%	100%
Arms-Guns-Knives	3	100%	0%	3	0%	100%	0	-	-
Automobile	11	62%	38%	3	67%	33%	1	0%	100%
Aviation	0	-	-	0	-	-	0	-	-
Boating-Marine	18	50%	50%	9	33%	67%	12	0%	100%
Bridal	11	75%	25%	2	100%	0%	0	-	-
Business-Franchise-Entrepreneur	2	100%	0%	2	100%	0%	0	-	-
Computer-Electronics	1	0%	100%	5	50%	50%	1	0%	100%
Craft-Hobby-Woodworking	13	60%	40%	2	100%	0%	2	100%	0%
Education-College-Career	3	100%	0%	0	-	-	0	-	-
Fairs-Festivals	5	100%	0%	2	100%	0%	1	100%	0%
Food-Beverage	33	100%	0%	6	100%	0%	3	100%	0%
Gift-Gem-Jewelry	3	50%	50%	7	67%	33%	1	100%	0%
Home-Garden	14	75%	25%	15	60%	40%	39	80%	20%
Kids-Family-Lifestyle-Pets	11	80%	20%	2	50%	50%	7	100%	0%
Miscellaneous*	9	100%	0%	25	50%	50%	17	75%	25%
RV	17	75%	25%	33	67%	33%	21	0%	100%
Retirement-Senior	0	-	-	0	-	-	0	-	-
Sportsman-Hunting-Outdoors	8	100%	0%	14	75%	25%	5	100%	0%
Travel	2	0%	100%	13	67%	33%	2	100%	0%
Women's	13	100%	0%	3	50%	50%	2	100%	0%
TOTAL	**195**			**161**			**131**		

***Miscellaneous** events include: Holiday Boutique; Fashion & Medical Eye Care; Multi-products Consumer Fair; Furniture; Energy; Construction; Marble

Figure 1

New Launch Expectations

The majority of new launches (Figure 2), including **Agriculture-Farm-Ranch, Business-Franchise-Entrepreneur, Computer-Electronics** and **Sportsman-Hunting-Outdoors,** report 100% of their events meeting or exceeding expectations in 2011. The **RV** sector reported on two events in 2011, one meeting or exceeding expectations and the other below expectations. Both the **Bridal** and **Food-Beverage** sectors' new launches were 100% below expectations in 2011.

NEW LAUNCH COMPARISON; 2009-2011

NEW LAUNCHES INDUSTRY SECTOR	2011 EVENTS	EXPECTATIONS		2010 EVENTS	EXPECTATIONS		2009 EVENTS	EXPECTATIONS	
		% Met or Exceeded	% Below		% Met or Exceeded	% Below		% Met or Exceeded	% Below
Agriculture-Farm-Ranch	1	100%	0%	0	-	-	6	50%	50%
Antiques-Collectibles	0	-	-	2	100%	0%	1	0%	100%
Arms-Guns-Knives	1	-	-	1	100%	0%	0	-	-
Automobile	1	-	-	0	-	-	0	-	-
Aviation	0	-	-	0	-	-	0	-	-
Boating-Marine	0	-	-	0	-	-	0	-	-
Bridal	3	0%	100%	0	-	-	0	-	-
Business-Franchise-Entrepreneur	0	100%	0%	0	-	-	0	-	-
Computer-Electronics	1	100%	0%	0	-	-	0	-	-
Craft-Hobby-Woodworking	0	-	-	2	100%	0%	1	100%	0%
Education-College-Career	0	-	-	1	0%	100%	0	-	-
Fairs-Festivals	0	-	-	0	-	-	0	-	-
Food-Beverage	3	0%	100%	0	-	-	1	100%	0%
Gift-Gem-Jewelry	0	-	-	0	-	-	0	-	-
Home-Garden	0	-	-	1	100%	0%	2	100%	0%
Kids-Family-Lifestyle-Pets	0	-	-	0	-	-	1	100%	0%
Miscellaneous*	2	-	-	11	67%	33%	4	100%	0%
RV	2	50%	50%	1	100%	0%	1	0%	100%
Retirement-Senior	0	-	-	0	-	-	0	-	-
Sportsman-Hunting-Outdoors	1	100%	0%	3	100%	0%	0	-	-
Travel	0	-	-	0	-	-	0	-	-
Women's	0	-	-	0	-	-	1	0%	100%
TOTAL	**15**			**22**			**16**		

***Miscellaneous** events include: Holiday Show and Multi-products Consumer Fair **Figure 2**

2011 EVENT REVENUE, EXHIBIT SPACE SALES (NSF) and ATTENDANCE
(When compared to 2010)

Public events organizers were asked if their event **Revenue**, **Exhibit Space Sales** (**NSF)** and **Attendance** for their most profitable event in 2011 was better, nearly the same or worse as compared to 2010. (Figures 3, 4 and 5)

Of particular note is that in the baseline year of 2009, **Revenue** and **Attendance** were performing substantially better than **Exhibit Space Sales (NSF)**. **Revenue** continues to perform well with 78% reporting better or nearly the same results when comparing 2011 to 2010. **Attendance** is steady with 72% at better or nearly the same in 2009, 80% in 2010 and 78% in 2011.

Exhibit Space Sales results have been the most dramatic. In 2009, only 39% reported space sales at better or nearly the same as the previous year, and 54% reported worse results. In 2010, the industry experienced a shift in results, increasing to 70% at better or nearly the same. The growth continued in 2011 as organizers report **Exhibit Space Sales** at 89% better or nearly the same as in 2010.

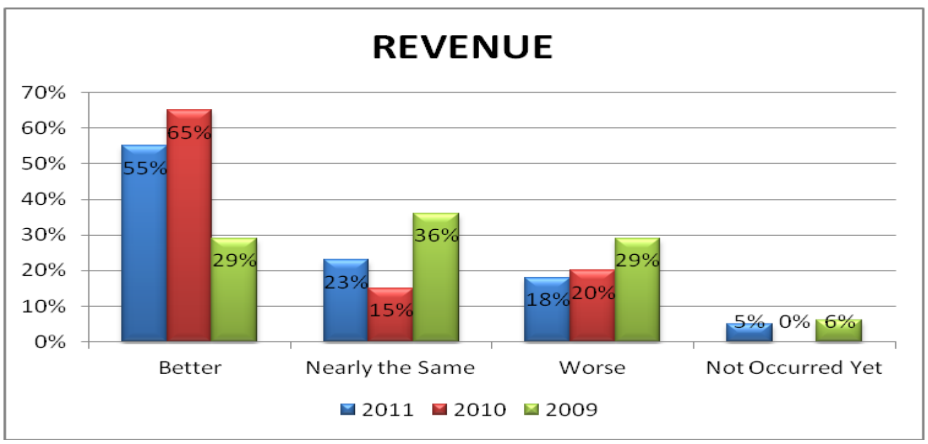

Figure 3

Revenue results (Figure 3) have been steady over the last two years. Although the better category dropped to 55% in 2011 from 65% in 2010, when the better and nearly the same results are combined, 2010 is at 80% and 2011 at 78%. This result is a considerable improvement from the 65% reported in the baseline year of 2009.

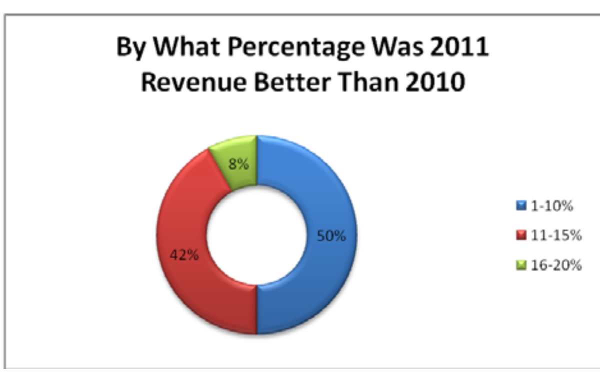

Figure 3a

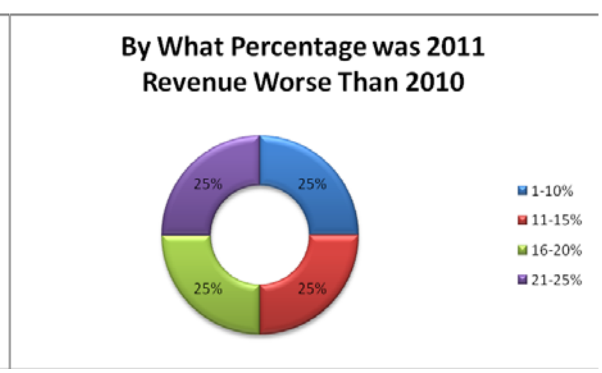

Figure 3b

Figures 3a and 3b show by what percentage increment 2011 **Revenue** was better or worse than in 2010.

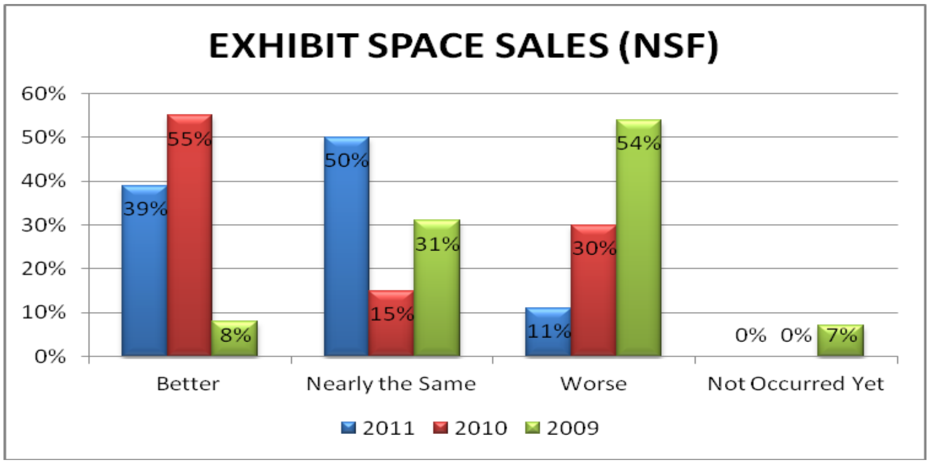

Figure 4

Exhibit Space Sales (NSF) results (Figure 4) have shown the most overall positive change. From 2009, 54% reported worse results and only eight percent reported better results than the previous year, but in 2010, 55% reported better results than the previous year.

In 2011, 89% report better or nearly the same **Exhibit Space Sales** than in the previous year. In the 2010 report, it was unclear whether this upturn was an indicator of recovery or a reflection of 2009 space sales at such a low that any improvement proved noteworthy. **Exhibit Space Sales** for the public events industry continues to trend in a positive direction as evidenced by the initial upturn in 2010 followed by the 2011 overall better and nearly the same results.

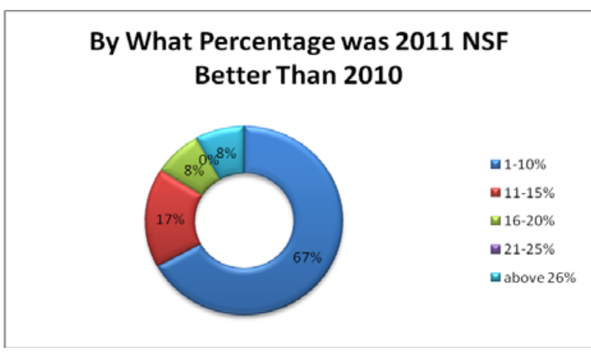

Figure 4a

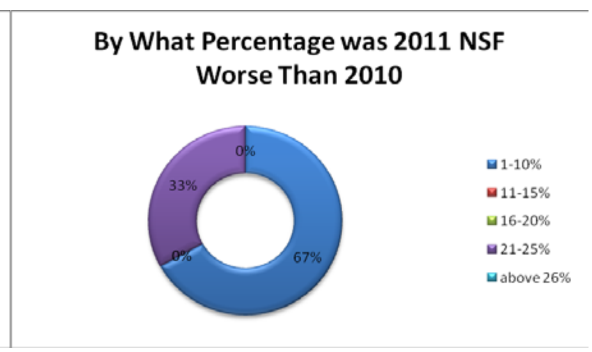

Figure 4b

Figures 4a and 4b show by what percentage increment 2011 **Exhibit Space Sales** was better or worse than in 2010. In Figure 4b, a substantial percentage (33%) report **Exhibit Space Sales** at 21-25% worse than in 2010; therefore, this is an important statistic to monitor in 2012.

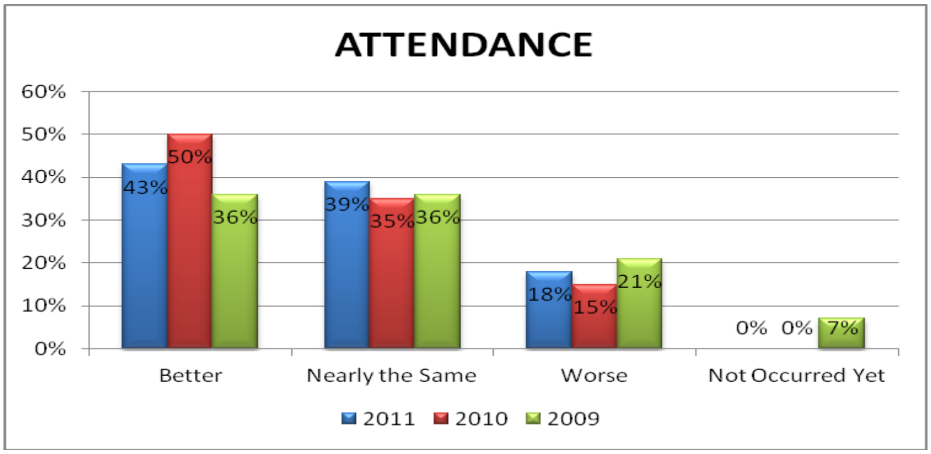

Figure 5

As shown in Figure 5**, Attendance** remains stable across the board with a slight decrease (43% in 2011 compared to 50% in 2010) in those organizers reporting better results and a slight increase in those reporting nearly the same results (39% in 2011 and 35% in 2010). Eighteen percent reported worse results in 2011 compared to 15% in 2010.

As **attendance** is one of the indicators of recovery, stable results are encouraging, however, it will be important to see growth in 2012.

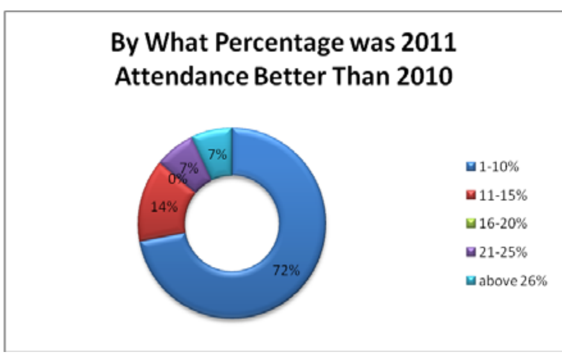

Figure 5a

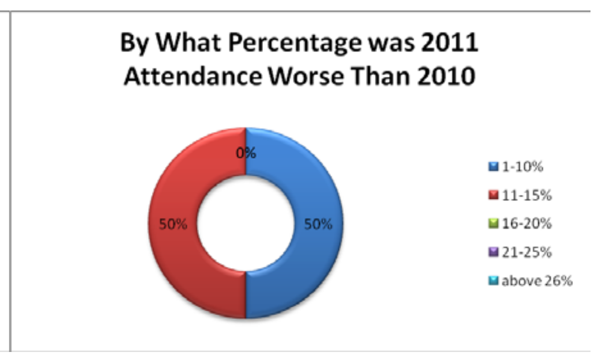

Figure 5b

Figures 5a and 5b show by what percentage increment 2011 **Attendance** was better or worse than in 2010.

Of the 43% reporting better results, 86% report 2011 **attendance** at one to 15% better than in 2010. One hundred percent of the 18% reporting worse attendance results in 2011 than 2010 reported results between one to 15% as well. This is in keeping with the steady results reported in 2011 **attendance** – no substantial increases or decreases.

EXHIBITORS SECURING EXHIBIT SPACE

This statistic reflects that the ***exhibitor*** does not have confidence in the economy and is waiting longer in the process to commit to exhibit space. This downward trend could reflect negatively on the stability of the event and the organizer and potential attendees may choose not to participate.

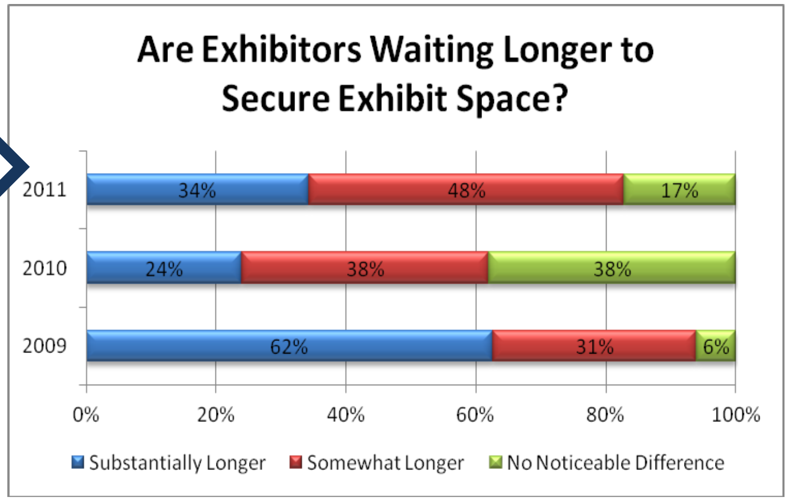

Figure 6

Respondents were asked if exhibitors were waiting longer to secure exhibit space. During the baseline year of 2009, this was a particularly troubling statistic for event organizers with 93% reporting exhibitors waiting somewhat to substantially longer to secure exhibit space.

There was substantial improvement with 62% of 2010 respondents reporting exhibitors waiting substantially or somewhat longer to secure exhibit space than in 2009.

After the vast improvement noted in 2010, it is discouraging that organizers reporting on 2011 events indicate 82% of exhibitors waiting substantially to somewhat longer to commit to securing exhibit space for their events.

EVENT CANCELLATIONS AND WORKFORCE REDUCTION

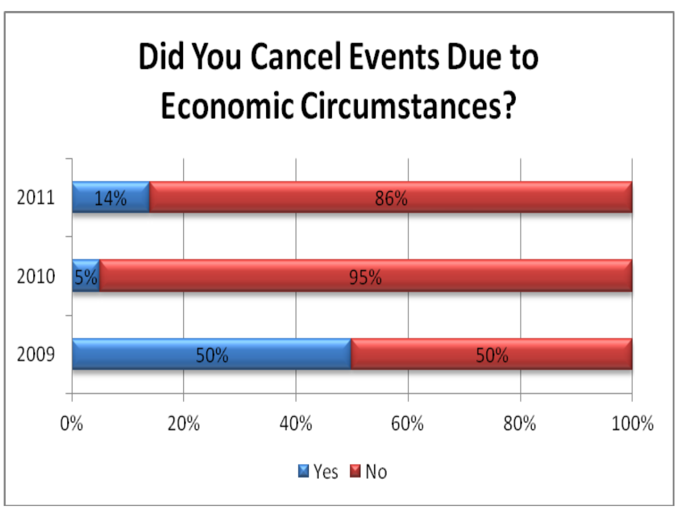

Figure 7

In 2009, 50% cancelled events due to economic circumstances and nearly three-quarters had no plans to reschedule. In 2010, a huge turnaround was realized with only five percent cancelling events for that reason.

Fourteen percent cancelled events in 2011, and while that reflects a slight increase from 2010 results, it is still a substantial improvement from the baseline year of 2009.

On a positive note, all respondents from 2010 and 2011 who cancelled events plan on rescheduling them.

Workforce reduction (laying off employees) continues to move in a positive direction, diminishing from 44% in the baseline year of 2009, to 29% in 2010 and 14% in 2011. Of the 14% who had to layoff employees, all workforce reductions were between one and 15%.

When asked if they would consider rehiring in 2012, responses were split evenly (33% each) between yes, unsure and no; a notable improvement when compared to data from the 2009 and 2010 reports. In 2009 and 2010 respectively, 83% and 100% of survey respondents were unsure or not planning to rehire laid off workers.

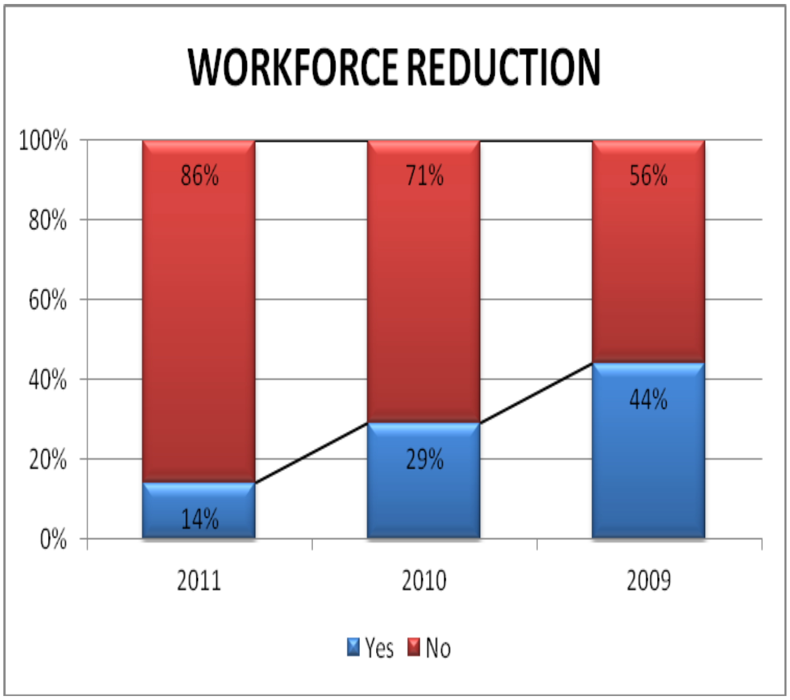

Figure 8

LOOKING TO THE FUTURE

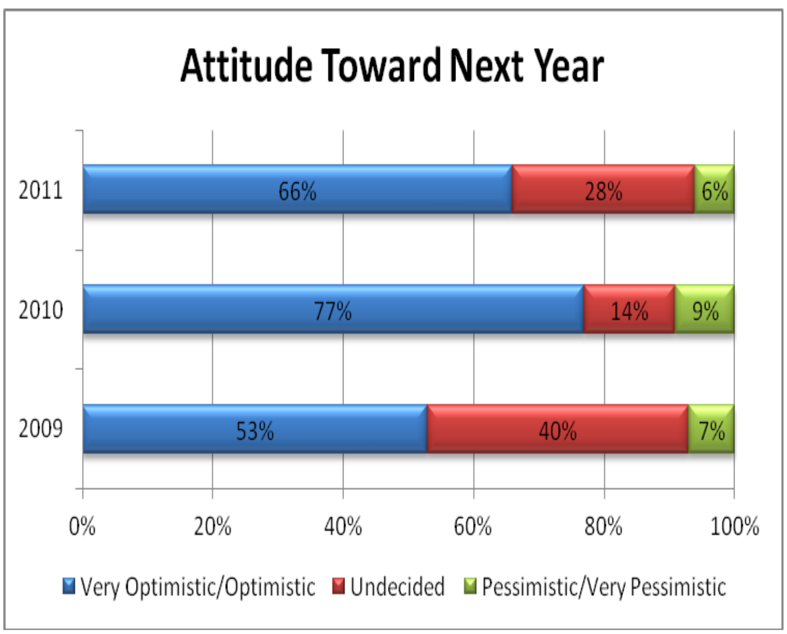

Figure 9

Organizers were asked in general, and based on 2011 events, what their **attitude is toward 2012**.

There was a slight decrease in those reporting optimistic to very optimistic from 77% in 2010 to 66% in 2011. The undecided response was at 14% in 2010 compared to a growth to 28% in 2011. Pessimistic and Very Pessimistic responses from 2009 through 2011 have been and remain in the single digits.

Overall, this result would still be categorized as positive but bears watching in 2012.

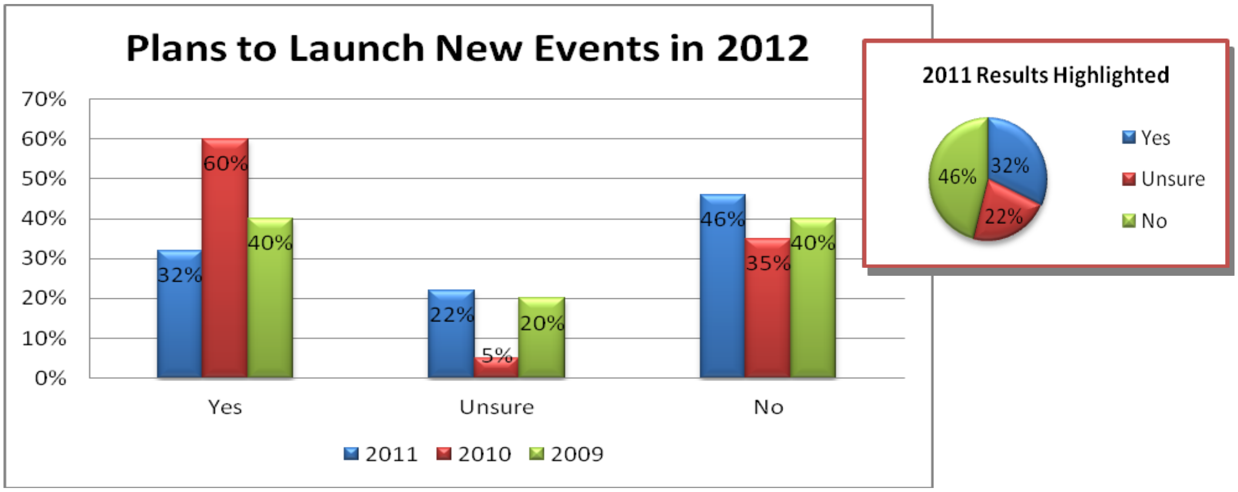

Figure 10

When asked about **launching new events** in 2012, 32% of the respondents chose Yes while 22% were Unsure. Forty-six percent have No plans to **launch new events** in 2012. **The 2011 results more directly reflect the responses from the baseline year of 2009 than 2010.**

Sponsorship revenue in 2012 should continue to improve or at least stay the same with 2011 results very similar to 2010 reported results. As shown in Figure 11, 36% expect better sponsorship revenue in 2012, 57% expect nearly the same and only 11% expect worse results.

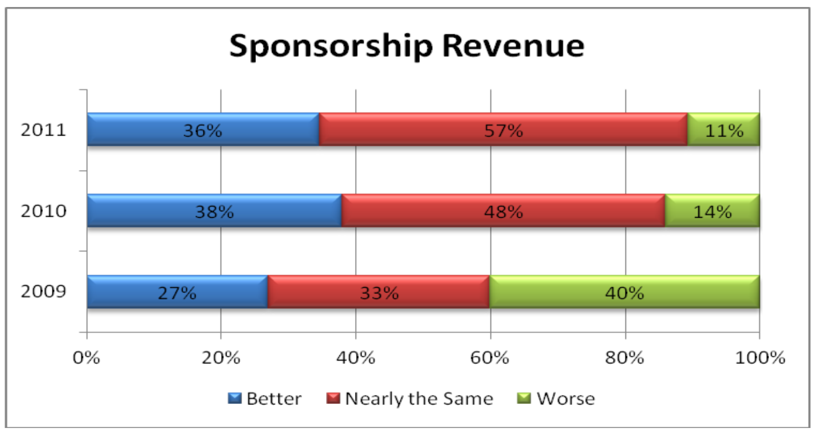

Figure 11

SIGNS OF RECOVERY MOVING INTO 2012

Public event organizers were asked if they were **seeing any signs of recovery** as 2012 approaches. As shown in Figure 12, only two sectors report seeing signs of recovery moving into 2012; the **Women's** sector at 100% and the **Automobile** sector at 71%. Several sectors such as **RV, Business, Fairs, Agriculture** and **Antiques** are split between seeing signs of recovery as well as unsure. **Kids-Pets** and **Home-Garden** report results across all three categories; 40% seeing signs of recovery, 40% unsure and 20% not seeing signs of recovery.

Several sectors, including **Sportsmen, Miscellaneous, Food-Beverage, Bridal** and **Arms-Guns**, were all 100% unsure about seeing signs of recovery. The **Gift-Gem-Jewelry** and **Craft-Hobby** sectors report being unsure or not seeing any signs of recovery.

Lapsing close to 2009 levels, the **Travel, Education and Computer-Electronics** sectors all report not seeing signs of recovery. It is interesting to note, however, that in 2009 the sectors that were struggling were the credit dependent industries such as **Automobile, Boating** and **Computer-Electronics**. It is encouraging that **RV** and **Automobile** sectors continue to see signs of recovery. [1]

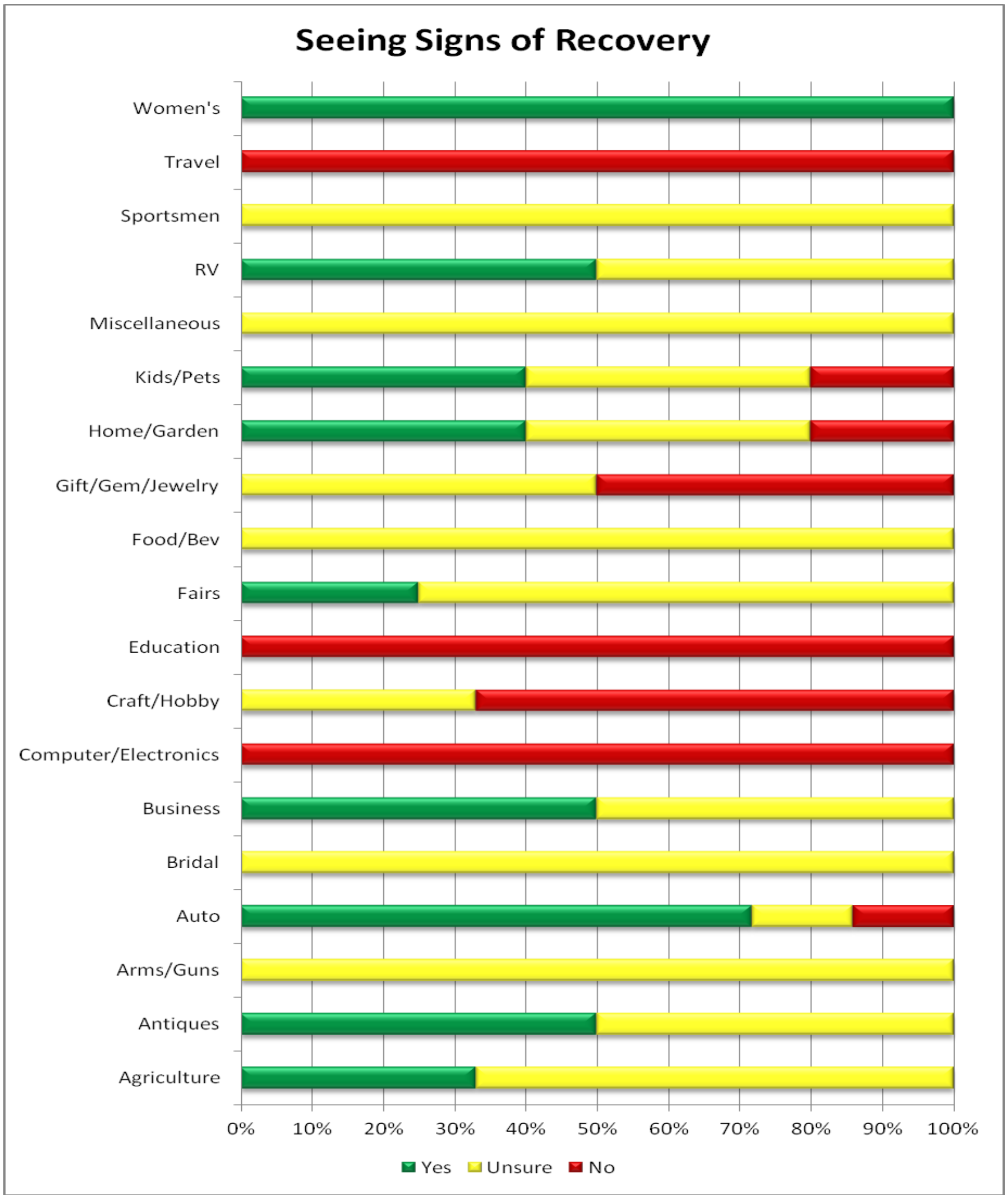

Figure 12

[1] Although Boating-Marine sector organizers reported on 18 events, there were no responses recorded for this question, therefore no data is available for the Boating-Marine sector in figure 12.

THE MOST IMPORTANT ISSUES FACING THE INDUSTRY TODAY

The top issues identified in the 2011 survey are:
1. The Economy (including the ability to secure sponsorships, rising costs from vendors as recession slows, lack of consumer confidence in the economy, rising costs of producing events, higher product manufacturing costs for importers/exhibitors, organizers scrambling to offer creative solutions to keep exhibitors and attendees participating, unemployment, declining revenues, gas prices, retail sector facing difficulties, companies downsizing, loss of small business exhibitors)
2. Exhibitor Issues (building exhibitor confidence, exhibitor ROI, declining exhibitor participation and exhibitor apathy, recruiting new exhibitors, marketing to the exhibitor)
3. Attendee Issues (marketing to attendees, booking clinicians that appeal to attendees, lack of consumer spending for admissions and with exhibitors, maintaining and growing public attendance, competition for attendees, recruiting new attendees)
4. Facilities/Venues/Event-Related (workable annual dates at venues, cost of goods and services, e.g., union labor, decorators and food, new competition, oversaturation in the marketplace, continued growth of technology, digital marketing and social media)

In the baseline year of 2009, **the economy** was a driver for most of the issues that were reported, but in 2010 there was some relief. Although **the economy** was still a major factor, organizers focused on more event-related issues with **exhibitors, technology/digital marketing** and **facilties and venues**. The 2011 survey refelected many of the same issues from 2009 and 2010, and although several **exhibitor and attendee issues** were reported, most have a direct relation to **the economy**.

IN CONCLUSION…

The **economy** continues to dominate the most important issues facing the public events industry. Although the economy continues to seriously affect several industry sectors, there are optimistic signs overall with **revenue** and **attendance** figures steady and continued growth in **exhibit space sales.** One note of caution relating to 2011 exhibit space sales is that of the 11% reporting worse results than in 2010, 33% report sales at 21-25% worse than the previous year. This will be an important trend to watch in 2012.

Exhibitors continue to show a lack of confidence in the economy as they wait longer to **secure exhibit space**. **Event cancellations** and **workforce reductions** show movement in a positive direction moving forward to 2012 and **sponsorship revenues** reflect a slight improvement over previous years.

When looking at the signs of recovery moving into 2012, responses were varied but overall, organizers report more unsure and not seeing signs of recovery than reported in 2010 for 2011. On a positive note, those **credit-related industries** that generally struggle in a downturned economy are reporting positive results. **Smaller business or niche sectors** seem to be struggling with exhibitor and attendee issues (related to the economy) in 2011 and likely moving forward to 2012.

Methodology: *The data for this report was obtained through an IAEE Public Events Council Survey sent to 919 Public Events organizers. Of those organizers, 31 responded and reported on* ***210 existing and newly launched events in 2011****.*

SUPPLEMENTAL REPORT
Public Events Council Survey Report:
Public Events Industry Report 2011

FOCUS TOPIC: How the Public Event/Consumer Show Engages with the Younger Generations/Professionals

1. Does your event provide any information in your exhibitor packets or outreach training for exhibitors on methods to best engage with the younger generations/professionals who attend your event?

24% -- YES
55% -- NO
21% -- Not at this time, be we have plans to

2. Does your event provide any of the following products/services as an element of the exhibition to engage with the younger generations/professionals?

15% -- Grouping exhibits by common product/service
0% -- Lounge areas with power ports throughout the exhibition area
20% -- Wireless access throughout the exhibition area
10% -- Updates posted to the website for easy look up while in the exhibition area
25% -- Healthy food items available throughout the exhibition
30% -- Other

(Other responses include: all of the above; "unwire" the facility to provide wireless; group common products; use Facebook; prior workshop on branding, presentation, marketing and sales; student networking; student conference sessions; student scholarships; Smartphone event app)

3. Does your event's education programming take into consideration the younger attendees and what content and delivery method might be most appealing to them?

68% -- YES
3% -- NO
29% -- N/A. We do not provide education programming at this time

4. Do you use young professionals on your staff to help develop education programming, networking opportunities and/or overall event planning?

7% -- YES, education programming
11% -- YES, networking opportunities

39% -- YES, overall event planning
43% -- NO, not at this time

5. Does your event offer networking opportunities in the following formats that may appeal to the younger generations?

0% -- Identifying education sessions by career path
25% -- Allowing sufficient time following education sessions for interaction w/presenter
17% -- First Timer's Events
33% -- Activities on the exhibit floor or affiliated event to accelerate networking
8% -- Destination selection that appeals to younger generations
17% -- Other
(Other responses include: provide good features relevant to young audience; implementing interaction w/presenter, first timer's events and activities on the show floor next year.)

6. With websites identified as the most frequently used source of information throughout the industry, what social media avenues does your event use to engage with the younger generations?

48% -- Facebook
3% -- YouTube
3% -- LinkedIn
0% -- Google Plus
0% -- Dedicated Event Blog
14% -- Twitter
0% -- Flickr
3% -- None
28% -- Other
(Other responses include: Facebook x6; YouTube x5; Twitter x5; News Websites; Apps; none, but plan to)

7.When thinking in terms of how your show engages the younger attendees/professionals, please describe any activity you have developed that may be considered an industry best practice, especially in the training, education and networking areas.

Responses include:

- *Launching a sponsored VIP reception (at a cool and upscale venue)*
- *Maintaing a constant presence on Facebook (x3)*
- *Partnering with Boy Scouts*
- *Holding seminars between shows focusing on how to be a successful exhibitor*
- *Teaching vendors how to interact with our Facebook advertising and networking experience*
- *Bringing students to shows—great networking opportunity for exhibitors and attendees*
- *Adding elements (motorcycle stunt shows) that appeal to the younger audience*
- *Market to seasoned and first time attendees*

- *Allow younger employees to develop networking activities*

8. When it comes to your show(s), what issues or challenges have you encountered as it relates to engaging with the younger attendees/professionals?

- *Antiques/collectibles do not seem "cool" to the younger generation….trying to rebrand as the perfect place to start a collection…it has been difficult*
- *Identifying the best ads/promotion channels to reach them*
- *Maintaining the digital content they are looking to receive*
- *It takes a great deal of coordination to engage the young professional*
- *They do not have the money for our product*
- *How to reach them*
- *How to engage with the most brides*
- *Getting them to come to a show because they are in classes…they also want less communication because it is not a top priority for them*
- *The economy has hit certains sectors of the industry hard and the younger generation cannot afford to participate*
- *Establishing the importance of family and family vacations*
- *Lack of fieldwork*
- *Entertainment that will engage them*

9. What topics would you recommend as the focus topic for the industry report in 2012?

- *Proving Value in Sponsorships*
- *Social Media and Online Marketing*
- *Social Media for Idiots*
- *The Future of the Public Event Industry: Will Attendees Still Come in Five Years*
- *How to Reach the Younger Market*
- *Social Media and Networking*
- *Economics of Traveling to a Show…Instead of Driving to Each Exhibitor*
- *How to Regain Attendees Trust After a Long Period of Financial Crisis*

***PLEASE NOTE**: The survey mechanism (for the supplemental report only) was not designed to record more than one response to the questions. Several respondents indicated they would have selected multiple responses some of which are noted in the other section if provided.*