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SEMA SHOW OVERVIEW

SEMA SHOW TIMELINE

- 1963: Specialty Equipment Market Association (SEMA) is founded.
- **1965:** L.A.-area promoter and automotive magazine publisher Noel Carpenter organizes "Speed & Custom Equipment" (SCEN), the first-ever speed and performance trade show. It was NOT sponsored by SEMA.
- **1966:** Noel Carpenter produces the second "Speed & Custom Equipment" trade show, with SEMA sponsoring the event and receiving a share of the profits for the use of the association's name. While SEMA received a check for \$535, the event is NOT recognized as the first "SEMA Show."
- 1967: Noel Carpenter moves the "Speed & Custom Equipment" show to Las Vegas; meanwhile, the first official SEMA Show takes place in January 1967, under the grandstands of Dodger Stadium in Los Angeles. The event, featuring 98 booths and approximately 3,000 attendees, was organized by Robert Petersen.
- **1974:** The SEMA Show moves to the Anaheim Convention Center.
- **1977:** The SEMA Show moves to the Las Vegas Convention Center. Las Vegas was chosen because it provided room for growth, has dependable weather, big-name entertainment and a world-famous location.
- 1982: SEMA assumes full control of the SEMA Show from Robert Petersen.
- **1988:** The idea of sectionalization is born, as exhibitors within the street-rod market are grouped in the "Street Rod Equipment" area. Since 2003, the entire Show has been sectionalized into specific market niches.
- **1992:** SEMA joins with other aftermarket organizations to consolidate fragmented trade show activities into one comprehensive week, aka Automotive Aftermarket Industry Week (AAIW). Set each year for the first week of November in Las Vegas, AAIW is now a key event in the automotive industry throughout the world.
- **2002:** The Las Vegas Convention Center completes construction on its expansion, opening up an additional 1 million sq. ft. of space in the two-story South Hall.
- **2003:** A vehicle Proving Ground is added to the SEMA Show, where attendees can experience exhibitors' products in action. The track is the only place at the SEMA Show where vehicles are in motion.
- **2009:** The New Products Showcase expands to include scanning devices, which visitors use to obtain printouts and e-mails of selected products. New products is the Number One reason why attendees come to the SEMA Show.
- **2010:** A new award emerges "The SEMA Award," recognizing the Hottest Vehicles at the SEMA Show. Winners are determined by the vehicle model that is on display most in exhibitors' booths, and represent the hottest trending vehicles for the year ahead.
- 2012: As automotive customization grows internationally, the HiLux, a vehicle not sold in the United States, is on display along with products for the vehicle made by various exhibitors. Prior to the SEMA Show, the SEMA International Dept. made a HiLux available to members to assist with manufacturing products for the top-selling vehicle.
- **2013:** Specialty market strengthens with an upward turn toward pre-recession exhibitor numbers and more than \$33.4B in retail sales representing a 7% increase from 2012.
- **2014:** For the first time ever the general public is invited to share in the excitement of the SEMA Show at SEMA Ignited, a giant, Friday night celebration of car culture at the LINQ. New displays, exhibits and services include the SCORE Baja 1000 Experience (featuring a qualifying event for the race), more efficient transportation, and Gold Lot activities including a live build by Chip Foose for the Velocity Network's Overhaulin' and the Snow Zone featuring products for winter use.



2014 SEMA SHOW FACTS

The SEMA Show is a trade-only event where automotive specialty equipment manufacturers debut new, innovative products, and connect with industry buyers from all over the world.

The four-day event consistently attracts more than 130,000 individuals, including:

- 60,000 quality buyer companies seeking the hottest products to sell in their shops.
- 3,000 media representatives from both trade and consumer outlets.
- Staff from some 2,500 exhibiting companies.
- Representatives from more than 130 countries outside the United States.

The 2,500 exhibiting companies consist of:

- Manufacturers of automotive accessories that enhance the performance, styling, comfort, convenience and safety of cars, trucks and SUVs.
- 550 companies exhibiting at the SEMA Show for the very first time, who are bringing brand-new, innovative products to the market.
- 13 major automakers and leading aftermarket manufacturers, but primarily small businesses that are owned and operated by automotive enthusiasts who know, love and understand vehicles inside and out.

In addition to connecting manufacturers with buyers at the SEMA Show, the annual event provides value to participants through:

- more than 50 education seminars focuses on business strategies and techniques such as online marketing, customer service and even the new healthcare reform law.
- Networking events where those in specific market segments are able to have mingle with one another—something that is not as common today given today's technology.
- Features and attractions that highlight industry trends, including live drifting demonstrations, hands-on workshops and more.

The SEMA Show includes:

- More than 1-million square feet of exhibit space, and an addition 1.5 million square feet of features and attractions throughout the Las Vegas Convention Center, outside areas and neighboring Westgate Las Vegas Resort and Casino.
- Nearly 2,000 products in the New Products Showcase.
- 1,500 feature vehicles in both exhibitors' booths and throughout the convention center.

The SEMA Show is organized by the Specialty Equipment Market Association (SEMA), the trade organization representing the \$33.4 billion automotive aftermarket industry. In addition to organizing the premier automotive trade show in the world, SEMA offers members research, training, education, manufacturing support services, legislative advocacy, group-buying discounts, networking events and more.



AFTERMARKET INDUSTRY FACTS

The Auto Aftermarket is Big Business.

In 2013 consumers bought more than \$33.4 billion in non-repair/replacement parts and accessories to personalize their cars, trucks and SUVs, a nearly 7% growth over 2012 and a 19.7% increase since the recession ended in 2009.

Trends in two market niches especially stand out: Street Performance and Light Truck.

The Street Performance niche (all products used to modify performance vehicles such as sports and muscle cars—superchargers, suspension, body kits, etc.) has nearly quadrupled since 2001 and now represents about \$9 billion in retail sales.

Interestingly, that niche actually grew during the recession and has seen even higher annual growth rates since 2009.

The Light Truck niche (all products to modify performance, appearance and/or handling of light trucks [pickups, vans and SUV/CUV] for normal use), historically the largest niche SEMA tracks, is seeing strong signs of recovery after being hit hardest by the recession and rising gas prices. It's up 16% since 2010 and is starting to show pre-recession growth rates.

Accessories Influence New Car Sales

SEMA research shows specialty products can influence over 1.7M new-vehicle sales each year and that nearly a third (29%) of Modifiers are influenced to buy their vehicle due to the availability of specialty parts. Even more interestingly, nearly 1 in 10 (9%) of Non-Modifiers are influenced to buy their vehicle because they saw a customized version of that vehicle.

What Accessories are Consumers Buying?

The largest product segments are specialty performance tires and custom wheels with \$1.87 and \$1.6 billion in manufacturer sales, respectively, in 2013, and 27% and 18% growth since 2008.

Other large growth product categories include Suspension (26.6% 2008-2013), Mobile Electronics (13.5% 2008-2013) and Engine Products (12.9% 2008-2013).

Where and How are Consumers Buying Accessories?

Before buying, 53.3% of consumers research parts and accessories online. 33.7% get info from a friend or relative and 30.4% go to manufacturers' websites.

Most consumers by far (36.3%) shop at chain auto parts stores most often. Independent and specialty shops are the second largest retail group with about 10% of consumers shopping there.



SEMA SHOW MAP & MARKET SEGMENTS:

For in-depth view of floorplan, go to www.SEMAshow.com/floorplan



WESTGATE



COLLISION REPAIR & REFINISH



MOBILE ELECTRONICS & TECHNOLOGY



RESTYLING & CAR CARE ACCESSORIES



TOOLS & **EQUIPMENT**

CENTRAL HALL



RACING & PERFORMANCE





HOT ROD ALLEY



RESTORATION MARKETPLACE



RIISINESS SERVICES

TRUCKS, SUVs

POWERSPORTS &

UTILITY VEHICLES

FEATURED EXHIBITORS

FIRST-TIME &

& OFF-ROAD

SOUTH HALL LOWER



GLOBAL TIRE EXPO



WHEELS & ACCESSORIES





FIRST-TIME & FEATURED EXHIBITORS

SEMA SHOW STUDENT PROGRAM—OVERVIEW:

The SEMA Show Student Program offers educators the opportunity to invite "qualified and motivated students" to attend the annual SEMA Show. The primary objective is to provide students with unique learning experiences that integrate the student's field of study with actual business and tradeshow opportunities in the automotive aftermarket industry.

WATCH: The SEMA Show Student Program: The Ultimate Field Trip

Students who participate in this program will:

- Have an increased understanding of SEMA's role in the automotive aftermarket industry and the market segments that make up the specialty equipment market.
- Gain awareness of the diversity and depth of the automotive aftermarket.
- Gain information about potential careers in the aftermarket industry.
- Establish a network of key industry contacts and potential future employers.

BENEFITS:

- Complimentary Admission:
 - SEMA offers complimentary SEMA/AAPEX Show admission to school officials and students.
 - o Cost savings per person: \$25 USD before October 16; \$75 USD after October 16.
 - o Admission badges include access to:
 - SEMA Show Education & Special Events: Monday, November 2 – Friday, November 6.
 - SEMA Show Exhibits: Tuesday, November 3 Friday, November 6.
 - AAPEX Show Exhibits: Tuesday, November 3 Thursday, November 5.
- Automotive Career Paths—Student Seminars:

Free-to-attend career orientation seminars for students, presented by industry leaders and experts, on topics ranging from "how to master the job interview" and "building your personal brand," to "finding your future" in the automotive aftermarket.

SEMA Show Education Days:

Free-to-attend business and professional development seminars covering everything from digital marketing to customer service, vehicle technology, industry trends and more. For more information about individual sessions visit: www.semashow.com/education



SEMA SHOW STUDENT PROGRAM—OVERVIEW:

EVENTS AND NETWORKING OPPORTUNITIES:

SEMA encourages you to take advantage of the various networking opportunities hosted throughout the event week. Introduce your students to industry leaders and representatives of the various specialty equipment market segments and meet with other school representatives to share your successes and challenges and to discuss ideas for collaboration. The experience and professional contacts that you and your students will make by attending these events are invaluable and often lead to internships and employment for students, and facilitate the development of lasting relationships between you and industry employers.

- SEMA Show Student Program Welcome & Orientation Luncheon
- SEMA Education Partners Luncheon
- SEMA Council/Network Events & Receptions

Gear-Up Girl:

This event is in collaboration with the SEMA Businesswomen's Network (SBN) and the SEMA Show Student Program. It is a unique networking opportunity created for the benefit of female students pursuing careers in the automotive industry. The event goals are to:



- Connect female students with female leaders in the industry
- Help female students gain a broad understanding of opportunities in the industry
- Help female students identify their interests and how those might connect with specific niche market segments and/or companies in the industry

WATCH: 2013 Gear-Up Girl Event

Mentor-A-Student Program:

Selected students (mentees) may spend thirty (30) minutes to one (1) hour with participating Industry representatives (mentors) to conduct informational interviews and to gain industry perspectives, real-world insights and career advice. Students must provide their resumes to apply for this program. SEMA Staff will coordinate meeting locations and times.



SEMA SHOW STUDENT PROGRAM-OVERVIEW:



SCRS' Repairer Driven Education (RDE) Full-Series Discount:

School officials and students are eligible to attend the full-series of SCRS' Repairer Driven Education (RDE) seminars for a significantly discounted rate of \$50.00/per person (\$250 Savings). The full-series pass allows you to select a seminar in each educational time slot offered by SCRS. The pricing structure was made possible through coordination between SCRS and the SEMA Education Department, emphasizing the focus from both organizations to support the future of the automotive repair industry. Check out the 2015 SCRS RDE schedule at www.semashow.com/scrs.

About SCRS: Through its direct members and 39 affiliate associations, SCRS is comprised of 6,000 collision repair businesses and 58,500 specialized professionals who work with consumers and insurance companies to repair collision-damaged vehicles. For more information about SCRS please visit their web site: **Society of Collision Repair Specialists**.





REGISTERING FOR THE SEMA SHOW:

There are two (2) options for school officials to register for the SEMA Show:

SCHOOL OFFICIALS ONLY:

As employees in the education sector of the automotive industry, school officials may register
as Attendees via the main SEMA Show online registration and by selecting Non-Buyer and
Association/Education/Government as the categories for employment qualification.

Student registration is not available with this option

- a) The cost to register is \$25.00 USD per person for early registration and covers the entire week of the show. After October 16, late or on-site attendee registration at the show is \$75.00 USD.
- b) Each person that registers must have their own, unique email address in order to complete registration. It must be a valid email address where the confirmation can be emailed.
- c) Registration guidelines require you to provide **two of the following documents during the qualification process to confirm your employment** within the automotive industry:
 - Tax registration certificate or business registration
 - Business license
 - Two recent paycheck stubs
 - Business cards (company name and address must correspond with information on registration form, and must include job title)
 - Business photo ID (must include company name, photo, and your name)
- d) Spouses are eligible to attend the SEMA Show and can be registered at the same time as the qualified registrant. The cost to register a spouse is the same as for an attendee.
- e) Register online at www.semashow.com before the pre-registration deadline of Friday, October 16. The employment verification process may take up to ten (10) business days. For U.S. and Canada: once your attendance has been approved, your badge(s) will be mailed via U.S.P.S. to the address that you provide.
- f) **International attendees** must register online before Friday, September 18, in order for their badge(s) to be shipped via UPS.
- g) If you register after Friday, October 16, your badge(s) will not be mailed. You will need to print your barcode confirmation and bring it to Express Registration in the Westgate Hotel adjacent to the Las Vegas Convention Center. Your barcode will be scanned and your badge printed out upon presenting an official, government-issued photo ID (such as a passport or driver's license). The name on your ID must match the name on the badge. There are NO exceptions to this policy and badges are not transferable.

-OR-



REGISTERING FOR THE SEMA SHOW:

SCHOOL OFFICIALS WITH STUDENTS:

2. To participate in the <u>SEMA Show Student Program</u> events and to bring a group of students to the show, <u>SEMA offers a dedicated web site for school group registration</u>. This is not available through the main online SEMA Show registration website. The guidelines to register your group are as follows:

School Requirements:

- a) Each school or college department is permitted to bring a maximum of fifteen (15) students.
- b) There must be one (1) school official in attendance for every five (5) students.
- c) Only one (1) school official may serve as the primary contact for each school and/or college department.
- d) The primary contact is responsible for registering the student group and fellow school officials accompanying the group.
- e) Provide contact information and cell phone numbers for all school officials in the group.
- f) School officials must accompany students at the SEMA Show and show-related functions.
- g) Provide the following information for each student:
 - First and last name
 - Age
 - Anticipated graduation date
 - Field of study
 - Interests
 - Email address

Student Eligibility Requirements:

While each institution should establish their own criteria for student selection, SEMA requires at a minimum, that all students must adhere to the following:

- 1. Be at least 16 years of age.
- 2. Be enrolled as a full-time student at a high school, vocational technology school, college or university.
- 3. Be preparing for a career in the automotive industry.
- 4. Be accompanied by a school official (i.e. administrator, professor, instructor, advisor or counselor) while attending the SEMA Show and SEMA Show-related functions.



DRESS CODE:

Dress Code:

Inside the exhibit halls, the SEMA Show is a business-to-business trade show and not open to the public. Attendee dress ranges from casual to business professional. Exhibitor dress ranges from golf-casual to business-professional. Here are some examples of preferred school attire:

- Collared, button-down shirts, shop shirts, polo shirts, preferably with school logo.
- Casual slacks similar to Dockers or Chinos
- Closed-toe and comfortable walking shoes









GETTING TO THE SHOW:

VISITING LAS VEGAS:

Check out www.lasvegas.com/ for "How to Vegas" travel planning tools, shows, tours and activities.

TRAVEL & LODGING:

Lock in the best rates at Las Vegas' best hotels today through SEMA's official housing bureau.

www.semashow.com/travel-and-lodging

SEMA SHOW STRATEGY GUIDE & FAQS:

- www.semashow.com/sema-show-strategy-guide
- www.semashow.com/faqs

PARKING & TRANSPORTATION:

Parking is \$10 daily on Show days with in/out privileges at the following locations:

- Gold Lot: located across from the Convention Center entrance on Paradise Road.
- **Green Lot:** located on the Southeast corner of Swenson and Desert Inn, behind the Convention Center. This lot is unavailable on Tuesday, November 3.
- Handicap parking is available in the Gold Lot.

Sorry, there is no overnight parking permitted in any Las Vegas Convention Center lot.

SEMA SHOW ESSENTIALS: THINGS YOU MAY WANT TO BRING TO THE LAS VEGAS CONVENTION CENTER:

- Small back-pack or messenger bag to carry personal belongings and promotional materials that you collect at the Show.
- Driver License, state-issued identification card or passport
- Cash or credit card. There are ATM's onsite, but it's just easier to have it on you.
- Refillable water bottle
- Lip balm
- Eye drops or contact lense solution
- Snacks (i.e., protein bars)
- Business cards



ABOUT SEMA

SPECIALTY EQUIPMENT MARKET ASSOCIATION (SEMA) - Fast Facts

HISTORY

- Founded in 1963, the Specialty Equipment Market Association is a trade association dedicated to helping businesses involved with vehicle customizations.
- Businesses include manufacturers, distributors, resellers and promoters.
- Products includes those that enhance a vehicle's performance, styling, comfort, convenience or safety.
- The history of the automotive aftermarket industry dates back to the 1950s, when hot rod and racing hobbies were just beginning.
- SEMA is governed by a board of directors who volunteer their time to lead and guide the association. A professional staff is responsible for the day-to-day execution of the programs and services.

MEMBERSHIP PROFILE

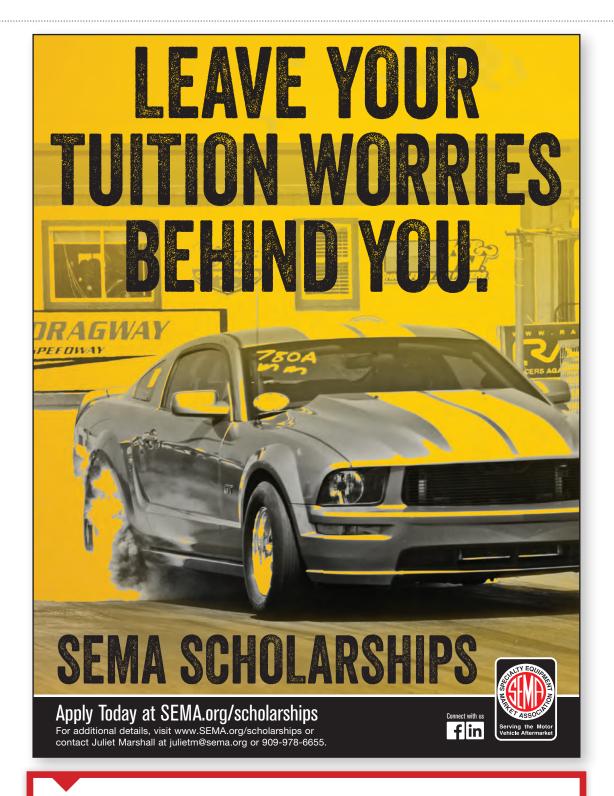
- SEMA has more than 6,800 member companies, all manufacturing, selling, distributing and marketing automotive specialty-equipment parts and accessories.
- The typical SEMA member company is a small to midsize business, with an owner entering the industry as an enthusiast whose passion led to a career.
- SEMA membership complements their existing staff by providing education, training, research, legislative advocacy, international outreach, as well as group discounts on insurance, shipping and more.

SEMA SHOW

- The SEMA Show is an annual trade show that brings manufacturers together with buyers from all over the world.
- The 2014 SEMA Show features more than 2,500 exhibiting manufacturing companies.
- The SEMA Show consistently hosts more than 130,000 individuals, including:
- More than 60,000 buyers
- 25 percent of professionals from outside the United States
- About 3,000 media representing automotive and mainstream outlets
- Over 500 students and faculty from all over North America, Japan and Europe.
- The SEMA Show takes place the first week of November each year, with the Show beginning on Tuesday and continuing until Friday of the week.
- A major component of the SEMA Show is the educational program, which begins the Monday before the Show opens and continues until the end of the week. With dozens of seminars, workshops and sessions, the educational program is considered to be a premier conference in and of itself.
- Manufacturers come to the SEMA Show to showcase their new products, while buyers come to the SEMA Show to discover the new products and trends. The SEMA Show is a place for industry professionals to connect and do business, and so the SEMA Show is a trade-only event that is not open to the general public.



SEMA SCHOLARSHIPS & LOAN FORGIVENESS:



For more information, visit www.sema.org/scholarships



SEMA CAREER WINDOWS



SEMA Education has launched a new resource to help members address their concerns about the future of the industry. Geared toward college students, the one-, two- or three-week Career Windows internship program is designed to expose future employees to the wide array of career fields in the industry.

"In talking to our members, one of their biggest challenges right now is finding qualified and eager employees. We are launching this new tool to develop the next generation of industry leaders and ultimately help fill that void. After test driving a successful program at our headquarters last summer, we are excited to see how our member companies will benefit, too," said Chris Kersting, SEMA president and CEO.

Through its unique structure of scheduled department visits, student participants gain a big-picture view of the automotive industry and exposure to the variety of career options within a particular company. While not a traditional job-training program, SEMA-member companies have the opportunity to invest in the next generation of automotive industry leaders by offering a tailored work experience for one, two or three weeks at a time.

As a Career Windows host, the role of the member company is to provide the structure, goals and experience for the student. SEMA has put together resources to help host companies launch their own successful Career Windows programs, and will also assist in matching students and hosts.

Member companies interested in hosting a student are invited to visit the <u>www.sema.org/career-windows/</u> or contact Director of Education **Zane Clark**.





DISCOVER THE BENEFITS OF SEMA MEMBERSHIP

BUSINESS RESOURCES AND SOLUTIONS

Boost Sales. Cut Costs.

- Business Insurance Solutions (SEIA): Custom Discounted Property and Liability Insurance Programs.
- Logistics Solutions (UPS): Discounts on Package and Freight Shipping.
 Special Pricing or Discounts on Value-Added Business Services.
- Payment Solutions (First Data): Single-Source Credit Card Processing Solutions.
- Industry Classified Ad Postings/Listings.

MARKET RESEARCH

Plan Better. Stay Ahead of Your Competition.

- Annual Market Study
- Niche-Focused Reports
- Consumer Demand Index
- Financial Benchmarking Program

EDUCATIONAL AND TRAINING PROGRAMS

Learn More. Earn More.

SEMA Education:

- SEMA Show Education Days Live Seminars
- · eLearning Center
- Scholarship and Loan Forgiveness Fund
- SEMA Show Student Program
- SEMA Biz Tips Video Series

WORLD-CLASS TRADE SHOWS

Connecting Manufacturer, Buyers and the Media.

- SEMA Show- Member Discounts for Exhibitors and Perks for Buyers
- SEMA CIAPE China Business Development Conference
- PAACE Automechanika
- MPMC Media Trade Conference

SEMA GARAGE - PRODUCT DEVELOPMENT CENTER

Resources to Test, Tune and Develop.

- Photo Studio with Vehicle and Product Infinity Photo Coves
- Surface Scanning and 3D Printing Services (Rapid Prototyping)
- Tech Transfer OEM-Provided CAD/CAM Drawings
- EO Testing and Certification, Dyno Performance Product Development Assistance
- Measuring Sessions for Hands-on Access to New Vehicles
- Fully-Equipped Installation Center
- Press Conference/Training Center

COUNCILS AND NETWORKS

Networking Based on Your Business and Interests.

- Automotive Restoration Market Organization (ARMO)
- Hot Rod Industry Alliance (HRIA)
- Light-Truck Accessory Alliance (LTAA)
- Manufacturers' Rep Network (MRN)
- Motorsports Parts Manufacturers Council (MPMC)
- Professional Restylers Organization (PRO)
- Wheel & Tire Council (WTC)
- Emerging Trends & Technology Network (ETTN)
- SEMA Businesswomen's Network (SBN)
- Young Executives Network (YEN)

GOVERNMENT AFFAIRS

Protecting Your Business and Your Passion.

- Government Advocacy/Legislative Programs
- Professional Lobbying Staff (federal and state)
- Legislative Alerts and Comprehensive Website
- Grassroots Enthusiast Support/SEMA Action Network (SAN)
- Political Action Committee (PAC)
- Quarterly PAC Newsletter

INTERNATIONAL RELATIONS

Identifying Global Opportunities.

- Global Legislative/Regulatory Updates
- International Market Research and Statistics
- International Buyers' Guide
- Networking Opportunities With International Buyers/Media at the SEMA Show/Year-Round

SEMA DATA CO-OP

Manage and Distribute your Product Data.

- Industry-owned and-operated Product Data Repository
- Live Help Desk Support Throughout the Process
- Industry-Standard ACES and PIES Validation
- Extensive Web-Based Tools
- Suppliers Own and Control All Data
- Customized Export Formats for Receivers
- Lowest Cost Solution

INDUSTRY COMMUNICATIONS

Get the Latest and Most Relevant Industry Information.

- Monthly Trade Magazine—SEMA News
- Weekly Electronic Newsletter—SEMA eNews
- Comprehensive Websites www.SEMA.org, www.SEMAShow.com

Questions? See reverse side for SEMA contacts or call SEMA Customer Service at 909-610-2030.



Need more information? visit www.SEMA.org/benefits



BECOME A SEMA MEMBER TRADE SCHOOL TODAY!



- Industry Communications SEMA News & eNews
- SEMA Scholarships for Students & Loan Forgiveness for Employees
- Access to Market Research Reports
- SEMA Action Network & Legislative Programs
- Join SEMA Councils and Networks
- Regional Career Mixers & Career Windows
- And So Much More!

Annual Membership Fee: \$150

To Join SEMA Visit www.SEMA.org/join-sema





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Need more information? visit www.SEMA.org/staff-directory



For the SEMA staff directory, visit: www.sema.org/staff-directory