Visual Media Association

VMA Annual Industry Metrics Survey

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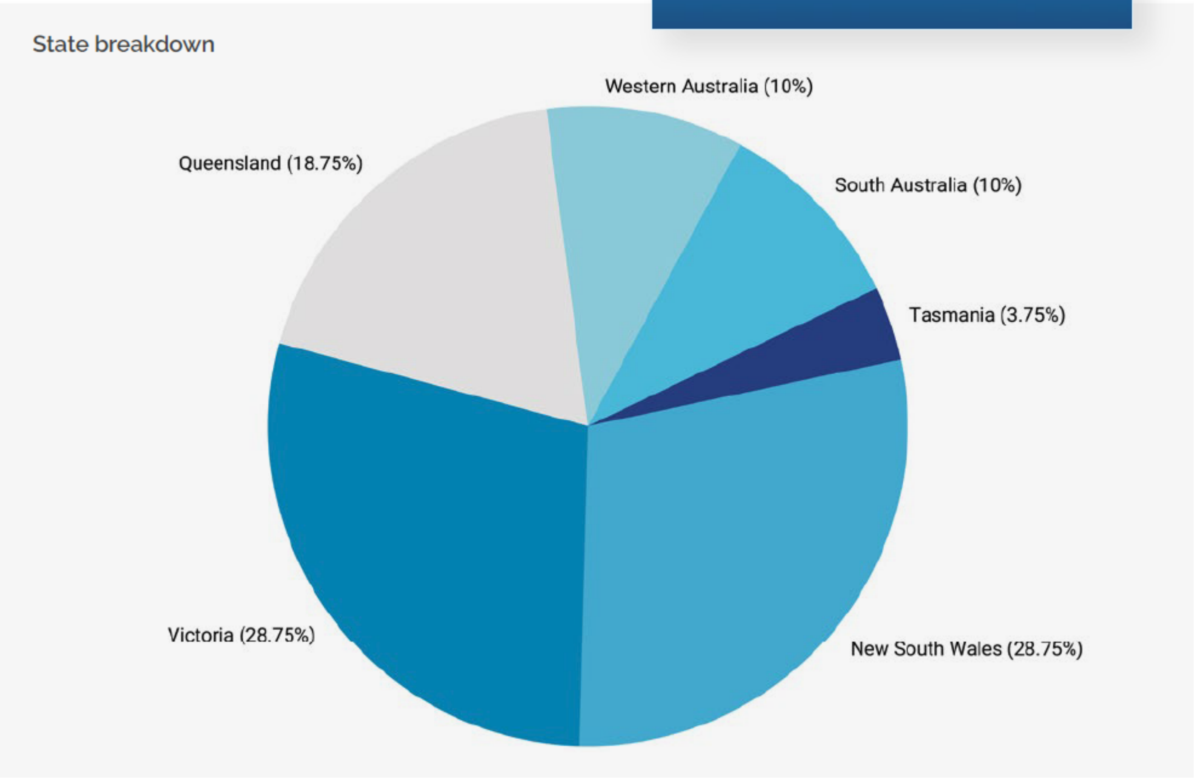
GENERAL INDUSTRY TRENDS AND DEMOGRAPHIC

67.50% of businesses operate across a single site.



Total Industry Employment is 229,113 reflecting industry stability and the largest sovereign manufacturing employer in the country.

With 4,435 (was 4,114) businesses registering as print or visual media businesses across Australia, the majority of businesses being in NSW and VIC, reflects membership breakdown of Association.

Larger buying group head offices also reflects business location.

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GENERAL INDUSTRY TRENDS AND DEMOGRAPHIC

96% of businesses are **privately** owned.

86.25% of companies are privately owned and operated

		3.75%	Publicly listed
2.50%	Privately owned – not working within the business	1.25%	Privately owned with external investor (locally based)
2.50%	Privately owned with external investor (internationally based)	3.75%	Private equity owned

37.50% of businesses report **$1M-$5M** in annual turnover

17.50% of businesses report **less than $1M** in annual turnover

37.50% of businesses report **$5M to $50M** in annual turnover

7.50% of businesses report **$50M - $100M+** in annual turnover

GENERAL INDUSTRY TRENDS AND DEMOGRAPHIC

Industry Gender Breakdown

- **38.63%** of industry employ women
- **64.91%** of industry employ men
- **8.33%** of industry employ non-binary persons

38.75% of companies currently **employ under 10 people**

26.25% of companies currently **employ 11–30 people**

12.50% of companies currently employ 51–100 people

8.75% of companies currently employ 31–50 people

6.25% of companies currently employ 101–200 people

1.25% of companies currently employ 201–400 people

6.25% of companies currently **employ 500+ people**

83.52% of employees are **Full-time employees** (80.11% in 2023)

16.14% of employees are **Part-time employees** (16.34% in 2023)

7.21% of employees are **Casual employees** (12.94% in 2023)

4.07% of employees are **Contracted employees** (4.37% in 2023)

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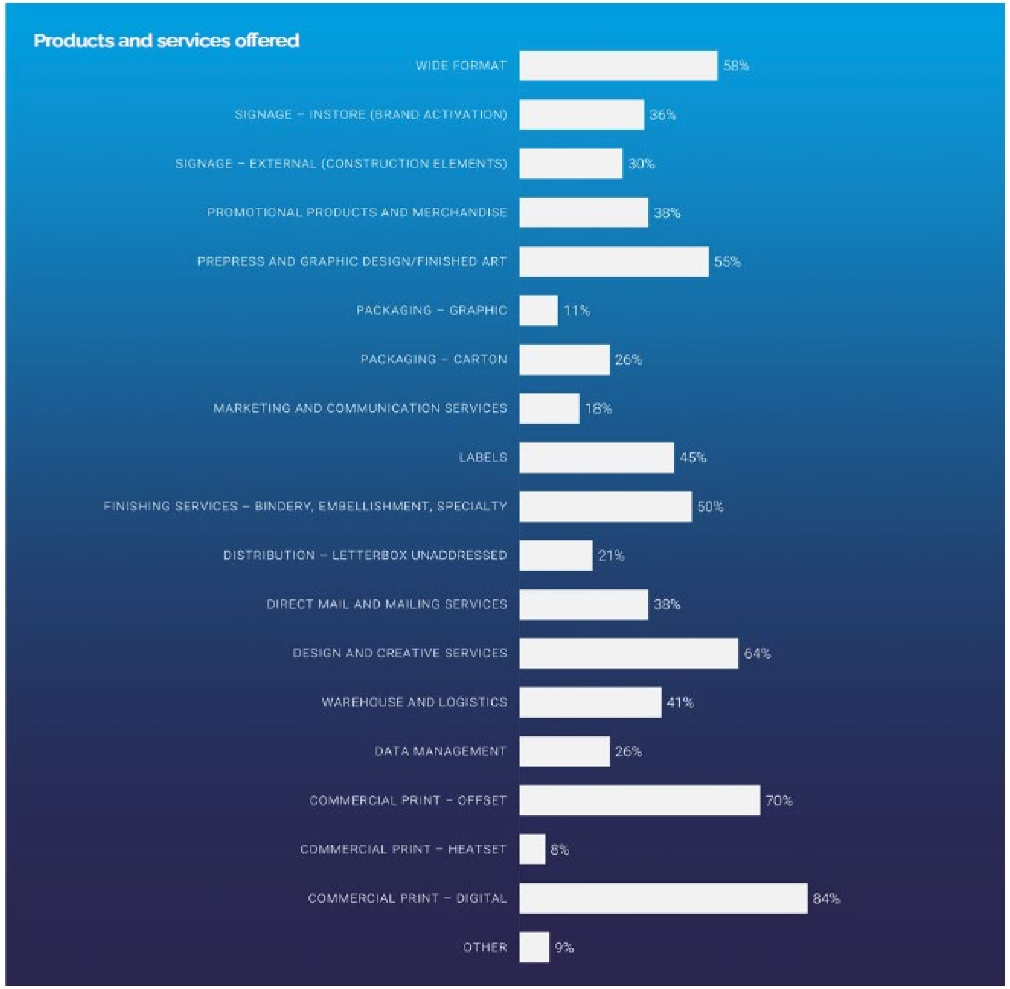
SERVICE OFFERING & DIVERSITY ACROSS THE INDUSTRY

84%

of average job size are under 1000 units, with 30.6% being under 500report offering **Commercial Print – Digital** to market.



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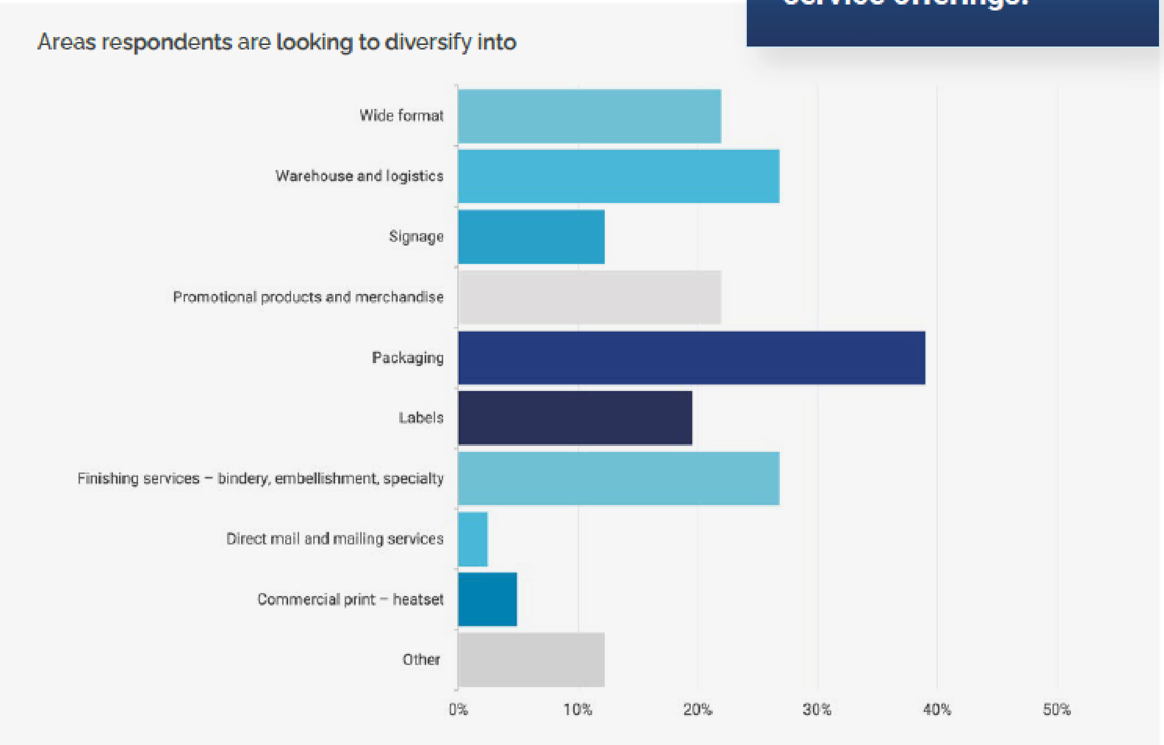
SERVICE OFFERING & DIVERSITY ACROSS THE INDUSTRY

42% of businesses are looking to invest in new equipment and upgrades to expand service offerings.

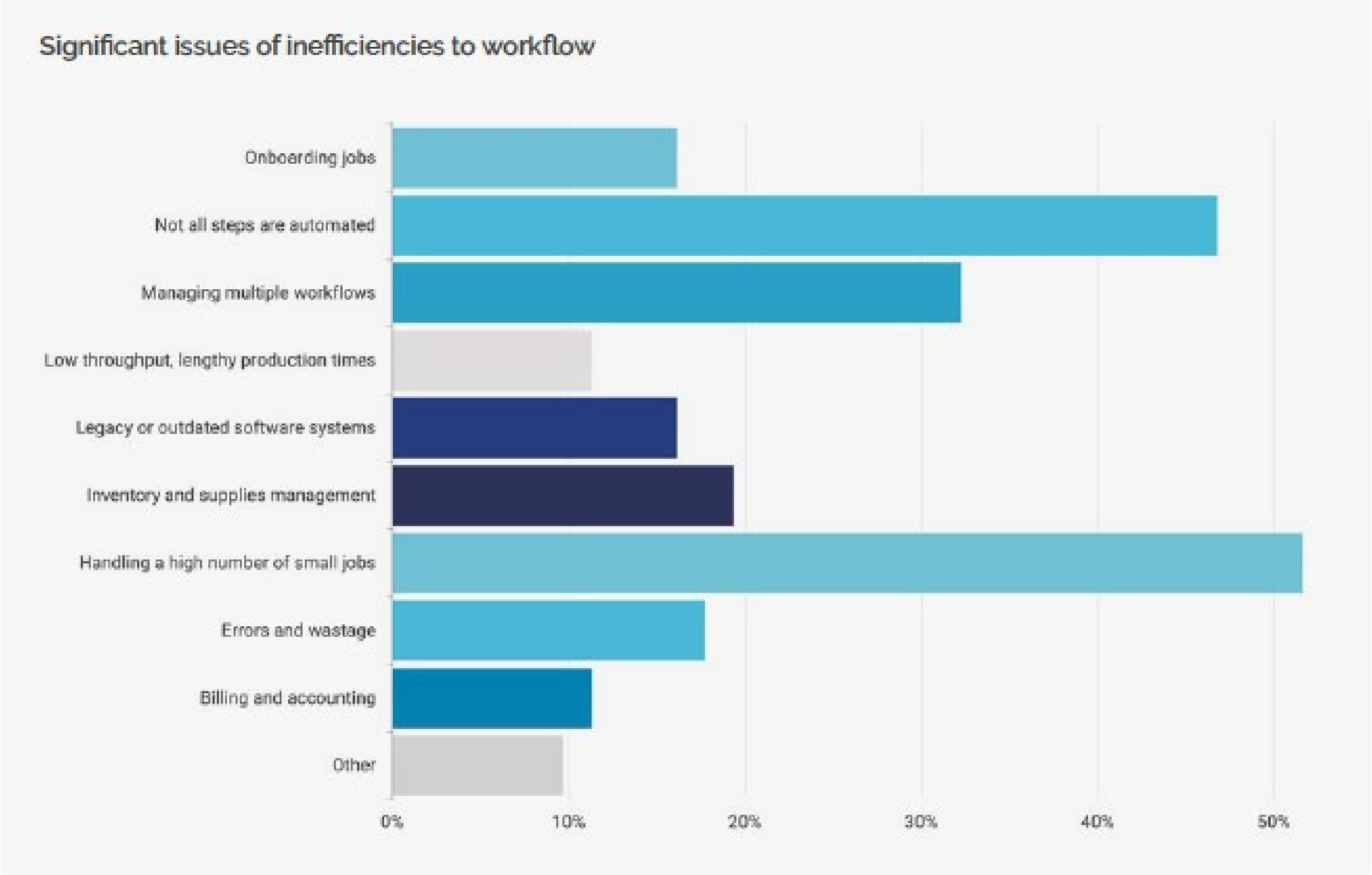


Packaging, Warehouse and Logistics and Finishing are the three top growth areas.

Noting this is the second year that Packaging ranks the highest in diversification investment.

In 2023, promotional products and merchandise and wide format fell into the top three. 2024 reports these sectors receiving investment, however warehouse and finishing pushing ahead.

QUOTING JOBS AND WORKFLOW



Job ordering is mainly via email (59.95%) with e-Commerce or web-to-print (30.15%) second and Direct Sales (27.09%) third.

Job Ordering to Quote to Production and Distribution is the highest concern from businesses with high manual handling costs and fragmented automation being the highest concern areas.

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QUOTING JOBS AND WORKFLOW

62.50% Seasonal – Easter, Christmas, sporting events	**32.14%** Fiscal – end of year, budgeting windows
41.07% Education and government – budget, sitting weeks, school terms, elections	**37.50%** Irregular – no predictability, project to project, quote to quote
33.93% Stable – month to month volume trends to client output	**7.14%** Other

34%

of businesses report average Job Size has increased, however 19.74% report Job Size declined significantly.

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LABOUR & SALARY BENCHMARKING

77.78%

currently employ one or more
1st Year/Stage 1 Apprentice
(38.46% in 2023)

77.78%

currently employ one or more
2nd Year/Stage 2 Apprentice
(53.85% in 2023)

55.56%

currently employ one or more
3rd Year/Stage 3 Apprentice
(30.77% in 2023)

33.33%

currently employ one or more
4th Year/Stage 4 Apprentice
(30.77% in 2023)

Since being returned to the AAPL, there has been a significant increase in apprentice employment nationally.

Professional organisations or on-site training programs is the highest training engaged at 37.5%.

With improved 3rd Year / Stage 3 Apprentice levels improving by 24.79% there is a buoyed enthusiasm for completion rate improvements for the industry.

LABOUR & SALARY BENCHMARKING

2.44% of companies pay **100% to the Award** (10.29% in 2023)	**26.83%** of companies pay **5-10% above the Award** (38.24% in 2023)
39.02% of companies pay **11-20% above the Award** (36.76% in 2023)	**21.95%** of companies pay more **than 20% above the Award** (5.88% in 2023)

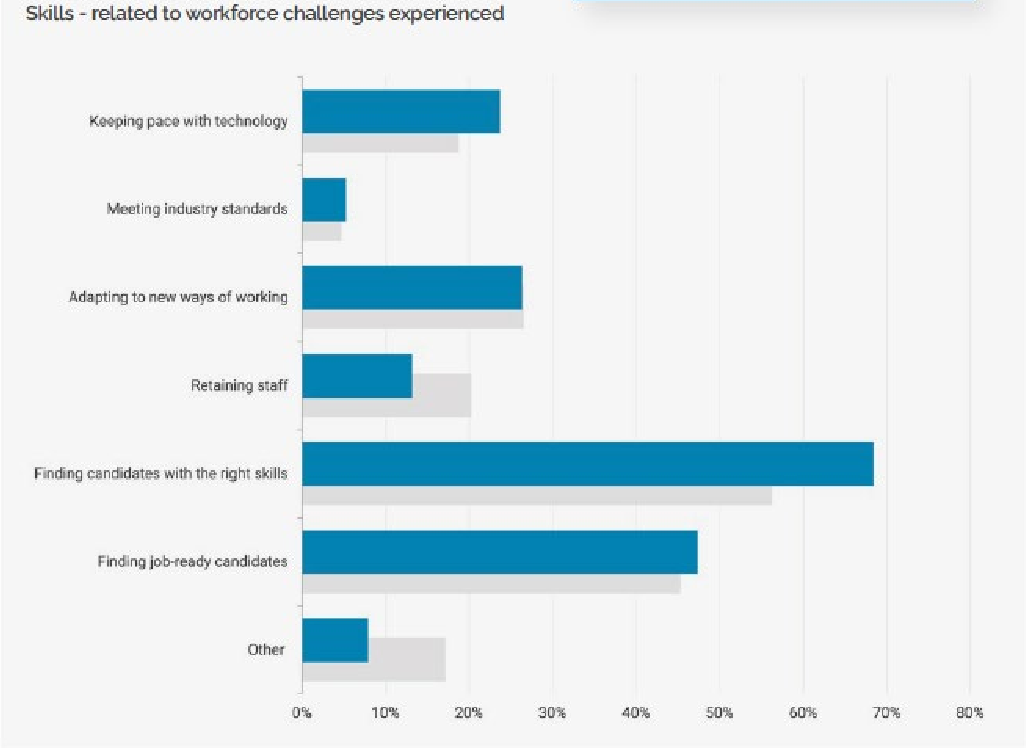
The most significant shift to Wages is companies paying 20% above the Award, from 5.88% in 2023 to 21.95% in 2024.

The lowest percentage report 100% to the Award and overall industry is paying above and continued trends of above at higher levels.

This is due to skills shortages and demand imbalance across the industry which is anecdotally reported as leading to increased investment in automation and innovative consideration to employment channels.

SKILLS & TRAINING

68% of businesses say finding **candidates with the right skills is the biggest challenge for the industry.**



Finding candidates with the right skills in the biggest challenge for the industry (68%) and a further 47.37% report Finding job-ready candidates is challenging.

In 2023 47% reported a return to onsite work and 2024 reports this trend will continue with a further 27% returning to onsite.

32% report they will continue work-from-home arrangements. Industry reports showing increased balance of work from home and onsite average moving to four (4) days onsite and one (1) offsite arrangements.

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BUSINESS CERTIFICATION & STANDARDS

51.35% of businesses hold **no certification**

27.03% of businesses are **ISO9001 certified**

24.32% of businesses are **FSC certified**

8.11% report certification in **carbon mapping**

8.11% of businesses are **SGP certified**

16.22% of businesses have **other certification**

18.92% of businesses are **ISO14001 certified**

8.11% of businesses are **PEFC certified**

8.11% of businesses are **APCO certified**

Quality and FSC are the highest certifications recorded across the respondents, however anecdotal stakeholder engagement reports FSC is costly and operationally burdensome which could facilitate greater opportunity for PEFC certification throughout the next twelve (12) months.

Carbon mapping has realised an increase of 6.55% reflecting government attention to emission mapping and targeting.

THE YEAR AHEAD

> February 2025 roadshow presenting more analysis across the industry metrics and new research across the power of print

> Sustainable Green Print (SGP) automated tool, independent auditing and a forest stewardship alliance

> National Print Awards are back and aligning with PacPrint25, celebrating excellence across the industry

> Two Sides new website with updated content and collateral for 2025

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