EIA EVENTS INDUSTRY ALLIANCE

AEO AEV ESSA

SASIE

SIZE AND SCALE INDEX FOR EXHIBITIONS 2023

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FOREWORD

Exhibitions continue to have a vital role to play in Britain's future

The UK's exhibitions industry, as confirmed by this latest SASIE research, continues to successfully display its creativity, entrepreneurial dynamism and overall resilience for the benefit of us all. This is despite all the challenges the economy faces: the negative impacts and changes resulting from Brexit and the Covid pandemic and, internationally, new wars and growing geopolitical tensions not to mention the national pressures of continued high inflation and cost of living whilst teetering on the brink of recession for many months.

We have seen some venues reporting their highest number of new show launches helping to truly underline the positive impact of the exhibitions industry on UK trade.

We already know that this vital industry generates some £9.4 billion in trade, attracts over 6 million global visitors annually, provides almost 100,000 jobs and, after accounting for indirect and direct impacts, contributes over £4 billion to UK GDP (Economic Impact Study, 2023, Events Industry Alliance).

The basis for these huge impacts is to be found in this new SASIE research which confirms that the industry is on a promising post-Brexit, post-Covid path to growth and recovery. It shows that, in 2023, the numbers of exhibitions were up significantly and at comparable levels to the pre-Covid period. Visitor and exhibitor numbers also showed signs of recovery although not yet reaching pre-Covid levels. The total number of 'event days' and total gross space sold in 2023 were up on 2022 and broadly on a par with the pre-Covid figures.

One of the noticeable trends in 2023 was the substantial increase in the number of conference events (all with an excess of 500m^2 in exhibition space), as well as new consumer events. These developments have impacted positively on overall totals but more negatively on averages, particularly on average exhibition size and the number of exhibitors, with newer, smaller events contributing to a reduction in certain average indicators.

However, while the SASIE 2023 findings reveal some significant increases on the market's 2022 performance, some uncertainty remains in terms of the longer term picture, with many values not yet back to 'normal' levels despite a boost from conference events, potentially only short-term. We will need to maintain a close watch on such trends in 2024 and 2025.

We are always grateful to the AEV and AEO members who contribute the time and resource collating data for this report. We believe that your efforts enable us to produce vitally important market intelligence for our industry and help to demonstrate the value of our sector in discussions with government. We know that the UK exhibitions industry will continue to play a crucial role in driving international trade, creating community cohesion and prosperity for destinations across the UK while, at the same time, supporting the government's growth agenda.

Marija Erzen – Chair, Events Industry Alliance

EXECUTIVE SUMMARY

OVERVIEW

The Size and Scale Index for Exhibitions (SASIE) measures the scale and characteristics of the UK exhibition sector. It has been running since 2014.

It is produced by the Events Industry Alliance (EIA) which is an alliance of trade associations created by the three event industry bodies: the Association of Event Venues (AEV), the Association of Event Organisers (AEO), and the Event Supplier and Services Association (ESSA) to provide a group secretariat service in the events industry.

1. Dimensions of exhibition performance

In 2023, there were an estimated 1,016 exhibitions at the UK's main exhibition venues.

- These were split evenly between trade (42%) and consumer (40%) exhibitions.
- Two-thirds (64%) of these were held on an annual basis.
- In terms of gross exhibition size, a typical (median) exhibition was 5,200m^2 in 2023. The average was 8,700m^2 in 2023 (including outdoor space).
- Typical (median) net exhibition size was 2,600m^2 - the average was 4,900m^2.
- A typical exhibition was, in terms of number of exhibitors, medium sized (i.e. 50-150 exhibitors).
- An exhibition occupied a venue for an average of 4.7 days and was open for 2.3 days. Consumer exhibitions were typically longer than trade exhibitions

In 2023, there were an estimated 6.92m visits to exhibitions at the UK's main exhibition venues.

- The typical (median) event attendance was 3,000 – the average was higher at 6,800 visitors.
- The leisure sector was the largest sector for exhibitions – representing a fifth of exhibitions in 2023.
- In 2023, March, September, October and November were the busiest exhibition months accounting for over half of all exhibitions.

EXECUTIVE SUMMARY

2. Trends

Performance among the exhibition sector in 2023 continued to show significant recovery with numbers of events comparable to pre-Covid levels.

- Visitor and exhibitor numbers also showed signs of post-Covid recovery but remained below pre-Covid levels.
- **Total** number of event days (open and venue hire) and total gross space sold were also up on 2022 and broadly on a par with pre-Covid figures.
- However, **average** duration (open and hire days) and average gross and net size of exhibitions were down on 2022.
- The increase in events in 2023 is partly explained by a significant upturn in conference events but also new consumer events.
- This has impacted positively on **totals** – like visitor numbers, number of exhibitors, gross space sold, event days – with more events increasing these.
- However, it has impacted on average indicators, most notably on average size and number of exhibitors with newer, smaller events contributing to a reduction in these.

Total visitor numbers were up on 2022 by 14% with more events in 2023 but remained below pre-Covid levels.

1.

INTRODUCTION

INTRODUCTION

The Events Industry Alliance (EIA), which comprises the Association of Event Venues (AEV), the Association of Event Organisers (AEO), and the Event Supplier and Services Association (ESSA), is undertaking a programme of research into the size, scale and characteristics of the UK exhibitions sector. This has been running since 2014, with a break in 2020 and 2021 (when the Covid pandemic impacted heavily on the sector).

The following report is divided into three main sections.

The first provides an overview of the dimensions of activity in 2023 and includes data on:

- The number and type of exhibitions
- The number of visits to UK exhibitions
- Event duration
- Event size - both gross and net
- Events by industrial sectors
- Seasonality of events.

The second section provides a trend analysis for the period 2015 to 2023. This is based on a sample of venues where comparable year-on-year data exists.

The final section outlines the approach and methodology.

The research is based on a survey of venues (in AEV membership) and organising companies (in AEO membership) which involved collecting and reconciling detailed individual exhibition data.

GLOSSARY OF TERMS

DEFINITION OF AN EXHIBITION

An **exhibition** is an event with at least 500m^2 of exhibition space.

EXHIBITIONS INCLUDE:

- **Trade** - an exhibition aimed primarily at those working within a particular trade sector and its peripherals. Visitors to trade exhibitions are usually required to establish their trade bona fides.
- **Consumer** (also referred to as 'public') - an exhibition that is primarily organised to attract the consumer or general public. Usually makes a charge for admission.
- **Outdoor** – an exhibition which primarily uses outdoor space, often with temporary structures, which may or may not be held at a qualifying venue.
- **Conference** – a conference event that also includes a substantial (minimum 500m^2) exhibition element.

OTHER TERMS:

- **An exhibition organiser** - a company or individual that rents venue space for an exhibition and resells that space to exhibitors or exhibition participants.
- **Exhibition start date** - the date the show is open to either trade visitors or consumers (or both).
- **Total venue hire days** - the number of days for which the venue is hired. This would include exhibition set-up, open and break-down days.
- **Total open days** - the number of days an exhibition is open to either trade visitors or consumers (or both).
- **Gross Hall Space** (m^2) of exhibition - the overall space occupied by an exhibition, irrespective of the floor space occupied by exhibition stands, measured in square metres.
- **Net Hall Space** (m^2) of exhibition - the actual space sold occupied by exhibitors/exhibition participants at the exhibition, measured in square metres.
- **Number of exhibiting companies** – the number of companies exhibiting at an exhibition.

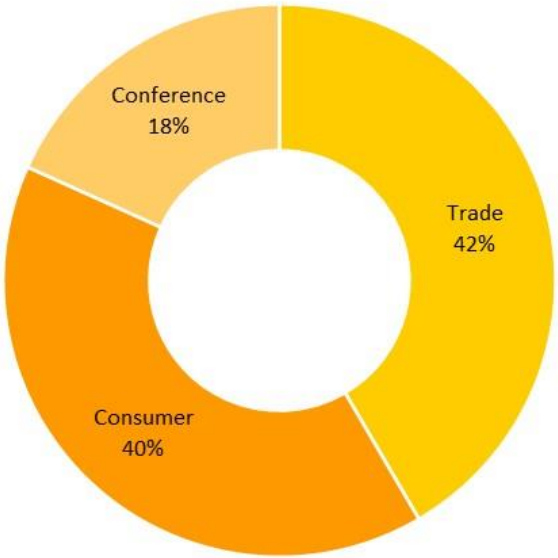
2.

DIMENSIONS OF EXHIBITIONS 2023

NUMBER AND TYPE OF EXHIBITIONS

In 2023,there were an estimated 1,016 exhibitions at the UK's main exhibition venues.

TYPES OF EXHIBITION



Trade exhibitions accounted for the largest proportion of the market – 42% (i.e. 422 exhibitions).

Consumer (or public) exhibitions had a similar share – 40% (i.e. 408 exhibitions). Conferences that incorporated a significant exhibition element (i.e. 500m^2 plus) accounted for 18% of the market – an increase over 2022 (see page 23).

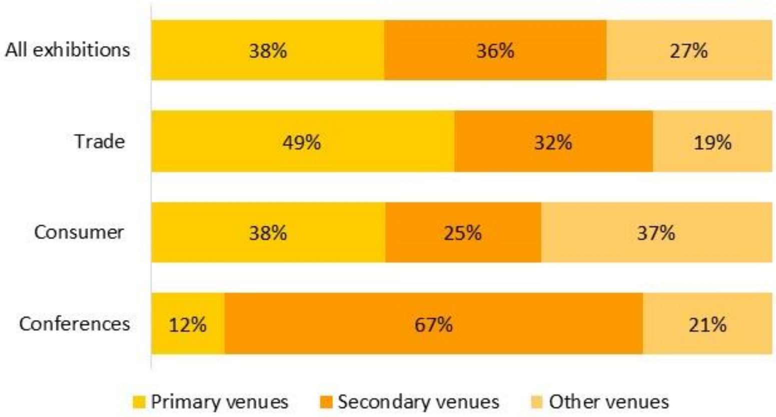
NUMBER AND TYPE OF EXHIBITIONS

The four primary venues, ExCeL London, Olympia London, the National Exhibition Centre (NEC) and Scottish Event Campus (SEC) (see section 4 for a full definition of venue categories), hosted approximately two-fifths (38%) of all exhibitions held in 2023.

They hosted a higher proportion of trade exhibitions (49% of all trade exhibitions).

Secondary venues (see section 4) also hosted over a third of exhibitions (36%) held in 2023 but they had a much higher proportion of the conferences with exhibitions (67%).

Other / outdoor venues (see section 4) hosted 27% of all exhibitions. They were more likely to host consumer exhibitions (37% of all consumer exhibitions).



Trade exhibitions tended to use primary and secondary venues.

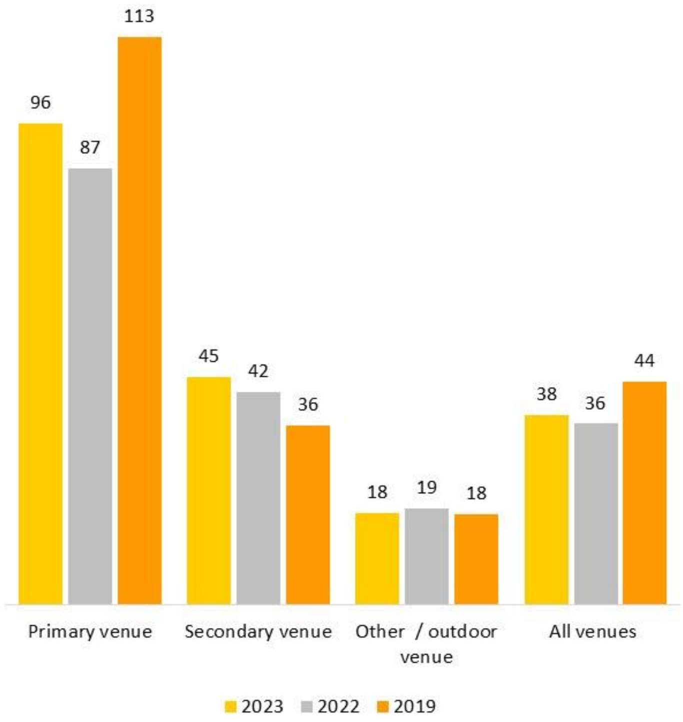
Consumer exhibitions were likely to use primary and other/outdoor venues.

EXHIBITION SHARE - BY VENUE TYPE

Venue type	Trade exhibitions	Consumer exhibitions	Conferences	Total exhibitions
Primary venues	206	154	22	**382**
Secondary venues	135	102	125	**362**
Other / Outdoor venues	81	152	39	**272**

NUMBER AND TYPE OF EXHIBITIONS

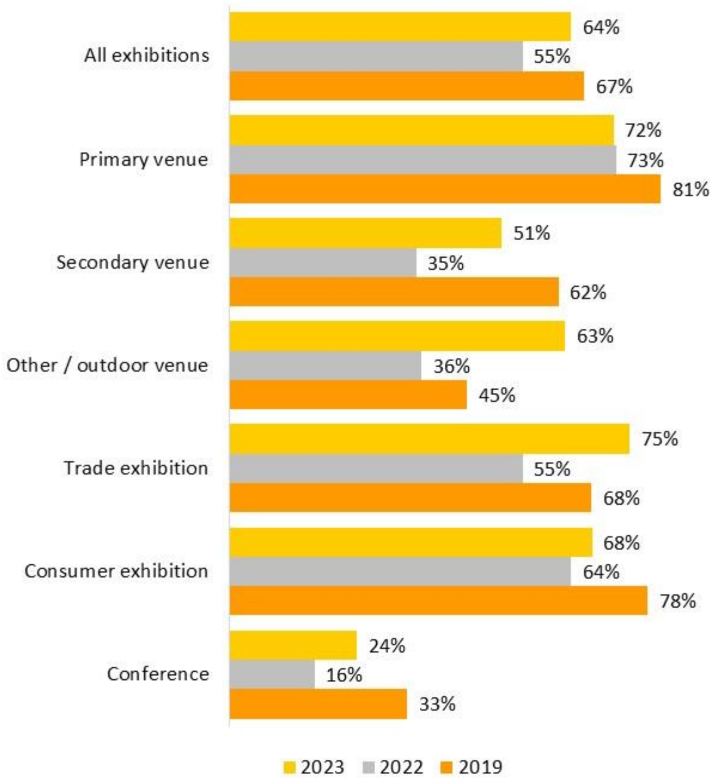
AVERAGE EXHIBITIONS - BY VENUE TYPE



On average, venues hosted 38 exhibitions a year (three a month) – slightly up on 2022.

This varied significantly, with primary venues hosting an average of 96 per annum (8 a month) compared to an average of 1.8 per month for other / outdoor venues.

ANNUALLY-HELD EXHIBITIONS



In 2023, 64% of exhibitions had been held on an annual basis. This was up on 2022 (when 55% had been annual events) – a reflection of new events coming on stream post-Covid.

Primary venues had the highest proportion of repeat events in 2023 – 72%.

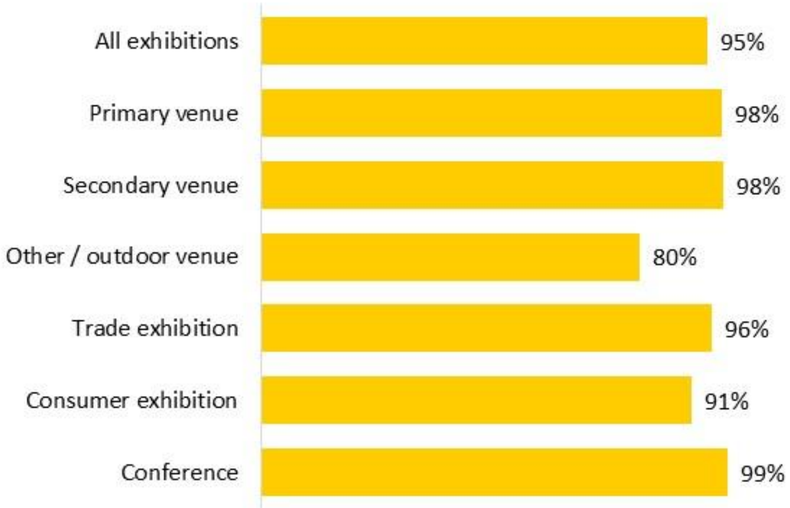
Secondary had the lowest (51%) – a reflection of the large number of more peripatetic conferences they hosted.

Only a quarter of conferences (24%) were held on an annual basis compared to three quarters of trade exhibitions (75%) and two-thirds of consumer exhibitions (68%).

Two thirds of exhibitions were held on an annual basis – up on 2022.

EXHIBITION SIZE

PROPORTION OF INDOOR-ONLY EXHIBITIONS

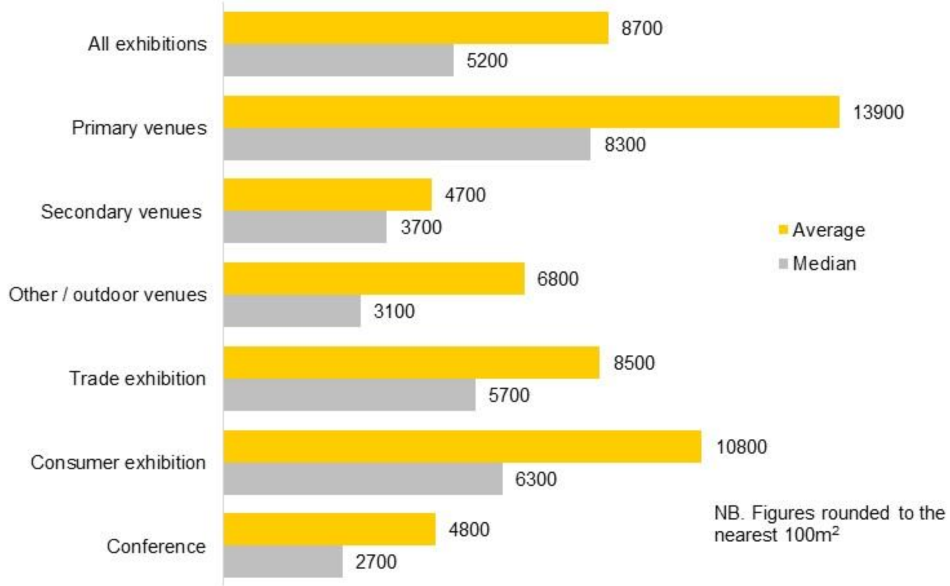


Most exhibitions (95%) were indoor only with just 6% including some outdoor space.

The proportion of exhibitions with an outdoor element was higher at other/outdoor venues (20%) and for consumer exhibitions (9%).

Consumer exhibitions (a median of 6,300m^2) and events at primary venues (a median of 8,300m^2) were typically larger than others.

TOTAL GROSS EXHIBITION SIZE (AVERAGE AND MEDIAN)



Typical (median) gross exhibition size (including outdoor space) was 5,200m^2.

EXHIBITION SIZE

The following table summarises the breakdown of events based on gross size. The circled values highlight the most common exhibition by either venue or exhibition type.

Just under half of exhibitions (49%) were small or small/medium (i.e. less than 5,000m^2). The most common exhibition size was small/medium (2,500-5,000m^2).

Just under a third (31%) of exhibitions were 8,000m^2 or more. For primary venues, the majority (51%) were 8,000m^2 or more.

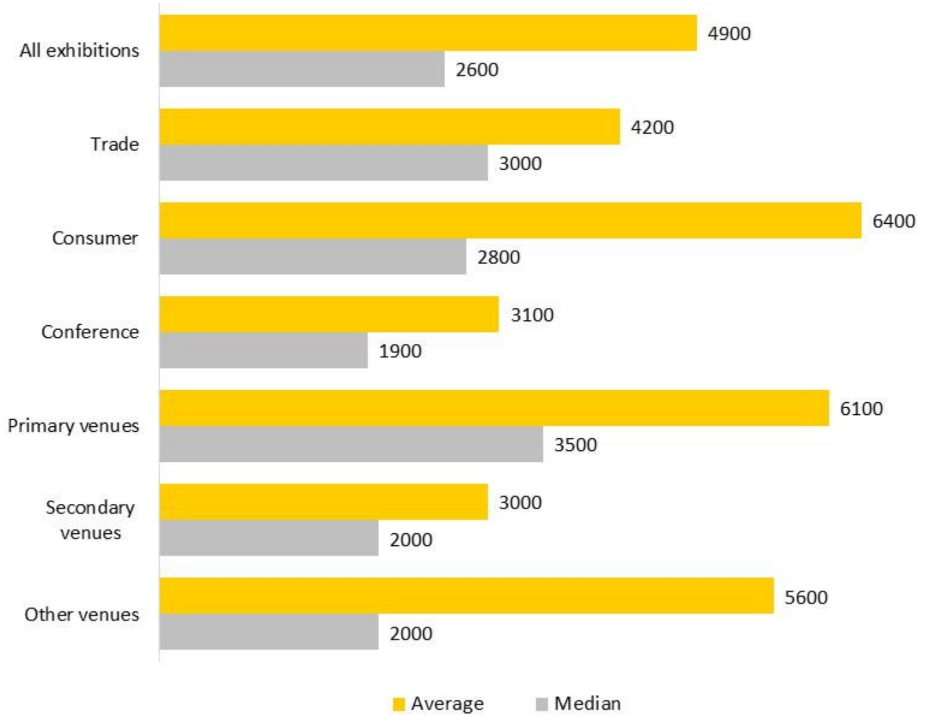
GROSS EXHIBITION SIZE

Exhibition size (based on total gross size)	All Exhibitions	Trade Exhibition	Consumer Exhibition	Conference	Primary Venue	Secondary Venue	Other /Outdoor Venue
	(%)	(%)	(%)	(%)	(%)	(%)	(%)
Small (up to 2500 m^2)	23%	20%	18%	42%	7%	26%	42%
Small / medium (2500-5000 m^2)	26%	25%	25%	32%	20%	37%	22%
Medium (5000-8000 m^2)	20%	24%	19%	13%	22%	23%	13%
Medium/large (8000-15000 m^2)	17%	19%	19%	7%	24%	12%	12%
Large (15000+ m^2)	14%	13%	19%	6%	27%	2%	12%
Average (gross m^2)							
Indoor gross	7900	8200	9100	4700	13600	4700	4200
Total (indoor and outdoor) gross	8700	8500	10800	4800	13900	4700	6800
Median (based on total gross size)	5200	5700	6300	2700	8300	3700	3100

EXHIBITION SIZE

Typical (median) net exhibition size was 2,600m^2 – the average was 4,900m^2.

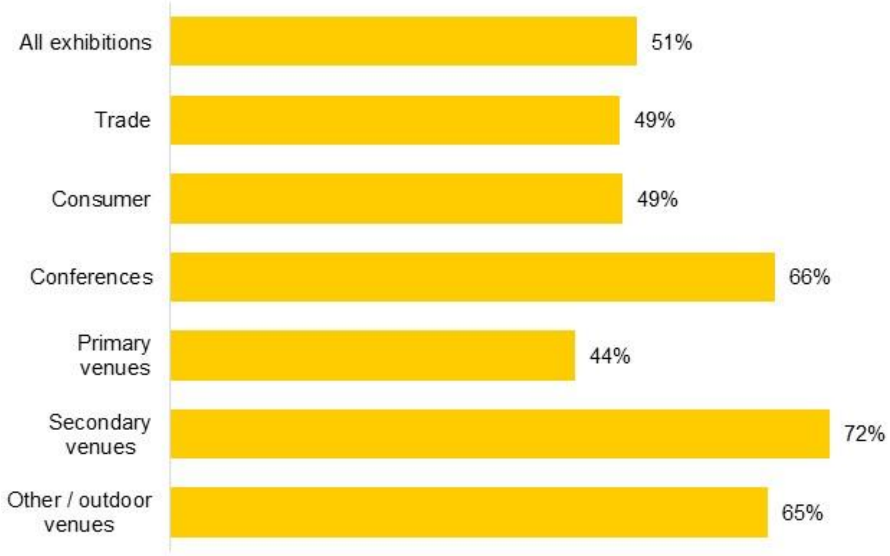
NET EXHIBITION SIZE (AVERAGE AND MEDIAN)



NB. Figures are net total exhibition size (indoor and outdoor) rounded to the nearest 100m^2

Net space was typically about half of gross space in 2023.

TOTAL NET SPACE AS A PERCENT OF GROSS SPACE

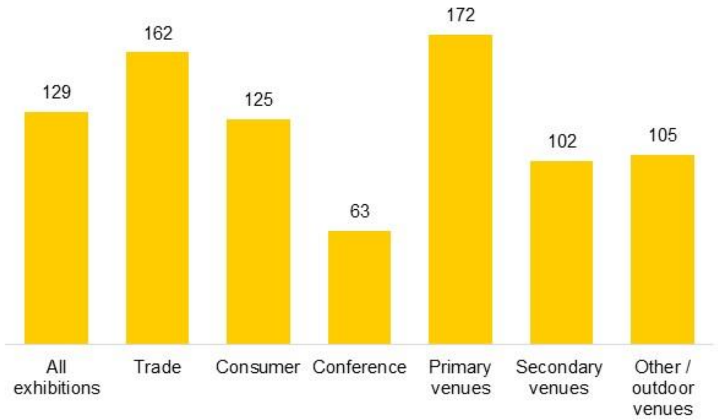


NB This analyis is based on exhibitions where the data is available for both gross and net exhibition sizes. It is based on total (not indoor) size. It is unweighted. The overall sample was 732 exhibitions.

EXHIBITOR NUMBERS

On average there were 129 exhibitors per event.

AVERAGE NUMBER OF EXHIBITORS



Trade exhibitions had significantly more exhibitors than consumer exhibitions in 2023 (162 compared to 125).

NO. OF EXHIBITORS PER EXHIBITION
(by % of exhibitions)

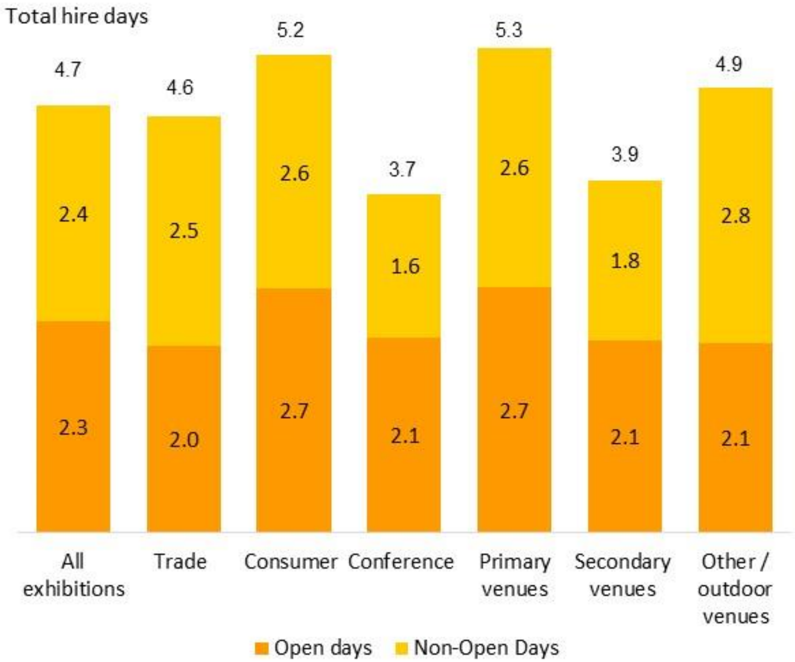
	Small (up to 50 exhibiting companies)	**Medium** (50-150 exhibiting companies)	**Large** (151 - 300 exhibiting companies)	Very **Large** (300+ exhibiting companies)
All exhibitions	28%	40%	20%	12%
Trade exhibitions	17%	42%	24%	17%
Consumer exhibitions	32%	38%	21%	9%
Conference	53%	40%	6%	2%
Primary venue	21%	37%	25%	17%
Secondary venue	32%	49%	15%	5%
Other / outdoor venue	40%	36%	17%	7%

A typical exhibition was, in terms of number of exhibitors, medium sized (i.e. 50-150 exhibitors). Primary venues tended to host larger exhibitions – with the highest proportion of large and very large exhibitions (42% of their exhibitions).

EXHIBITION DURATION

On average an exhibition occupied a venue for 4.7 days. Exhibitions were open for an average of 2.3 days.

EXHIBITION DURATION



NB. Figures rounded.

EXHIBITION DURATION
(by % of exhibitions)

	Trade exhibitions	Consumer exhibitions	Conference	All exhibitions
Venue Hire Days				
1- 2 days	17%	19%	21%	18%
3 days	24%	27%	29%	26%
4 days	20%	12%	27%	18%
5 -7 days	31%	28%	22%	28%
8+ days	8%	14%	2%	9%
Open Days				
1 day	20%	22%	26%	22%
2 days	57%	36%	45%	47%
3 days	19%	24%	22%	22%
4 days	3%	13%	5%	7%
5 + days	1%	6%	3%	3%

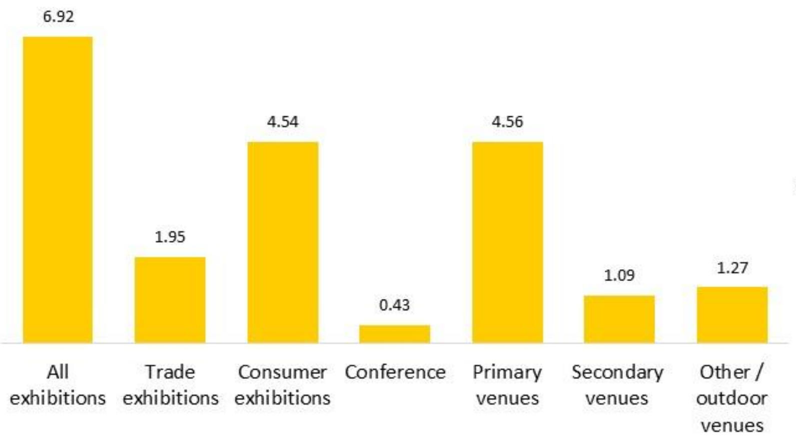
The most common number of hire days was three days, and five to seven days.

The most common exhibition duration, in terms of open days, was two days.

VISITOR NUMBERS

In 2023, there were an estimated 6.92m visits to exhibitions at the UK's main exhibition venues. Typical (median) event attendance was 3,000 visitors.

VISITOR NUMBERS



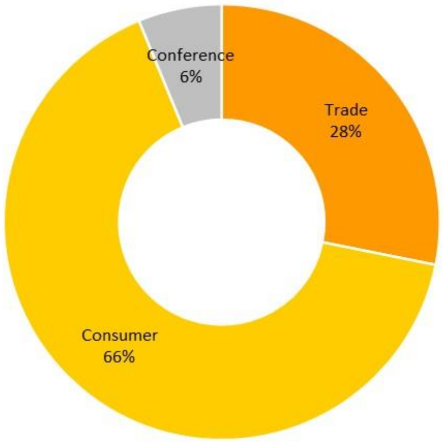
NB. Figures in millions

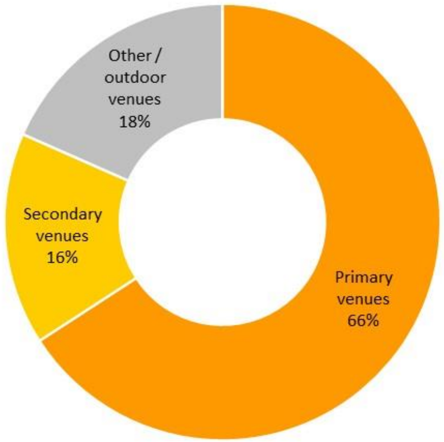
AVERAGE AND MEDIAN VISITOR NUMBERS

NB. Figures rounded to the nearest 100

Consumer exhibitions (median 6,000 and an average of 11,100 visitors) and exhibitions at primary venues (median 5,800 and an average of 11,900) had the largest average number of visitors.

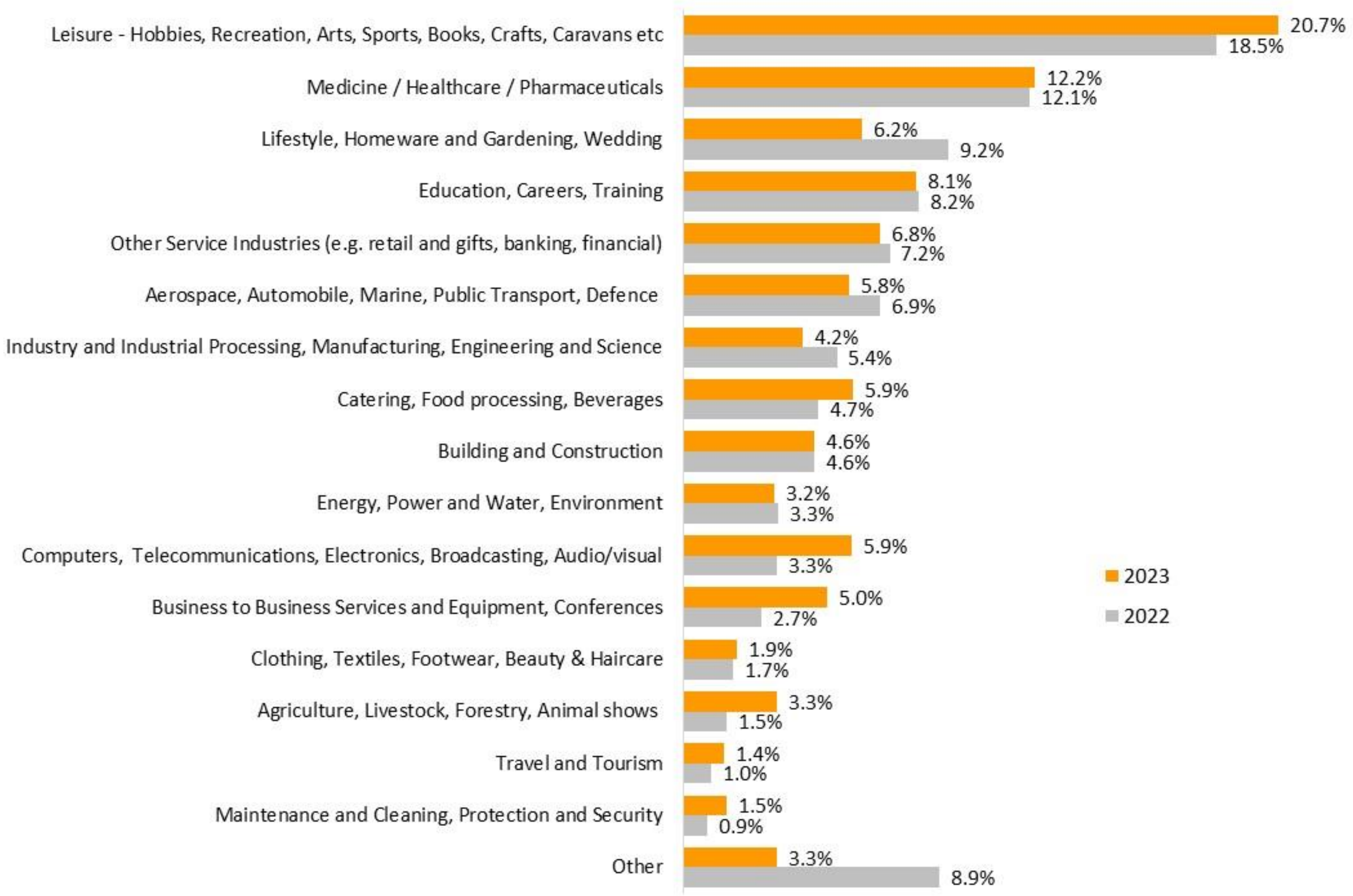
Consumer exhibitions (66%) and primary venues (66%) also accounted for most visits.





INDUSTRY SECTOR

INDUSTRY SECTOR (% OF EXHIBITIONS)



The leisure sector was the largest sector for exhibitions – representing over a fifth of exhibitions in 2023.

INDUSTRY SECTOR

INDUSTRY SECTOR

	All Exhibitions (%)	Trade Exhibition (%)	Consumer Exhibition (%)	Conferences (%)
Leisure (Hobbies, Recreation, Arts, Sports, Books, Crafts, Caravans etc.)	20.7%	2.7%	47.9%	2.2%
Medicine, Healthcare, Pharmaceuticals	12.2%	14.3%	4.1%	24.1%
Education, Careers, Training	8.1%	5.6%	9.5%	11.7%
Other Service Industries (e.g. retail and gifts, banking, financial)	6.8%	7.6%	5.4%	8.3%
Lifestyle, Wedding, Homeware and Gardening	6.2%	4.4%	10.3%	1.6%
Catering, Food processing, Beverages	5.9%	8.5%	5.3%	1.1%
Computers, Telecoms, Electronics, Broadcasting, Audio/Visual	5.9%	7.1%	0.7%	14.2%
Aerospace, Automobile, Marine, Public Transport & Defence	5.8%	8.2%	4.3%	2.8%
Business to Business Services and Equipment, Conferences	5.0%	7.8%	0.8%	8.4%
Building and Construction	4.6%	7.5%	2.3%	2.7%
Industry & Processing, Manufacturing, Engineering and Science	4.2%	7.7%	0.9%	3.3%
Agriculture, Livestock, Forestry, Animal Shows	3.3%	4.2%	2.6%	2.9%
Energy, Power and Water, Environment	3.2%	5.7%	0.0%	4.4%
Clothing, Textiles, Footwear, Beauty, Hair	1.9%	3.2%	1.4%	0.0%
Maintenance & Cleaning / Protection & Security	1.5%	3.3%	0.0%	0.5%
Travel and Tourism	1.4%	0.7%	1.9%	2.2%
Other	3.3%	1.5%	2.7%	9.5%

The table summarises the industry sector by exhibition type. The circled values indicate the most common sectors.

Consumer exhibitions were strongly orientated to the Leisure sector (approximately 48% of consumer exhibitions), Lifestyle, Wedding, Homeware and Gardening (10%), and the Education / Careers / Training sector (10%).

Trade exhibitions were more diverse in their industry sector – popular ones were Medicine, Healthcare and Pharmaceuticals (14%), Catering, Food Processing, Beverages (8%), and Aerospace, Automobile, Marine, Public Transport & Defence (8%).

Conferences with exhibitions also tended to be from a small number of sectors – Medicine / Healthcare / Pharmaceuticals (24%), Computers, Telecoms, Electronics, Broadcasting, Audio/Visual (14%) and Education, Careers, Training (12%).

SEASONALITY

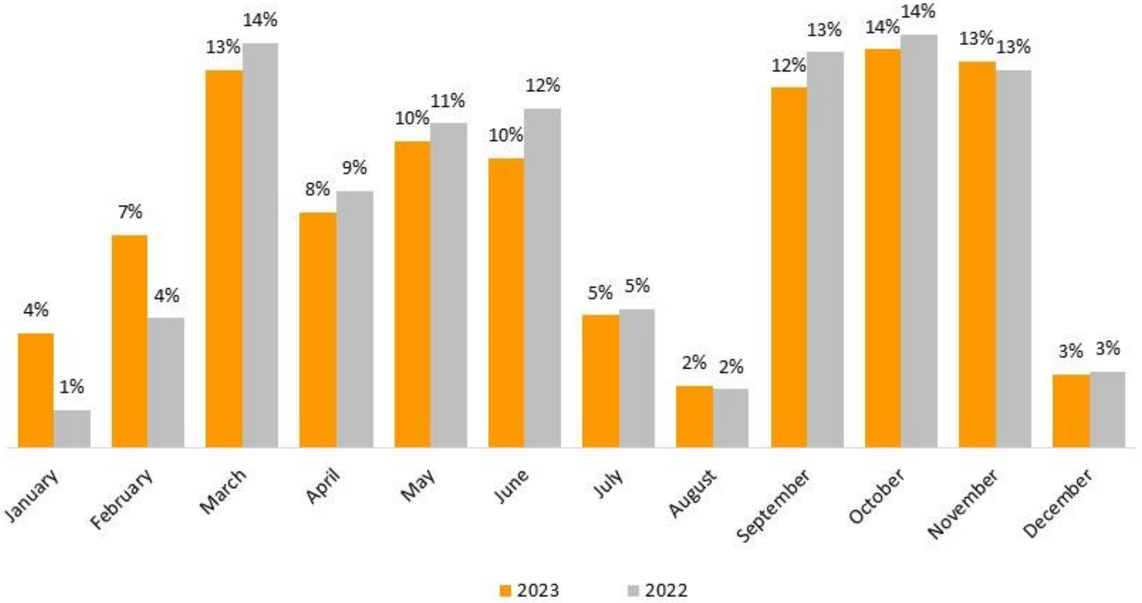
There was a more robust start to 2023 with an increase in events in January and February - a return to pre-Covid patterns.

March, September, October and November were the busiest exhibition months accounting for over half of all exhibitions.

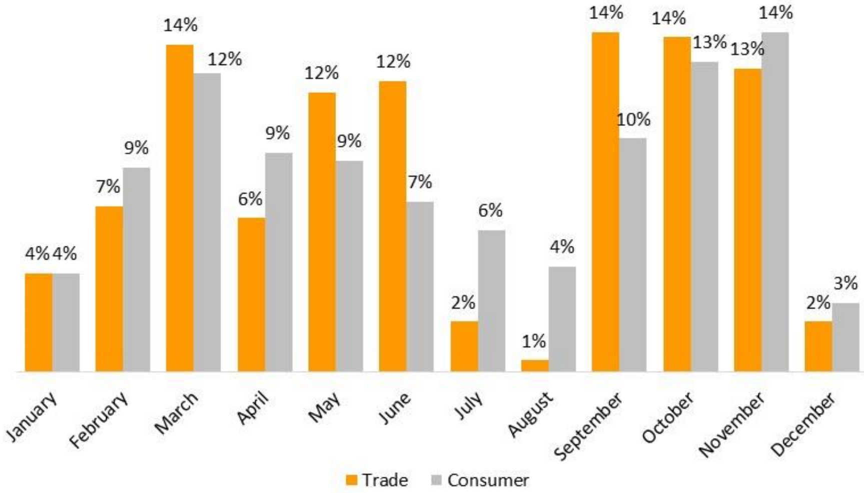
Consumer exhibitions peaked in November, March and October. They were also more likely to be held in July and August than trade events.

Trade exhibitions peaked in March, September and October.

SEASONALITY
(% OF EXHIBITIONS)



SEASONALITY
(% OF TRADE & CONSUMER EXHIBITIONS)



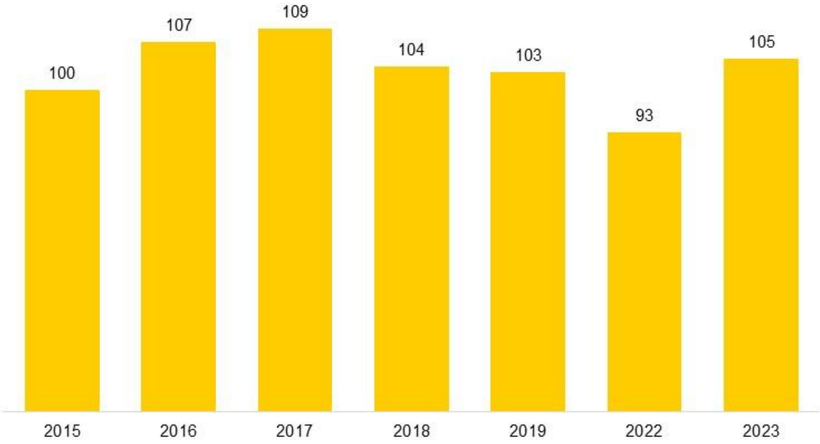
3.

TRENDS

NUMBER OF EXHIBITIONS

Numbers of exhibitions showed strong recovery and growth in 2023 with levels above pre-Covid levels.

NUMBER OF EXHIBITIONS
(TREND 2015-23)

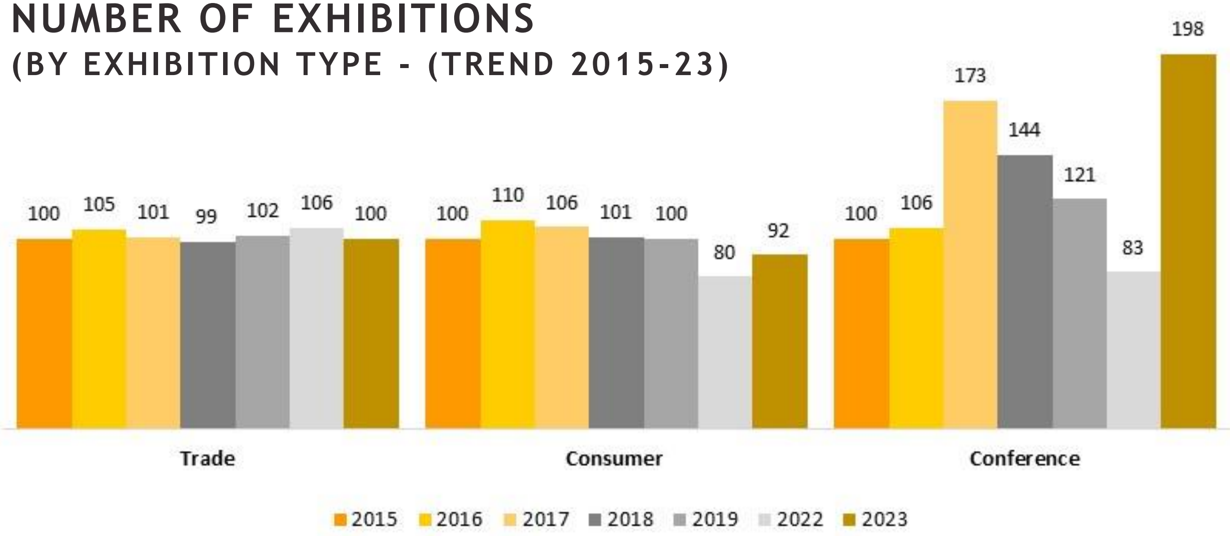


Note: chart shows change in average value relative to 2015. Figures are indexed. 2015 = 100. Data is based on venues that have provided consistent responses since 2015.

NB. These figures are based on responses from venues that have consistently reported since 2015. These include ACC Liverpool, Alexandra Palace, Business Design Centre, ExCeL London, Farnborough International Exhibition & Conference Centre, Harrogate Convention Centre, the NEC, Olympia London, Scottish Event Campus, Telford International Centre and Yorkshire Event Centre.

The trend analysis in this section is based on a sample of venues where comparable year-on-year data exists (see section 4 for more details).

NUMBER OF EXHIBITIONS
(BY EXHIBITION TYPE - (TREND 2015-23)



The number of exhibitions was up in 2023 by 12% (over 2022) but there were mixed trends.

Conference events (all with 500m^2 of exhibition space) showed a significant surge in 2023 to their highest levels since 2015. This was possibly a post-Covid 'catch-up' with larger events postponed from previous years, and it will be interesting to see if these levels are maintained in 2024 and beyond.

Consumer exhibitions also demonstrated continued recovery and were up significantly on 2022 levels – a reflection of minimal disruption in 2023 and returning consumer confidence.

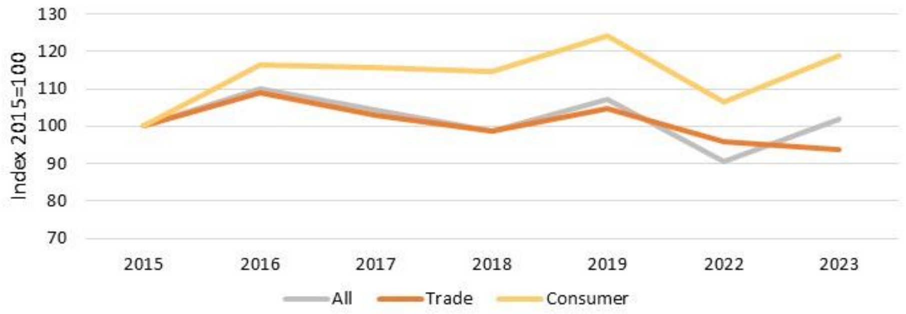
Trade exhibitions showed a slight downturn in 2023 after their strong recovery in 2022 but remained broadly on a par with their pre-Covid levels.

EXHIBITION SIZE

Total gross exhibition space sold was, in overall terms, up on 2022.

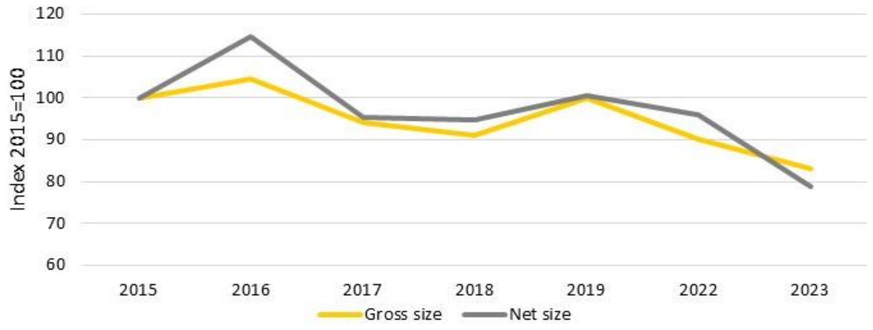
There are likely to be a mixture of factors behind this. The increase in the number of (typically smaller) conference events will have impacted on exhibition size, bringing the average down.

TOTAL GROSS EXHIBITION SIZE(m^2) (TREND 2015-23)



Note: chart shows change in average value relative to 2015. Figures are indexed. 2015 = 100
Data based on primary venues (where the dataset is consistent)

AVERAGE GROSS AND NET EXHIBITION SIZE(m^2) (TREND 2015-23)



Note: chart shows change in average value relative to 2015. Figures are indexed. 2015 = 100

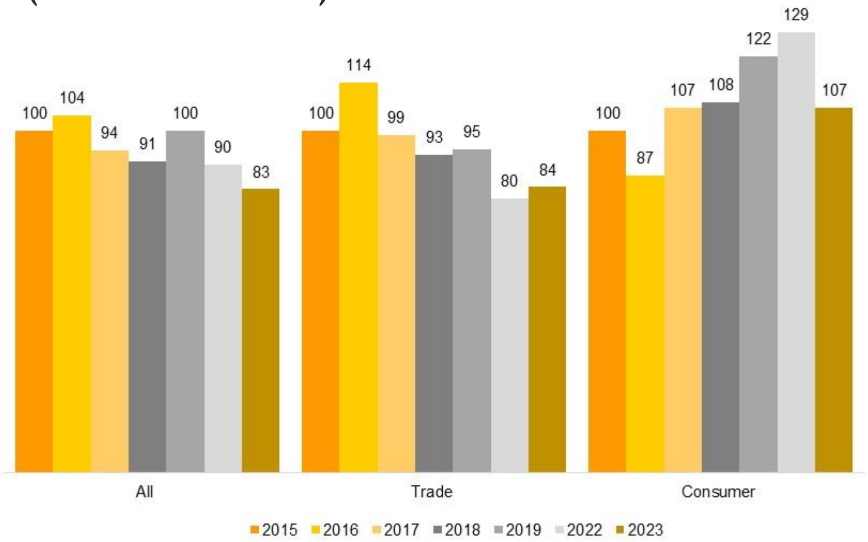
Exhibition sizes show a mixed trend. In terms of the total gross space sold (above), there was an increase in 2023, with overall levels on a par with the pre-Covid period. Total trade size was broadly the same as 2022. This trend largely reflected the volume of exhibitions – i.e. consumer up, trade more static.

However, exhibition sizes, based on average gross/net area. showed a reduction in overall gross/ net sizes from 2022.

In addition, consumer exhibitions are, on average, smaller than 2022 levels. However, they are on a par with pre-Covid levels and the apparent downturn in 2023 (over 2022) may be a factor of new (and smaller) events coming on stream (with 2022 dominated by larger, well established and less risky events).

Average sizes of trade exhibitions, in 2023, were slightly up on 2022 but still below pre-Covid average levels.

AVERAGE GROSS EXHIBITION SIZE (m^2) (TREND 2015-23)

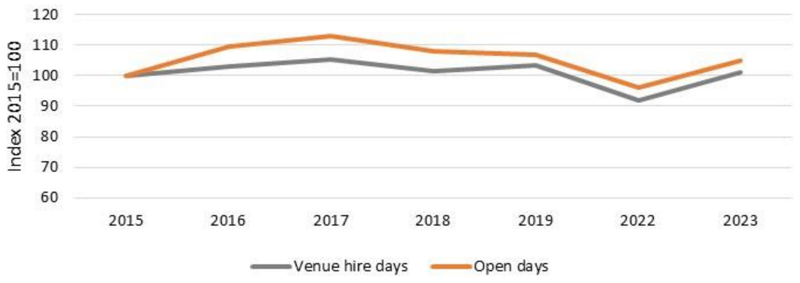


Note: chart shows change in average value relative to 2015. Figures are indexed. 2015 = 100

EXHIBITION DURATION

Total open and hire days were up in 2023. Average events durations showed a slightly mixed pattern.

TOTAL VENUE HIRE AND OPEN DAYS
(ALL EXHIBITION TREND 2015-23)



Note: chart shows change in average value relative to 2015. Figures are indexed. 2015 = 100.

Total hire and open days were, for all exhibitions, up in 2023 (see above) – driven by increased numbers of events.

Exhibition open days based on **average** were on a par with the 2015 baseline (see bottom right) while average hire days (top right) were slightly down (possibly the impact of conference events in the overall mix). Consumer exhibitions were at the same level as 2022 (and above the pre-Covid level). The average duration (open and hire) of trade exhibitions was slightly down on previous years.

AVERAGE VENUE HIRE DAYS
(TREND 2015-23)

Note: chart shows change in average value relative to 2015. Figures are indexed. 2015 = 100

AVERAGE EXHIBITION OPEN DAYS
(TREND 2015-23)

Note: chart shows change in average value relative to 2015. Figures are indexed. 2015 = 100

VISITOR NUMBERS

Total visitor numbers were up on 2022. The average per event was also up – trade events were particularly robust.

The average number of visitors per trade exhibition was up 12% on 2022 levels – and at the highest level since 2015.

The average number of visitors to consumer exhibitions was slightly down on 2022 (although the **total** number of visitors was actually up – by an estimated 10%). The slight decrease in average size is probably the consequence of new (but smaller) exhibitions coming on stream.

Similarly, the average for all exhibitions was up 2.5% (while the total was up 14%). The discrepancy is explained by a growth in the numbers of events (bringing up the total) but these were typically smaller conference and consumer events (impacting on the average).

(NB these figures are from primary venues (i.e. ExCel London, Olympia London, NEC and SEC) where a consistent trend exists.)

TOTAL VISITOR NUMBERS (TREND 2015-23)

AVERAGE VISITOR NUMBERS PER EVENT (TREND 2015-23)

Note: chart shows change in average value relative to 2015. Figures are indexed. 2015 = 100
Data is based on primary venues (i.e ExCel London, Olympia London, NEC and SEC) only

EXHIBITORS

TOTAL NUMBER OF EXHIBITING COMPANIES (TREND 2015-23)

Note: Figures are indexed. 2015 = 100. Data is based on the total number of exhibiting companies at **primary** venues.

AVERAGE NUMBER OF EXHIBITING COMPANIES PER EVENT (TREND 2015-23)

Note: Figures are indexed. 2015 = 100. Chart shows change in average number of exhibiting companies per event

The total number of exhibiting companies was up in 2023. Average number of exhibiting companies per event was similar to 2022.

Again, there were mixed patterns. In terms of the **total** number of exhibiting companies, 2023 shows a significant increase over 2022. Numbers for all events were up 16%, for trade exhibitions they were up 17%, and for consumer exhibitions they were up 5%. (NB these figures are based on primary venues where there has been consistent data reporting since 2015).

The **average** number of exhibitors per event was up for trade events but down for consumer events (probably a reflection of smaller events coming on stream in 2023). Similarly, the overall average was slightly down – a combination of the trend in consumer events (above) and the increase in the number of conference events (which on average have considerably fewer exhibiting companies).

TREND SUMMARY

The trend data is complex and requires careful interpretation. In looking at trends, points to note include:

- The baseline of 2015 is sightly arbitrary and determined by the data that is available. The analysis seeks to use consistent data that allows year-on-year comparisons (see section 4)
- Arguably 2015/2016 was the end of a period of growth and recovery from 2008/2009 and may therefore represent a high point.
- The period of 2016 onwards may represent a new phase of a Brexit impacted market (which may be continuing), and a Covid and post-Covid impacted market which had still not settled in 2023. Inflationary and cost of living pressures, and the slow post-Covid opening of some markets in 2023 (like China) are further factors impacting in 2023.
- For some indicators, there are subtle differences in trends based on totals and averages (per event).

In terms of trends:

- The numbers of exhibitions were up significantly in 2023 and at comparable levels to the pre-Covid period.
- Visitor and exhibitor numbers also showed signs of a post-Covid recovery but remained below pre-Covid levels.
- **Total** number of event days (open and venue hire) and total gross space sold were up on 2022 and broadly on a par with the pre-Covid figures.
- However, **average** duration (open and hire days) and average gross and net size of exhibitions were down on 2022.
- The longer-term trend in average duration has remained broadly static. Average size has shown evidence of a more variable pattern making identification of a longer- term trend more difficult

There are probably a number of factors at play.

- The increase in events in 2023 is partly explained by a significant upturn in conference events (with 500m^2 exhibition space) but also many new consumer events.
- This has impacted positively on **totals** – like visitor numbers, number of exhibitors, gross space sold, event days – with more events increasing these.
- However, it has impacted on average indicators, most notably on average size and number of exhibitors with newer, smaller events contributing to a reduction in these.

Trade and consumer exhibitions have different patterns. The number of consumer events and their total visitor numbers are up on 2022 levels but down compared to the pre-Covid period.

In contrast, average visitor numbers, size and duration compare well to pre-Covid levels but are down on 2022. The impacts of Covid are probably at play here – Covid saw a downturn in consumer events with, as a generalisation, some smaller events disappearing (leaving larger events – hence an increase in 2022 in some indicators based on averages). In 2023, new but smaller consumer events have started coming on stream (but not yet to pre-Covid levels) and these may have reduced indicators based on averages (size etc). However, the underlying trend seems to be one of a strong post-Covid recovery.

The volume of trade exhibitions is slightly down on 2022 levels but remains at pre-Covid levels. Average and total numbers of exhibitors, visitors and size are up on 2022 suggesting continued recovery. However, trade exhibitions are not fully returned to pre-Covid levels in terms of total and average numbers of exhibitors, and average size. Continued recovery in 2024 might see a return to pre-Covid levels for these indicators.

Duration of trade exhibitions in 2023 was slightly below 2022 and pre-Covid levels, and it will be interesting to see if this is just a one-year blip or a longer-term phenomenon.

4.

METHOD

RESEARCH APPROACH

The approach to SASIE included the following steps:

- Data collection – from both exhibition venues and organisers;
- Data checking and reconciliation;
- Weighting data and grossing up;
- Trend analysis.

DATA COLLECTION

The survey involved data collection from both UK venues and organisers (typical AEV and AEO members) on a self-completion basis. The same questionnaire was used for both groups and a range of data was collected on individual exhibitions.

DATA CHECKING

The survey then involved a process of data checking and reconciliation. This included checking responses to ensure exhibitions qualified (see glossary of terms) – exhibitions outside this threshold were excluded from the analysis.

The survey collected data on exhibitions from both venue and organiser perspectives which meant duplicated values for some exhibitions. These were reconciled to ensure only one record per exhibition (NB where there were discrepancies, responses from organisers were treated as the principal response).

SAMPLE UNIVERSE

Exhibition venues were categorised into three groups - primary, secondary, other/ outdoor venues. These were defined partly on the basis of relative size but also on their likely business levels as the table (below) summarises.

VENUE CATEGORISATION

Category	Description	Venues
Primary	Primary venues have a capacity of over 20,000m^2. They are those that are proactive in the exhibitions sector and manage a high volume of events. Exhibitions will account for all (or the majority) of their turnover	ExCeL London, National Exhibition Centre (NEC), Olympia London and Scottish Event Campus (SEC)
Secondary	Typically, secondary venues have a capacity of 10,000 to 20,000m^2 (but some may be larger or smaller). They are moderately busy in the market place with approximately one to two events each month. Exhibitions will form a significant part of their turnover.	ACC Liverpool, Business Design Centre, Farnborough International Exhibition & Conference Centre, Harrogate Convention Centre, Telford International Centre, Manchester Central, P&J Live, Coventry Building Society Arena.
Other and outdoor	Typically (but not always) smaller venues (with less than 10,000m^2 capacity) or venues where a significant component of their exhibition space is outdoors. Exhibitions will tend to be an ancillary or minority part of their business and they will only host exhibitions on an ad-hoc or irregular basis	Alexandra Palace, Barbican Exhibition Centre, Bournemouth International Centre, The Brighton Centre, StadiumMK, Eikon Exhibition Centre, The Kia Oval, ICC Wales, Sandown Park Racecourse, Silverstone International Conference & Exhibition Centre, East of England Arena, Stoneleigh Park, Kent Event Centre, Royal Highland Centre, Yorkshire Event Centre

RESEARCH APPROACH

RESPONSE RATES

The following table summarises the number of identified venues (by categories) and sample (in terms of number of responses).

SAMPLE

	Supply	Sample
Primary	4	4
Secondary	8	8
Other /outdoor	15	7

In addition, responses were received from 23 organisers.

WEIGHTING DATA AND GROSSING UP

The survey collected data from some, but not all, venues in AEV membership. The survey provides a comprehensive picture of the performance of primary and secondary venues.

There are two potential issues with SASIE. Firstly, it is a sample survey – as the table highlights, there are responses from most but not all venues. Secondly, where there are responses, there is not necessarily a complete dataset – i.e. respondents excluded some data.

To address this, the data needs to be weighted and grossed up to provide an estimate of the overall performance of the sector (not just the sample). This has been done on the basis of venues (rather than organisers) since the overall supply is known.

Venues perform in different ways, so they have been weighted according to their categorisation. Weighting was a two-stage process.

Firstly, sample data was grossed up to provide an estimate of the overall number of exhibitions. The following table illustrates the process for all exhibitions. The estimated number of exhibitions (column C) was calculated by multiplying the number of venues (by venue category – column A) by the average number of exhibitions per venue (Column B).

GROSSING UP PROCESS

	A. No. of venues	B. Average no of exhibitions per venue	C. Estimated exhibitions
Primary	4	95.5	382
Secondary	8	45.3	362
Other / outdoor	15	18.10	272

RESEARCH APPROACH

The second stage was to align other data in the sample (e.g. visitor numbers, exhibition duration etc.) by weighting it so that it reflected the overall universe. The weighting framework was based on the number of exhibitions derived in the first stage - i.e. the number of exhibitions by exhibition type and venue categorisation. Unless otherwise stated, all data in this report is weighted by the exhibition / venue - sample data for consumer exhibitions at other venues is weighted by the estimated number of consumer exhibitions in other venues etc.

For data relating to visitor numbers, outlying values (i.e. exhibitions with over 100,000 visits) in the sample were excluded for 'other and outdoor venues' since they could have a significant impact and skew on the results when grossed up.

TREND ANALYSIS

Section 3 provides a trend analysis. This was based on data from venues that have provided consistent responses annually since 2015.

These include ACC Liverpool, Alexandra Palace, Business Design Centre, ExCeL London, Farnborough International Exhibition & Conference Centre, Harrogate Convention Centre, the NEC, Olympia London, Scottish Event Campus, Telford International Centre and Yorkshire Event Centre. In 2022, this group hosted approximately two-thirds of total exhibitions.

The analysis on visitors numbers was, however, based on the four primary venues (ExCeL London, the NEC, Olympia London, Scottish Event Campus) because they had provided consistent data since 2015 relating to visitor numbers.

This trend analysis should not necessarily be regarded as representative of the whole exhibition sector. It is largely based on data from primary and, to a lesser extent, secondary venues. It does not represent other/ outdoor venues – a group where exhibitions tend to be more ad-hoc and subject to market variations.

5.

ABOUT EVENTS INDUSTRY ALLIANCE

ABOUT EIA

The Events Industry Alliance (EIA) is an alliance of trade associations created by the three event industry bodies: the Association of Event Organisers (AEO), the Association of Event Venues (AEV) and the Event Supplier and Services Association (ESSA) to provide a group secretariat service in the business events industry.

Association of Event Organisers Ltd (AEO) is the trade body representing companies which conceive, create, develop or manage trade and consumer events both in the UK and around the world.

Association of Event Venues Ltd (AEV) is a committed trade body representing venues of all size and type both in the UK and internationally.

Event Supplier and Services Association Ltd (ESSA) is a trade association representing the very best suppliers of goods and services to the events industry.

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