



SASiE

SIZE AND SCALE
INDEX FOR
EVENTS

The Size and Scale Index for Events (SASiE) in 2016

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Foreword

In 2016, a pivotal tipping point was reached when, for the very first time, UK consumers spent more time using digital media than its traditional counterparts. Of course, this revelation comes as no surprise but, for an industry cemented in face-to-face interaction, it raises the question once more: how do we keep the allure of events alive?

Where opportunities to see something new or connect with like-minded peers were once few and far between, exhibitions were, in many ways, the only choice for those looking to be entertained or educated; something of great prestige and anticipation. Today, our industry's purpose remains but our once captive audience's attention could not be more divided. However, it is when we realise that it is experience, not speed and accessibility, that grasps a visitor's attention and loyalty that we can start to see digital in a brand new light—friend, not foe.

After all, human interaction is a core driver of any consumer behaviour. With more than 95 million photos shared on Instagram each day and its 'live' function becoming more popular by the day, the platform is not a threat but an opportunity to amplify the reach of events to a whole new audience and raise brand awareness. Similarly, LinkedIn will never replace good old fashioned networking - after all, 87% of business directors still believe that face-to-face is the most effective form of communication. It simply adds another avenue for professionals to connect with one another, become aware of an upcoming show, and share learnings from an exhibition or conference.

The emotional exchange fostered through events may very well be enhanced through technology, but never replaced, so long as we continue to place visitor experience at the heart of all we do. Essential to this are, of course, the relationships and partnerships we foster with one another.

One such example of this is the relationship between the Association of Event Organisers (AEO) and the Association of Event Venues (AEV), which has led to this very study. Through collaboration and the recognition that we as an industry can achieve more as a collective than alone, SASiE, the Size and Scale Index for Events, was born.

This, the third report, reveals exciting growth in the number of exhibitions held at the UK's main exhibition venues in 2014-16. It also provides benchmark data on key metrics including the number and size of events; visitor numbers; ticket sales and prices; industry sectors generating major events; and the duration and seasonality of events. The findings encompass results of events hosted by the main UK players, providing vital marketing intelligence to organisers, venues and suppliers of every size so that they can identify investment opportunities, create informed marketing strategies, and measure and monitor emerging trends.

As an industry, it is important we continue to recognise and promote the major role that events can and do play in supporting and developing local economies; both in job creation and for providing platforms to showcase the creativity and innovative talents of UK businesses.

SASiE demonstrates the resilience, strength and scale of our industry and, as a result, aids in identifying the importance of ongoing support for, and investment in, the event sector.

In-depth, transparent understanding is crucial to maintaining the industry's position as visitors' preferred source of entertainment, education, and inspiration, so I would like to extend my sincerest thank you to all who have contributed to this latest research. I encourage you to read and share these findings, incorporate them in your own business strategies, and to continue to fully participate in SASiE in future years if you are not already doing so.

Nigel Nathan, MD at Olympia London, AEV Board

Executive Summary

Introduction

The data in this report covers UK exhibitions of 500m² plus staged in 2016. The data was sourced from the membership of the Association of Event Venues (AEV) and the Association of Event Organisers (AEO). It, therefore, covers events organised and hosted by the main UK exhibition players.

Number of exhibitions

- In 2016, there were an estimated 948 exhibitions hosted by the UK's main exhibition venues. Trade exhibitions accounted for 45% of these, with a similar proportion of consumer events (44%)
- The number of events was up 9.7% in 2016 (over 2015) (NB based on consistent reporting venues).

Exhibition Sizes

- From the participating exhibitions, the average gross exhibition size was 10,000m² – the median was 6,000m², with nearly half (49%) of exhibitions between 2,500 and 8,000m².
- On average consumer exhibitions tended to be slightly larger than trade exhibitions.
- Average net exhibition size was 6100m².

Number of Exhibiting Companies

- An average exhibition had 169 exhibiting companies.
- Consumer exhibitions were slightly larger (with an average of 183 exhibiting companies) than trade events (an average of 177 events).
- Conference exhibitions were much smaller (an average of 83 exhibiting companies).

Exhibition Duration

- On average an exhibition occupied a venue for 4.7 days – on average exhibitions were open for 2.4 days
- Consumer exhibitions tended to be open for slightly longer - an average of 2.6 days compared to 2.4 days for trade exhibitions.
- The commonest exhibition length, in terms of open days, was 2 days (47% of exhibitions).

Visitors

- Exhibitions attracted an estimated 8.6m visitors in 2016.
- Consumer exhibitions accounted for the majority of visitors – 70%. Trade exhibitions accounted for 25% of visitors.
- Exhibitions, on average, attracted 9,000 visits – a median of 4,200.
- Consumer exhibitions, at an average 14,300 visitors (a median of 8,000), typically attracted over twice the number of visitors as trade exhibitions (an average of 5,000 and a median of 3000).

Ticket Sales and Prices

- Nearly three quarters (72%) of tickets were sold and/or visitors registered before an exhibition. This was higher among trade exhibitions (92%) than consumer exhibitions (63%).
- Trade exhibitions tended to be free - 94% were free. Consumer exhibitions typically charged – 79% levied a charge. The average price for a chargeable consumer exhibition was approximately £13.

Industry Sector

- The Leisure Sector was the largest generator of exhibitions. This included a range of sub-sectors like sports, arts, recreation, caravanning, hobbies, books, and crafts etc. and accounted for 20% of exhibitions. This was followed by the Lifestyle (including

Homeware and Weddings) sector, and the Medicine / Healthcare and Pharmaceutical sector (both approximately 9%).

- Consumer exhibitions were strongly orientated to the Leisure sector (accounting for 43% of consumer exhibitions). Trade exhibitions covered a broader spread of sectors.

Seasonality

- September, October and November were the busiest months for exhibitions in 2016.

Year-on-Year Comparisons

Year-on-year comparisons have been made where comparable 2014, 2015 and 2016 data exists on an event by event basis. While providing an overview of year-on-year change, this should be not regarded as an analysis of trends in the *overall* exhibition sector.

- Gross exhibition size has increased since 2014 - by approximately 4%.
 - Overall the number of exhibiting companies was down year on year from 2014. While consumer exhibitions demonstrated a small increase (3%), the number of exhibiting companies at trade exhibitions was down by 9%.
 - Overall venue hire days have been largely static since 2014. However, the average number of exhibition open days did show an upturn in 2016
 - Across all exhibition types, average numbers of visitors have increased since 2014 – up 5%.
 - Average numbers of visitors to consumer exhibitions have increased nearly 9% since 2014. Numbers of visitors to trade exhibitions were more static – 2016 levels were slightly down on 2014 but did show a minor increase on 2015.
-

Market Insights

An Organiser Perspective

This year's report does not suggest any major changes in the size, performance or nature of exhibitions in the United Kingdom. The sense is of an industry growing slowly in tune with the world economy – which has recently moved into a remarkably optimistic phase. The UK is, of course, a very provincial marketplace, but we still have reasonable spill over from the rest of the world.

It is interesting that the report suggests that space booked is rising at circa 2% a year *despite* there being a very slight fall in net space sold. This does not accord with everyone's anecdotal experience, but the statistics do seem resilient. This would seem to suggest that UK trade shows are probably growing at around 2% a year in revenue terms and this does tie in with the annual results of our major UK-based groups. These suggest overall annualised growth rates of circa 3-5%, but from which it is almost impossible to separate out the UK from shows in the rest of the world.

At the time of writing, the dominant story remains the almost frantic deal making among the large exhibition groups. Last year I noted that deals involving major UK-based event companies had reached £2.4 billion in total. The current 12 months - and the next 12 – will see even larger sums expended. Blackstone's acquisition of Clarion for circa £590 million (Clarion was last sold in 2015 for £208 million) generated a rise in activity and a febrile atmosphere. Blackstone can have only one objective – to grow Clarion from an EBITDA (profit before interest in rough terms) of £45 million to £150 or perhaps £200 million. To do this they will have to make a number of large deals – you really can't do it at £100,000 a time – and there are vanishingly few of those around.

But this was dwarfed by Informa's long-expected bid for UBM, the objective being to create a trade show behemoth worth £9 billion and the largest in the world. Informa plus UBM would have a combined events revenue of some £1,450 million compared with Reed's £1,120 million (Comexposium come a distant third with circa £263 million). This bid had a number of peculiar features. One was that the board of UBM ("the target") instantly recommended the offer and it became clear that they were not, individually, part of the merged group's future. This is highly unusual – the boards of "target" companies almost invariably mouth platitudes about the bid "undervaluing the company" etc etc. The press and analysts were also tart. 'The Times' pointed out that Informa had chosen not to bid for Advanstar (\$972 million at 12X multiple) or AllWorld (£382 million at 14.7X multiple) when UBM bought them. Informa themselves have recently paid \$1.2 billion for Penton at an 11X multiple – the numbers begin to make mere exhibition organisers feel dizzy.

The details quoted above give the sense of a business where good exhibition assets are being traded at perhaps 14X or 15X profits and such numbers may even go higher. Ascential's (formerly EMAP) rumoured disposal of its own major exhibition assets is clearly one to watch carefully.

The one thing we can be certain of is that there will be more deals and even larger sums spent. It is not impossible that we will become similar to the newspaper industry – where a once very diffuse and very widely spread business eventually came to be dominated by just three or four players. And that will be a very different environment indeed.

Phil Soar, Chairman CloserStill Group, Brand Events & Nineteen Events

A Supplier Perspective – 'It's the experience, stupid'

A key statistic caught my eye this year. Gross exhibition space is up 4% despite a small reduction in space booked by exhibitors. So what's driving the data? It seems there's been a shift in organiser thinking: it's the experience, stupid.

The trend has been building for some time, but the fact that the uptick in 'non exhibiting' space is so significant this year suggests it has now become mainstream. Exhibitions are evolving from pure 'buyer-meets-seller' platforms to delivering a broader, richer, community experience for visitors and exhibitors alike.

Here at GES we are seeing a bigger emphasis on education, product demonstration, hands-on product testing, peer-to-peer networking and even entertainment. More of the show floor is now dedicated to 'feature areas' – and they are increasing in scale and sophistication. From champagne bars to fashion catwalks, demo kitchens with celebrity chefs to general sessions with international gurus, intimate breakout sessions to table tennis and scalextric tracks. And there's no discernible difference between consumer and trade shows – experience is paramount across both segments.

It all sounds rather exciting but, as we all know, it plays havoc with a show's yield. Does the investment pay off? Exhibitors have always been vocal when activities take the action off the show floor – so how can organisers balance the need for bustling aisles with show stopping content that increases attendance rates and improves dwell times?

Savvy organisers are deploying a number of tactics that help resolve the conundrum. The show floor plan has become a vital tool in 'experience design' – with the best operators combining visitor engagement technologies like Poken with data intelligence platforms to track traffic

flow, improve wayfinding, determine hot spots and drive footfall across the whole floor. The holy grail is doing it in real time – so you can measure interactions as they happen and make interventions that create alternative traffic flows at peak times or during popular speaker sessions – to ensure the floor stays buzzing,

Sponsorship programmes are also evolving – moving away from simple static banner opportunities to creating immersive, engaging experiences on the show floor. The ideal sponsor is one who adds value to the overall attendee experience – it's good for the show, the visitor and the commercial partner, as it delivers real brand engagement. Sponsorship revenues are almost certainly under-exploited across the industry – a rich seam still to be mined for many organisers.

The experience genie is firmly out of the bottle. The exhibition industry is increasingly in competition with big brands going solo and running their own, large scale customer events that sometimes feel more akin to a music festival than a traditional B2B meeting. GES is looking forward to continuing to partner with our customers to deliver unforgettable, meaningful and measurable experiences.

Nick Marshall, Executive Chairman, GES EMEA & ESSA Board Member

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1 Introduction

1.1 Introduction

The Association of Event Venues (AEV), the Association of Event Organisers (AEO), and the Event Supplier and Services Association (ESSA) are undertaking a programme of research into the size, scale and characteristics of the UK exhibitions sector.

The following report is divided into two main sections. The first provides an overview of the dimensions of activity in 2016 and includes data on:

- The number and type of exhibitions
- The number of visits to UK exhibitions
- A number of other performance indicators such as:
 - Event duration
 - Event size - both gross and net
 - Ticket sales and prices
- Events by industrial sectors
- Seasonality of events.

The second section provides a trend analysis for 2014, 2015 and 2016. This is based on a sample of events where comparable year-on-year data exists.

The research is based on a survey of venues (in AEV membership) and organisers (in AEO membership) which involved collecting and reconciling detailed individual exhibitions. The next section provides an overview of the methodology for the research.



1.2 Methodology

Data collection

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

Checking and reconciliation

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 and this meant a number of duplicated values for some exhibitions. These were reconciled to ensure only one record per exhibition (NB where there were cases of discrepancies between records, responses from organisers were treated as the principal response).

Sample universe and response rates

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

Venue Type	Definition	Examples
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	National Exhibition Centre (NEC), ExCel London, 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 a couple of events each month. Exhibitions will form a significant part of their turnover.	ACC Liverpool/Liverpool Exhibition Centre*, Aberdeen Exhibition and Conference Centre, Business Design Centre, Harrogate International Centre, Ricoh Arena*, International Centre Telford, Manchester Central.
Other	Typically (but not always) smaller venues with less than 10,000m ² capacity. 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, Wembley, the O2, Yorkshire Event Centre, Manchester United etc.

* Re-categorised 'other' (in 2014) to secondary in 2015 due to known levels of business and/or new exhibition facilities.

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

	Supply (AEV membership) ¹	Sample
Venues		
Primary	4	4
Secondary	7	7
Other	17	7

1. Our venue audit identified a number of other potential venues that were not in AEV membership. No information was available on their performance and it was assumed that these are smaller venues in the market place. As such, they were not included in the overall supply figures.

Weighting data and grossing up

As the table above highlights, the survey has collected data from some, but not all, venues in AEV membership. The survey provides a comprehensive picture of the performance of primary venues

There are two potential issues with SASiE. Firstly, it is a sample survey – as the table above 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 number of venues (by venue category – column A) by average number of exhibitions per venue (Column B).

Grossing up process			
Venue Category	A. No. of venues	B. Average no of exhibitions per venue	C. Estimated exhibitions
Primary	4	126	504
Secondary	7	34	240
Other – AEV members	17	12	204
Total			948

NB data is rounded

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 - so 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' 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 events that took place in 2014, 2015 and 2016, and where there was a consistent dataset.

This analysis should not be regarded as representative of the whole exhibition sector – it only looks at certain events in certain venues and

will, for example, exclude new, biennial or peripatetic exhibitions. However, it does provide an indication of year-on-year change in the sector.

Glossary of terms

A number of terms are used in this report.

- **An exhibition** is an event with at least 500m² of exhibition space.
- **Exhibition type.** Exhibitions are broken down into a number of categories. These 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 (min 500m²) exhibition element.
- **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 or consumers (or both).
- **Total venue hire days** - the number of days that the venue is hired for. 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 or consumers (or both)

- **Gross Hall Space (m²) 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 (m²) of exhibition.** The actual space sold occupied by exhibitors/exhibition participants at the exhibition, measured in square metres.
- **Number of exhibiting companies.** Number of companies exhibiting at an exhibition.
- **Total number of tickets sold / visitor registrations.** The total number of tickets sold or registrations for an exhibition including trade and consumers (including complimentary tickets).
- **% of tickets sold pre-show/ visitors registered pre-show.** Proportion of tickets sold or registrations that happened before an exhibition
- **Average price.** The average price of all tickets sold.



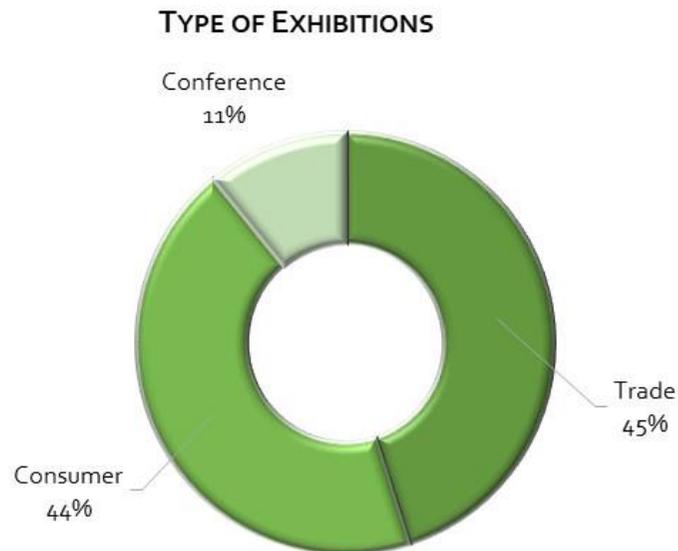
2 Dimensions 2016

2.1 Number and Type of Exhibitions

In 2016, there were an estimated 948 exhibitions at the UK's main exhibition venues.

The number of events was up 9.7% on 2015¹.

Trade exhibitions accounted for 45% (an estimated 427 events).

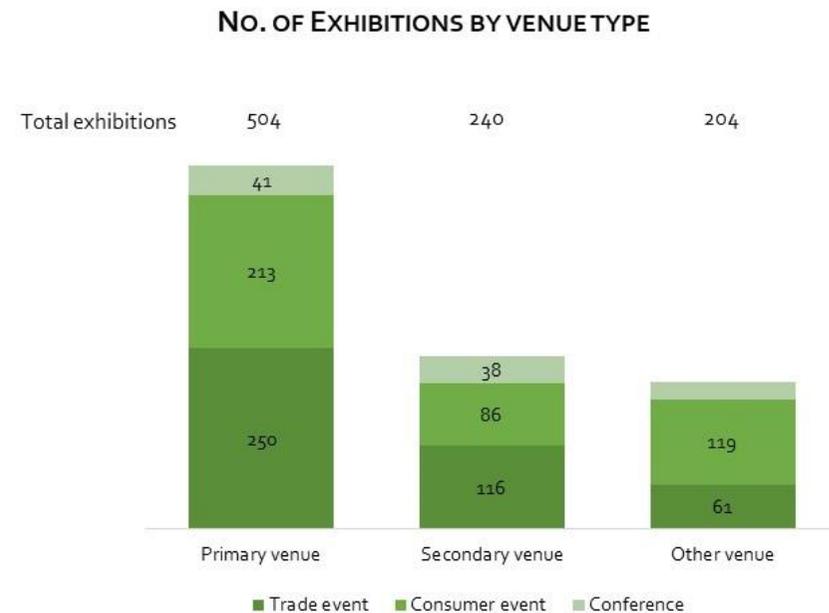


Consumer (or public) exhibitions accounted for a similar proportion - 44% of exhibitions (an estimated 418 exhibitions). The remaining 11% of

¹ Based on venues responding in both 2015 and 2016 (not the weighted data).

events were conferences that incorporated a significant exhibition element.

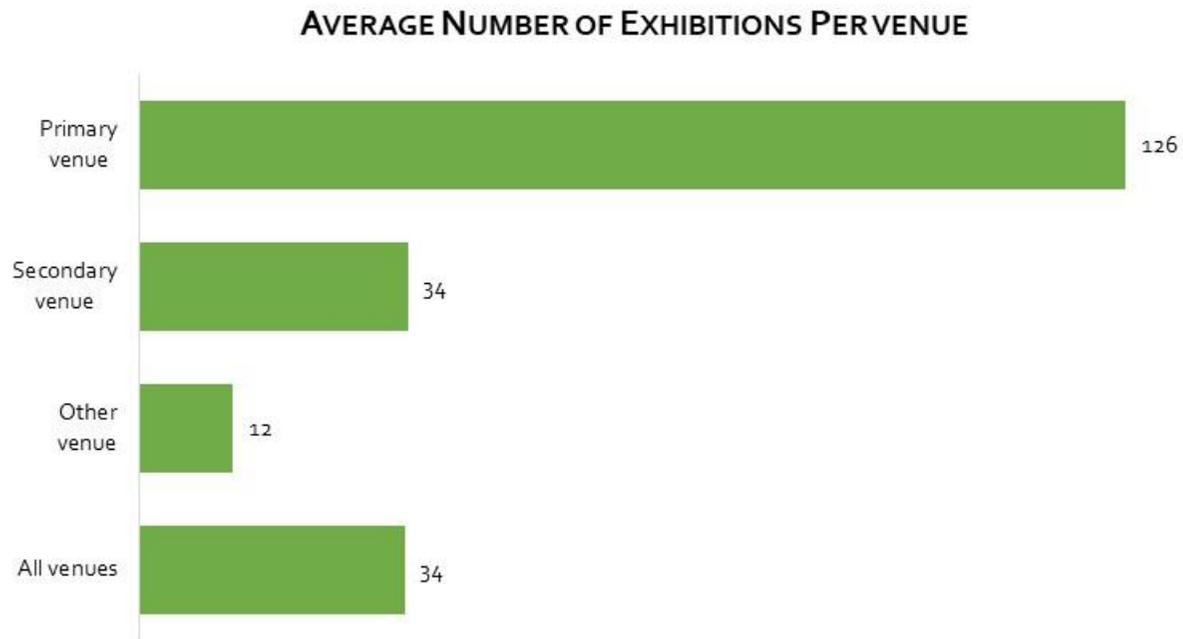
The majority of exhibitions were held in the four primary venues².



Primary venues hosted 504 exhibitions - 53% of the UK's total. Secondary venues hosted 25% of exhibitions.

² See section 1.2 for a definition.

On average each venue hosted 34 exhibitions in 2016



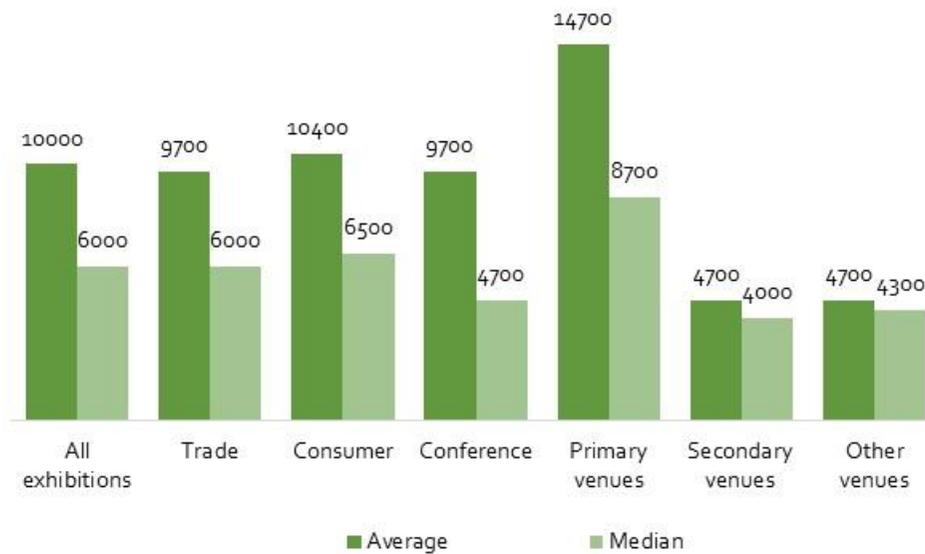
However, there were marked differences by venue type. Primary venues on average hosted 126 exhibitions. Secondary venues hosted an average of 34 exhibitions in 2016 and 'other' venues an average of 12 exhibitions.

2.2 Exhibition Sizes

Average exhibition size (gross³) was 10000m² in 2016 – the median was 6000m²

Primary venues, not surprisingly, hosted larger exhibitions than secondary and other venues. Average event size in primary venues was 14,700m² compared to 4,700m² in secondary venues

AVERAGE AND MEDIAN EXHIBITION SIZE (GROSS M²)



NB. Figures rounded to the nearest 100m²

³ The overall space occupied by an exhibition, irrespective of the floor space occupied by event stands, measured in square metres.

The following table summarises sizes by different exhibition types.

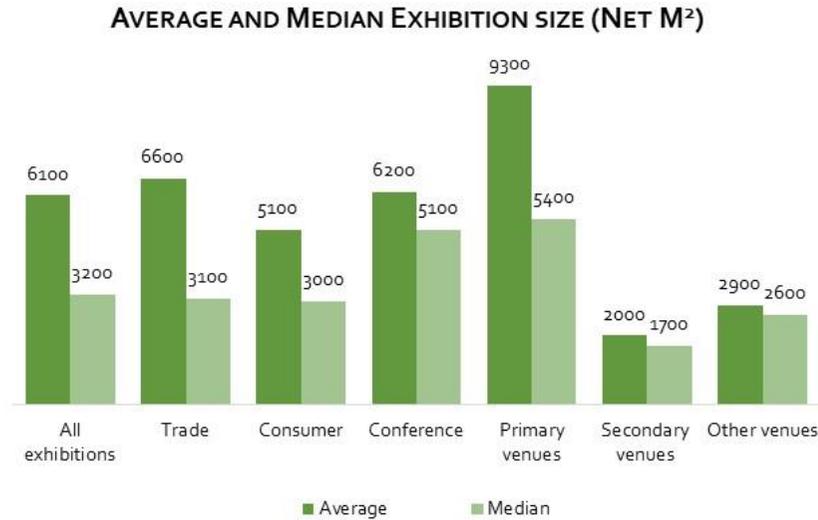
Exhibition size (gross m ²)							
Exhibition size	All exhibitions (%)	Trade (%)	Consumer (%)	Conference (%)	Primary (%)	Secondary (%)	Other venue (%)
Small (up to 2500 m ²)	15	15	11	33	10	26	16
Small / medium (2500-5000 m ²)	23	25	19	28	20	37	13
Medium (5000-8000 m ²)	26	22	33	13	15	26	52
Medium/large (8000-15000 m ²)	19	20	21	11	26	10	14
Large (15000 + m ²)	17	18	16	15	30	1	5
Average (gross m²)	10000	9700	10400	9700	14700	4700	4700
Median	6000	6000	6500	4700	8700	4000	4300

Trade exhibitions varied in size – the commonest size was 2500-5000m².

Consumer exhibitions were most commonly medium -sized (5000-8000m²).

Conference exhibitions in 2016, tended to be below 5000m².

Net exhibition size⁴ was 6100m².

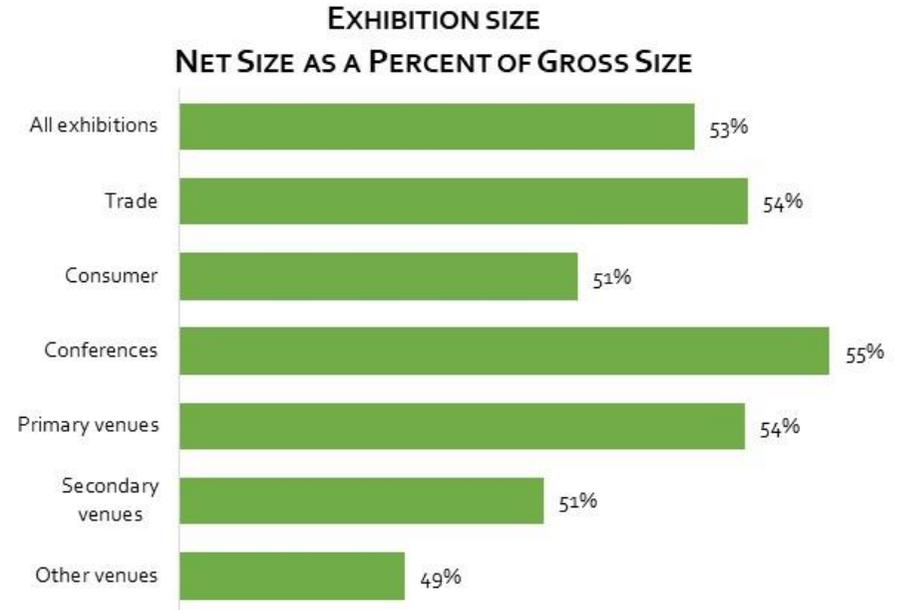


NB. Figures rounded to the nearest 100m²

The median was 3200m² in 2016.

⁴ The actual space sold occupied by exhibitors/event participants at the event.

Net exhibition size was typically about half of gross exhibition size.



NB This analysis is based on exhibitions where there data is available for both gross and net exhibition sizes. It is unweighted. The overall sample was 387 exhibitions.

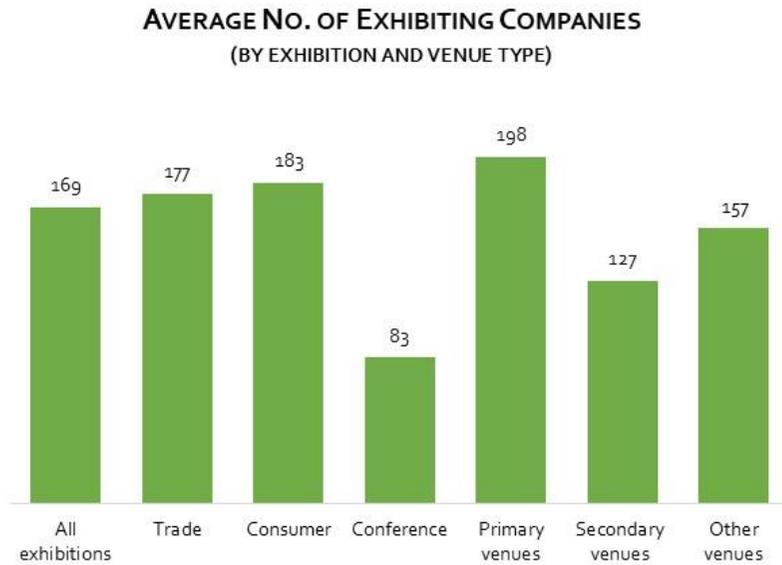
The ratio⁵ of net to gross size for all events was 53%.

⁵ NB this ratio is based on exhibitions where data is available for both gross and net exhibition space.

2.3 Number of Exhibiting Companies

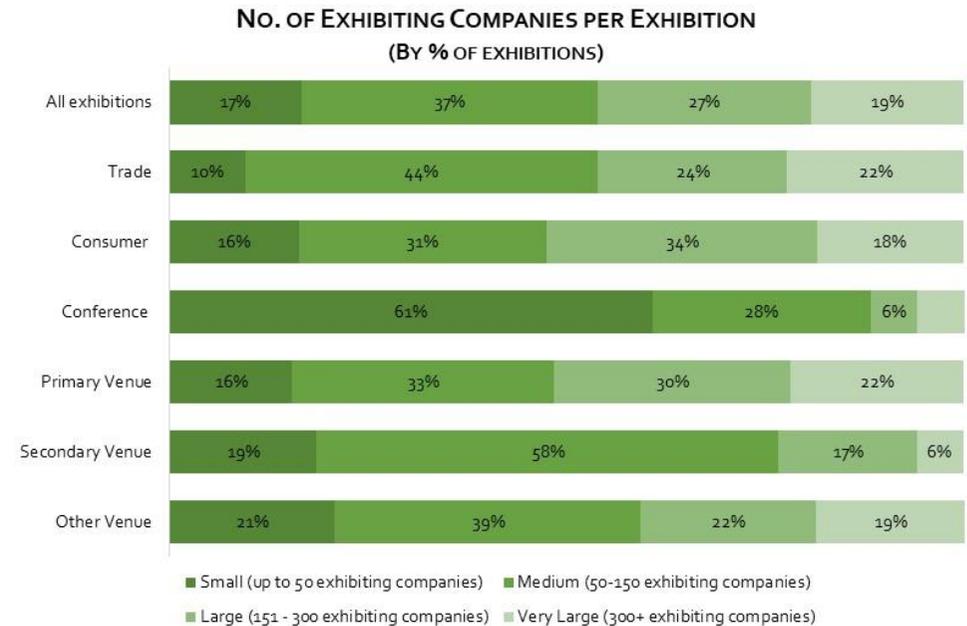
On average, an exhibition had 169 exhibiting companies.

Trade and consumer exhibitions tended to be approximately the same



size with around 180 exhibiting companies in 2016. Conference exhibitions were considerably smaller (an average of 83 exhibiting companies).

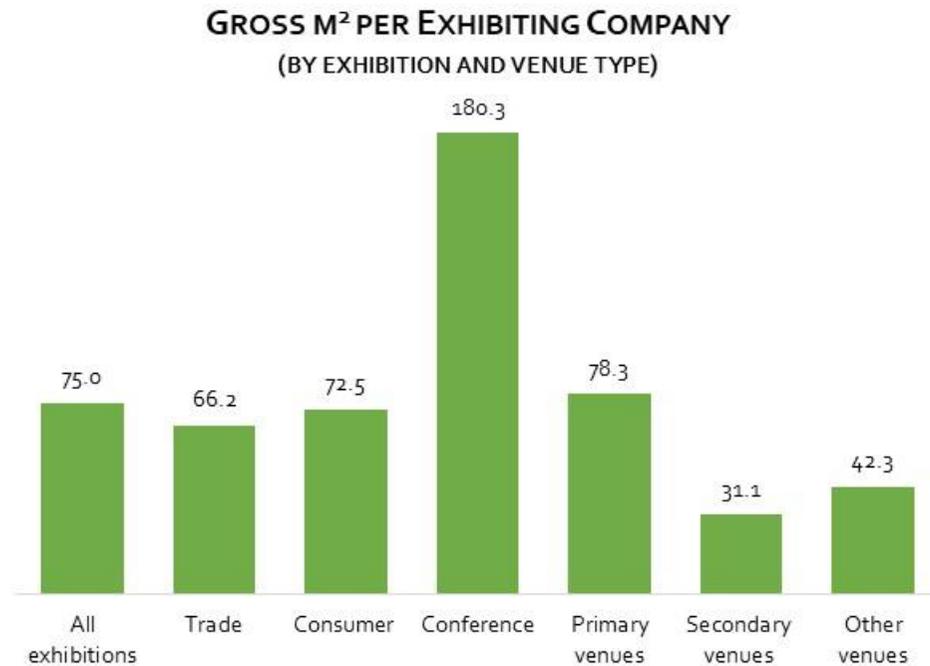
Primary venues typically hosted exhibitions with larger numbers of exhibiting companies (an average of 198) than secondary and other venues.



The commonest exhibition size was 50-150 exhibiting companies for trade and consumer exhibitions.

On average, there was one exhibiting company per 75m² gross venue space.

Gross sqm per exhibiting company was much lower in secondary and

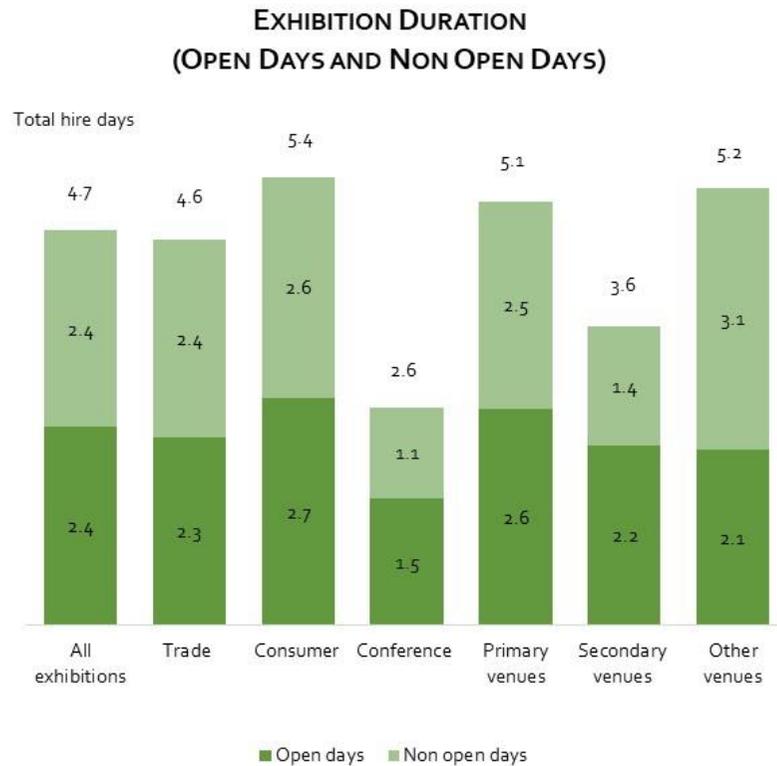


NB This analysis is based on exhibitions where there data is available for both gross exhibition sizes and no. of exhibitors. It is unweighted. The overall sample was 643 exhibitions.

other venues than primary venues, and slightly lower for trade events. It was much bigger for conference events (180m²).

2.4 Exhibition Duration

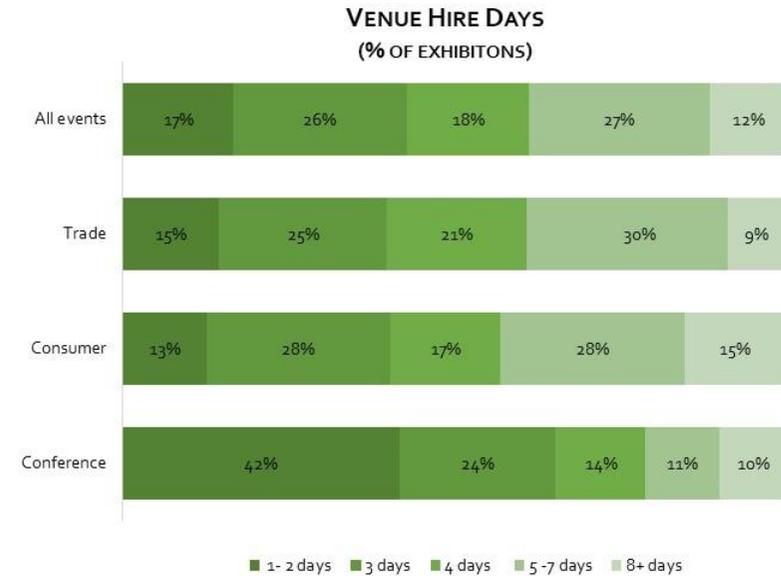
On average an exhibition occupied a venue for 4.7 days. Exhibitions were open for an average of 2.4 days.



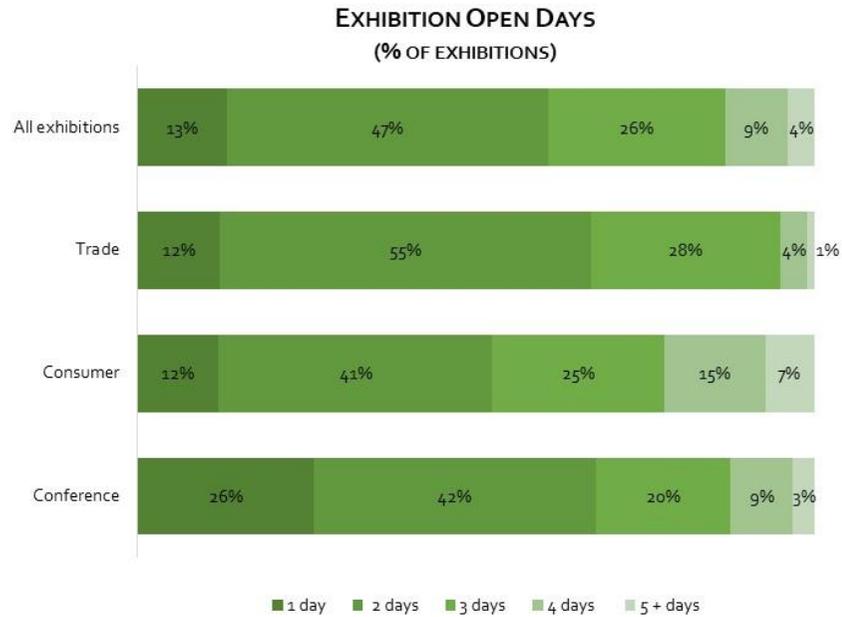
The approximate set up and breakdown time was 2.4 days in 2016.

In 2016, set up and breakdown times, and open days were greater for consumer exhibitions than trade exhibitions.

The most common length for venue hire was 5-7 days.



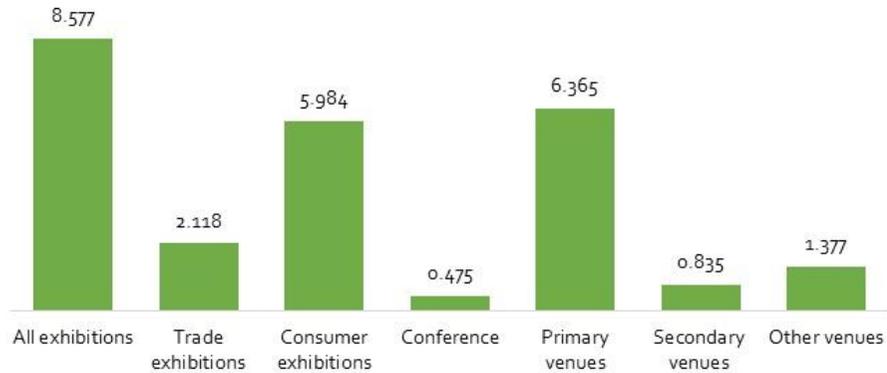
The commonest exhibition length, in terms of open days, was 2 days.



2.6 Number of Visitors

In 2016, there were approximately 8.6m visitors across exhibitions at UK venues.

NO. OF VISITORS BY EXHIBITION AND VENUE TYPE

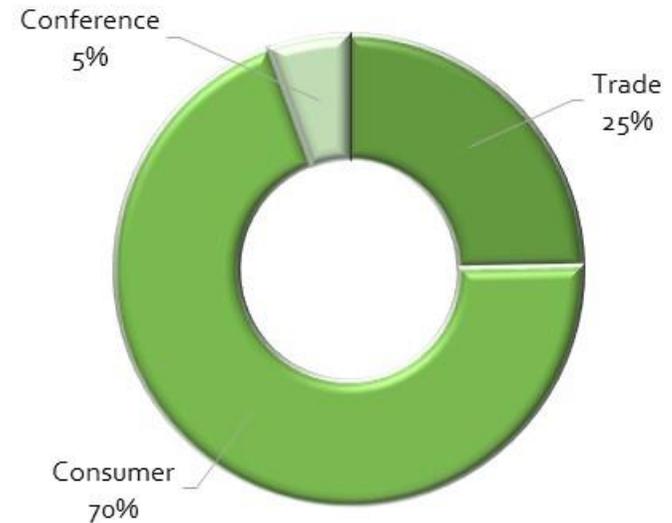


NB. Figures in millions

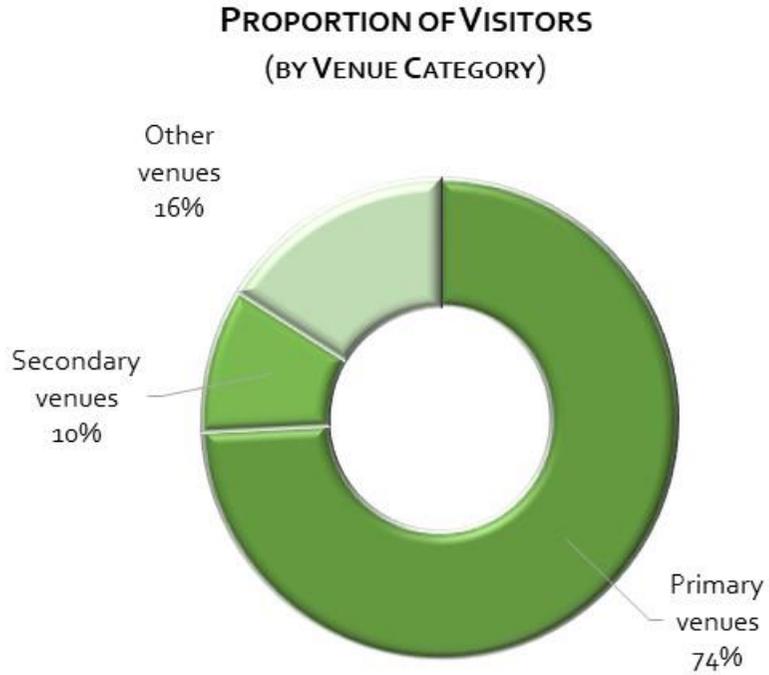
Consumer exhibitions attracted the majority of visitors.

Consumer exhibitions accounted for over two thirds (70%) of visitors. Trade exhibitions accounted for 25% of visitors.

PROPORTION OF VISITORS
(BY EXHIBITION TYPE)

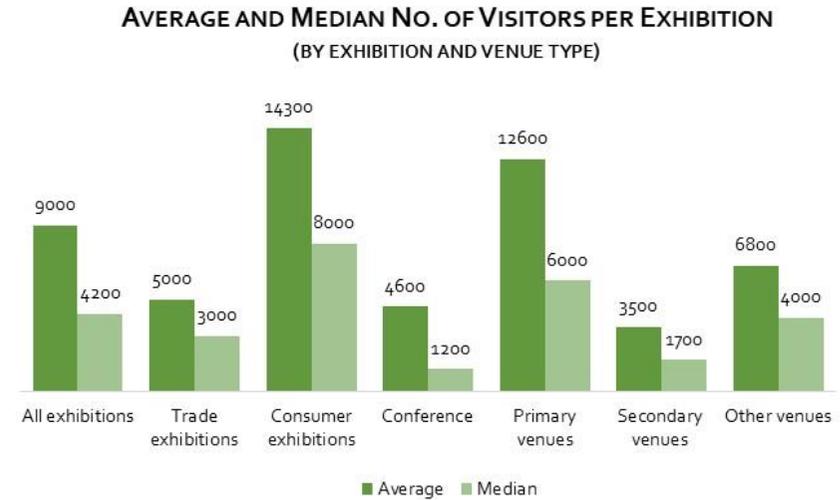


Primary venues accounted for the majority of visitors



Primary venues accounted for over two-thirds (74%) of visitors.

Average event attendance was 9,000 visitors. The median was 4,200.

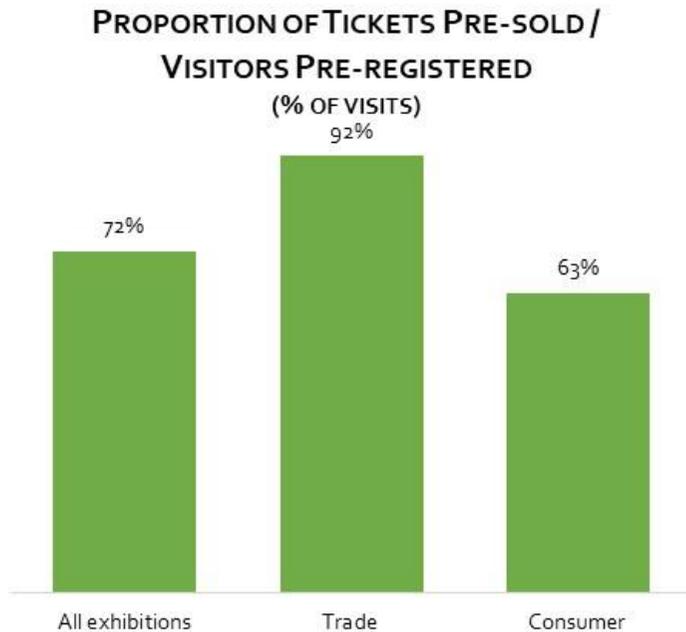


NB. Figures rounded to the nearest 100

Consumer events were significantly larger – an average of 14,300 visitors. Trade events were 5,000 visitors on average.

2.7 Ticket Sales and Prices

Nearly three quarters of tickets were sold and/or visitors registered before an exhibition.



NB. sample size small - approximately 135 exhibitions.

⁶ NB the sample size this analysis was based on was small (approximately 135 exhibitions) so the figures should be treated as indicative. It was not weighted.

Levels of tickets sold and / or visitors registered before an event were higher among trade exhibitions (92%) than at consumer exhibitions (63%).⁶

Over half of exhibitions (55%) did not charge for admission.



There were significant differences between consumer and trade exhibitions. **Trade** exhibitions were typically free – only 6% of those covered in the survey charged. In contrast, most **consumer** exhibitions levied a charge (79%).

The average price for entry to all exhibitions (where there was a charge) was £13.10.

AVERAGE TICKET PRICES (FOR ALL EXHIBITIONS AND CHARGED EXHIBITIONS)



NB. Figures rounded to the nearest 10p. Sample size for all exhibitions was 290.

2.8 Industry Sector

The Leisure sector was the largest sector for exhibitions.

This included a range of sub-sectors like sports, arts, recreation, caravanning, hobbies, books, and crafts etc. and accounted for over 20% of exhibitions.

This was followed by the Lifestyle (including Homeware and Weddings) sector (8.7%), and the Medicine / Healthcare and Pharmaceutical sector (8.6%).

INDUSTRIAL SECTORS (% OF EXHIBITIONS)



There were variations by different exhibition types.

Consumer exhibitions were strongly orientated to the Leisure sector (43% of consumer exhibitions), the Lifestyle / Wedding / Homeware sector (nearly 13%) and the Education / Careers / Training sector (approximately 9%). These three sectors accounted for approximately two-thirds (64%) of consumer exhibitions.

Trade exhibitions covered a broader spread of sectors. The most important ones were Medicine / Healthcare / Pharmaceuticals (approximately 13%), Industry and Industrial processing (over 8%).

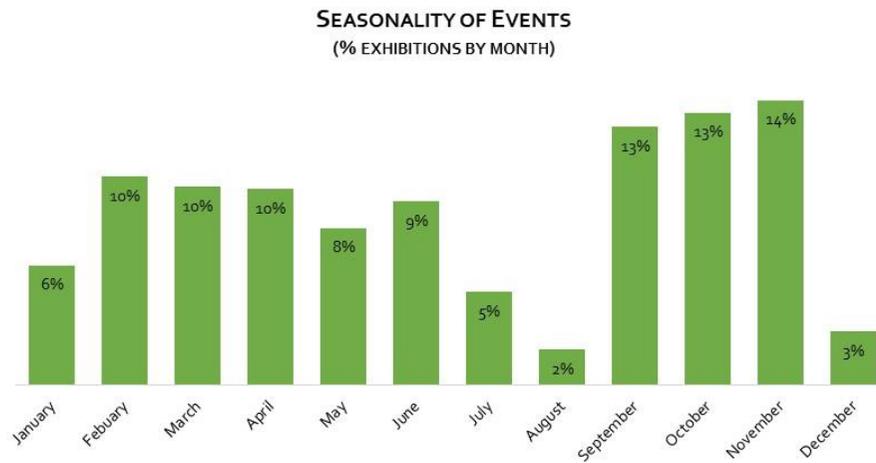
Conferences with exhibitions also tended to be from a small number of sectors – Medicine / Healthcare / Pharmaceuticals, Business to Business Services, and Computers / Telecoms etc. These three sectors accounted for approximately 46% of conference exhibitions.

Industrial Sectors (% of exhibitions by exhibition type)				
	All exhibitions	Trade	Consumer	Conference
Leisure (Hobbies, Recreation, Arts, Sports, Books, Crafts, Caravans etc.)	20.4%	3.3%	42.8%	1.3%
Lifestyle, Wedding, Homeware and Gardening	8.7%	6.6%	12.6%	1.3%
Medicine, Healthcare, Pharmaceuticals	8.6%	12.5%	2.2%	16.5%
Education, Careers, Training	6.7%	5.7%	8.7%	3.8%
Building and Construction	6.6%	8.8%	4.5%	7.6%
Catering, Food processing, Beverages	5.9%	7.6%	4.5%	5.1%
Aerospace, Automobile, Marine, Public Transport & Defence	5.3%	5.4%	5.5%	5.1%
Other Service Industries (e.g. retail and gifts, banking, financial)	5.1%	7.6%	2.4%	7.6%
Computers, Telecoms, Electronics, Broadcasting, Audio/Visual	5.1%	7.1%	1.0%	17.7%
Business to Business Services and Equipment, Conferences	4.8%	5.9%	1.7%	11.4%
Industry & processing, Manufacturing, Engineering and Science	4.3%	8.5%	0.7%	1.3%
Energy, Power and Water, Environment	3.2%	6.1%	0.0%	5.1%
Clothing, Textiles, Footwear, Beauty, Hair	2.7%	3.1%	2.9%	0.0%
Travel and Tourism	1.9%	1.9%	2.4%	0.0%
Agriculture, Livestock, Forestry, Animal Shows	1.9%	2.6%	1.5%	0.0%
Maintenance & cleaning / Protection & security	0.7%	1.2%	0.2%	0.0%
Other	8.2%	6.2%	6.4%	16.5%

2.9 Seasonality

September, October and November were the busiest months for exhibitions in 2016

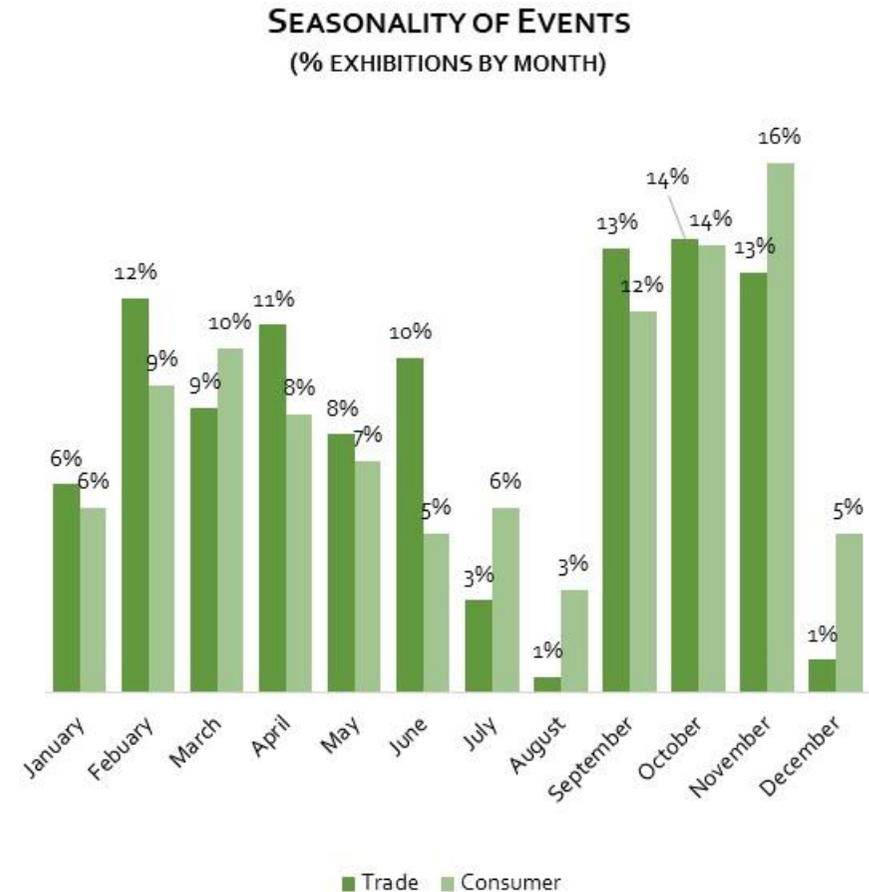
Together they accounted for approximately 40% of exhibitions.



The quietest months were in the winter (January and December) and in the summer (July and August).

Trade and consumer exhibitions followed a similar seasonality pattern.

Consumer exhibitions, in 2016, were more likely to be concentrated in October and November. Trade events were more likely to take place in September and October.

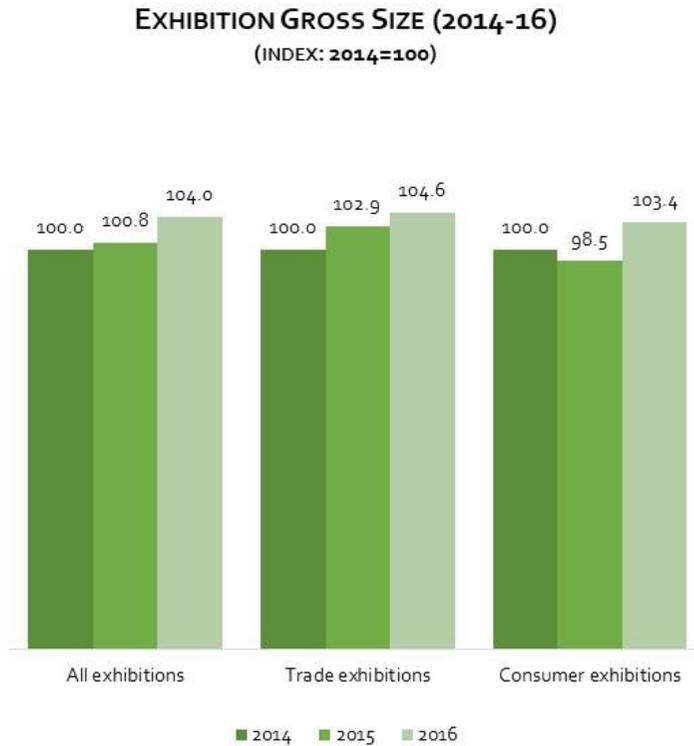


3 Trend Analysis

3.1 Exhibition Size

Gross exhibition size has increased since 2014 - by approximately 4%

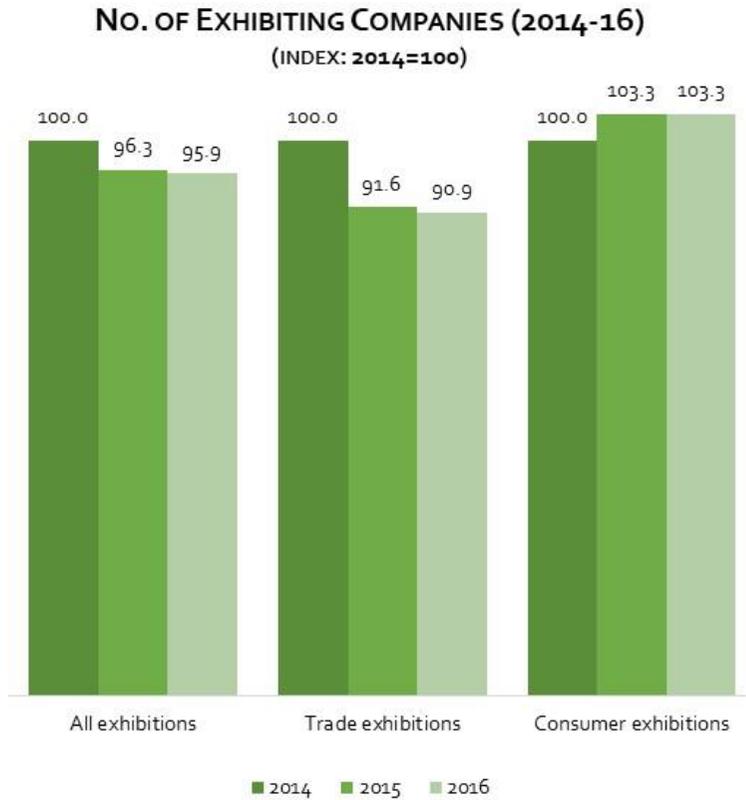
Consumer events were marginally smaller in 2015 but recovered in 2016 – 3% up on 2014 levels.



Note: chart shows change in average value relative to 2014. Figures are indexed. 2014 = 100
N=304

3.2 Number of Exhibiting Companies

Overall the number of exhibiting companies was down year on year from 2014.



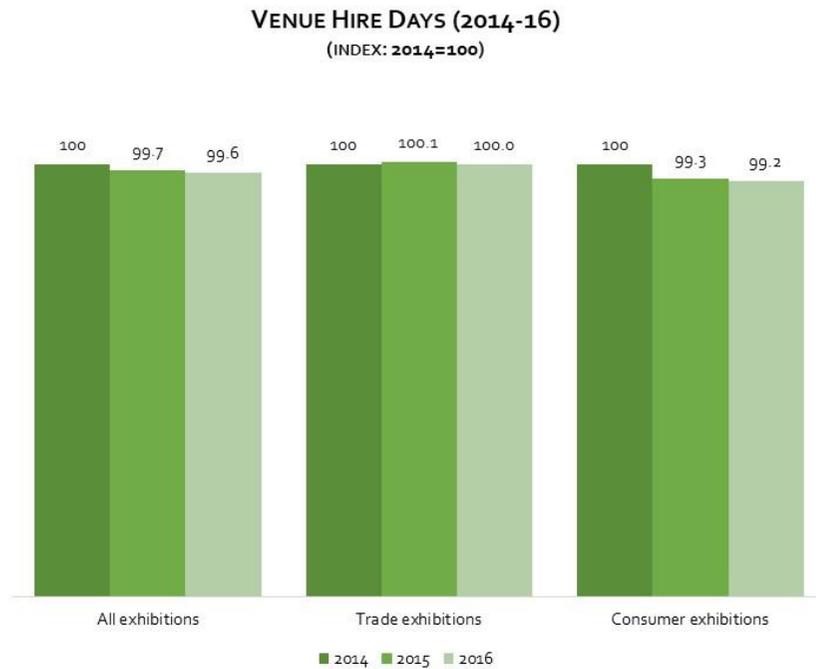
Note: chart shows change in average value relative to 2014. Figures are indexed. 2014 = 100
N=264

This was caused by a decrease in the number of exhibitors at trade exhibitions.

Consumer exhibitions demonstrated the opposite pattern – with a small increase in 2016 (over 2014).

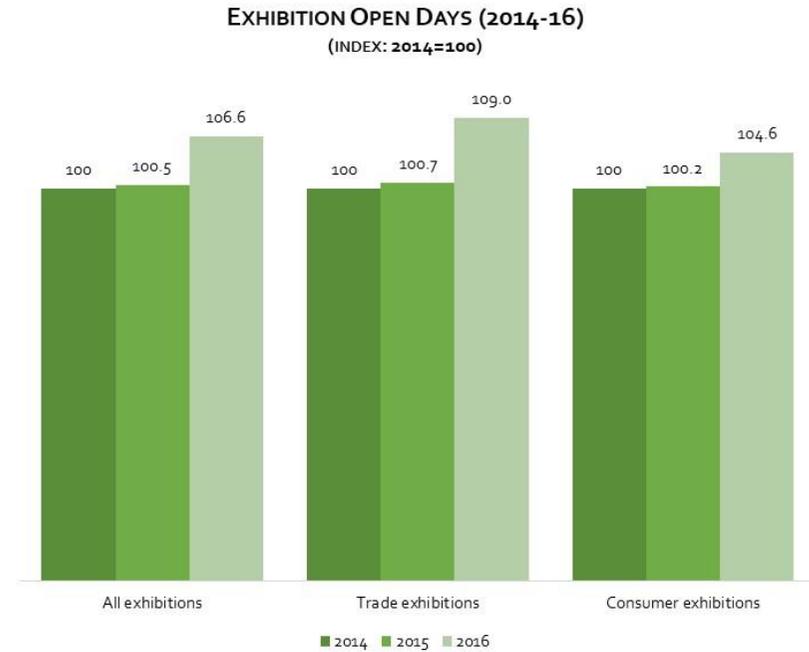
3.3 Exhibition Duration

Overall venue hire days have been largely static since 2014.



Note: chart shows change in average value relative to 2014. Figures are indexed. 2014 = 100
N=322

However, the average number of exhibition open days did show an upturn in 2016.



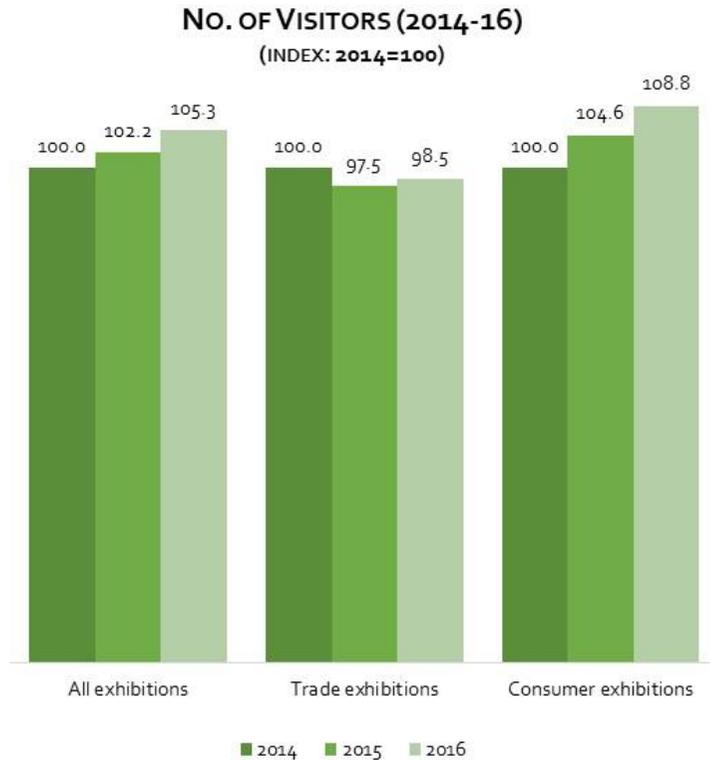
Note: chart shows change in average value relative to 2014. Figures are indexed. 2014 = 100
N=339

Average open days were up nearly 7% on 2014 levels – this was particularly the case among trade exhibitions.

3.4 Number of Visitors

Across all exhibition types, numbers of visitors have increased since 2014 – up 5%.

Numbers of visitors to trade exhibitions were more static – 2016 levels were slightly down on 2014 but did show a minor increase on 2015.



Note: chart shows change in average value relative to 2014. Figures are indexed. 2014 = 100
N=109

This increase was a result of higher visitor numbers at consumer exhibitions which were up in both 2015 and 2016.