



SASiE

SIZE AND SCALE
INDEX FOR
EVENTS

The Size and Scale Index for Events (SASiE) in 2017

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Foreword

Industry remains balanced and stable

As SASiE matures into its 4th year, the intelligence we can derive from the information becomes more robust. Analysis of existing and new data provides a deeper understanding of the current heartbeat of the event industry and the influence of external trends: we remain stable and resilient in the face of strong macro factors, such as Brexit.

In 2017, we welcomed an estimated 1035 exhibitions in the UK's main venues categorised by industry sector: trade events hosted 41% of the total, whereas consumer accounted for 48% and conferences 11%. Consumer shows had slightly more exhibiting companies with an average of 193 per event, compared to 167 on trade; and finally, visitor numbers were stable from 2015-2017. This is particularly encouraging considering the dynamic change in the industry, in which we have seen some of the largest events either ceasing to operate or relaunching. However, as we wave goodbye to old favourites, new events spring up in their place showcasing original interests and attracting fresh audiences. The show goes on.

Whilst the data reveals no ground-breaking surprises, it is interesting to note that the Leisure Sector accounted for 44% of all consumer exhibitions. In fact, it was the largest generator of all exhibitions; delivering 24% of the total, spread across a range of sub-sectors such as sports, arts, recreation, caravanning, hobbies, books, crafts and other interests. The sector has maintained its leading position since the launch of SASiE when it accounted for 17% of all exhibitions and it has been steadily rising each year. In the context of the UK economy, leisure is one of the UK's most vital sectors, employing over 4.5 million people and

generating 10% of the UK GDP; and it is growing.¹ It is also interesting to note that the creative industries as a group have been consistently growing twice as fast as the economy in recent years, with a 7.6% increase in the sector's gross value in 2016 alone, generating £10.5m for the UK economy every hour¹.

Another solid and crucial part of our industry is the traction that comes with trade events. A strong performance was revealed in an array of vital segments with Medicine, Healthcare and Pharmaceuticals hosting 10% of all trade events – the sector maintained its position as the second biggest generator of exhibitions increasing from 9% in the previous survey. This year, it is closely followed by Building and Construction which accounted for 9.7% of all trade exhibitions, up from 6% last year.

Whether trade or consumer, a complex web of interdependency keeps the industry strong and resilient; enabling organisers, venues, exhibitors, contractors and partners to establish successful and sustainable businesses. Connecting people and business interests through events still is as relevant as it has ever been, despite the pressures for digital connectedness. In his book 'The Fourth Industrial Revolution', Klaus Schwab argues that the constant digital connection may deprive us of one of life's most important assets: the time to pause, reflect and engage in meaningful conversation. I believe this is one of the reasons why events remain so important.

Events play an important role in promoting Britain's best assets at home and onto the global stage. A healthy and stable industry will continue to grow, prosper and inspire generations to come.

Nigel Nathan, MD at Olympia London, AEV Board

¹ Figures by the London Stock Exchange Group – 1000 Companies to Inspire the UK 2018 Report.

Executive Summary

Introduction

The data in this report covers UK exhibitions of 500m² plus staged in 2017. 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 2017, there were an estimated 1035 exhibitions hosted by the UK's main exhibition venues. Trade exhibitions accounted for 41% of these, with a slightly higher proportion of consumer events (48%).

Exhibition Sizes

- From the participating exhibitions, the average gross exhibition size was 8400m² – the median was 5600m², with nearly half (48%) of exhibitions under 5,000m².
- On average consumer exhibitions (8900m²) tended to be slightly larger than trade exhibitions (8500m²).
- Average net exhibition size was 4200m².

Number of Exhibiting Companies

- An average exhibition had 166 exhibiting companies.
- Consumer exhibitions were slightly larger (with an average of 193 exhibiting companies) than trade events (an average of 167 exhibiting companies).

- Conference exhibitions were much smaller (an average of 41 exhibiting companies in 2017).

Exhibition Duration

- On average an exhibition occupied a venue for 4.8 days.
- On average exhibitions were open for 2.4 days.
- Consumer exhibitions tended to be open for slightly longer - an average of 2.7 days compared to 2.3 days for trade exhibitions.
- The most common exhibition length, in terms of open days, was 2 days (44% of exhibitions).

Visitors

- Exhibitions attracted an estimated 8.66m visitors in 2017.
- Consumer exhibitions accounted for the majority of visitors – 74%. Trade exhibitions accounted for 23% of visitors.
- Exhibitions, on average, attracted 8,400 visits – a median of 4,200.
- Consumer exhibitions, at an average 12,800 visitors (a median of 8,000), typically attracted over twice the number of visitors as trade exhibitions (an average of 4,700 and a median of 3000).

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 approximately 24% of exhibitions. This was followed in importance by the Medicine / Healthcare and Pharmaceutical sector (10%). and the Lifestyle (including Homeware and Weddings) sector (7.4%).
- Consumer exhibitions were strongly orientated to the Leisure sector (accounting for 44% of consumer exhibitions). Trade exhibitions covered a broader spread of sectors. The most

important ones were Medicine / Healthcare / Pharmaceuticals (approximately 10%) and Building and Construction (9.7%).

Seasonality

- March, October and November were the busiest months for exhibitions in 2017.

Year-on-Year Comparisons

Year-on-year comparisons have been made where comparable 2015, 2016 and 2017 data exists on an event-by-event basis. While providing an overview of year-on-year change, this should not be regarded as an analysis of trends in the *overall* exhibition sector.

- The number of exhibitions was up by about ½% in 2017 over 2016.
 - Gross exhibition size in 2017 was similar to 2015 levels but spiked in 2016.
 - Overall, the number of exhibiting companies in 2017 was down slightly from 2015 levels but remained at the same level as 2016.
 - Overall, venue hire days have been largely static since 2015. However, the average number of exhibition open days did show an upturn in 2017 from 2015.
 - Average numbers of visitors to exhibitions have been broadly static since 2015.
-

Market Insights

An Organiser Perspective

It takes time for annual statistics to bed in and one of the pleasures of reading the 2017 SASiE Report is that it now has enough of a history for there to be meaningful comparisons. That being said, the most notable for a mathematician are the direct year-on-year averages. The number of exhibitions detailed is increasing – but that is likely to mean that, as SASiE matures, it is able to record more events rather than there actually being more events. But on 3 major metrics there appears to be a downward trend: Gross Exhibition Size is down 1% over 3 years (and therefore presumably net square metres sold is also down); the number of exhibiting companies is down some 4% over 3 years; and the total number of visitors is down 3% over 3 years. These trends are broadly similar for both Trade and Consumer events. I think our research is now rigorous and consistent enough for us to regard these trends as accurate.

But what they mean is rather more complex. If one looks at the organic growth rates (in other words same events, year on year) claimed by our major companies, then there is a mismatch – the latest financial reports suggest DMG at +3%, Informa at +3.4%, UBM at +4.1%, ITE at +5%, Reed at +6%, Clarion at +8%. Two obvious caveats – these figures relate to revenues and not space sold, and of course all our main companies are now thoroughly international. But there is no evidence from these sources that the UK is performing materially worse than the rest of the world (2017 was probably too early for the inevitable Brexit effect). And, to state the obvious, space may be declining at 1% per year but if prices go up at 3% a year then revenues are still rising at 2% annually. One of the great problems of all exhibition research is that it covers visitors, square metres and exhibitor numbers but NOT what ultimately gets

reported by companies and what pays our salaries – which is dollars and cents.

The other reason for mismatches is the effect of larger events. Though recent changes cover a number of years and not just 2015 to 2017, one cannot ignore the fact that, in this decade, we have effectively lost three of our four largest consumer shows: the Motor Show, the London Boat Show and the Clothes Show. That is circa 700,000 visitors, which is 8% of the total annual number of 8,660,000 recorded in 2017 by SASiE. There has been a trend of losing the larger events in recent years, and the effect on the overall numbers has to be carefully calibrated.

The same is broadly true for trade events. While IPEX ran only every 4 years, it was one of the four largest trade events in the UK in terms of square metres sold. Of the other three, Spring Fair has shown a steady decline year on year in size and Interiors was the second largest event at the NEC in square metres before its move to ExCeL. So, again, I think we are seeing the effect that a small number of large shows has on the overall statistics of the industry – it has been calculated that the 50 largest exhibitions in the UK represent 75% of the industry's turnover.

From where I sit, I don't see any overall decline in any of my businesses and I therefore think that the SASiE numbers have to be handled carefully. I cannot be sure that the qualifications I have made here are the whole story, but I don't see any reason to be pessimistic about the exhibition business for the foreseeable future.

Phil Soar, Chairman, 19 Events and Brand Events

A Supplier Perspective

The model is changing: meet Exhibitions 2:0

On the face of it, the latest SASiE Report makes for sober reading.

The trend analysis suggests the UK exhibition market is essentially flat with little discernible growth in either number of exhibitions, number of exhibitors or number of visitors since 2015.

All a bit depressing? Not so.

The level of corporate activity over the past 12 months has been phenomenal. The UK has been leading the way with Informa, UBM Clarion, ITE, and Ascential all being parts of major transactions. As predicted by Phil Soar in last year's SASiE report, globalisation and consolidation continue apace.

What does this mean for the UK service contractor? Life is becoming ever more challenging as clients seek global supply partners who can drive ever improving levels of service, whilst helping them to deliver synergy savings in line with aggressive business plans.

I am still very positive about the UK event industry. As content becomes ever more important, the 'conference-with-exhibition' segment has shown significant growth. This is consistent with our experience at GES where an increasing portion of our business is serving 'hybrid' events – heavily content-driven and focused on audience quality over quantity.

It's one of the reasons we went on the acquisition trail ourselves – investing in market-leading AV and next generation engagement technology to serve the changing needs and requirements of our customers.

Kevin Costner's old adage 'if you build it they will come'* is no longer viable in the modern event world and probably never was. Time-poor

consumers and business execs crave face-to-face interaction but they are becoming increasingly demanding about what they want in exchange for their undivided attention - they need an irresistible proposition.

Many organisers have spotted the potential for growth in visitor/delegate revenue and are investing in content, community and customer experiences that create value and brand loyalty. The 'three-legged stool' is an attractive model to investors and shareholders alike. Where exhibitor, sponsor and delegate revenues all contribute are the Holy Grail – and make a stable and sustainable business proposition.

So the models may be changing and evolving - away from chasing big headline numbers for a more considered and more profitable revenue mix. The exhibition is still a vital, dynamic marketplace – highly prized by marketers and business leaders as a marketplace for ideas as much as products and services.

Nick Marshall, Executive Chairman, GES EMEA

**Field of Dreams 1989*

Contents

Foreword	i
Executive Summary	ii
Market Insights	iv
Contents	1
1 Introduction	1
1.1 Introduction.....	2
1.2 Methodology.....	3
2 Dimensions 2017.....	6
2.1 Number and Type of Exhibitions.....	7
2.2 Exhibition Sizes	9
2.3 Number of Exhibiting Companies	12
2.4 Exhibition Duration.....	13
2.6 Number of Visitors.....	15
2.7 Industry Sector	17
2.8 Seasonality	19
3 Trend Analysis	20
3.1 Exhibition Size	21
3.2 Number of Exhibiting Companies	23
3.3 Exhibition Duration.....	24
3.4 Number of Visitors.....	25

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 2017 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
- Events by industrial sectors
- Seasonality of events.

The second section provides a trend analysis for 2015, 2016 and 2017.

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, 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	6
Other	15	6

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.

In addition, responses were received from 18 organisers.

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 the number of venues (by venue category –

column A) by the average number of exhibitions per venue (Column B). In addition, the survey of organisers identified a number of exhibitions held at a range of other venues that are not in AEV membership. These have been added to the overall estimate of the number of exhibitions.

Grossing up process			
Venue Category	A. No. of venues	B. Average no of exhibitions per venue	C. Estimated exhibitions
Primary	4	124.0	496
Secondary	7	31.5	221
Other – AEV members	15	19.2	288
Other – non AEV members	n/a	n/a	31
Total			1035

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 2015, 2016, and 2017, 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 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 (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 visitors 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.

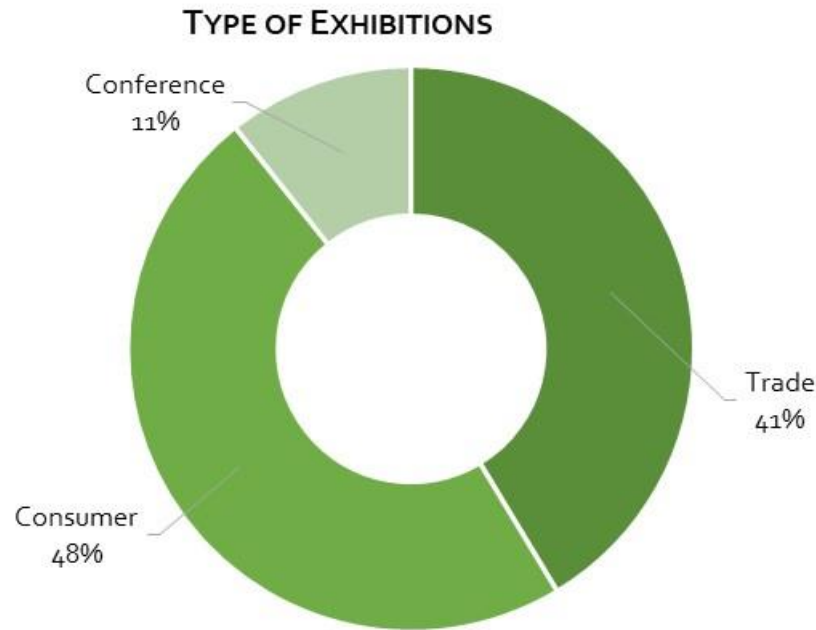


2 Dimensions 2017

2.1 Number and Type of Exhibitions

In 2017, there were an estimated 1035 exhibitions at the UK's main exhibition venues.

Trade exhibitions accounted for 41% (an estimated 428 events).

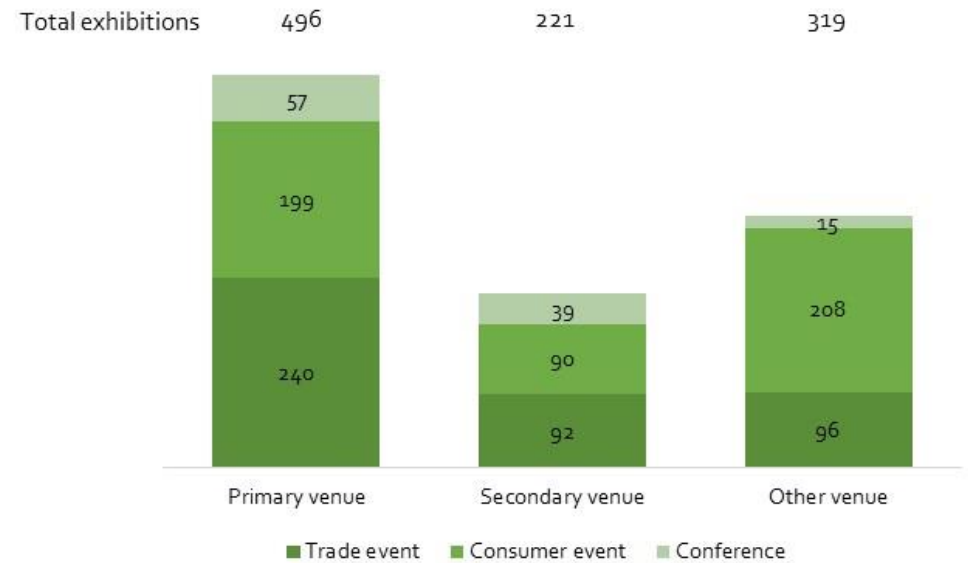


Consumer (or public) exhibitions accounted for a slightly higher proportion - 48% of exhibitions (an estimated 496 exhibitions). The

remaining 11% of events were conferences that incorporated a significant exhibition element.

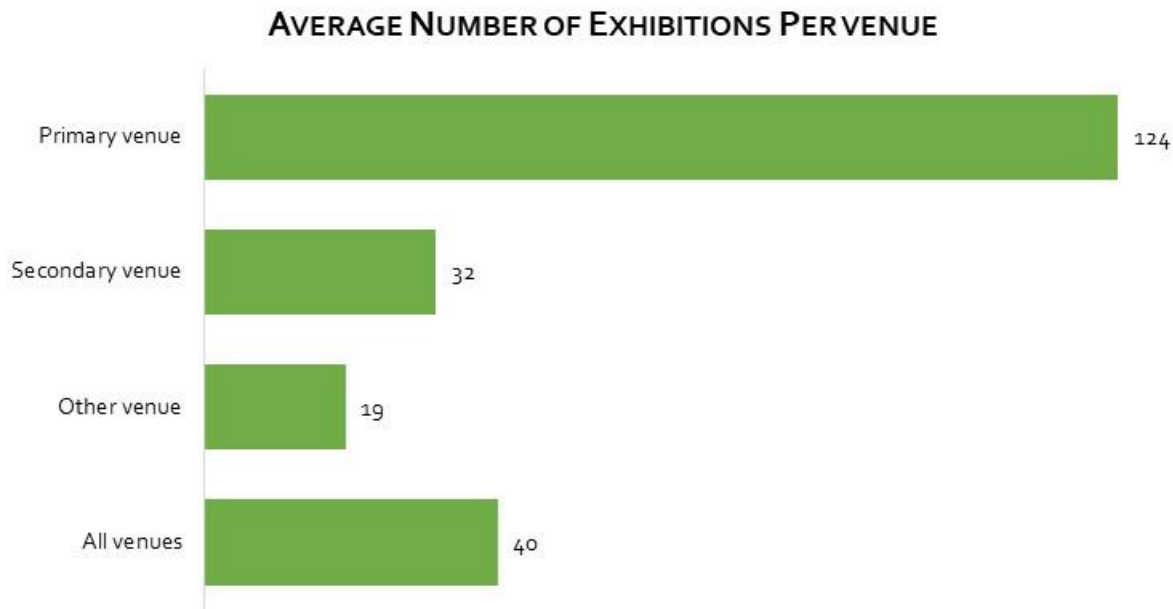
Primary venues² hosted 496 exhibitions - 48% of the UK's total.

NO. OF EXHIBITIONS BY VENUE TYPE



² See section 1.2 for a definition.

On average each venue hosted 40 exhibitions in 2017.



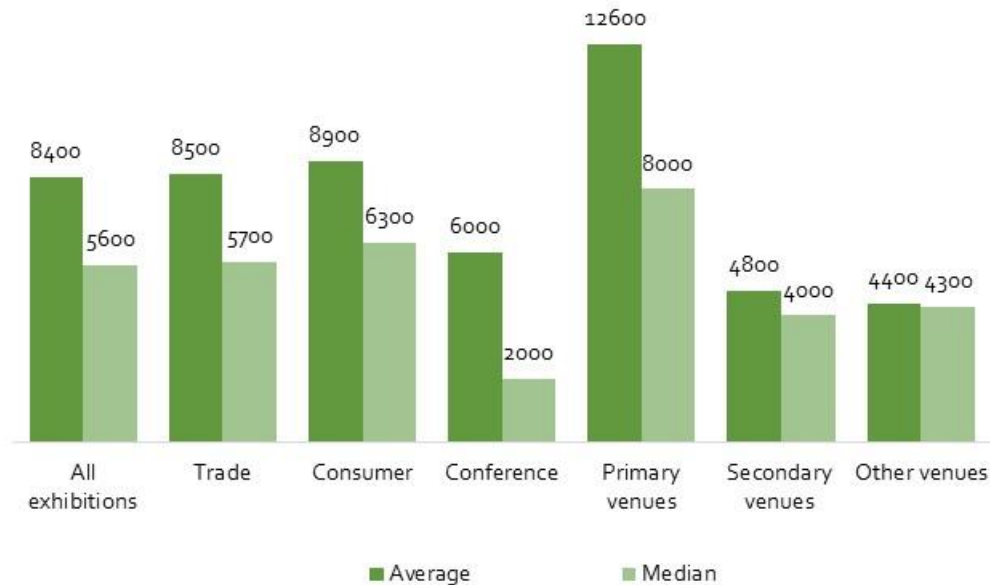
There were marked differences by venue type. Primary venues on average hosted 124 exhibitions. Secondary venues hosted an average of 32 exhibitions in 2017 and 'other' venues an average of 19 exhibitions.

2.2 Exhibition Sizes

Average exhibition size (gross³) was 8400m² in 2017 – the median was 5600m²

Primary venues hosted larger exhibitions than secondary and other venues. Average event size in primary venues was 12,600m² compared to 4800m² 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.

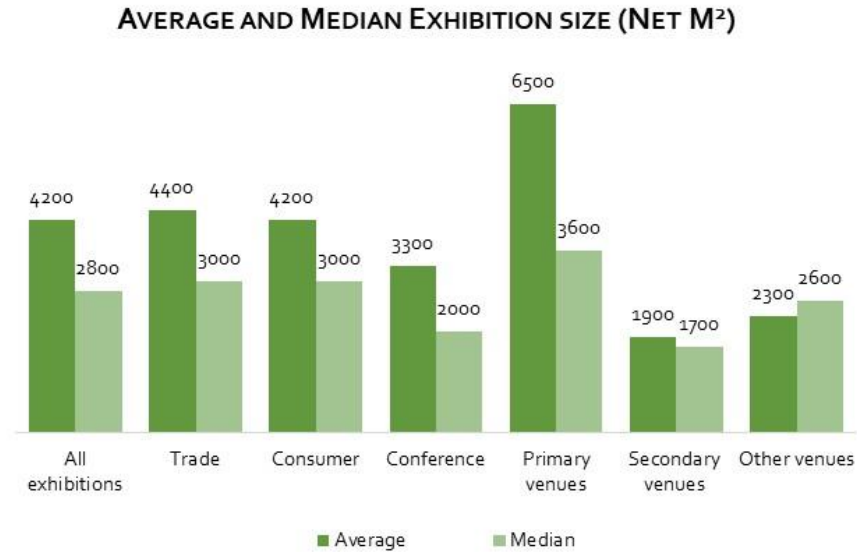
Exhibition size (gross m ²)							
Exhibition size	All exhibitions (%)	Trade (%)	Consumer (%)	Conference (%)	Primary (%)	Secondary (%)	Other venue (%)
Small (up to 2500 m ²)	22	18	19	57	15	26	31
Small / medium (2500-5000 m ²)	26	32	24	17	20	38	28
Medium (5000-8000 m ²)	19	17	24	7	15	19	26
Medium/large (8000-15000 m ²)	18	21	18	10	26	16	8
Large (15000 + m ²)	14	12	16	9	24	1	7
Average (gross m²)	8400	8500	8900	6000	12600	4800	4400
Median	5600	5700	6300	2000	8000	4000	4300

Trade exhibitions varied in size – the commonest size was 2500-5000m² but a third were larger than 8,000m².

Consumer exhibitions were most commonly small to medium-sized (2500-8000m²) – 48% - but a third were larger than 8,000m²

Conference exhibitions tended to be below 5000m² - 59%.

Net exhibition size⁴ was 4200m².



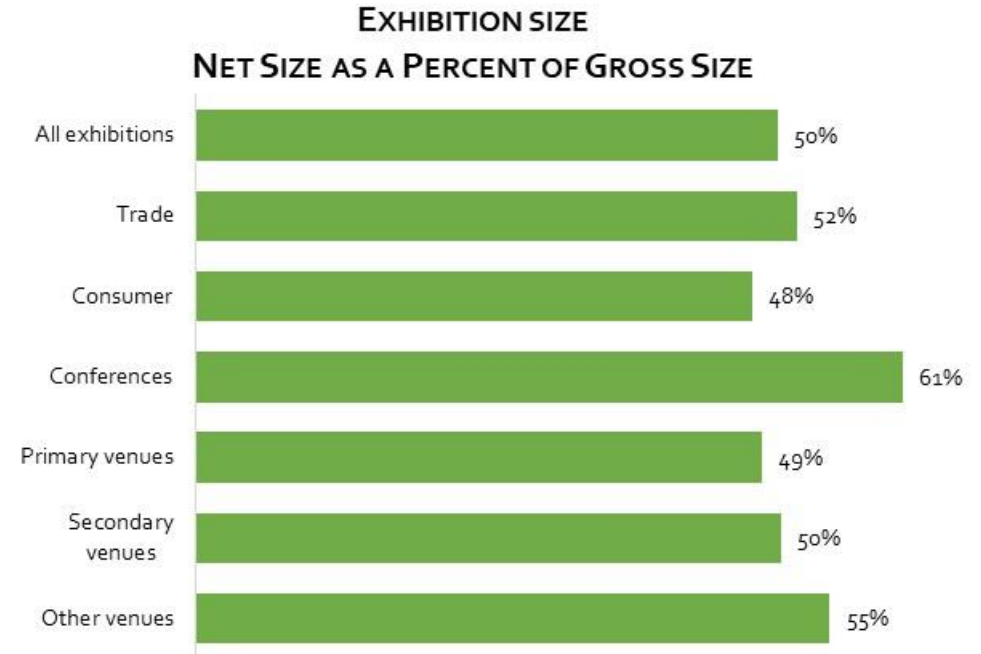
NB. Figures rounded to the nearest 100m²

The median was 2800m² in 2017.

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

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

The ratio⁵ of net to gross size for all events was 50%.



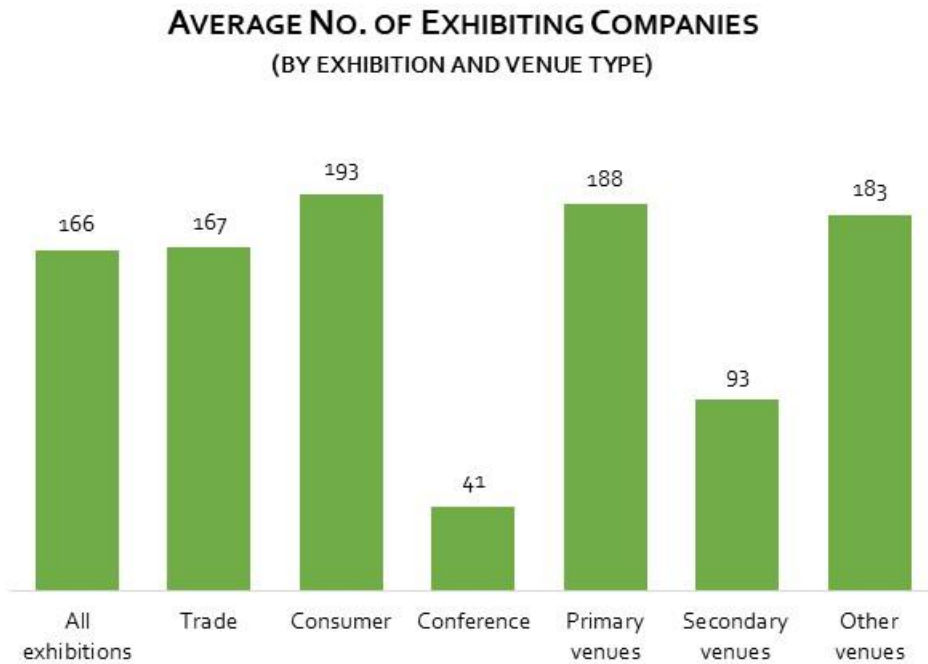
NB This analysis is based on exhibitions where there data is available for both gross and net exhibition sizes. It is unweighted. The overall sample was 625 exhibitions.

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

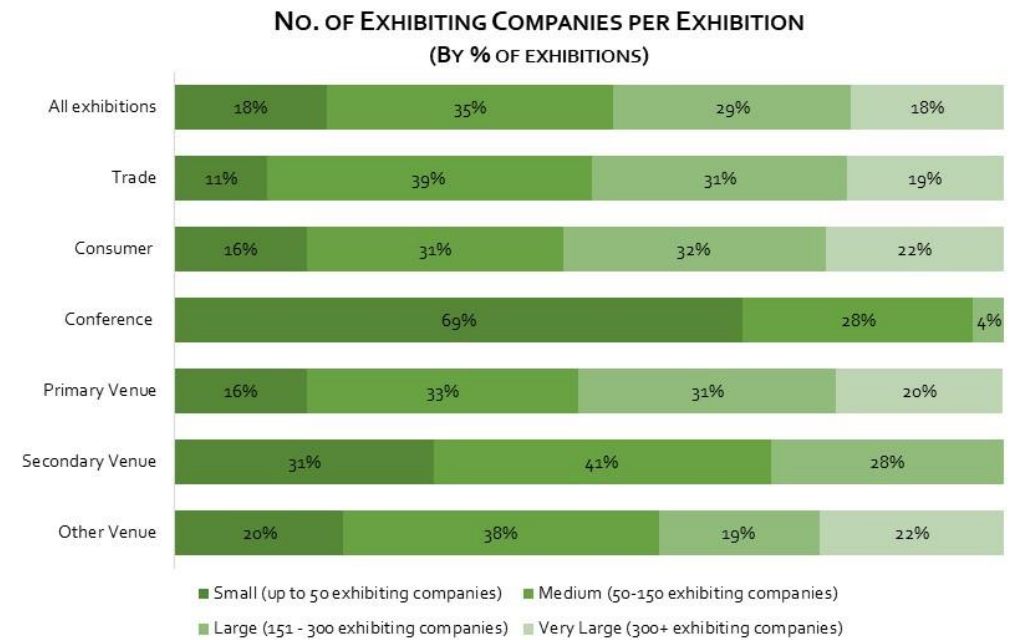
On average, an exhibition had 166 exhibiting companies.

In 2017, consumer exhibitions, with an average of 193 exhibitors, were larger than trade exhibitions (an average of 167 exhibitors). Conference



exhibitions were considerably smaller (an average of 41 exhibiting companies).

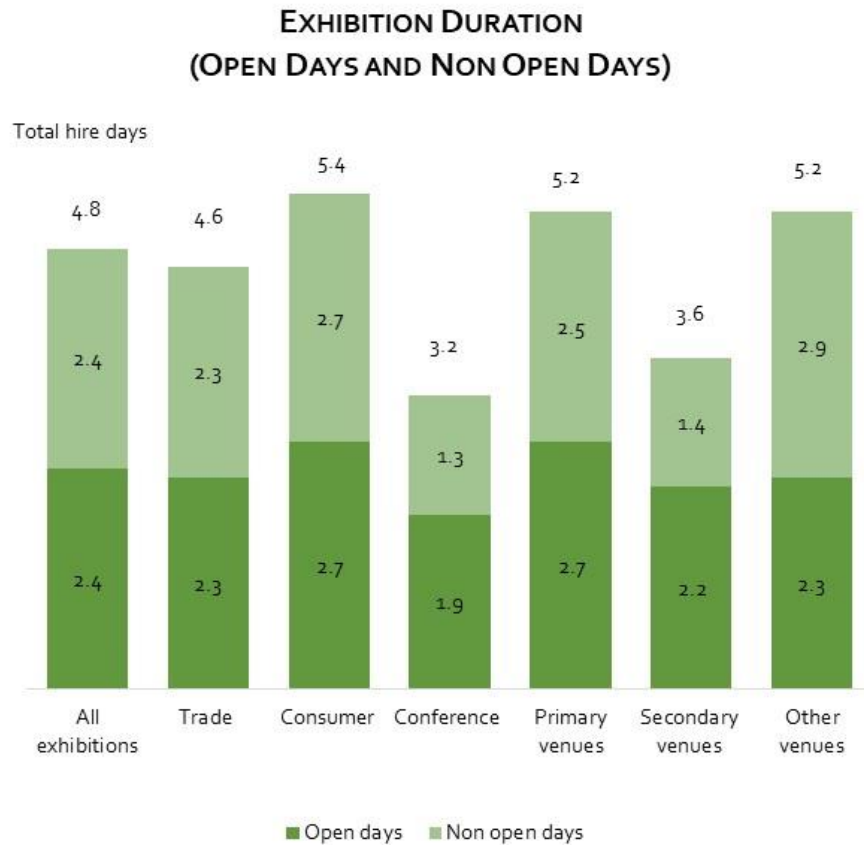
Primary venues typically hosted exhibitions with larger numbers of exhibiting companies (an average of 188).



The commonest exhibition size was 50-150 exhibiting companies.

2.4 Exhibition Duration

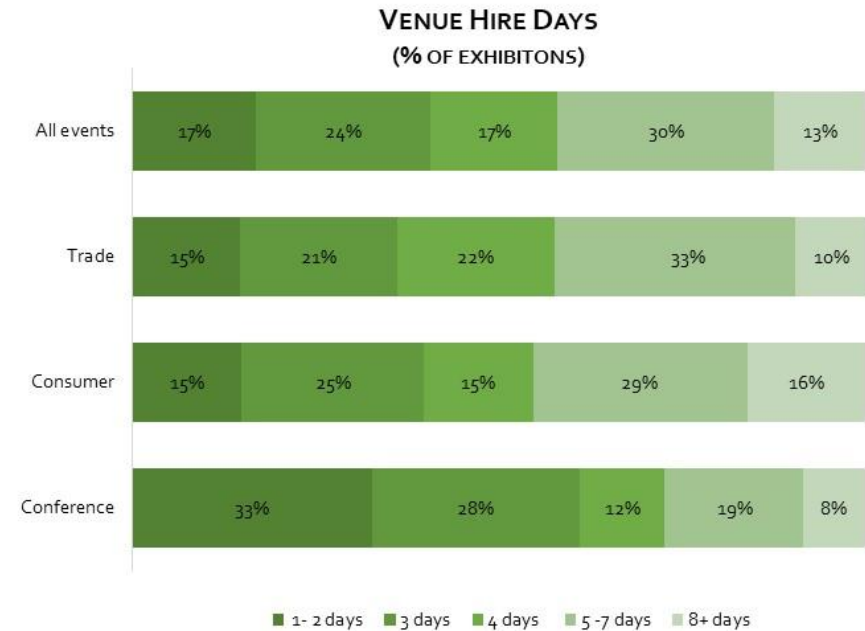
On average an exhibition occupied a venue for 4.8 days. Exhibitions were open for an average of 2.4 days.



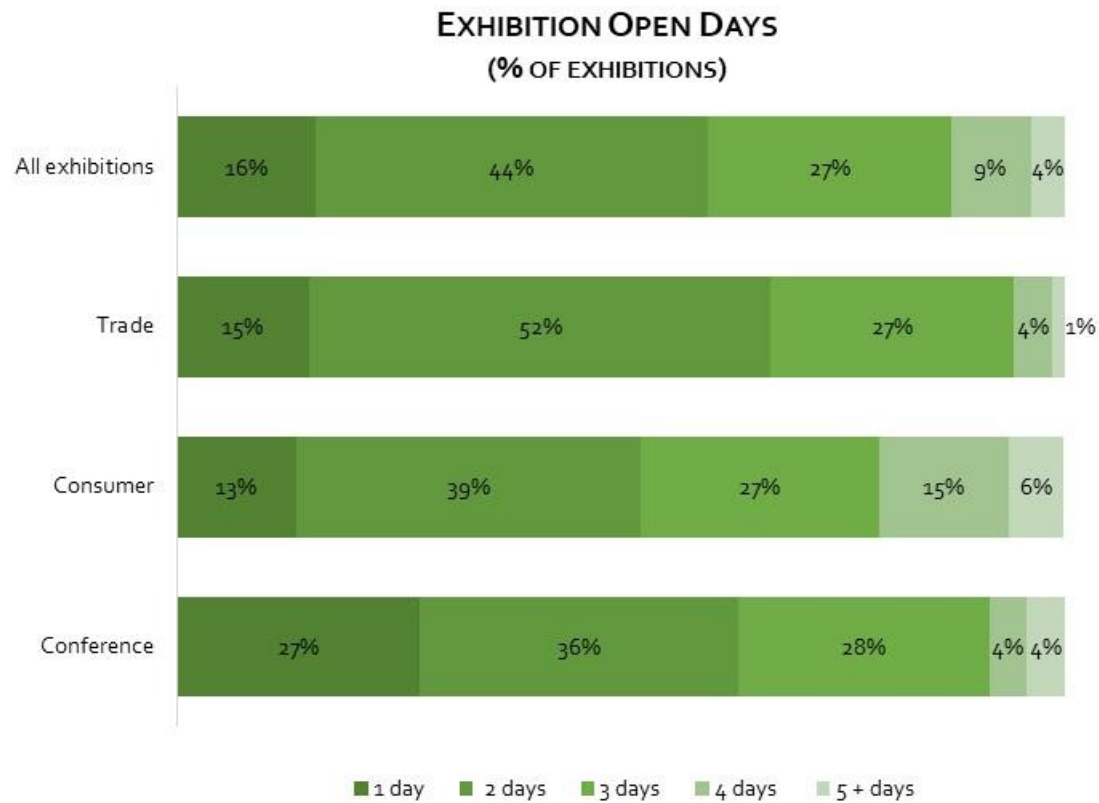
The approximate set up and breakdown time was 2.4 days in 2017.

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.



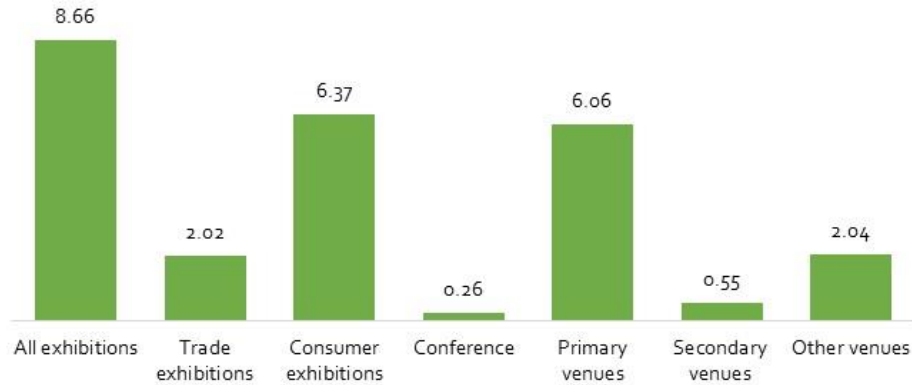
The commonest exhibition length, in terms of open days, was 2 days.



2.6 Number of Visitors

In 2017, there were approximately 8.66m visitors across exhibitions at UK venues.

NO. OF VISITORS BY EXHIBITION AND VENUE TYPE

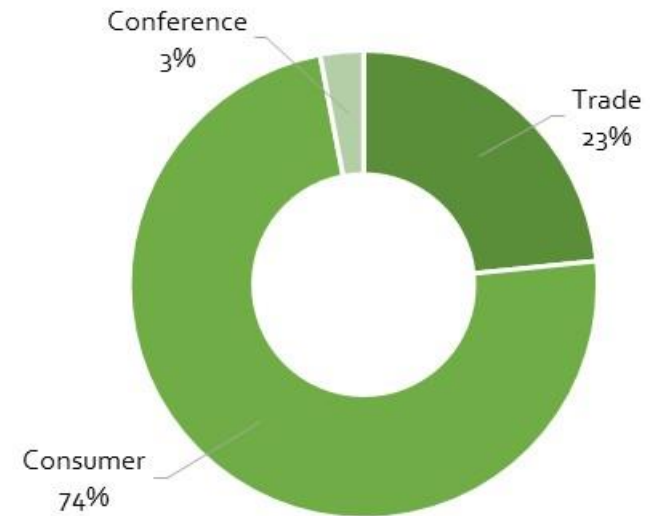


NB. Figures in millions

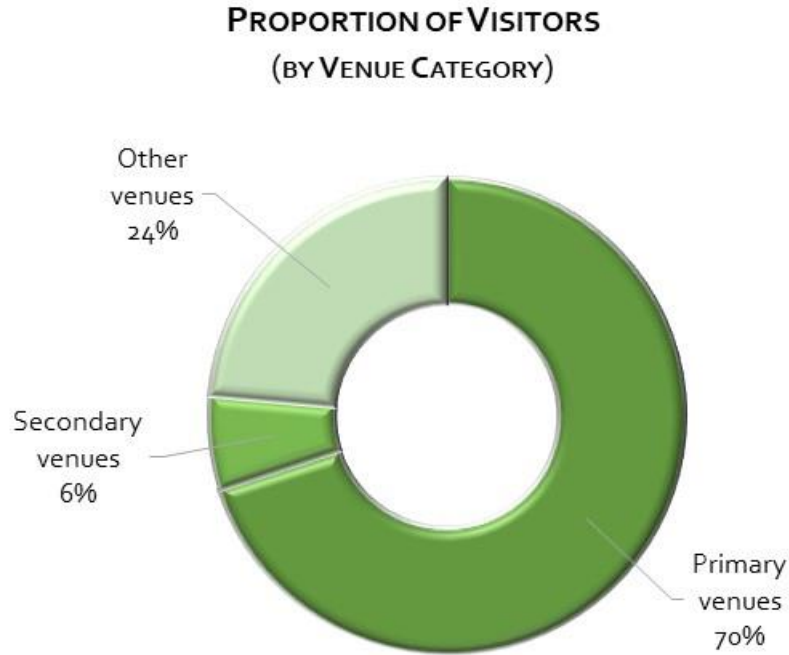
Consumer exhibitions attracted the majority of visitors.

Consumer exhibitions accounted for nearly three quarters (74%) of visitors. Trade exhibitions accounted for 23% of visitors.

PROPORTION OF VISITORS
(BY EXHIBITION TYPE)

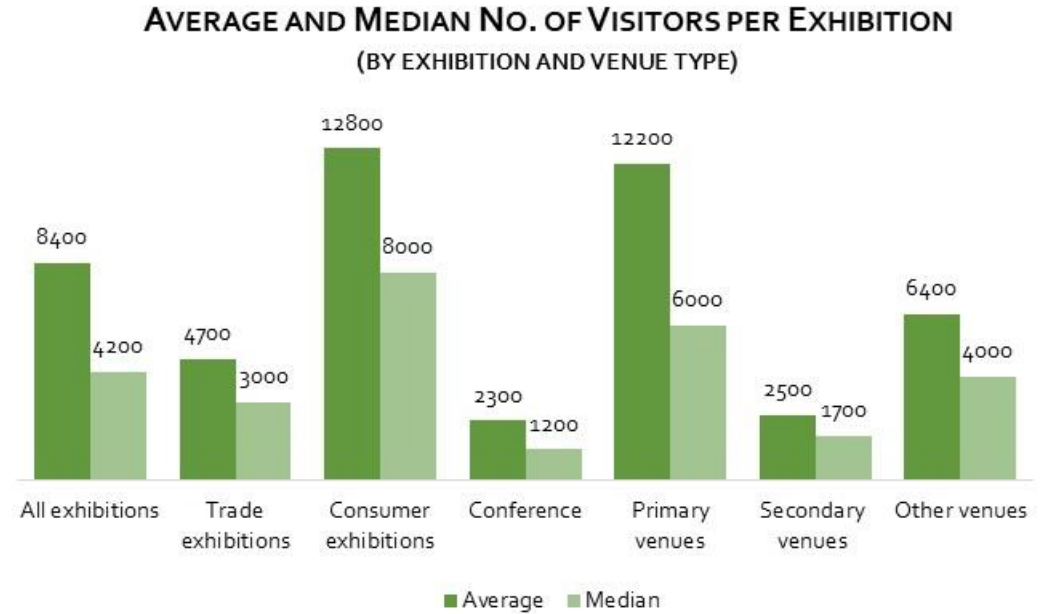


Primary venues accounted for the majority of visitors



Primary venues accounted for over two-thirds (70%) of visitors.

Average event attendance was 8,400 visitors. The median was 4,200.



NB. Figures rounded to the nearest 100

Consumer events were significantly larger – an average of 12,800 visitors. Trade events were 4,700 visitors on average.

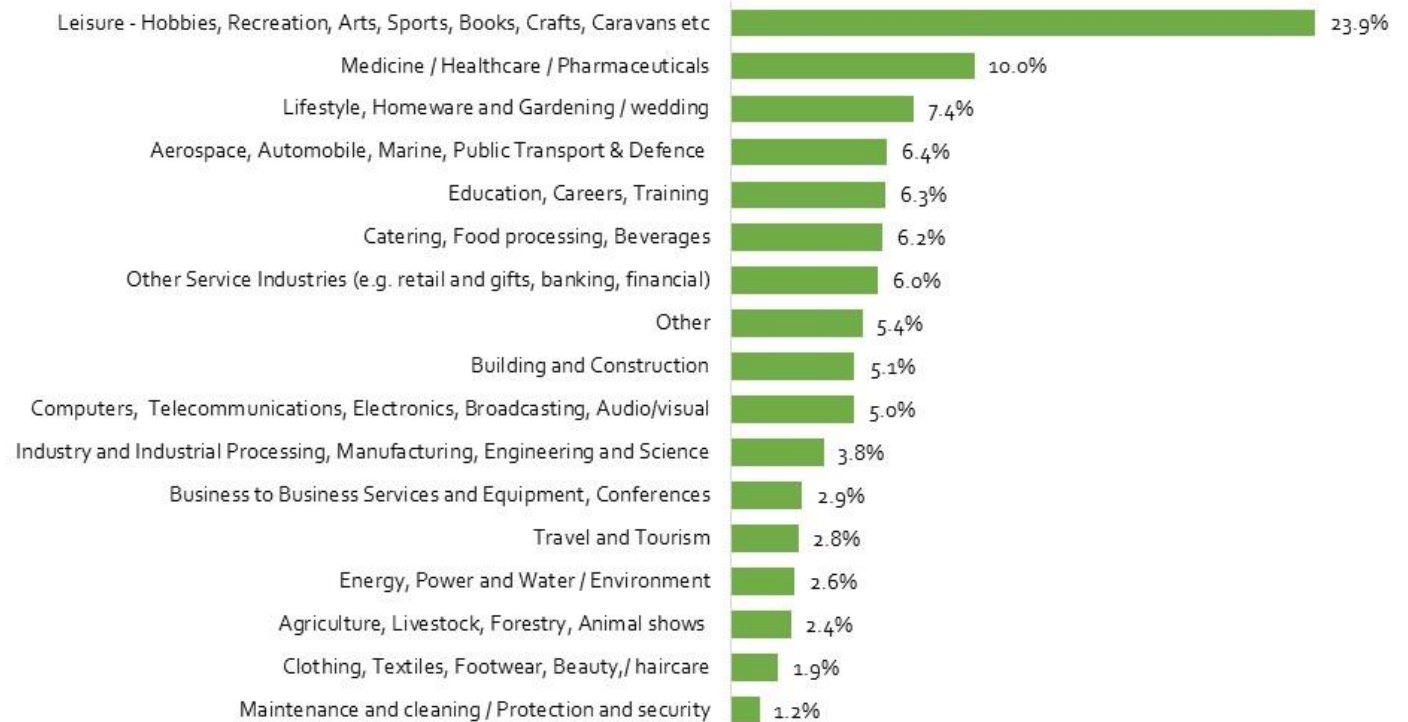
2.7 Industry Sector

The Leisure sector was the largest sector for exhibitions – representing nearly a quarter of exhibitions in 2017.

This included a range of sub-sectors like sports, arts, recreation, caravanning, hobbies, books, and crafts etc.

This was followed in importance by the Medicine / Healthcare and Pharmaceutical sector (10%), and the Lifestyle (including Homeware and Weddings) sector (7.4%).

INDUSTRIAL SECTORS (% OF EXHIBITIONS)



There were variations by different exhibition types.

Consumer exhibitions were strongly orientated to the Leisure sector (44% of consumer exhibitions), and the Education / Careers / Training sector (13%) and the Lifestyle / Wedding / Homeware sector (10%). These three sectors accounted for approximately two-thirds (nearly 68%) of consumer exhibitions.

Trade exhibitions covered a broader spread of sectors. The most important ones were Medicine / Healthcare / Pharmaceuticals (approximately 10%), and Building and Construction (9.7%)

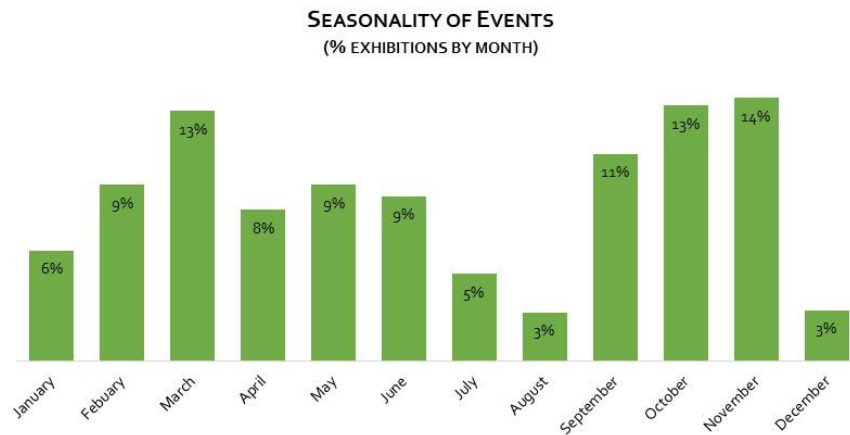
Conferences with exhibitions also tended to be from a small number of sectors – Medicine / Healthcare / Pharmaceuticals, and Computers / Telecoms etc. These two sectors accounted for approximately 43% of conference exhibitions.

Industrial Sectors (% of exhibitions by exhibition type)				
	All exhibitions	Trade	Consumer	Conference
Leisure (Hobbies, Recreation, Arts, Sports, Books, Crafts, Caravans etc.)	23.9%	3.8%	44.4%	7.5%
Education, Careers, Training	9.4%	6.3%	13.0%	5.0%
Medicine, Healthcare, Pharmaceuticals	7.6%	10.0%	1.5%	26.5%
Lifestyle, Wedding, Homeware and Gardening	7.4%	6.0%	10.2%	0.9%
Aerospace, Automobile, Marine, Public Transport & Defence	6.4%	6.1%	6.9%	4.8%
Catering, Food processing, Beverages	6.2%	8.6%	5.2%	0.9%
Other Service Industries (e.g. retail and gifts, banking, financial)	6.0%	7.9%	3.9%	7.5%
Building and Construction	5.1%	9.7%	1.8%	1.8%
Computers, Telecoms, Electronics, Broadcasting, Audio/Visual	5.0%	7.6%	0.2%	16.7%
Industry & processing, Manufacturing, Engineering and Science	3.8%	7.5%	0.8%	3.0%
Business to Business Services and Equipment, Conferences	2.9%	5.1%	1.0%	2.7%
Travel and Tourism	2.8%	3.4%	2.9%	0.0%
Energy, Power and Water, Environment	2.6%	5.2%	0.2%	3.2%
Agriculture, Livestock, Forestry, Animal Shows	2.4%	3.7%	1.7%	1.1%
Clothing, Textiles, Footwear, Beauty, Hair	1.9%	2.4%	2.0%	0.0%
Maintenance & cleaning / Protection & security	1.2%	2.6%	0.0%	0.9%
Leisure (Hobbies, Recreation, Arts, Sports, Books, Crafts, Caravans etc.)	23.9%	3.8%	44.4%	7.5%

2.8 Seasonality

March, October and November were the busiest months for exhibitions in 2017

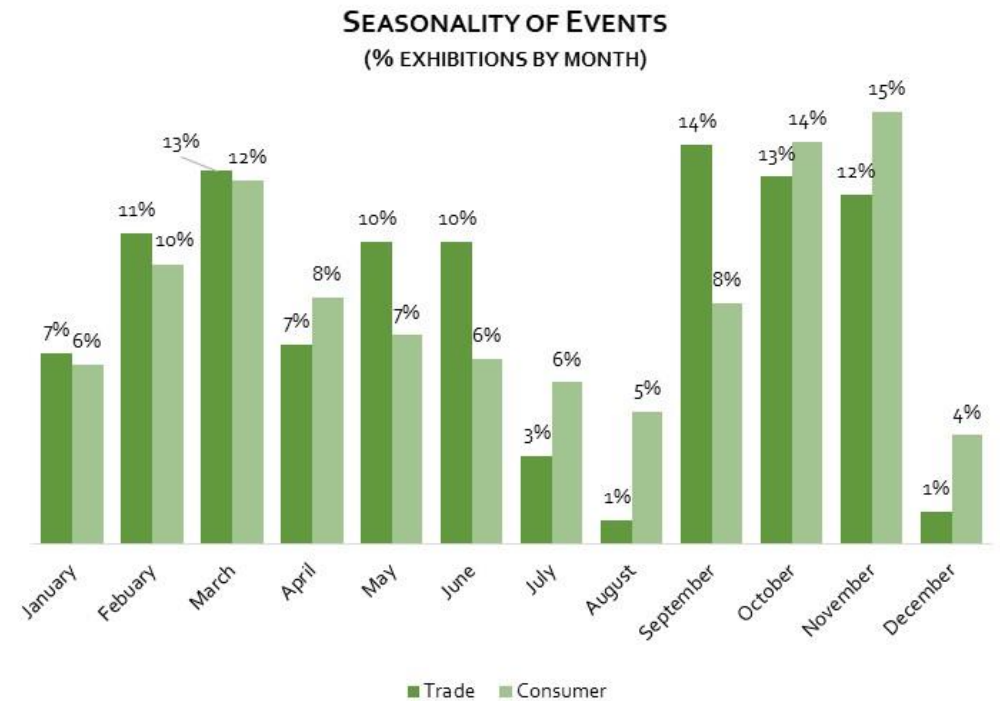
Together they accounted for approximately 40% of exhibitions.



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 2017 were more likely to be concentrated in November, and also in the off-peak months (July, August and December).



Trade events were more likely to take place in May, June and September.

3 Trend Analysis

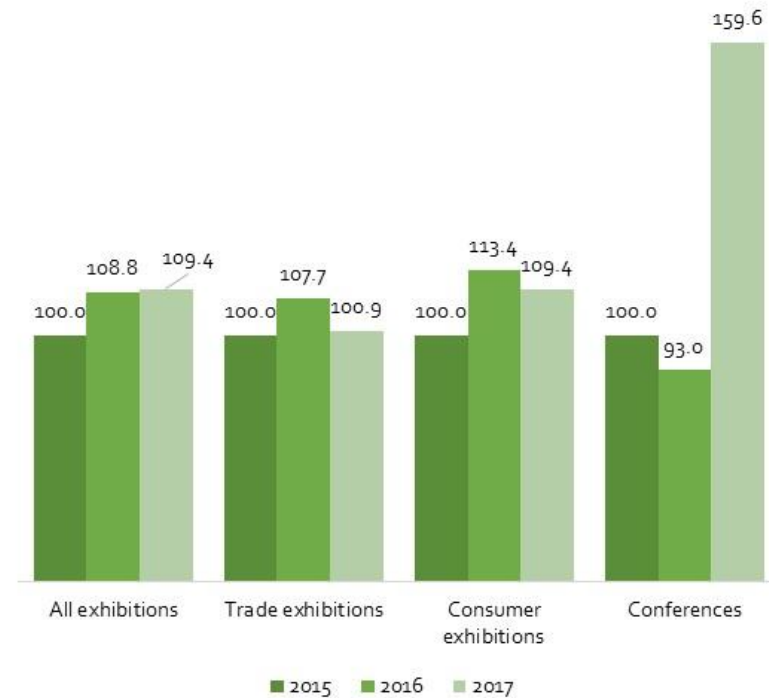
3.1 Numbers of exhibitions

The number of exhibitions was broadly static in 2017.

The number was up by about ½% in 2017 over 2016⁶.

Both trade and consumer exhibitions showed a downturn in volume in 2017. Trade exhibitions were at 2015 levels, while levels of consumer exhibitions were still up on 2015. Conference exhibitions demonstrated a more mixed pattern – down in 2016 but up significantly in 2017 (albeit from a relatively small base). This contributed to the small increase in exhibitions in 2017

NO OF EXHIBITIONS (2015-17)
(INDEX: 2015=100)



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.

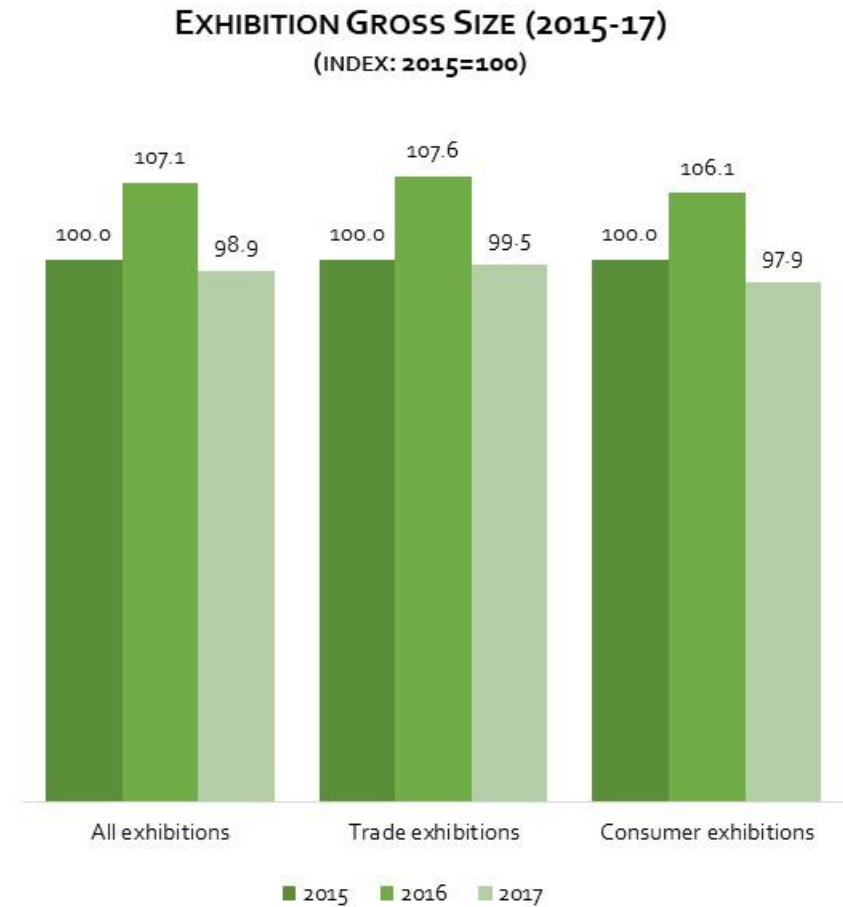
⁶ These figures were based on responses from venues that have consistently reported since 2015. These include Aberdeen Exhibition & Conference Centre, ACC Liverpool, Alexandra Palace, Business Design Centre, ExCel London, FIVE (Farnborough International), Harrogate International Centre, the NEC, Olympia London, Scottish

Exhibition & Conference Centre, the International Centre, Telford and Yorkshire Event Centre Ltd.

3.2 Exhibition Size

Gross exhibition size in 2017 was similar to 2015 levels⁷.

2016 levels show a slight spike in gross size. Trade and consumer events have the same pattern.



Note: chart shows change in average value relative to 2015. Figures are indexed. 2015= 100
N=364

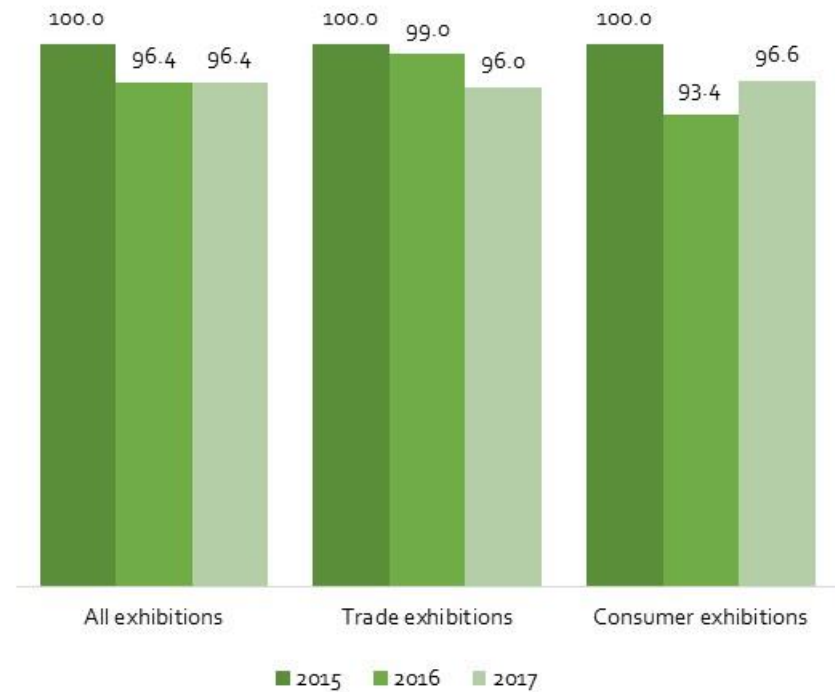
⁷ Based on events which have been held in 2015, 2016 and 2017, and where there is a consistent dataset – see section 1.2.

3.3 Number of Exhibiting Companies

The number of exhibiting companies in 2017 was down slightly from 2015 levels.

Overall levels were comparable with 2016. The number of exhibitors at consumer exhibitions increased slightly in 2017 but were down slightly at trade exhibitions.

NO. OF EXHIBITING COMPANIES (2015-17)
(INDEX: 2015=100)

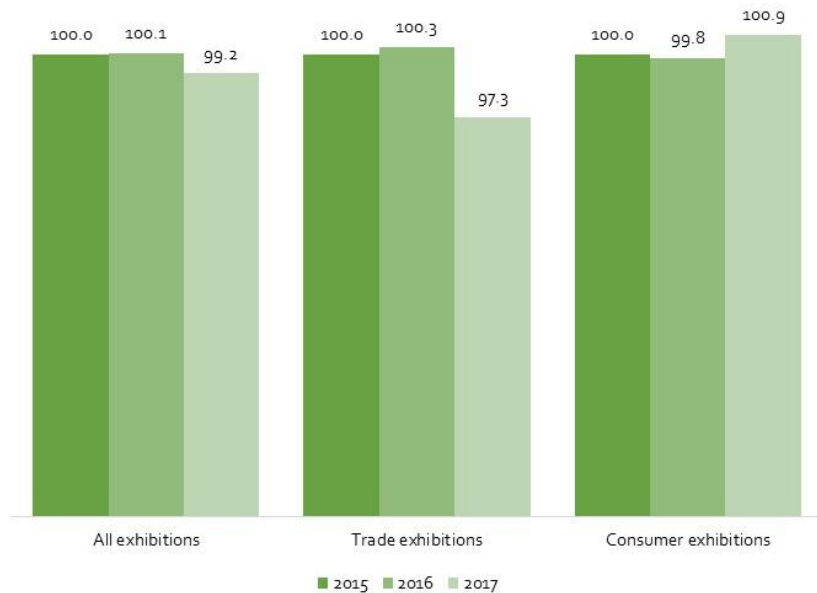


Note: chart shows change in average value relative to 2015. Figures are indexed. 2015 = 100
N=328

3.4 Exhibition Duration

Overall venue hire days have been largely static since 2015

VENUE HIRE DAYS (2015-17)
(INDEX: 2015=100)

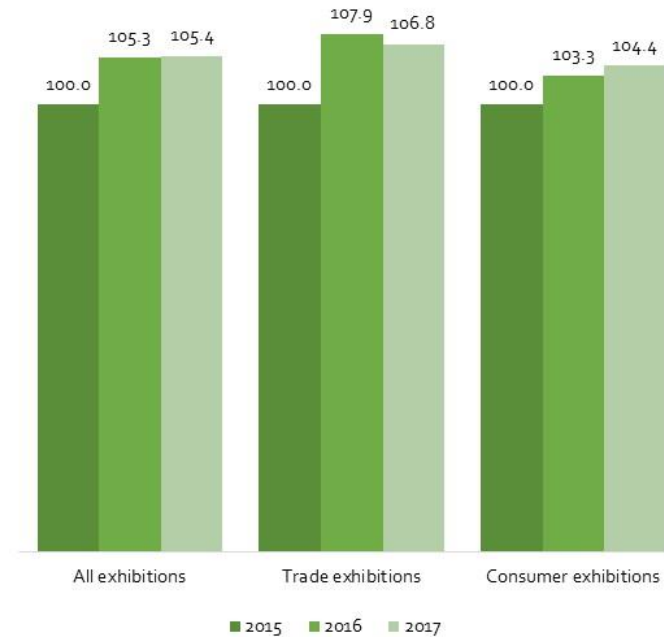


Note: chart shows change in average value relative to 2015. Figures are indexed. 2015 = 100
N=401

However, the average number of exhibition open days did show an upturn in 2017 from 2015.

Average open days were up nearly 5% on 2015 levels – with both trade and consumer exhibitions up.

EXHIBITION OPEN DAYS (2015-17)
(INDEX: 2015=100)

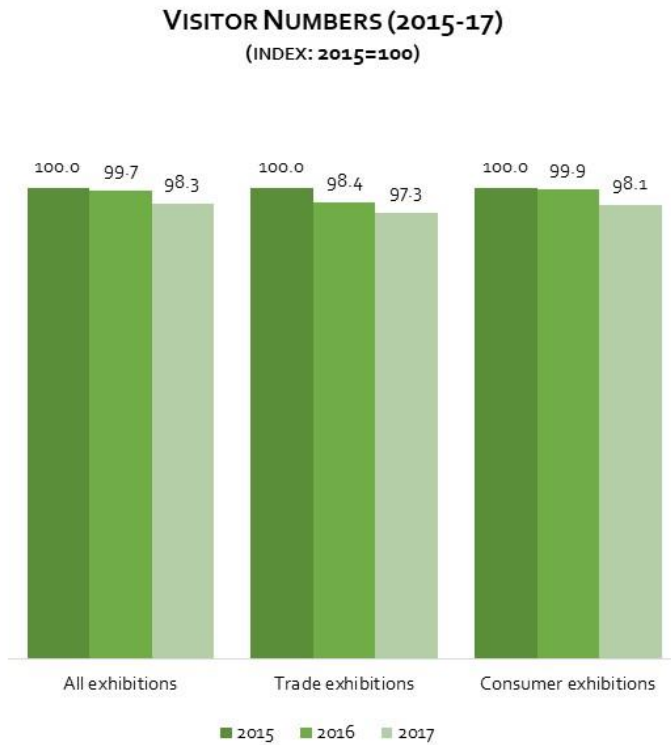


Note: chart shows change in average value relative to 2015. Figures are indexed. 2015 = 100
N=401

Hire days for trade exhibitions were slightly down in 2017.

3.5 Number of Visitors

Across all exhibition types, numbers of visitors have been broadly static since 2015.



Note: chart shows change in average value relative to 2015. Figures are indexed. 2015 = 100
N=320