SASiE
SIZE AND SCALE INDEX FOR EVENTS

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AEV ASSOCIATION OF EVENT VENUES

AEO ASSOCIATION OF EVENT ORGANISERS

ESSA Event Supplier and Services Association

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Foreword

Visitor numbers defy Brexit uncertainty

This is the 5^{th} year of SASiE and each year we get more confident about data capture and any trends emerging.

Despite continuing uncertainty around Brexit, the events business has performed well in 2018. However, Brexit is not the only uncertainty around as we see markets reacting to changes in the retail and property sectors. The leisure and lifestyle market – the events industry's biggest sector hosting 34% of all shows - has seen most impact and this could account for the small drop in the number of exhibitions held in 2018 and in the volume of gross square metres sold.

However, the events industry has once more shown resilience and provides good reasons for optimism. Visitor numbers, the industry's heartbeat, not only remained solid but increased with venues and organisers reporting approximately 9.06 million visitors, a healthy rise from 8.66 million in the previous year.

The events business tends to lag the markets by 12 months due to the booking cycle so we must also be cognisant of what happened 12 months ago feeding into our data sets. Equally, we may not see a response to a change in market conditions for a year after as we lag out too.

With all that in mind, it has been another solid year for the events industry with increasing visitor numbers providing the platform for further investment in the visitor experience.

As Olympia London and many others continue to invest in the visitor experience, we should be able to build on these encouraging results and look forward with confidence in our future.

Nigel Nathan - MD at Olympia London, AEV Board

Executive Summary

Introduction

The data in this report covers UK exhibitions of 500m² plus staged in 2018. 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 2018, there were an estimated 1077 exhibitions hosted by the UK's main exhibition venues. Trade exhibitions accounted for 43% of these, with a slightly higher proportion of consumer events (48%).

Exhibition Sizes

- From the participating exhibitions, the average gross exhibition size was 8100m² – the median was 5700m², with nearly half (47%) of exhibitions under 5,000m².
- On average consumer exhibitions (8600m²) tended to be slightly larger than trade exhibitions (8400m²).
- Average net exhibition size was 4400m².

Number of Exhibiting Companies

- An average exhibition had 165 exhibiting companies.
- Consumer exhibitions were slightly larger (with an average of 182 exhibiting companies) than trade events (an average of 167 exhibiting companies).
- Conference exhibitions were much smaller (an average of 64 exhibiting companies in 2018).

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 2.2 days for trade exhibitions.
- The most common exhibition length, in terms of open days, was 2 days (47% of exhibitions).

Visitors

- Exhibitions attracted an estimated 9.06m visitors in 2018.
- Consumer exhibitions accounted for the majority of visitors – 70%. Trade exhibitions accounted for 26% of visitors.
- Exhibitions, on average, attracted 8,400 visits – a median of 4,100.
- Consumer exhibitions, at an average 12,100 visitors (a median of 7,000), typically attracted over twice the number of visitors as trade exhibitions (an average of 5,200 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 23% of exhibitions. This was followed in importance by the Lifestyle (including Homeware and Weddings) sector (11%).

- Consumer exhibitions were strongly orientated to the Leisure sector (accounting for 43% of consumer exhibitions). Trade exhibitions covered a broader spread of sectors. The most important ones were Medicine / Healthcare / Pharmaceuticals (approximately 10%), Business to Business Services (9%), and Other Service industries (9%).

Seasonality

- October and November were the busiest months for exhibitions in 2018.

Year-on-Year Comparisons

Year-on-year comparisons have been made where comparable data is available on an event-by-event basis from 2015 to 2018. 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 down in 2018 over 2017 (by about 6%).
- Gross exhibition size in 2018 was slightly down on 2015 levels.
- Overall, the number of exhibiting companies in 2018 was down slightly from 2015 levels.
- Overall, venue hire days have been largely static since 2015. However, the average number of exhibition open days did show an upturn in 2018 from 2015.
- Average numbers of visitors to exhibitions increased slightly in 2018.

Market Insights

An Organiser Perspective

The 18 month period up to Spring 2019 was again dominated – in spades – by the buying and selling of major exhibition assets in the United Kingdom. In that period we saw deals for UBM, the NEC, Olympia, Clarion, CloserStill, MackBrooks, Comexposium (owned by a UK private equity house), Tarsus and the old EMAP assets under the name Ascential. The total value of these deals alone was nearly £8 billion……………………..yes, £8 billion.

This sounds more like frantic activity on the New York Stock Exchange for the likes of Uber and Lyft rather than the staid trade show world. And it perhaps sits rather strangely with this year's SASiE report and its conclusions.

Our database is now comprehensive and very reliable. So it is a surprise to see a reported fall in the number of events (by 6%), with Trade Shows having declined by 10% since 2016. Gross size overall was down 4% on average, with Trade Shows showing a 5% decline. And the number of exhibiting companies was down some 5% year on year, though the bulk of this decline was in Consumer Show exhibitors – down a dramatic 10%. All of these metrics show a steady decline of circa 1% per year since 2015. The only positive indicator was a rise of some 6% in reported Trade Show visitors, though a small decline of 2% in Consumer Shows.

I am not sure how to read all of this information – certainly one swallow does not a winter make, but the data is now more stable after 4 years and there is no reason to think that the results are unreliable.

I have been searching for insights in the data and also in the continual exchange of information with colleagues in the industry. My own three businesses also provide some interpretations.

We are in the Trade Show business, and one of the keys is in the name – Trade. There is some clear anecdotal evidence about Brexit. Some Continental companies have, not surprisingly, dialled back their marketing/attention to the UK in the past two years, waiting for some resolution of Brexit. It is impossible to put a firm number on this but, anecdotally I stress, it could be costing us 2% or even 3% of exhibitors and turnover at some trade shows. Within the UK, we must not pretend that political uncertainty and the prospect of a Corbyn government has not damaged business investment (and thus to a degree the propensity to attend trade shows).

My other qualification is about exhibition size. We have seen declines in the size and turnover of events in the last decade – and this year's numbers suggest these may still be declining. But one of the data problems is that the decline has clearly been disproportionately in the larger events (and the 50 largest exhibitions in the UK traditionally represent some 75% of the whole industry's turnover).

If we go back to the beginning of the decade, the 12 largest events by revenue were Spring Fair, WTM, the Motor Show, Interiors, DSEi, Ideal Home Show, Autumn Fair, Glee, Hotelympia, London Boat Show, IFSEC and InterBuild. Four of these no longer exist. It is no longer possible to obtain reliable turnover figures show by show, but at the beginning of the decade these events did attract 1,294,000 visitors. The remaining 8 events now attract less than 500,000. Taking just the eight which survive, their overall attendance (based on latest numbers) has fallen by 26% and only one, DSEi, has increased its attendance. Visitor numbers are not a proxy for square metres or total revenues, but there must be a connection.

The point I am making is not that exhibitions generally are showing a significant decline. Rather that the performance of a very small number of large events has a disproportionate effect on any analysis. The data suggests to me that the “typical” event is not declining in size and that visitor numbers to that “typical” show are slightly up. We must take care not to be too naïve about the limited statistics which are available in the industry.

Philip Soar, Chairman and CEO of CloserStill Media, Chairman of 19 Events and Brand Events

A Supplier Perspective

Flat is the new 'up' for UK exhibitions?

The latest SASiE data confirms our experience at GES: we are riding a mature exhibition market in the UK with strong, consistent performance but low growth at the macro level. The audience is increasingly domestic, probably a good thing with ongoing Brexit uncertainty, although we can (and do) host international blockbuster events with aplomb.

Organisers are increasingly focused on leveraging overseas potential, whether geo-cloning existing assets or acquiring new, and private equity is still investing enthusiastically on the back of that anticipated growth trajectory.

The world's biggest for-profit exhibition players are based in London, and looking at consolidation; reducing back office costs while aggregating audiences and communities of high value visitors.

Smaller, second tier exhibition organisers may have a ready market to sell to but they'll need to demonstrate international potential and scalability to attract the best multiples.

However, the market is diversifying to include pure-play conference producers, major brands running their own large scale customer 'festivals' and the peripatetic associations rotating through major European cities.

So what does that mean for the UK supply chain?

The good news is that our domestic market remains strong – buoyed by a robust entrepreneurial spirit and launching in new niches, focused on content and 'curated' visitor experiences.

Our organiser clients are engaging with us much earlier in the event lifecycle and becoming more creative and innovative in their thinking: a development we relish. Our role has evolved to be as much about event design and customer journey mapping as it is about build. Working collaboratively with ops, marketing and sales we are leveraging our collective knowledge to develop a dynamic show floor that excites exhibitors and engages attendees in equal measure. That means new products - analogue and digital - but also new ways of thinking in how we facilitate the buyer/seller dynamic.

That investment in the overall customer experience appears to be paying dividends: visitor numbers are growing. Greater show density - as long as audience quality is maintained - can only be good news for exhibitor rebook and retention.

The growth in conferences may have slowed slightly year-on-year but is still trending upwards from its 2015 base. This supports other industry research around visitor motivation: the key drivers of novelty and networking are joined by a desire for education, inspiration and professional development.

The demand for high quality content creation and delivery has spawned new opportunities for suppliers in AV, motion graphics and technical production. These younger, education-hungry audiences expect rock star speakers, knock-out graphics and career-changing content. Tired old style PowerPoint sales pitches will not pass muster.

The digital disruption we have fretted over for a decade or more appears to be complementary to face-to-face marketing - not its death knell. Organisers are learning how to leverage technology as part of an overall integrated offer and understand their true value to exhibitors as the gatekeepers of their community, not simply ‘real estate’ agents.

Sustainability is back as a board level issue. Whether it’s the ‘Greta Thunberg’ or the ‘David Attenborough’ effect may depend on your age, but they have galvanised our collective consciousness and brought renewed focus as to how we address our environmental legacy. I certainly don’t have all the answers and there’s much more we can do but collaboration is key: on recycling, using fabric over wood, hiring products that can be re-used (not single use) and encouraging exhibitors to follow suit with meaningful incentives.

Nick Marshall, Executive Chairman, GES EMEA

Contents

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 2018 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 the period 2015 to 2018. 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, EventCity, 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 *, Aberdeen Exhibition and Conference Centre, Business Design Centre, Harrogate International Centre, Ricoh Arena*, International Centre Telford, Manchester Central and Farnborough International Exhibition & Conference Centre.
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, East of England Showground 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 sample (in terms of numbers of responses).

	Supply (AEV membership)[1]	Sample
Venues		
Primary	4	4
Secondary	7	6
Other	15	10

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 29 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 and secondary 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	114.5	458
Secondary	7	33.3	233
Other – AEV members	15	23.7	356
Other – non AEV members	n/a	n/a	30
Total			**1077**

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 annually from 2015 to 2018, 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.

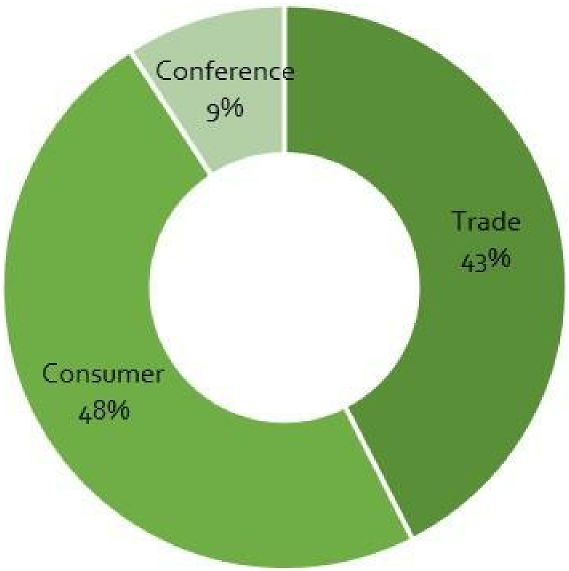
2 Dimensions 2018

2.1 Number and Type of Exhibitions

In 2018, there were an estimated 1077 exhibitions at the UK's main exhibition venues.

Trade exhibitions accounted for 43% (an estimated 458 events).

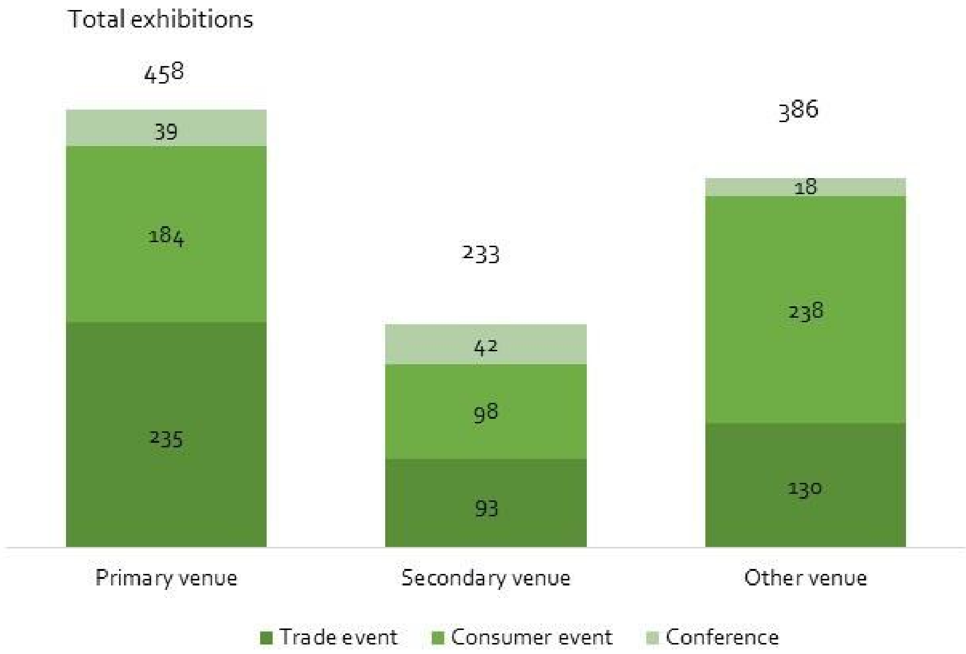
TYPE OF EXHIBITIONS



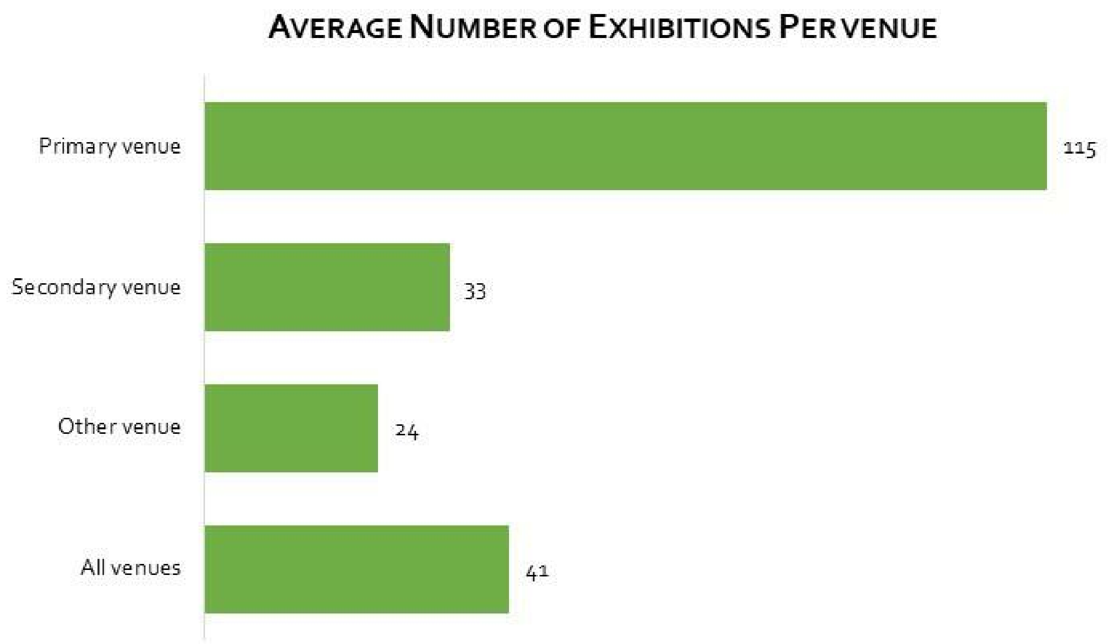
Consumer (or public) exhibitions accounted for a slightly higher proportion - 48% of exhibitions (an estimated 520 exhibitions). The remaining 9% of events were conferences that incorporated a significant exhibition element.

Primary venues hosted 458 exhibitions – 44% of the UK's total.

NO. OF EXHIBITIONS BY VENUE TYPE



On average each venue hosted 41 exhibitions in 2018.

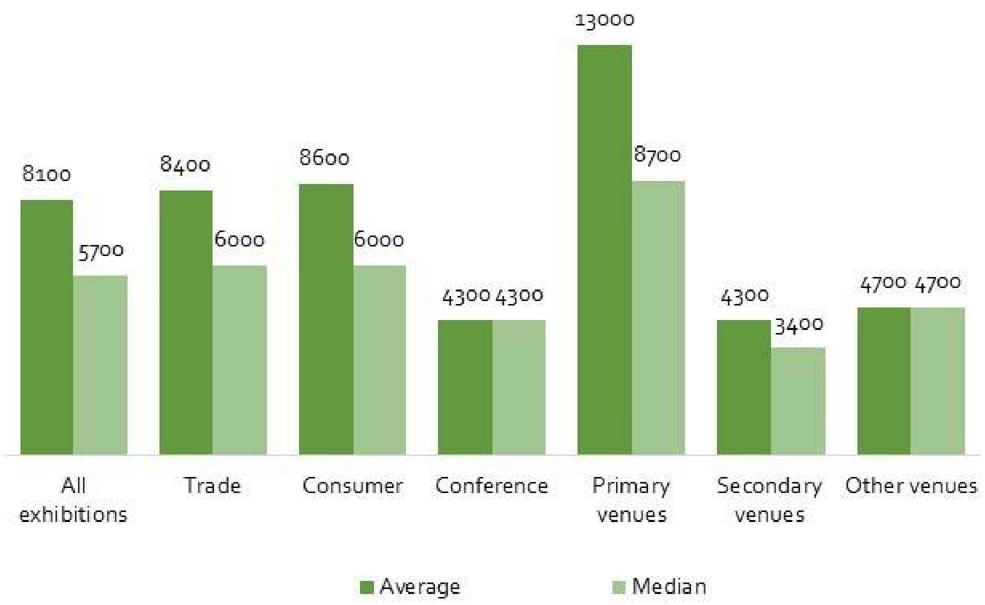


There were marked differences by venue type. Primary venues on average hosted 115 exhibitions. Secondary venues hosted an average of 33 exhibitions in 2018 and 'other' venues an average of 24 exhibitions.

2.2 Exhibition Sizes

Average exhibition size (gross[1]) was 8100m² in 2017 – the median was 5700m²

AVERAGE AND MEDIAN EXHIBITION SIZE (GROSS M²)



NB. Figures rounded to the nearest 100m²

Primary venues hosted larger exhibitions than secondary and other venues. Average event size in primary venues was 13,000m² compared to 4300m² in secondary venues

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[1] 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 m²)							
Exhibition size	**All exhibitions (%)**	**Trade (%)**	**Consumer (%)**	**Conference (%)**	**Primary (%)**	**Secondary (%)**	**Other venue (%)**
Small (up to 2500 m²)	17%	10%	21%	36%	7%	29%	23%
Small / medium (2500-5000 m²)	30%	36%	25%	32%	24%	40%	32%
Medium (5000-8000 m²)	18%	18%	20%	10%	15%	15%	24%
Medium/large (8000-15000 m²)	19%	22%	16%	21%	30%	15%	9%
Large (15000 + m²)	14%	14%	18%		23%	1%	12%
Average (gross m²)	**8100**	**8400**	**8600**	**4300**	**13000**	**4300**	**4700**
Median	**5700**	**6000**	**6000**	**4300**	**8700**	**3400**	**4700**

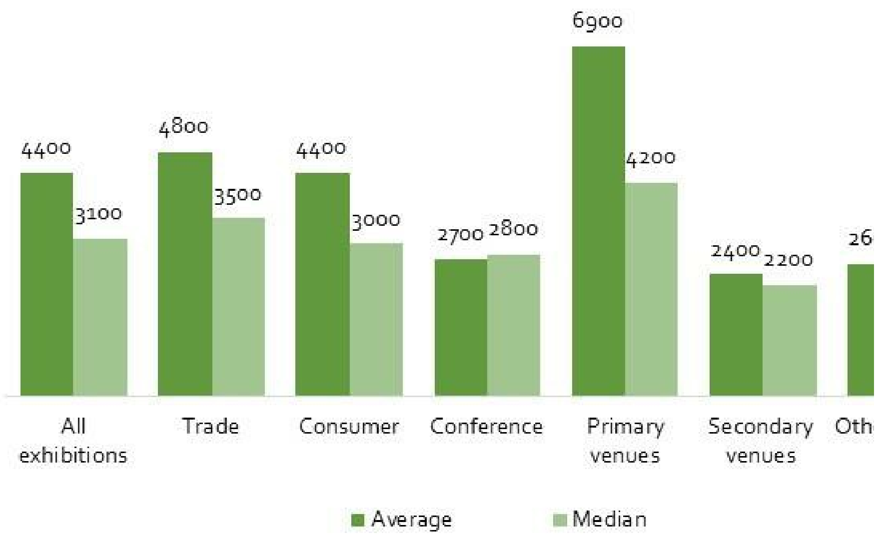
Trade exhibitions varied in size – the commonest size was 2500-5000m²
but a third were larger than 8,000m².

Consumer exhibitions were most commonly small to medium-sized
(2500-8000m²) – 45% - but a third were larger than 8,000m²

Conference exhibitions tended to be below 5000m² - 68%.

Net exhibition size[2] was 4400m².

AVERAGE AND MEDIAN EXHIBITION SIZE (NET M²)

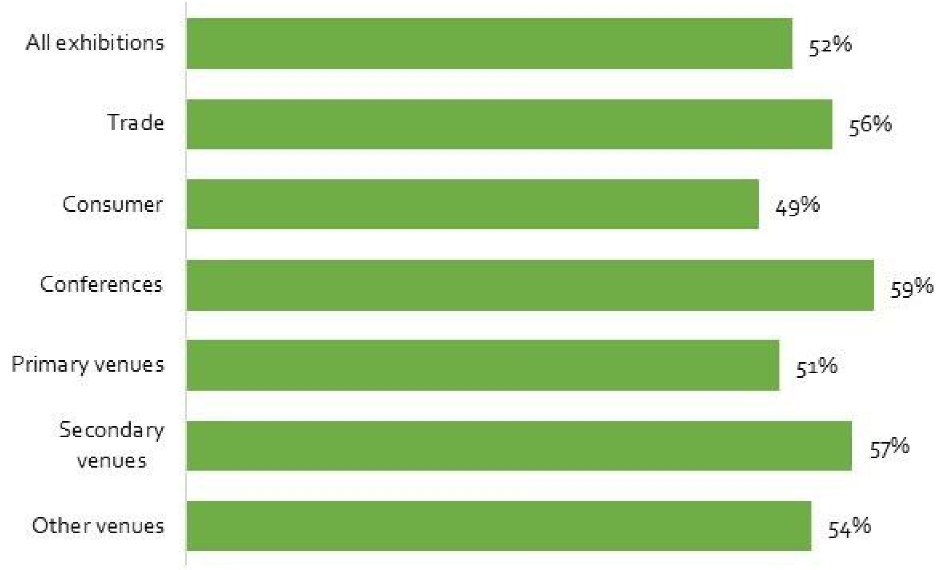


NB. Figures rounded to the nearest 100m²

The median was 3100m² in 2018.

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

EXHIBITION SIZE
NET SIZE AS A PERCENT OF GROSS SIZE



NB This analyis 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.

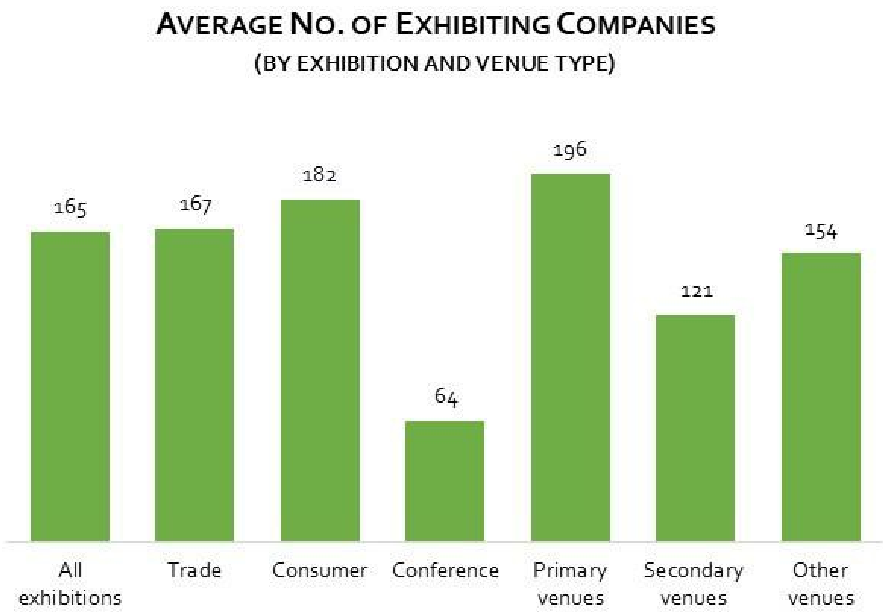
The ratio[3] of net to gross size for all events was 52%.

[2] The actual space sold occupied by exhibitors/event participants at the event.

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

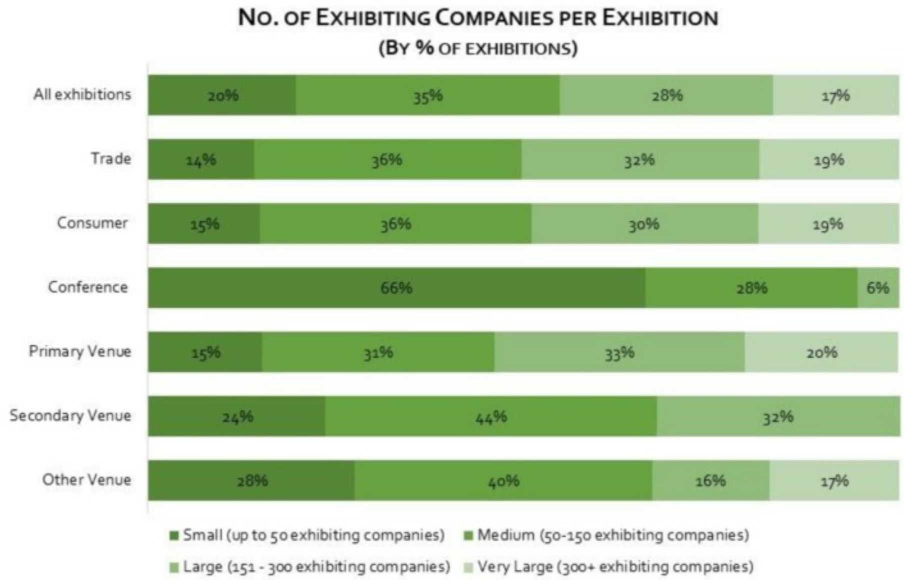
2.3 Number of Exhibiting Companies

On average, an exhibition had 165 exhibiting companies.



In 2018, consumer exhibitions, with an average of 182 exhibitors, were larger than trade exhibitions (an average of 167 exhibitors). Conference exhibitions were considerably smaller (an average of 64 exhibiting companies).

Primary venues typically hosted exhibitions with larger numbers of exhibiting companies (an average of 196).

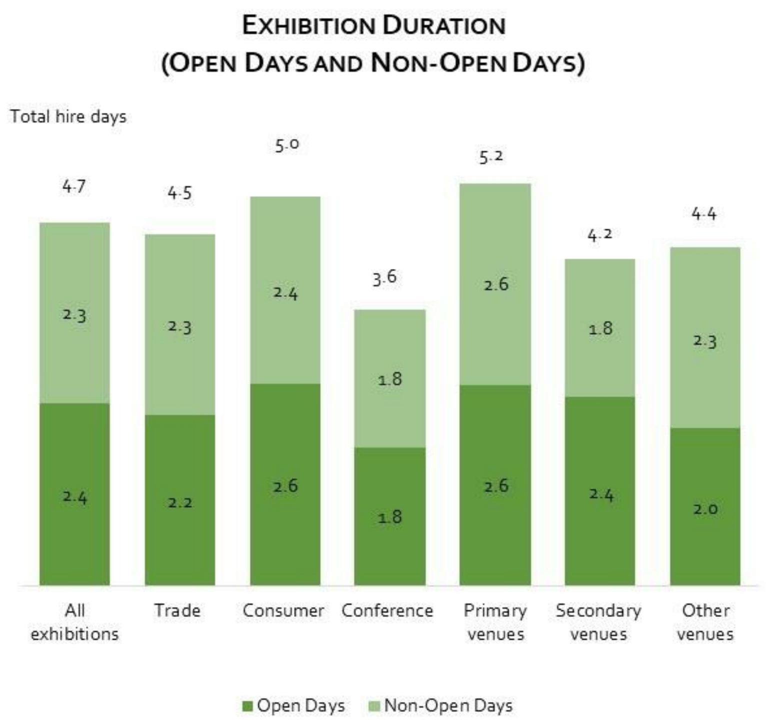


The commonest exhibition size was 50-150 exhibiting companies.

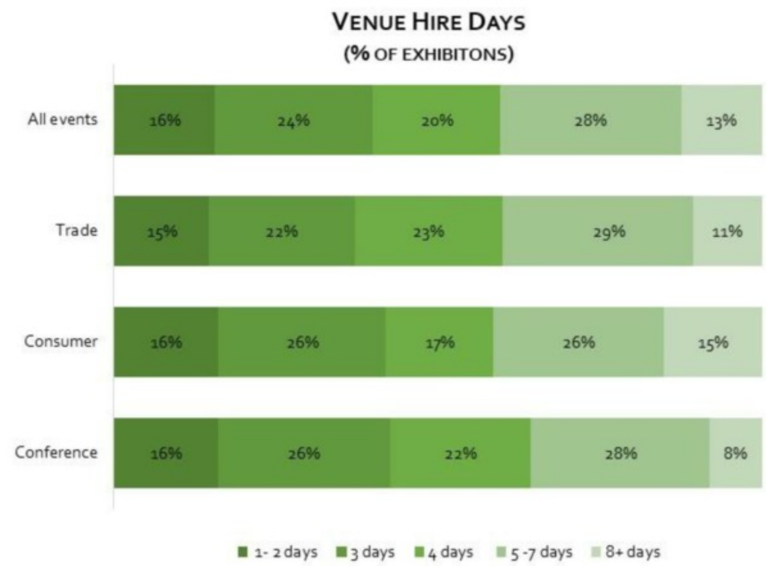
2.4 Exhibition Duration

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

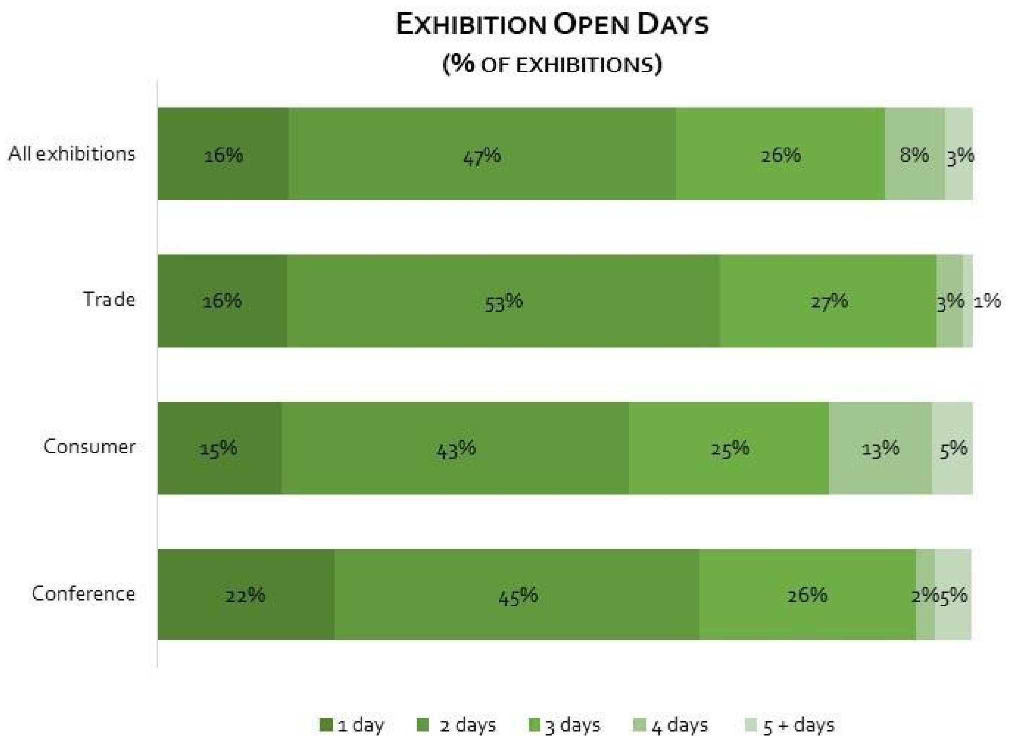
The approximate total set up and breakdown time was 2.3 days in 2018. Set up and breakdown times and open days were greater for consumer exhibitions than trade exhibitions.



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

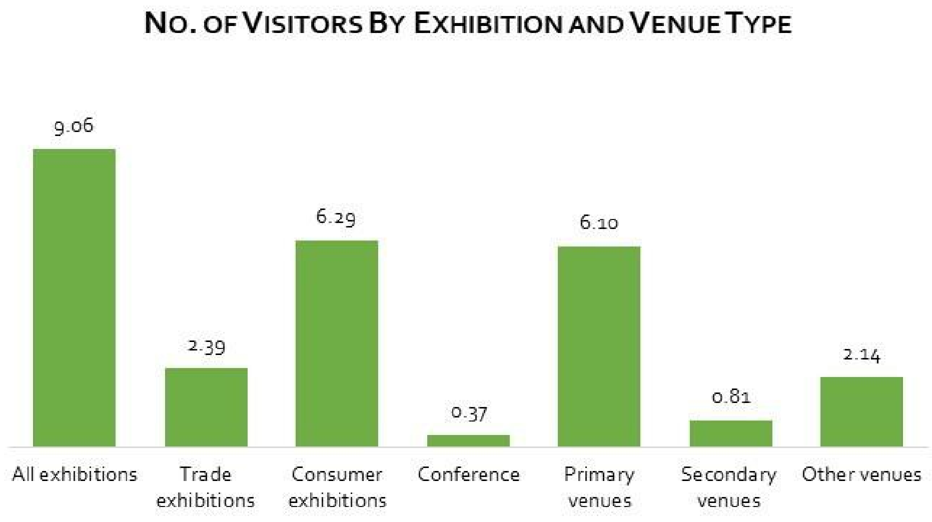


The commonest exhibition length, in terms of open days, was 2 days.



2.6 Number of Visitors

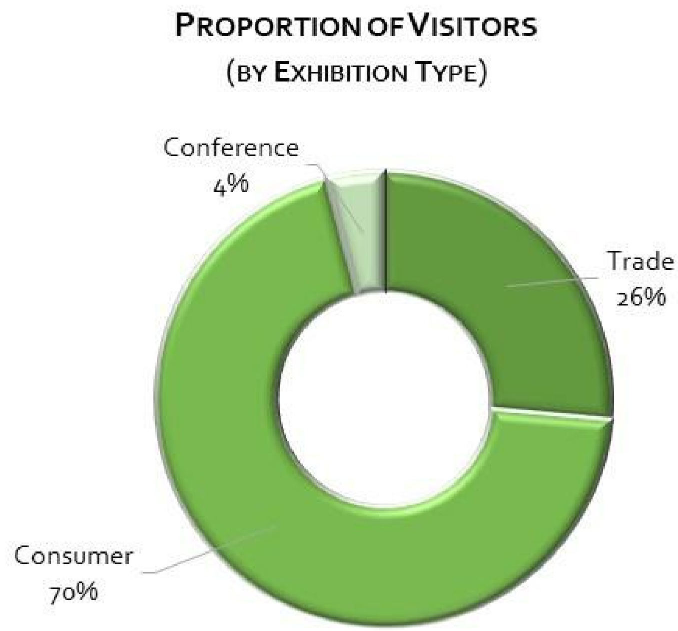
In 2018, there were approximately 9.06m visitors across exhibitions at UK venues.



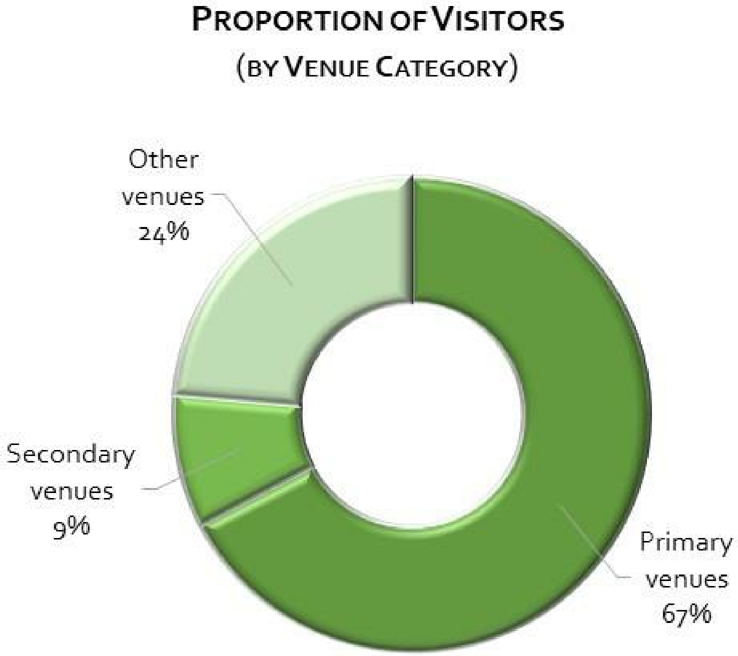
NB. Figures in millions

Consumer exhibitions attracted the majority of visitors.

Consumer exhibitions accounted for over two-thirds (70%) of visitors. Trade exhibitions accounted for 26% of visitors.

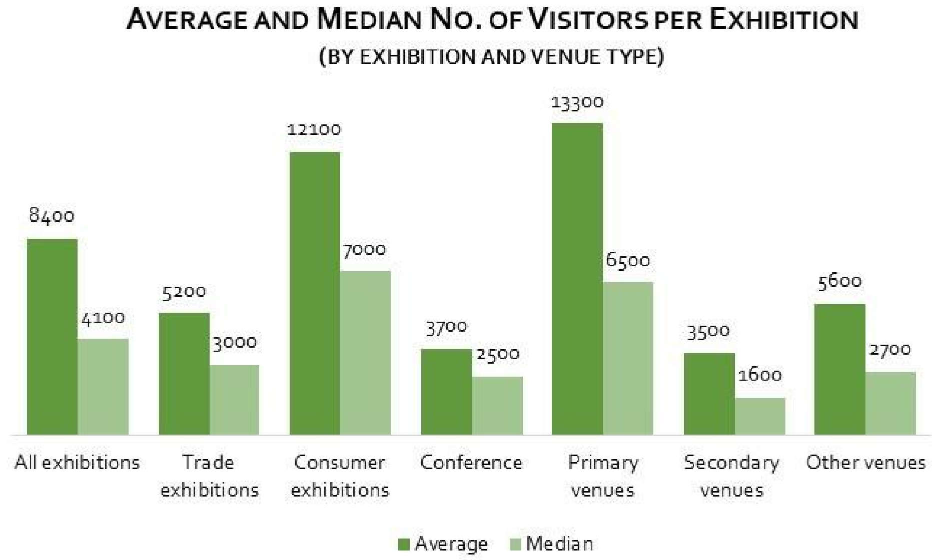


Primary venues accounted for the majority of visitors



Primary venues accounted for two- thirds (67%) of visitors.

Average event attendance was 8,400 visitors. The median was 4,100.



NB. Figures rounded to the nearest 100

Consumer events were significantly larger – an average of 12,100 visitors. Trade events were 5,200 visitors on average.

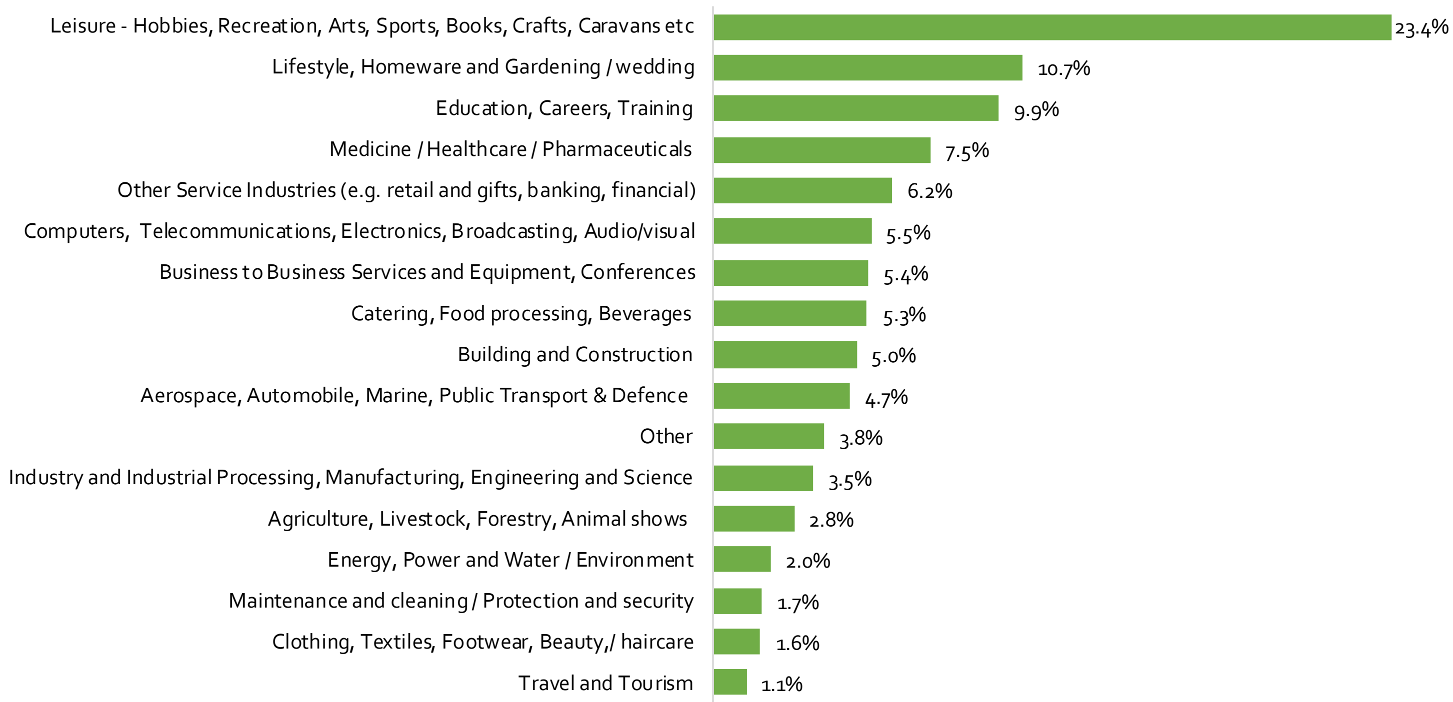
2.7 Industry Sector

The Leisure sector was the largest sector for exhibitions – representing nearly a quarter of exhibitions in 2018.

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

This was followed in importance by the Lifestyle (including Homeware and Weddings) sector (10.7%), Education, Careers and Training sectors (9.9%) and the Medicine / Healthcare and Pharmaceutical sector (7.5%).

INDUSTRIAL SECTORS (% OF EXHIBITIONS)



There were variations by different exhibition types.

Consumer exhibitions were strongly orientated to the Leisure sector (43% of consumer exhibitions), and the Lifestyle / Wedding / Homeware sector (17%) and the Education / Careers / Training sector (13%). These three sectors accounted for approximately two-thirds (nearly 68%) of consumer exhibitions.

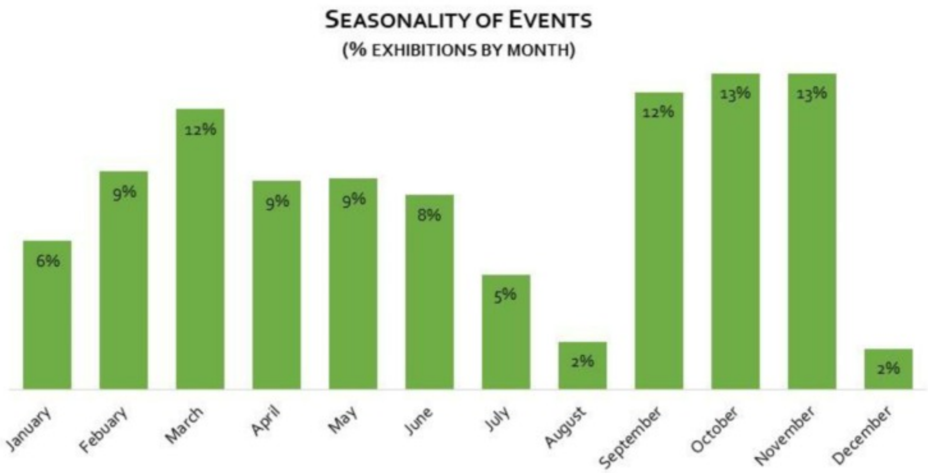
Trade exhibitions covered a broader spread of sectors. The most important ones were Medicine / Healthcare / Pharmaceuticals (approximately 10%), Business to Business Services (9%), and Other Service industries (9%).

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 52% of conference exhibitions.

Industrial Sectors (% of exhibitions by exhibition type)				
	All exhibitions	Trade	Consumer	Conference
Leisure (Hobbies, Recreation, Arts, Sports, Books, Crafts, Caravans etc.)	23.4%	5.4%	43.1%	3.2%
Lifestyle, Wedding, Homeware and Gardening	10.7%	6.4%	16.5%	0.0%
Education, Careers, Training	9.9%	7.2%	13.4%	3.4%
Medicine, Healthcare, Pharmaceuticals	7.5%	9.9%	1.9%	25.8%
Other Service Industries (e.g. retail and gifts, banking, financial)	6.2%	8.7%	3.3%	9.6%
Computers, Telecoms, Electronics, Broadcasting, Audio/Visual	5.5%	5.8%	1.1%	26.3%
Business to Business Services and Equipment, Conferences	5.4%	8.9%	2.0%	6.9%
Catering, Food processing, Beverages	5.3%	6.5%	4.6%	3.5%
Building and Construction	5.0%	7.8%	2.7%	3.7%
Aerospace, Automobile, Marine, Public Transport & Defence	4.7%	5.7%	4.3%	2.4%
Industry & processing, Manufacturing, Engineering and Science	3.5%	6.9%	0.8%	1.2%
Agriculture, Livestock, Forestry, Animal Shows	2.8%	4.3%	2.0%	0.0%
Energy, Power and Water, Environment	2.0%	4.4%	0.0%	1.2%
Maintenance & cleaning / Protection & security	1.7%	4.0%	0.0%	0.0%
Clothing, Textiles, Footwear, Beauty, Hair	1.6%	2.8%	0.9%	0.0%
Travel and Tourism	1.1%	1.7%	0.9%	0.0%
Other	3.8%	3.7%	2.3%	13.0%

2.8 Seasonality

October and November were the busiest months for exhibitions in 2018

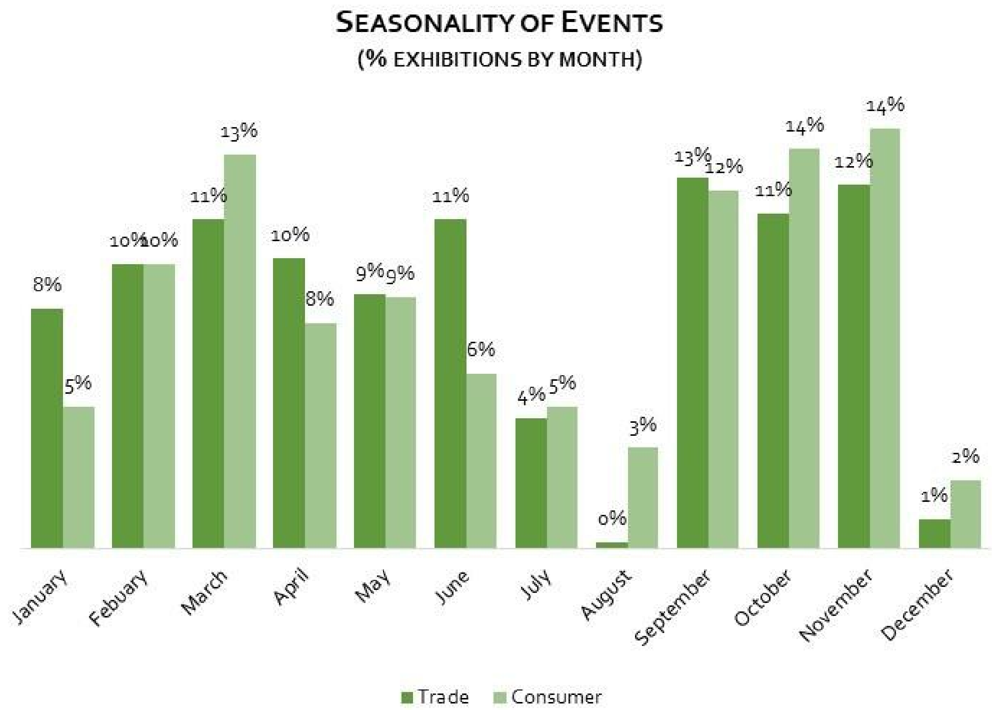


Together they accounted for 26% of exhibitions. March and September accounted for a further 24%.

The quietest months were in the winter (January and December) and in the summer (July and August). These four months accounted for 15% of exhibitions.

Trade and consumer exhibitions followed a similar seasonality pattern.

Consumer exhibitions in 2018 were more likely to be concentrated in October and November, and also in March and September.



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

3 Trend Analysis

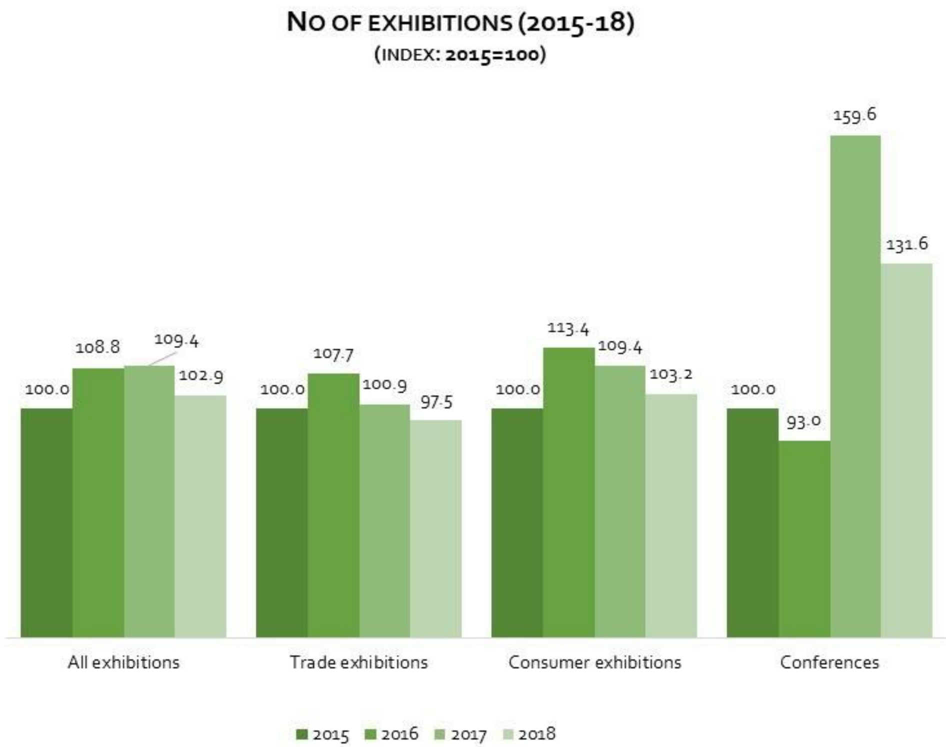
3.1 Numbers of exhibitions

The number of exhibitions was down in 2018.

The number was down by about 6% in 2018 over 2017[4].

All exhibition types showed a downturn in volume in 2018. Trade exhibitions were down slightly on 2017 levels (by approximately 3%). Levels of consumer exhibitions were also down on 2018 (by nearly 6%) but were still up on 2015 levels.

Conference exhibitions demonstrated a more mixed pattern – down in 2018 (by nearly 18%) but they were still up significantly from 2015 levels (albeit from a relatively small base).



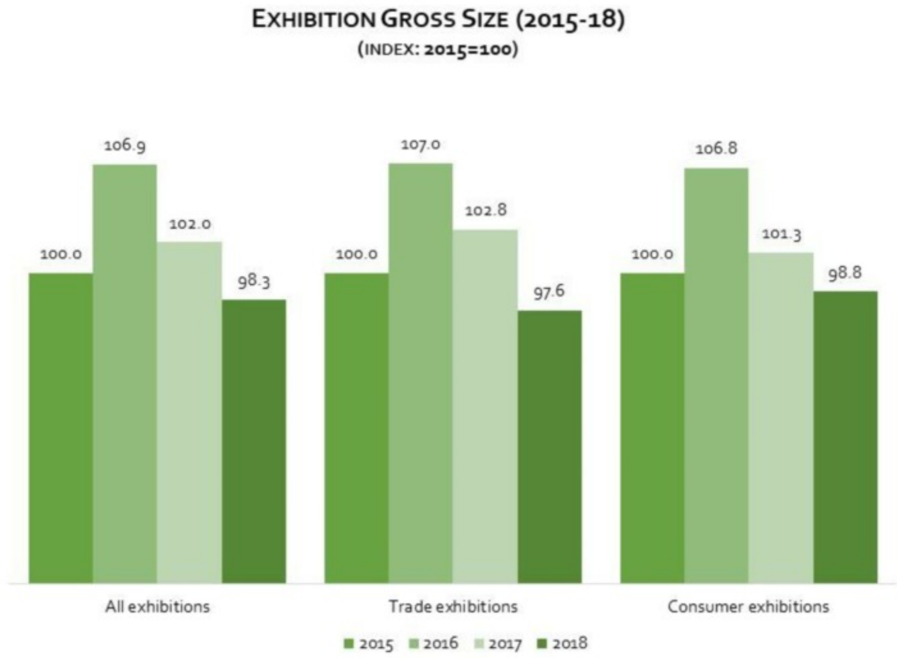
Note: chart shows change in average value relative to 2015. Figures are indexed. 2015 = 100
Data is based on venues that have provided consistent responses since 2015.

[4] 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 Event Campus, the International Centre, Telford and Yorkshire Event Centre Ltd.

3.2 Exhibition Size

Gross exhibition size in 2018 was slightly down on 2015 levels[5].

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



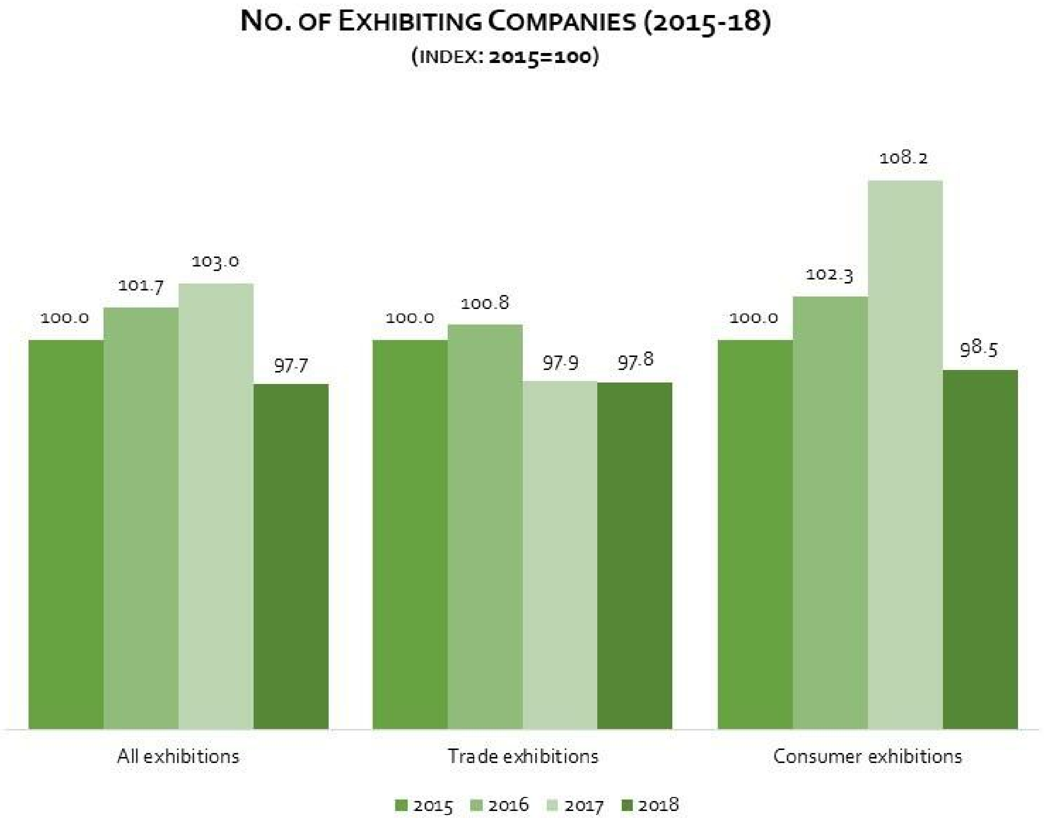
Note: chart shows change in average value relative to 2015. Figures are indexed. 2015 = 100
N=371

[5] Based on events which have been held in 2015 to 2018 and where there is a consistent dataset – see section 1.2.

3.3 Number of Exhibiting Companies

The number of exhibiting companies in 2018 was down slightly from 2015 levels.

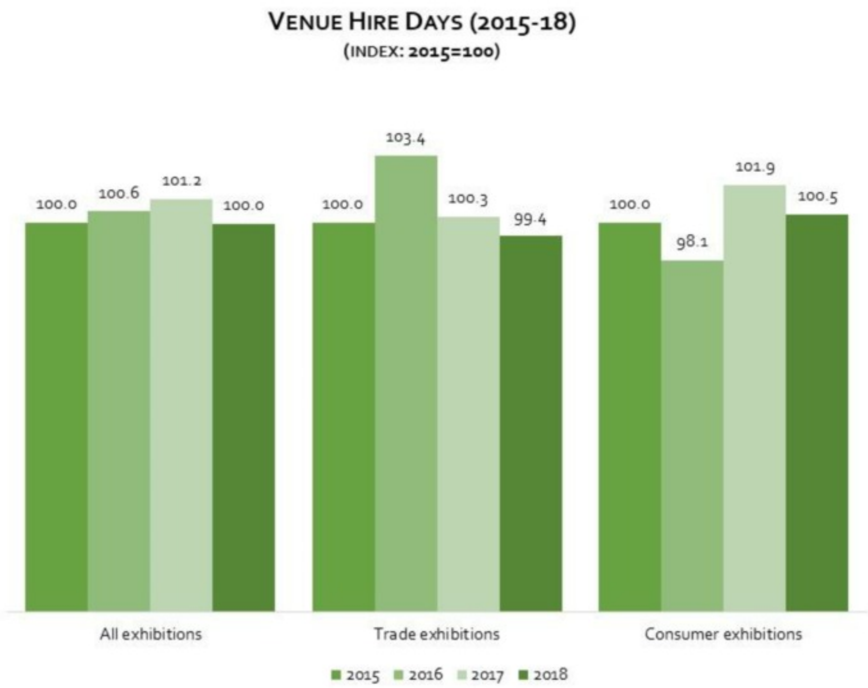
Numbers of exhibiting companies at consumer exhibitions were down, in 2018, from a 2017 peak, while trade exhibitions were static.



Note: chart shows change in average value relative to 2015. Figures are indexed. 2015 = 100
N=319

3.4 Exhibition Duration

Overall venue hire days have been largely static since 2015

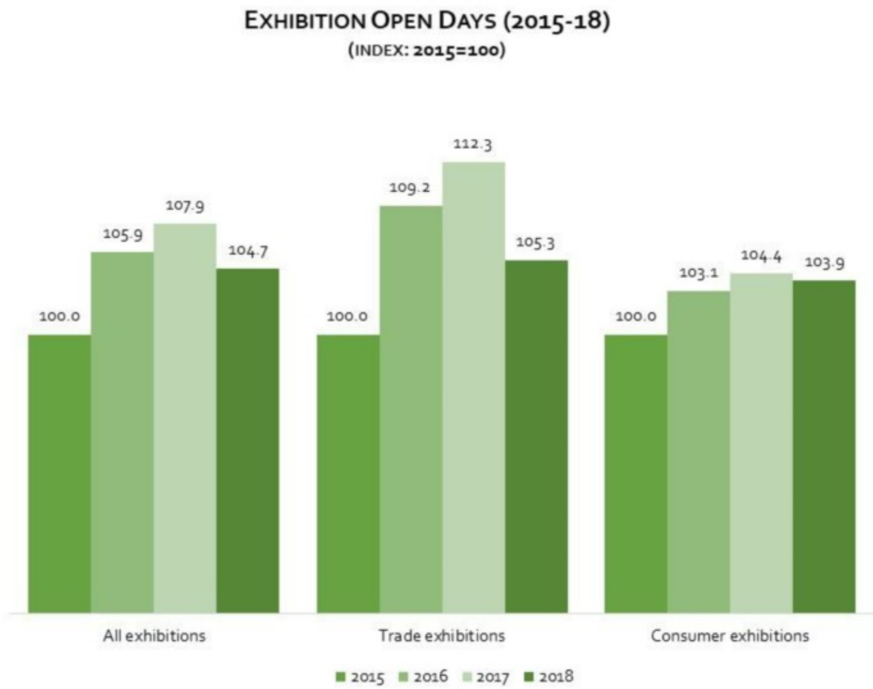


Note: chart shows change in average value relative to 2015. Figures are indexed. 2015 = 100
N=382

Hire days for all exhibitions were slightly down on 2017 but on a par with 2015 levels. Hire days for consumer exhibitions were slightly up on 2015 levels.

The average number of exhibition open days did show an upturn in 2018 from 2015.

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



Note: chart shows change in average value relative to 2015. Figures are indexed. 2015 = 100
N=382

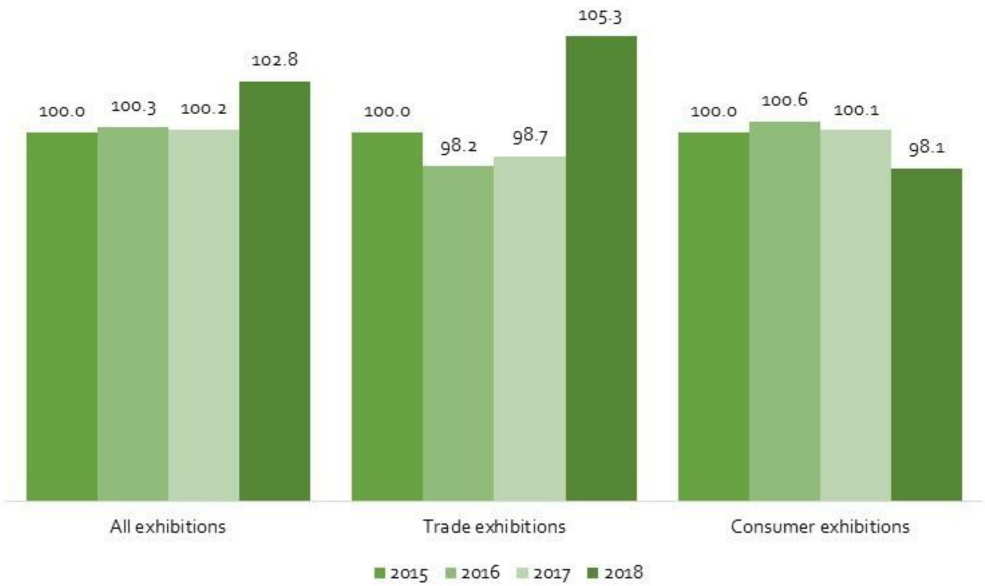
Exhibition open days at trade exhibitions were however down on 2017 levels.

3.5 Number of Visitors

Across all exhibition types, numbers of visitors have increased slightly in 2018.

This was driven by an increase in visitor numbers to trade exhibitions which showed an increase in 2018. Consumer exhibition visitor numbers were slightly down in 2018.

VISITOR NUMBERS (2015-18)
(INDEX: 2015=100)



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