EIA EVENTS INDUSTRY ALLIANCE

AEO AEV ESSA

SASIE

SIZE AND SCALE INDEX FOR EXHIBITIONS 2024

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FOREWORD

Encouraging signs for UK exhibitions

While this is undoubtedly a time of enormous uncertainty and challenge for our country and for the events industry, it is also one of real opportunity as the UK seeks to develop a mutually productive post-Brexit trading relationship with Europe, identify and cement new global markets, and satisfy the many differing demands from businesses and the general public to meet and enjoy event experiences safely and sustainably.

Exhibitions have always played a significant role in successfully promoting the UK’s best assets at home and onto the global stage, drawing on the unparalleled skills of innovation and creativity for which the country’s business events sector is renowned and respected. Confirmation of the world-leading abilities and performance of British exhibition organisers is to be found in a new report by jwc (‘The Global Industry Performance Review’) which reveals that, of the top 20 companies globally ranked by pure event organising revenue, the top three companies (Informa, RX and Clarion), all British, generated more revenue in 2023 than the remaining 17 companies combined.

It is against this backcloth that we publish the SASIE 2024 report, showing a number of encouraging signs for recovery and growth in UK exhibitions. For example, in 2024 (based on a trend analysis of consistently reporting venues), the number of exhibitions held at UK venues was up by 4% over 2023, reaching their highest level since 2017. Trade exhibitions demonstrated a strong bounce back, up by 6.5%. Total gross exhibition space sold was, in overall terms, up on 2023 although still below pre-Covid levels. Total hire and open days were, for all exhibitions, up in 2024, driven by increased numbers of events and average exhibition durations. However, while the total number of exhibition visitors was also up, the average number of visitors was slightly down on 2023, for both consumer and trade exhibitions. Yet, encouragingly, the total number of exhibiting companies was up in 2024, as was the average number per event.

We are convinced that the UK exhibitions industry will continue to play a vital role in boosting international trade and inward investment, and fostering scientific inquiry, innovation and technological advancement, thus supporting the government’s growth agenda. Exhibitions also make a substantial contribution to local economies in terms of the spending generated by exhibition participants and visitors, in the numbers of jobs created and sustained and, not least, in offering inspiration to future generations.

We would like to express our thanks, as ever, to the members of AEV and AEO who faithfully contribute their performance data and related information, without which this report would be impossible. SASIE provides crucial market intelligence for our industry and establishes the baseline against which future growth can be measured. It also enables us to highlight the importance of our sector to government and to the wider business community. We are, therefore, delighted to publish SASIE 2024 and do welcome any feedback.

Rachel Swann – Chair, Events Industry Alliance

EXECUTIVE SUMMARY

OVERVIEW

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

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

1. Dimensions of exhibition performance

In 2024, there were an estimated 1,145 exhibitions and conferences at the UK's main exhibition venues.

- Trade exhibitions accounted for the largest share (42%) with consumer exhibitions accounting for a third.
- Two-thirds (64%) of these were held on an annual basis.
- In terms of gross exhibition size, a typical (median) exhibition was 4,700m^2 in 2024. The average was 8,750m^2 (including outdoor space).
- Typical (median) net exhibition size was 2,200m^2 - the average was 4,000m^2.
- A typical exhibition was, in terms of number of exhibitors, medium sized (i.e. 50-150 exhibitors). The average was 119 exhibitors per event.
- An exhibition occupied a venue for an average of 4.6 days and was open for 2.1 days. Consumer exhibitions were typically longer than trade exhibitions

In 2024, there were an estimated 7.2m visits to exhibitions at the UK's main exhibition venues.

- The typical (median) event attendance was 2,400 – the average was higher at 6,300 visitors.
- The leisure sector was the largest sector for exhibitions – representing just under a fifth of exhibitions in 2024.
- In 2024, March, September, October and November were the busiest exhibition months accounting for half of all exhibitions.

EXECUTIVE SUMMARY

2. Trends

Numbers of events were up in 2024 and reached their highest level since 2017.

- This impacted on other indicators with **total** gross space, total event days, and total visitor and exhibitor numbers all up.
- **Average** duration, gross size and number of exhibitors were up on 2023 but average visitor numbers per exhibition were down on 2023.
- The increase in events in 2024 is due to an increase in trade events and a continuation of the post-Covid growth in conference events within exhibition venues.

- Longer term trends for trade and consumer exhibitions differ.
- Volume of trade exhibitions is up and above pre-Covid levels. There has been a broad levelling of average gross size, duration and numbers of exhibiting companies but at a lower level than the pre-Covid period.
- Numbers of consumer exhibitions remain below pre-Covid levels. Event duration and gross size are both above pre-Covid levels and number of exhibitors is on an upward trend (although these remained below pre-Covid levels). Average visitor numbers remain unchanged.

Total visitor numbers were up on 2023 by 3% but remained below pre-Covid levels.

1.

INTRODUCTION

INTRODUCTION

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

The following report is divided into three main sections.

The first provides an overview of the dimensions of activity in 2024 and includes data on:

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

The second section provides a trend analysis for the period 2015 to 2024. This is based on a sample of venues where comparable year-on-year data exists.

The final section outlines the approach and methodology.

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

GLOSSARY OF TERMS

DEFINITION OF AN EXHIBITION

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

EXHIBITIONS INCLUDE:

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

OTHER TERMS:

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

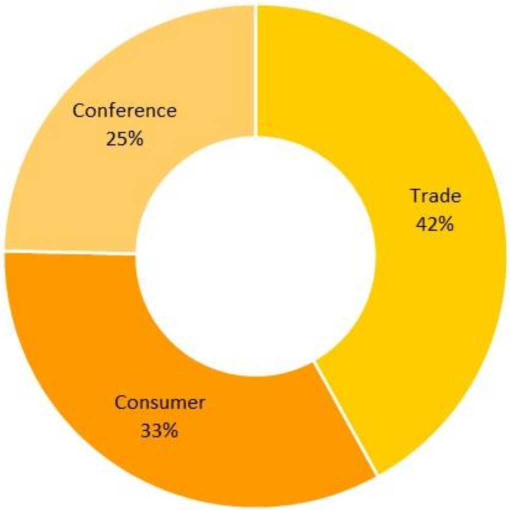
2.

DIMENSIONS OF EXHIBITIONS 2024

NUMBER AND TYPE OF EXHIBITIONS

In 2024, there were an estimated 1,145 exhibitions and conferences (with an exhibition element) at the UK's main exhibition venues.

TYPES OF EXHIBITION



Trade exhibitions accounted for the largest proportion of the market – 42% (i.e. 480 exhibitions).

A third of exhibitions were consumer (or public) (i.e. 382 exhibitions). Conferences that incorporated an exhibition element (i.e. 500m^2 plus) accounted for 25% of the market. This is an increase over 2023 (see page 23) but this is partly explained by an expansion of the response base of venues.

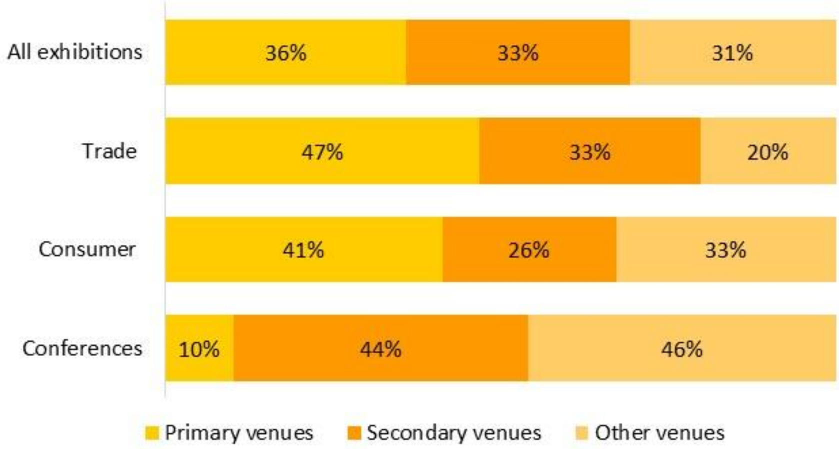
NUMBER AND TYPE OF EXHIBITIONS

The four primary venues, Excel London, Olympia, the NEC and Scottish Event Campus (SEC) (see section 4 for a full definition of venue categories), hosted over a third (36%) of all exhibitions held in 2024.

They hosted a higher proportion of trade (47% of all trade exhibitions) and consumer exhibitions (41% of all consumer exhibitions).

Secondary venues (see section 4) hosted a third of exhibitions (33%) held in 2024 with a mix of trade and consumer exhibitions and conferences.

Other / outdoor venues (see section 4) hosted 31% of all exhibitions. They were more likely to host conferences (46% of all conferences).



Trade exhibitions tended to use primary and secondary venues.

Consumer exhibitions were likely to use primary venues.

Conferences tended to use secondary and other venues.

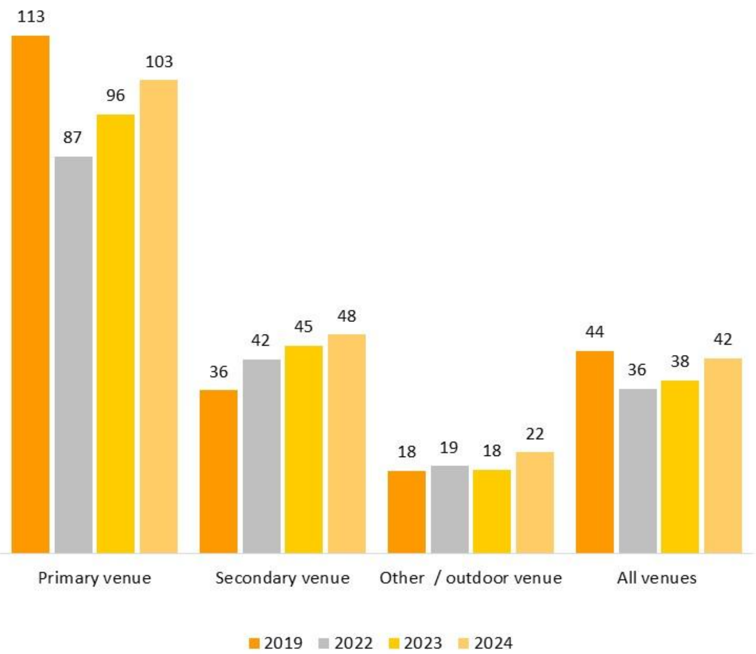
EXHIBITION SHARE - BY VENUE TYPE

Venue type	Trade exhibitions	Consumer exhibitions	Conferences	Total exhibitions
Primary venues	225	158	29	**412**
Secondary venues	158	99	124	**381**
Other / Outdoor venues	97	125	129	**352**

NB data is rounded so may not sum exactly.

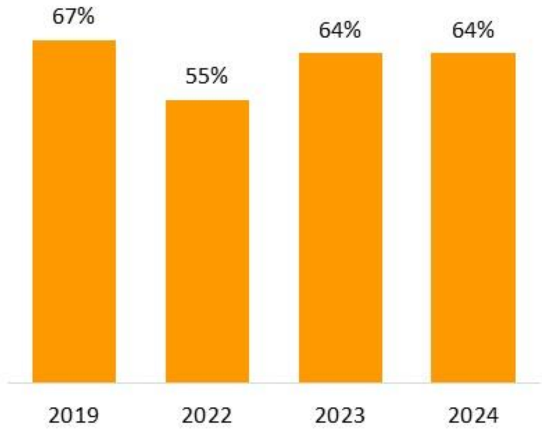
NUMBER AND TYPE OF EXHIBITIONS

AVERAGE EXHIBITIONS - BY VENUE TYPE



On average, venues hosted 42 exhibitions a year (three a month) – slightly up on 2023. This varied significantly, with primary venues hosting an average of 103 per annum (8.6 a month) compared to an average of 1.8 per month for other / outdoor venues.

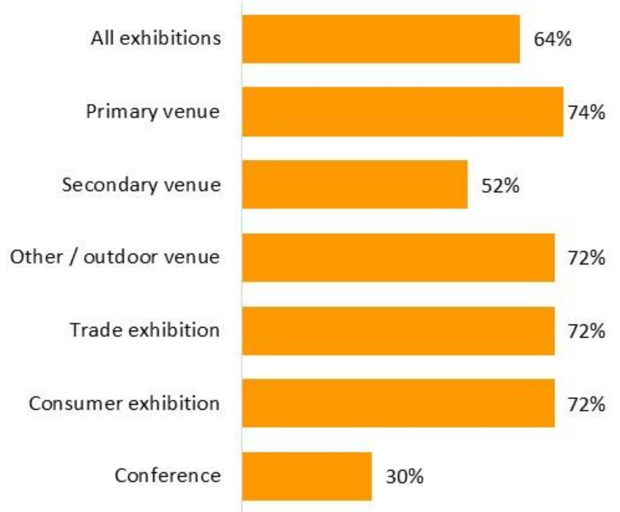
ALL ANNUALLY-HELD EXHIBITIONS(2019-2024)*



In 2024, 64% of exhibitions were held on an annual basis – the same as the previous year. This reflects a settling of new events established post-Covid.

Primary venues had the highest proportion of repeat events in 2023 – 74%. Trade and consumer exhibitions were typically annual (72%) while conferences were more peripatetic (with a significant minority of repeat events).

ANNUALLY-HELD EXHIBITIONS 2024*

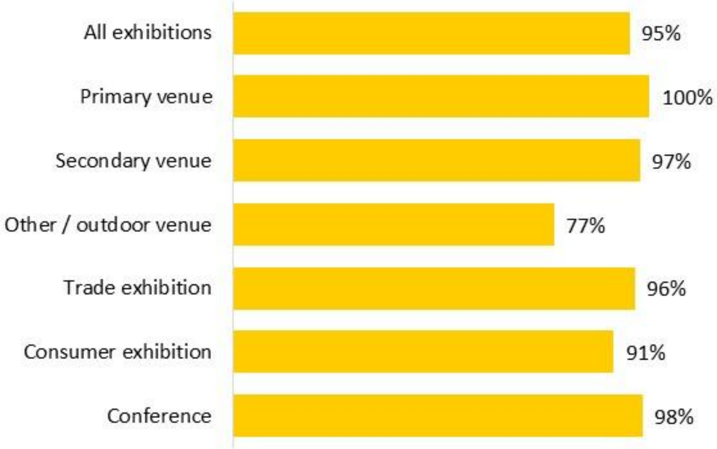


* NB. This analysis is based on venues that have reported in at least the last three years. The sample for other / outdoor venues was small (79 events) and should be treated with a degree of caution.

The average number of exhibitions per venue was up on 2023.

EXHIBITION SIZE

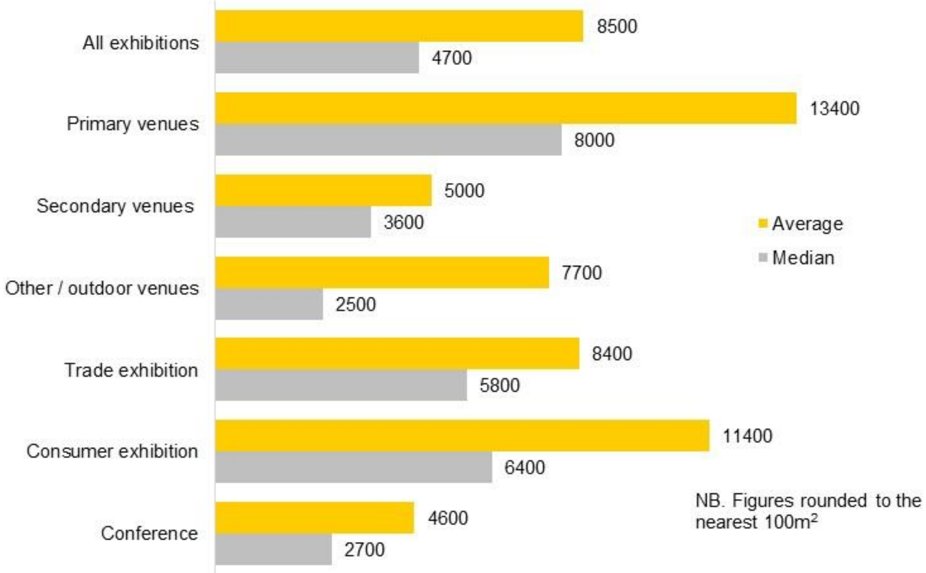
PROPORTION OF INDOOR-ONLY EXHIBITIONS



Most exhibitions (95%) were indoor only – 5% had an outdoor element. The proportion of exhibitions with an outdoor element was higher at other/outdoor venues (23%) and for consumer exhibitions (9%).

Gross exhibition size varied by event and venue type. Consumer exhibitions (a median of 6,400m²) and events at primary venues (a median of 8,000m²) were typically larger than others.

TOTAL GROSS EXHIBITION SIZE (AVERAGE AND MEDIAN)



Typical (median) gross exhibition size (including outdoor space) was 4,700m².

EXHIBITION SIZE

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

Just over half of exhibitions (52%) were small or small/medium (i.e. less than 5,000m^2). This was greater for conferences (79%) and other /outdoor venues (78%).

Just over a quarter (28%) of exhibitions were 8,000m^2 or more. For primary venues, half were 8,000m^2 or more.

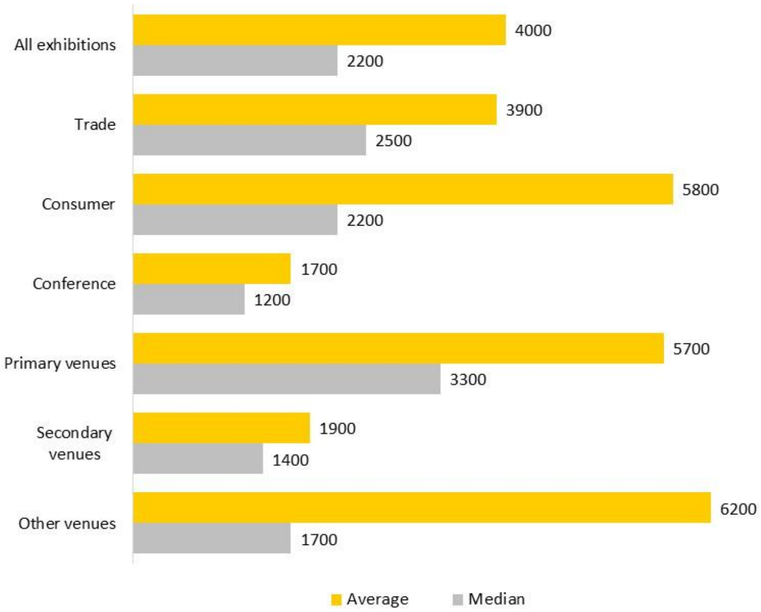
GROSS EXHIBITION SIZE

Exhibition size (based on total gross size)	All Exhibitions	Trade Exhibition	Consumer Exhibition	Conference	Primary Venue	Secondary Venue	Other /Outdoor Venue
	(%)	(%)	(%)	(%)	(%)	(%)	(%)
Small (up to 2500 m^2)	26%	19%	20%	48%	6%	25%	53%
Small / medium (2500-5000 m^2)	26%	27%	22%	31%	21%	37%	25%
Medium (5000-8000 m^2)	20%	26%	19%	10%	24%	23%	9%
Medium/large (8000-15000 m^2)	15%	17%	18%	6%	22%	13%	7%
Large (15000+ m^2)	13%	12%	21%	5%	28%	2%	6%
Average (gross m^2)							
Indoor gross	7500	8000	9100	4600	13200	4700	4400
Total (indoor and outdoor) gross	8500	8400	11400	4600	13400	5000	7700
Median (based on total gross size)	4700	5800	6400	2700	8000	3600	2500

EXHIBITION SIZE

Typical (median) net exhibition size was 2,200m^2 – the average was 4,000m^2.

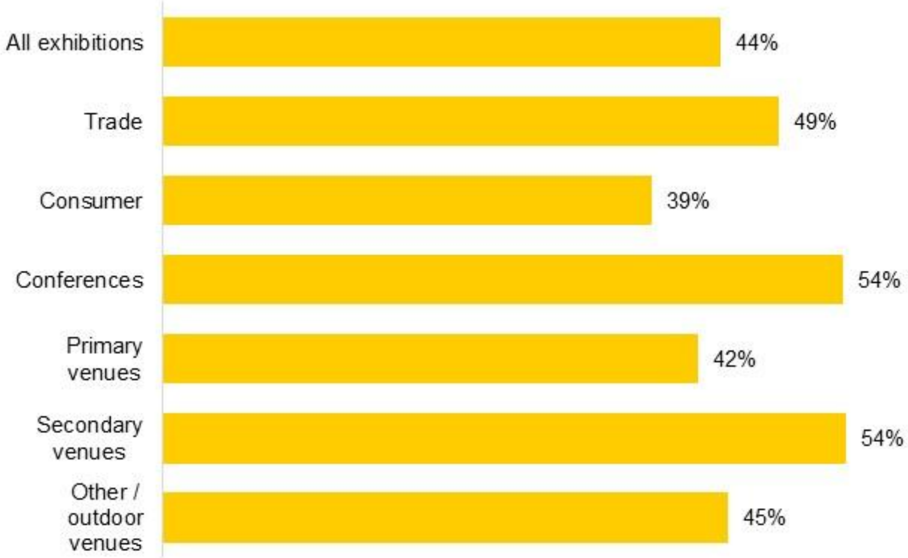
NET EXHIBITION SIZE (AVERAGE AND MEDIAN)



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

Net space was less than half of gross space (44%) in 2024. The proportion of net space was higher for trade exhibitions (49%), conferences (54%) and secondary venues (54%).

TOTAL NET SPACE AS A PERCENT OF GROSS SPACE

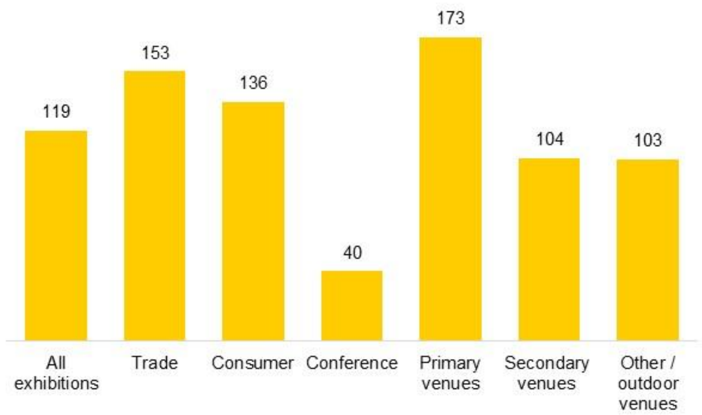


NB. This analysis is based on exhibitions where the data is available for both gross and net exhibition sizes. It is based on total (not indoor) size. It is unweighted. The overall sample was 763 exhibitions.

EXHIBITOR NUMBERS

On average there were 153 exhibitors per trade event and 136 per consumer event.

AVERAGE NUMBER OF EXHIBITORS



Exhibitions at primary venues had the most exhibitors (173 per event) reflecting their size. Conferences, with an average of 40 exhibitors, had the least and impacted the overall average.

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

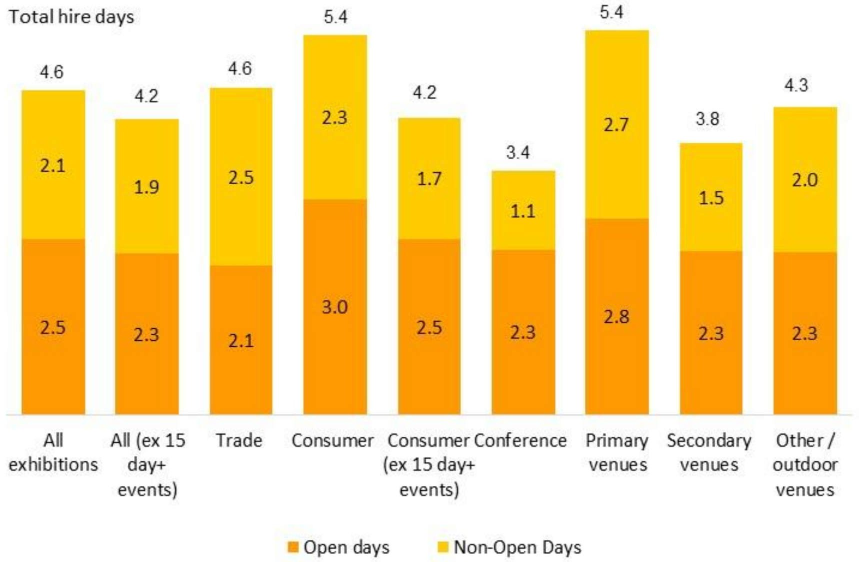
	Small (up to 50 exhibiting companies)	**Medium** (50-150 exhibiting companies)	**Large** (151 - 300 exhibiting companies)	Very **Large** (300+ exhibiting companies)
All exhibitions	27%	39%	23%	11%
Trade exhibitions	16%	44%	26%	14%
Consumer exhibitions	29%	34%	26%	11%
Conference	59%	37%	5%	0%
Primary venue	18%	39%	26%	17%
Secondary venue	36%	44%	18%	3%
Other / outdoor venue	39%	32%	23%	6%

A typical exhibition was, in terms of number of exhibitors, medium sized (i.e. 50-150 exhibitors). However, substantial proportions of trade (40%) and consumer exhibitions (37%) were large to very large (i.e. over 150 exhibiting companies).

EXHIBITION DURATION

On average an exhibition occupied a venue for 4.6 days. Exhibitions were open for an average of 2.1 days.

EXHIBITION DURATION



NB. Figures rounded.

EXHIBITION DURATION
(by % of exhibitions)

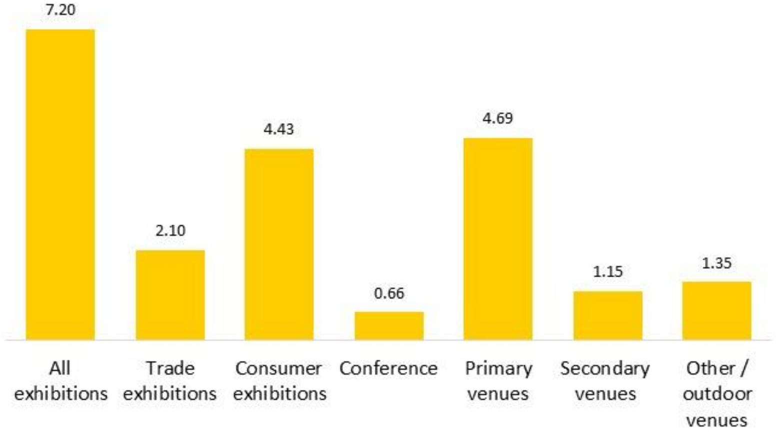
	Trade exhibitions	Consumer exhibitions	Conference	All exhibitions
Venue Hire Days				
1- 2 days	18%	22%	31%	22%
3 days	24%	28%	28%	26%
4 days	23%	12%	18%	18%
5 -7 days	27%	26%	21%	25%
8+ days	8%	13%	3%	8%
Open Days				
1 day	19%	23%	23%	21%
2 days	57%	38%	41%	47%
3 days	19%	21%	23%	20%
4 days	4%	12%	10%	8%
5 + days	1%	7%	3%	4%

In 2024, exhibition venues hosted several long duration consumer events, like Beyond Van Gogh: The Immersive Experience, and the Titanic Exhibition. These impacted on the overall exhibition duration. When these are excluded, the average hire days for all events reduces from 4.6 to 4.2, and from 5.4 hire days to 4.2 for consumer exhibitions.

VISITOR NUMBERS

In 2024, there were an estimated 7.2m visits to exhibitions at the UK's main exhibition venues. Typical (median) event attendance was 2,400 visitors.

VISITOR NUMBERS



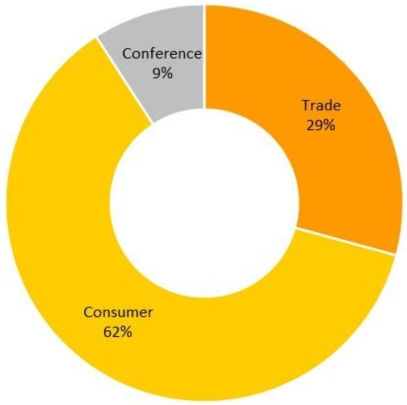
NB. Figures in millions

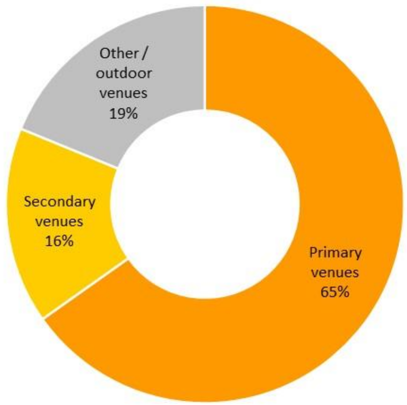
AVERAGE AND MEDIAN VISITOR NUMBERS

NB. Figures rounded to the nearest 100

Consumer exhibitions (median 6,000 and an average of 11,600 visitors) and exhibitions at primary venues (median 5,600 and an average of 11,500) had the largest number of visitors.

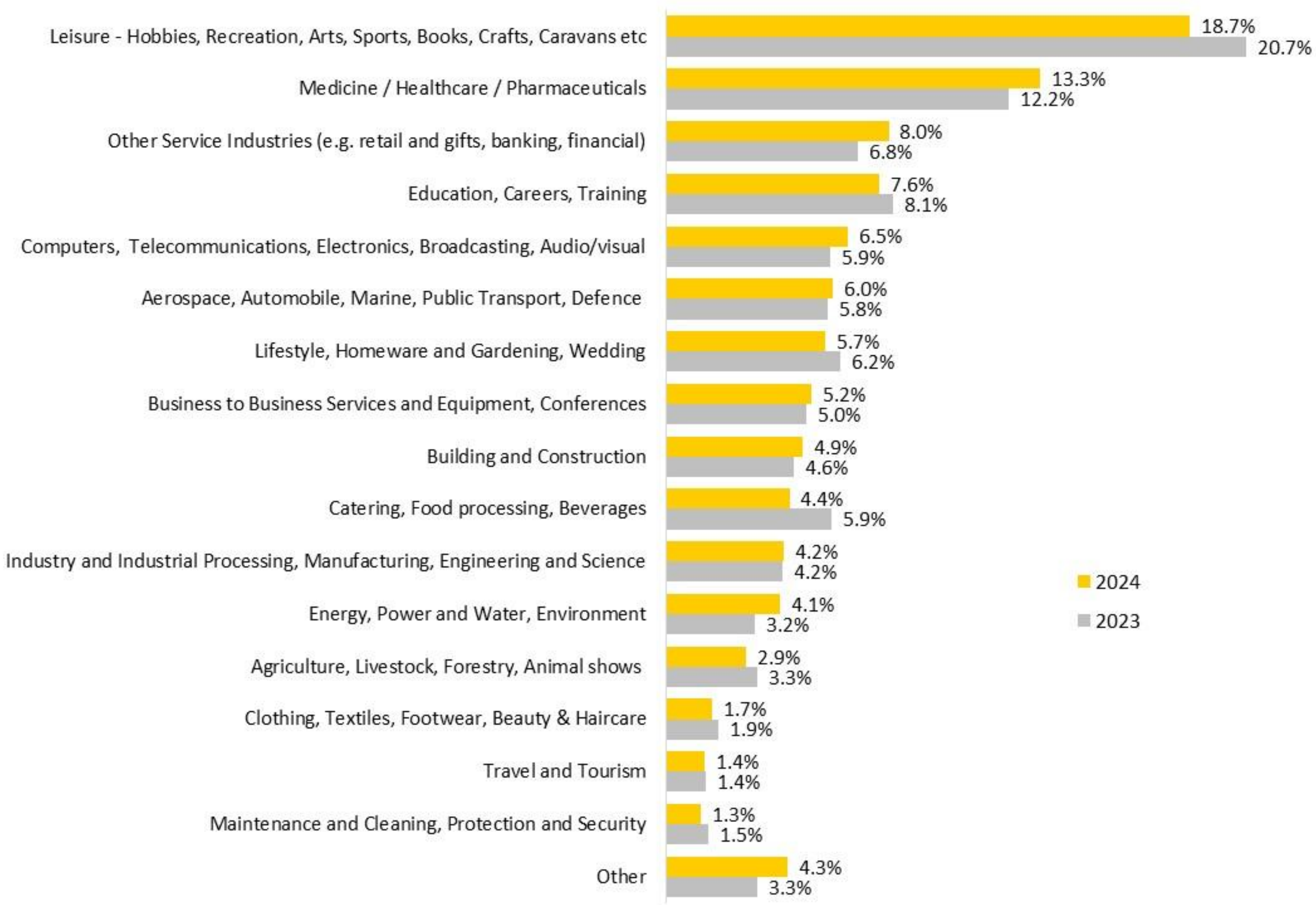
Consumer exhibitions (62%) and primary venues (65%) also accounted for most visits.





INDUSTRY SECTOR

INDUSTRY SECTOR (% OF EXHIBITIONS)



The leisure sector was the largest sector for exhibitions – representing just under a fifth of exhibitions in 2024.

INDUSTRY SECTOR

INDUSTRY SECTOR

	All Exhibitions (%)	Trade Exhibition (%)	Consumer Exhibition (%)	Conferences (%)
Leisure (Hobbies, Recreation, Arts, Sports, Books, Crafts, Caravans etc.)	18.7%	2.9%	52.0%	1.1%
Medicine, Healthcare, Pharmaceuticals	13.3%	13.7%	2.6%	26.8%
Other Service Industries (e.g. retail and gifts, banking, financial)	8.0%	6.9%	7.1%	10.7%
Education, Careers, Training	7.6%	6.5%	8.8%	8.2%
Computers, Telecoms, Electronics, Broadcasting, Audio/Visual	6.5%	8.3%	0.3%	11.7%
Aerospace, Automobile, Marine, Public Transport & Defence	6.0%	9.6%	3.3%	3.2%
Lifestyle, Wedding, Homeware and Gardening	5.7%	5.1%	9.9%	1.1%
Business to Business Services and Equipment, Conferences	5.2%	6.7%	0.5%	8.9%
Building and Construction	4.9%	8.7%	2.8%	1.1%
Catering, Food processing, Beverages	4.4%	6.0%	3.7%	2.5%
Industry & processing, Manufacturing, Engineering and Science	4.2%	7.4%	0.8%	3.6%
Energy, Power and Water, Environment	4.1%	5.1%	1.1%	6.0%
Agriculture, Livestock, Forestry, Animal Shows	2.9%	3.4%	2.4%	2.5%
Clothing, Textiles, Footwear, Beauty, Hair	1.7%	3.4%	0.7%	0.0%
Travel and Tourism	1.4%	1.1%	2.1%	1.1%
Maintenance & cleaning / Protection & security	1.3%	2.3%	0.0%	1.1%
Other	4.3%	2.9%	2.0%	10.5%

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

Consumer exhibitions were strongly orientated to the Leisure sector (approximately 52% of consumer exhibitions), Lifestyle, Wedding, Homeware and Gardening (10%), and the Education/ Careers / Training sector (9%).

Trade exhibitions were more diverse in their industry sector – popular ones were Medicine, Healthcare and Pharmaceuticals (14%), Aerospace, Automobile, Marine, Public Transport & Defence (10%), and Building and Construction (9%). Computers etc. and Industry and Manufacturing were also significant.

Conferences with exhibitions also tended to be from a small number of sectors – Medicine/Healthcare/Pharmaceuticals (27%), Computers, Telecoms, Electronics, Broadcasting, Audio/Visual (12%) and Other service industries (11%).

SEASONALITY

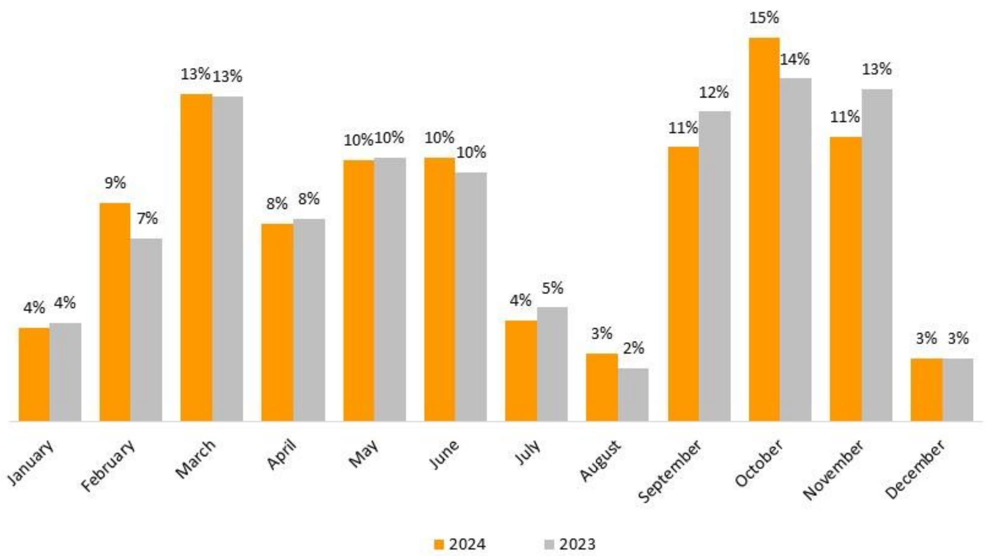
Seasonality of events in 2024 was similar to 2023, with a peak in October.

March, September, October and November were the busiest exhibition months accounting for 50% of all exhibitions.

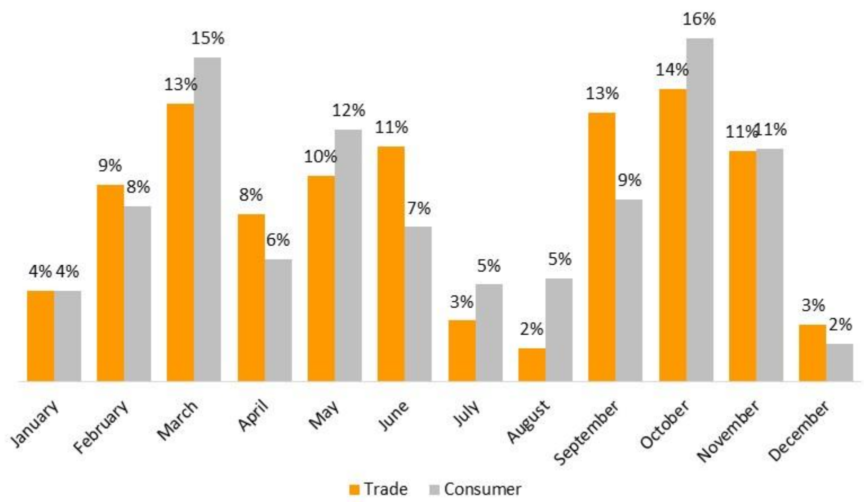
Consumer exhibitions peaked in October, March and May.

Trade exhibitions peaked in March, September and October.

SEASONALITY
(% OF EXHIBITIONS)



SEASONALITY
(% OF TRADE & CONSUMER EXHIBITIONS)



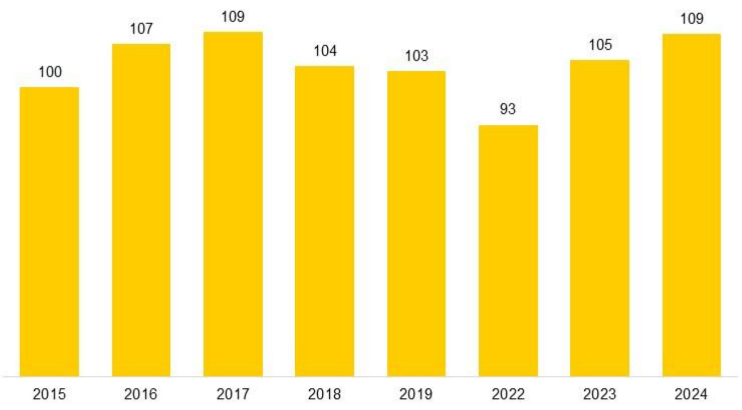
3.

TRENDS

NUMBER OF EXHIBITIONS

Number of exhibitions showed further recovery and growth in 2024 reaching their highest level since 2017.

NUMBER OF EXHIBITIONS
(TREND 2015-24)

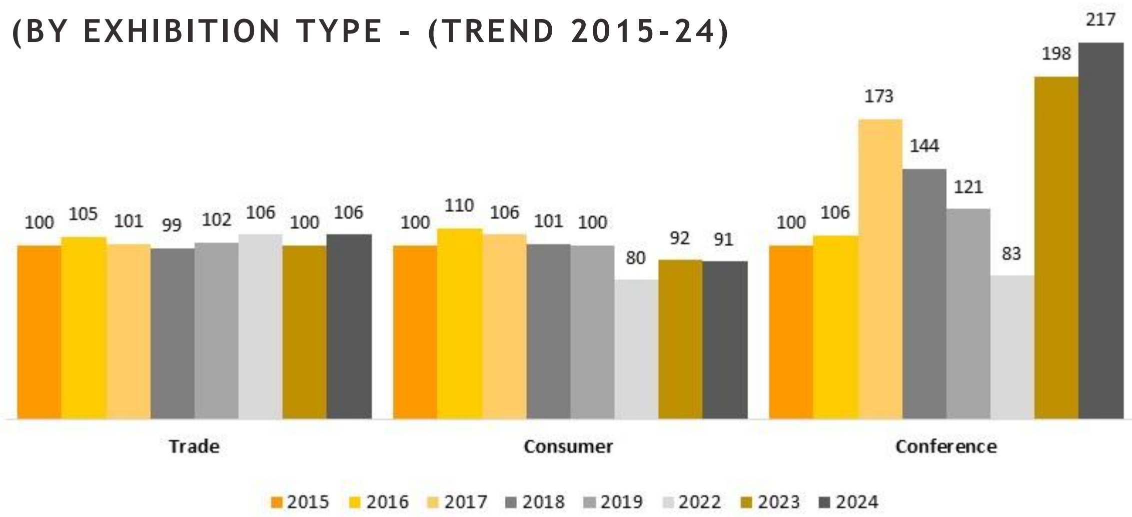


Note: chart shows change in average value relative to 2015. Figures are indexed. 2015 = 100. Data is based on venues that have provided consistent responses since 2015.

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

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

NUMBER OF EXHIBITIONS
(BY EXHIBITION TYPE - (TREND 2015-24)



The number of exhibitions was up in 2024 by 4% (over 2023) reaching their highest level since 2017.

There were mixed trends by exhibition type. Conference events (with 500m^2 of exhibition space) continued their post-Covid growth trend (up nearly 10% on 2023 but from a relatively small base. This represented ten additional events at these venues).

Trade exhibitions showed a bounce back from a slight downturn in 2023 (up 6.5%) to reach their highest levels since 2015.

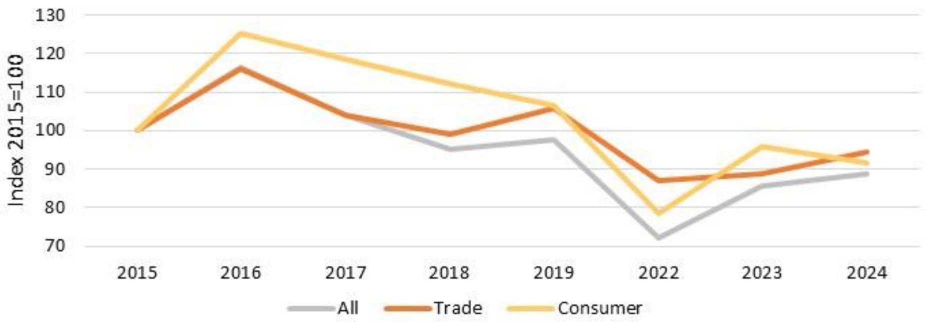
Consumer exhibitions were at broadly the same level as 2023 but remained their pre-Covid level.

EXHIBITION SIZE

Total gross exhibition space sold was, in overall terms up on 2023.

Average gross size for consumer exhibitions was up in 2024 and close to its 2019 levels. Average gross size for trade events remained at a similar level to previous years reflecting a flattening following a post-Covid downturn.

TOTAL GROSS EXHIBITION SIZE(m^2) (TREND 2015-24)

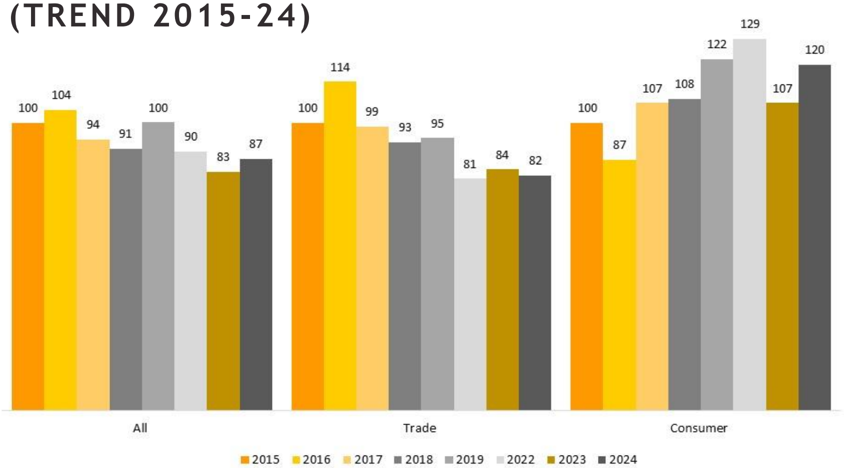


Note: chart shows change in average value relative to 2015. Figures are indexed. 2015 = 100
Data based on primary venues (where the dataset is consistent)

Exhibition sizes show a mixed trend. In terms of the **total** gross space sold (above), there was an increase in 2024. However, overall levels remained below the pre-Covid period. The **trade** total was up on 2023 (reflecting an increase in the number of events), while the **consumer** total was slightly down (a result of fewer events).

Exhibition sizes, based on **average** gross area, showed a slight increase in 2024 (over 2023) but were also below pre-Covid averages.

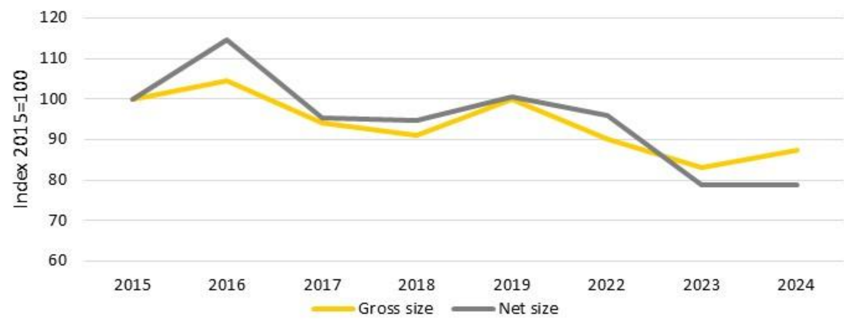
AVERAGE GROSS EXHIBITION SIZE (m^2) (TREND 2015-24)



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

Average net size was the same as 2023

AVERAGE GROSS AND NET EXHIBITION SIZE(m^2) (TREND 2015-24)



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

EXHIBITION DURATION

Total number of hire and open days were up in 2024.

TOTAL VENUE HIRE AND OPEN DAYS
(ALL EXHIBITION TREND 2015-24)

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

Total hire and open days were, for all exhibitions, up in 2024 (see above) – driven by increased numbers of events and average exhibition durations (below).

The average duration of exhibitions was also up – particularly in terms of open days. However, this was largely driven by a number of month-long consumer shows. If these are excluded from the analysis, the average duration of consumer exhibitions shows a decrease on 2023 levels (with average hire duration down 7% and open duration down 4.5%).

AVERAGE VENUE HIRE DAYS
(TREND 2015-24)

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

AVERAGE EXHIBITION OPEN DAYS
(TREND 2015-24)

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

VISITOR NUMBERS

Total visitor numbers were slightly up on 2023. The average per event was, however, slightly down.

The **average** number of visitors per exhibition was slightly down on 2023 – for both consumer and trade exhibitions.

Total number of visitors was up. (NB these figures are from primary venues - i.e. Excel London, Olympia, the NEC and SEC - where a consistent trend exists). This increase was driven by the growth in the number of trade exhibitions and conferences.

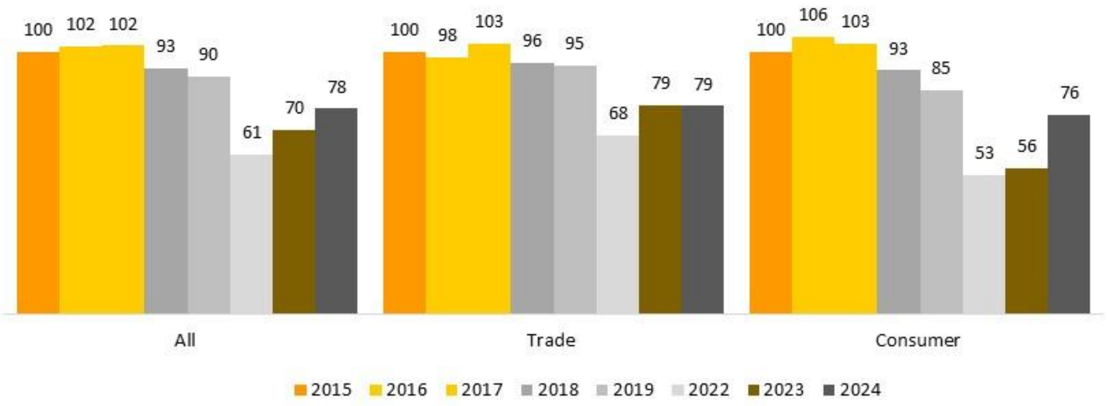
TOTAL VISITOR NUMBERS (TREND 2015-24)

AVERAGE VISITOR NUMBERS PER EVENT (TREND 2015-24)

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

EXHIBITORS

TOTAL NUMBER OF EXHIBITING COMPANIES (TREND 2015-24)



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

AVERAGE NUMBER OF EXHIBITING COMPANIES PER EVENT (TREND 2015-24)

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

The total number of exhibiting companies was up in 2024. The average number per event was also up.

The **total** number of exhibiting companies was up in 2024. This was driven by a significant increase from consumer shows (but levels remain below 2019).

For trade exhibitions, total exhibiting companies was static but the average per event was slightly down.

TREND SUMMARY

In looking at trends, points to note include:

- The baseline of 2015 is slightly arbitrary and determined by the data that is available. The analysis seeks to use consistent data that allows year-on-year comparisons (see section 4).
- Arguably 2015/2016 was the end of a period of growth and recovery from 2008/2009 and may therefore represent a high point.
- The period of 2016 onwards represents a Brexit and a Covid impacted market.
- This may still be continuing and is complicated by global uncertainties, and inflationary and cost of living pressures.

In terms of trends:

- The overall number of exhibitions was up significantly in 2024 and at their highest level since 2017.
- This has impacted on other indicators. For example, **total** gross space sold, total event days, and total visitor and exhibitor numbers were all up.
- For all exhibitions, **average** gross size, duration and exhibitor numbers were all up.
- However, average visitor numbers were down, and the underlying year-on-year trend for exhibition duration was also down when long duration consumer events were excluded from the analysis.

Trade and consumer exhibitions have different patterns. The number of trade exhibitions was up in 2024 while consumer exhibitions were broadly the same level as 2023. Venues are showing diversification in their business mix with an increase in conference events and new consumer shows.

Although numbers of **trade** exhibitions were up, several indicators were below 2023 levels, e.g. average visitor and exhibitor numbers. Average duration and gross size were at a similar level to 2023.

The longer term trend in trade exhibitions is one of an increase in numbers of events with a broad levelling of average gross size, duration and numbers of exhibiting companies albeit at a lower level than the pre-Covid period. Average visitor numbers are more variable with no clear long-term trend.

While numbers of **consumer** exhibitions were static most average indicators were up in 2024 – notably gross size, duration and number of exhibitors. Average visitor numbers per event were, however, down.

Longer term consumer exhibition trends are mixed. The volume of events remains below pre-Covid levels. Event duration is above pre-Covid levels and showing an upward trend (although this is influenced by long duration events). Gross size, while variable, is also above pre-Covid levels. Number of exhibitors are below pre-Covid but are on an upward trajectory. However, average consumer visitor numbers remain challenged – possibly a reflection of inflationary and cost of living pressures on consumers.

4.

METHOD

RESEARCH APPROACH

The approach to SASIE included the following steps:

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

DATA COLLECTION

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

DATA CHECKING

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

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

SAMPLE UNIVERSE

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

VENUE CATEGORISATION

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

RESEARCH APPROACH

RESPONSE RATES

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

SAMPLE

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

In addition, responses were received from 22 organisers.

WEIGHTING DATA AND GROSSING UP

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

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

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

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

Firstly, sample data was grossed up to provide an estimate of the overall number of exhibitions. The following table illustrates the process for all exhibitions. The estimated number of exhibitions (column C) was calculated by multiplying the number of venues (by venue category – column A) by the average number of exhibitions per venue (Column B). NB one of the other / outdoor venues reporting this year had a different performance pattern from the others. This was included in the analysis but not weighted to ensure it did not disproportionately impact on the results.

GROSSING UP PROCESS

	A. No. of venues	B. Average no of exhibitions per venue	C. Estimated exhibitions
Primary	4	103.0	412
Secondary	8	47.6	381
Other / outdoor*	15	16.7	251

* NB. Excludes outlying venue (see note above)

RESEARCH APPROACH

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

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

TREND ANALYSIS

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

These include ACC Liverpool, Alexandra Palace, Business Design Centre, Excel London, Farnborough International Exhibition & Conference Centre, Harrogate Convention Centre, the NEC, Olympia, Scottish Event Campus, Telford International Centre and The Great Yorkshire Events Centre. In 2024, this group hosted approximately three-fifths of total exhibitions.

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

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

5.

ABOUT THE EVENTS INDUSTRY ALLIANCE

ABOUT EIA

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

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

Association of Event Venues Ltd (AEV) is the trade body representing venues of every size and type that host business events both in the UK and internationally.

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

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