SASIE

SIZE AND SCALE INDEX FOR EVENTS
2019

AEV ASSOCIATION OF EVENT VENUES

AEO ASSOCIATION OF EVENT ORGANISERS

ESSA Event Supplier and Services Association

FOREWORD

Events have a vital role to play in Britain's future

This is a time of unprecedented change and uncertainty for the exhibitions and live events sector as we grapple with the myriad impacts of Covid-19, adapt to a new post-Brexit trading relationship with Europe and seek to satisfy the many differing demands from businesses and consumers to find ways to meet and enjoy event experiences safely.

While we start planning to stage events once again and rebuild our industry, it is still too early to see what the long-term implications of these huge changes are likely to be.

It is against this backcloth that we publish the SASiE 2019 report, which provides vitally important market intelligence for our industry, as well as for government and for businesses. SASiE establishes the baseline against which future growth (or decline) can be measured.

This sixth SASiE report shows the state of the industry pre-Covid, identifying and confirming important trends in UK exhibitions as well as describing the key dimensions and characteristics of the sector. It shows, for example, that the number of major exhibitions held in the UK's main exhibition venues (1,060) has remained stable, although visitor numbers in 2019 (8.91 million) were lower than in 2018. Venue hire days were at their highest level since 2015 for both trade and consumer exhibitions. The leisure sector continues to generate the highest proportion of exhibitions, accounting for almost a quarter of all exhibitions staged in 2019.

Complementary research into UK exhibitions published in 2019 found that the sector generated £11 billion in spending and contributed £5.4 billion in value-added to the UK economy in 2018, supporting 114,000 jobs.

Events have always played a significant role in promoting Britain's best assets at home and onto the global stage. There has probably never been a more crucial need for such activity to take place successfully and securely, drawing on the world-beating skills of innovation and creativity for which the country's events sector is renowned and respected. We must work together in close partnership to ensure that we have a healthy and stable industry that can grow again, help rebuild our economy, and be an inspiration to future generations.

Nigel Nathan: - MD at Olympia London, AEV Board

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EXECUTIVE SUMMARY

OVERVIEW

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

It is conducted by the Association of Event Venues (AEV), the Association of Event Organisers (AEO), and the Event Supplier and Services Association (ESSA).

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1. Dimensions of exhibition performance

In 2019, there were an estimated 1060 exhibitions at the UK's main exhibition venues.

- Two-thirds (67%) of these were held on an annual basis.
- Average gross exhibition size was 11,000m² in 2019 (including outdoor space). The average indoor gross space in 2019 was 8,880m².
- The average net exhibition size was 7,000m² including outdoor space – 4,500m² excluding it.
- A typical exhibition was, in terms of number of exhibitors, medium sized (i.e. 50-150 exhibitors).
- An exhibition occupied a venue for an average of 4.7 days and was open for 2.4 days. Consumer exhibitions were typically longer than trade exhibitions.

In 2019, there were an estimated 8.91m visits to exhibitions at the UK's main exhibition venues.

- Average event attendance was 8,400 visitors. The median was 4,800.
- The leisure sector was the largest sector for exhibitions – representing nearly a quarter of exhibitions in 2019.
- March and September, October and November were the busiest exhibition months accounting for half of all exhibitions.

EXECUTIVE SUMMARY

2. Trends

Numbers of exhibitions in 2019 were at the same level as 2018.

- Levels of trade exhibitions were slightly up with a small downturn in consumer exhibitions.
- Overall gross exhibition size in 2019 was broadly the same as 2018 and little changed from 2015 levels. Trade exhibitions were up slightly on 2018.
- The average number of exhibiting companies was down in 2019, particularly among consumer exhibitions.
- Both venue hire days and exhibition open days were up in 2019. Venue hire days were at their highest level since 2015 for both trade and consumer exhibitions. Open days for consumer exhibitions were also at their highest level since 2015.

Visitor numbers were down on 2018 and at their lowest level since 2015.

1.

INTRODUCTION

INTRODUCTION

1.

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. This has been running since 2014.

The following report is divided into three main sections.

The first provides an overview of the dimensions of activity in 2019 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 2019. This is based on a sample of events 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 organisers (in AEO membership) which involved collecting and reconciling detailed individual exhibitions.

GLOSSARY OF TERMS

1.

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 (min $500m^2$) 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**. Number of companies exhibiting at an exhibition.

2.

DIMENSIONS OF EXHIBITIONS 2019

NUMBER AND TYPE OF EXHIBTIONS

2.

In 2019, there were an estimated 1060 exhibitions at the UK's main exhibition venues.

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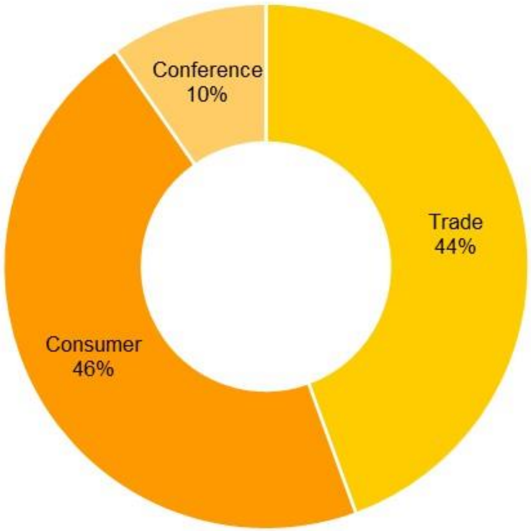
TYPES OF EXHIBITION



Consumer (or public) exhibitions accounted for the largest proportion of the market – 46% (i.e. 486 exhibitions)

Trade exhibitions had a similar share in 2019 – 44% (i.e. 471 exhibitions). Conferences that incorporated a significant exhibition element accounted for 10% of the market.

NUMBER AND TYPE OF EXHIBITIONS

2.

The four primary venues (ExCel London, Olympia London, the National Exhibition Centre – NEC – and Scottish Event Campus – SEC- see section 4 for a full definition of venue categories) hosted over two-fifths (43%) of exhibitions in 2019.

They hosted the majority of trade events.

Outdoor venues hosted 17% all of exhibitions but a quarter (24%) of consumer exhibitions. They typically did not host conferences.

The majority of trade exhibitions were held in four primary venues in 2019.

EXHIBITION SHARE -BY VENUE TYPE

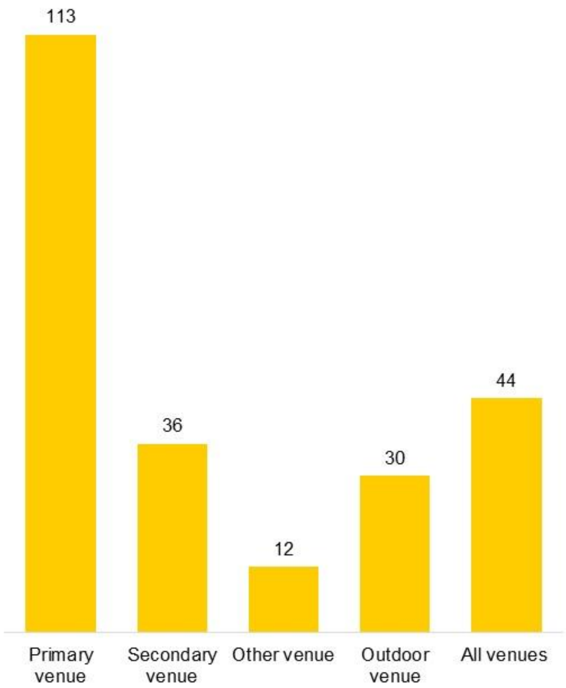
Venue type	Trade exhibitions	Consumer exhibitions	Conference	Total exhibitions
Primary venues	239	180	32	451
Secondary venues	116	127	41	284
Other venues	56	64	28	148
Outdoor venues	60	116	2	177

Secondary venues hosted just over a quarter of exhibitions but a higher proportion of conferences with exhibitions (40%). This was a reflection of the positioning many of these venues (e.g. Manchester Central, Harrogate International Centre, International Centre Telford) have as conference and exhibition centres.

NUMBER AND TYPE OF EXHIBITIONS

2.

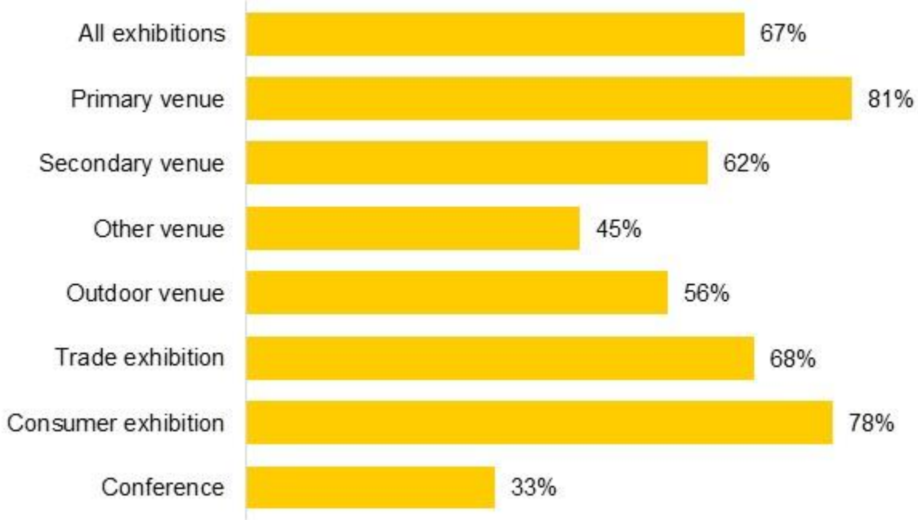
AVERAGE EXHIBITIONS - BY VENUE TYPE



On average the four primary venues hosted an exhibition every three days, while secondary venues hosted an exhibition approximately every 10 days on average. Other venues, on average, hosted one exhibition a month.

The majority of exhibitions had been held on an annual basis. Among primary venues, four-fifths of exhibitions were annual.

ANNUALLY HELD EXHIBITIONS



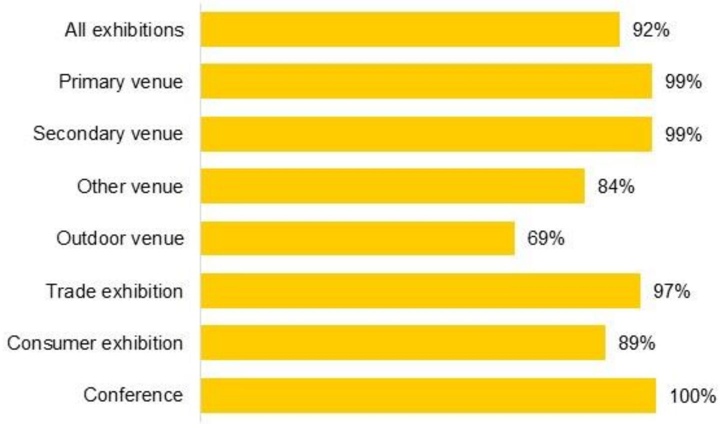
Consumer exhibitions were more likely to be held on an annual basis than trade exhibitions. Conferences were more ad-hoc – but a third had been held annually.

Two-thirds of exhibitions were held on an annual basis.

EXHIBITION SIZE

2.

PROPORTION OF INDOOR-ONLY EXHIBITIONS



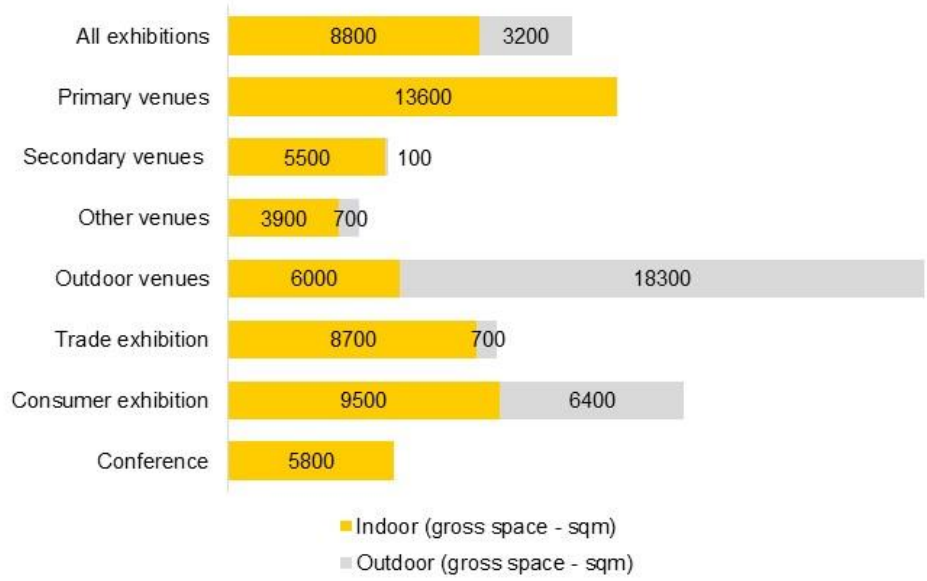
Most exhibitions (92%) were indoor only with 8% including some outdoor space. Even among outdoor venues (like East of England Arena or Stoneleigh Park) over two–thirds of events were indoor only.

The average indoor gross space in 2019 was 8,880m². This was higher for primary venues (13,600m²) and consumer exhibitions (9,500m²).

Exhibitions at outdoor venues were 24,300m² on average – the majority of this was outdoors.

Average gross exhibition size was 11,000m² in 2019 (including outdoor space).

AVERAGE GROSS EXHIBITION SIZE



NB. Figures rounded to the nearest 100m²

EXHIBITION SIZE

2.

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

The median gross size for trade exhibitions was 6000m². it was larger for consumer exhibitions (6600m²) and primary and outdoor venues.

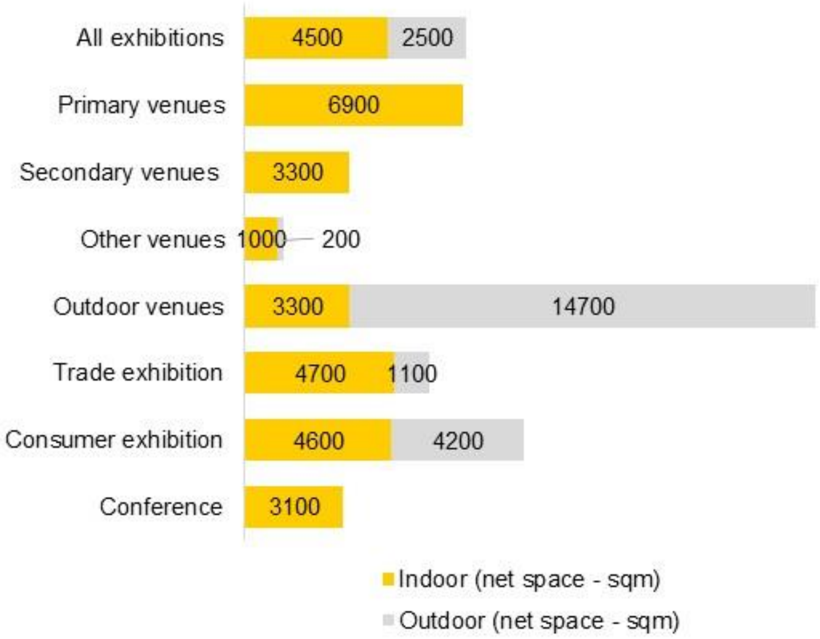
GROSS EXHIBITION SIZE

Exhibition size (based on total gross size)	All exhibitions (%)	Trade exhibition (%)	Consumer exhibition (%)	Conference (%)	Primary venue (%)	Secondary venue (%)	Other venue (%)	Outdoor venue (%)
Small (up to 2500 m²)	17%	17%	14%	31%	5%	16%	55%	17%
Small / medium (2500-5000 m²)	26%	28%	21%	39%	23%	40%	15%	19%
Medium (5000-8000 m²)	21%	21%	23%	14%	20%	24%	12%	26%
Medium/large (8000-15000 m²)	20%	22%	20%	9%	25%	16%	15%	14%
Large (15000 + m²)	16%	13%	22%	7%	26%	3%	3%	23%
Average (gross m²)								
Indoor gross	8800	8700	9500	5800	13600	5500	3900	6000
Total gross	12000	9400	15900	5800	13600	5600	4600	24300
Median (based on total gross size)	6000	6000	6600	4500	8500	4400	2500	6300

EXHIBITION SIZE

2.

AVERAGE NET EXHIBITION SIZE



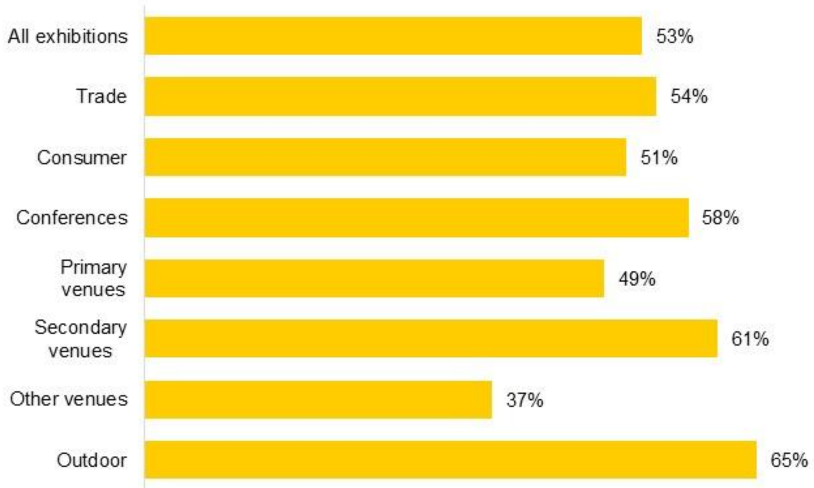
NB. Figures rounded to the nearest 100m²

The average indoor net space in 2019 was 4,500m².

Net space was about half (53%) of gross space.

The average net exhibition size was 7,000m² including outdoor space – 4,500m² excluding it.

TOTAL NET SPACE AS A PERCENT OF GROSS SPACE



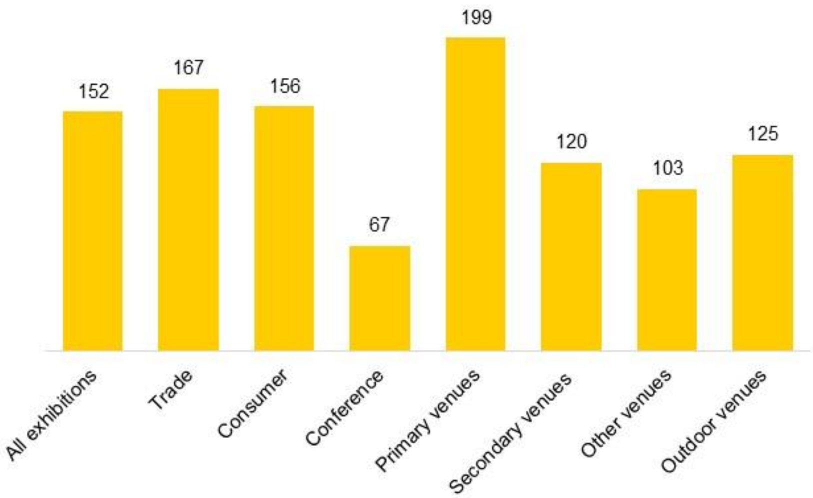
NB This analyis is based on exhibitions where there data is available for both gross and net exhibition sizes. It is based on total (not indoor) size. It is unweighted. The overall sample was 633 exhibitions.

EXHIBITORS

2.

On average there were 152 exhibitors per event.

AVERAGE NUMBER OF EXHIBITORS



Trade exhibitions had slightly more exhibitors than consumer exhibitions in 2019 (167 compared to 156).

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	19%	40%	27%	14%
Trade exhibitions	12%	42%	30%	16%
Consumer exhibitions	18%	41%	26%	15%
Conference	59%	23%	18%	
Primary venue	14%	32%	35%	19%
Secondary venue	19%	56%	21%	
Other venue	35%	50%	7%	7%
Outdoor venue	26%	45%	19%	10%

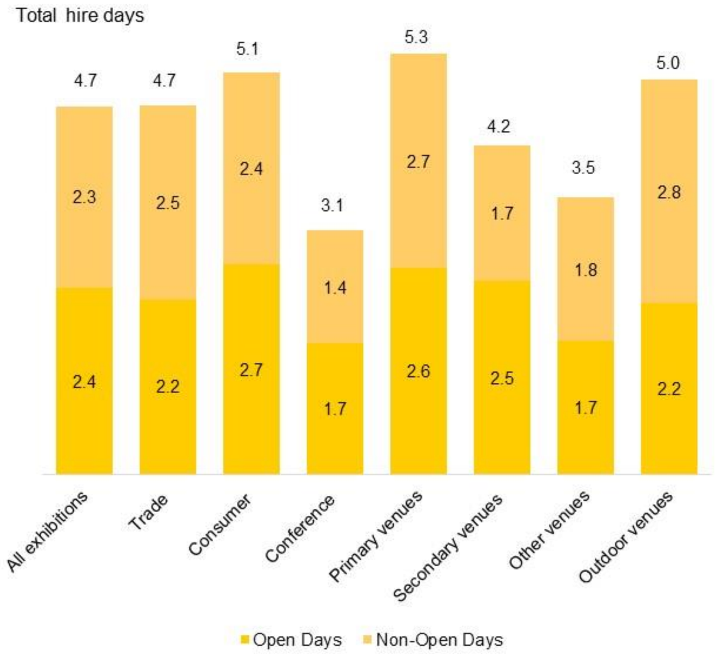
A typical exhibition was, in terms of number of exhibitors, medium sized (i.e. 50-150 exhibitors). Primary venues tended to host larger exhibitions – their commonest size was large (151-300 exhibitors).

EXHIBITION DURATION

2.

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

EXHIBITION DURATION



EXHIBITION DURATION
(by % of exhibitions)

	Trade exhibitions	Consumer exhibitions	Conference	All exhibitions
Venue Hire Days				
1- 2 days	13%	14%	14%	14%
3 days	22%	25%	24%	24%
4 days	22%	16%	24%	19%
5 -7 days	34%	32%	31%	33%
8+ days	9%	13%	6%	11%
Open Days				
1 day	15%	15%	18%	15%
2 days	53%	40%	40%	46%
3 days	27%	25%	27%	26%
4 days	4%	14%	15%	9%
5 + days	1%	6%	0%	3%

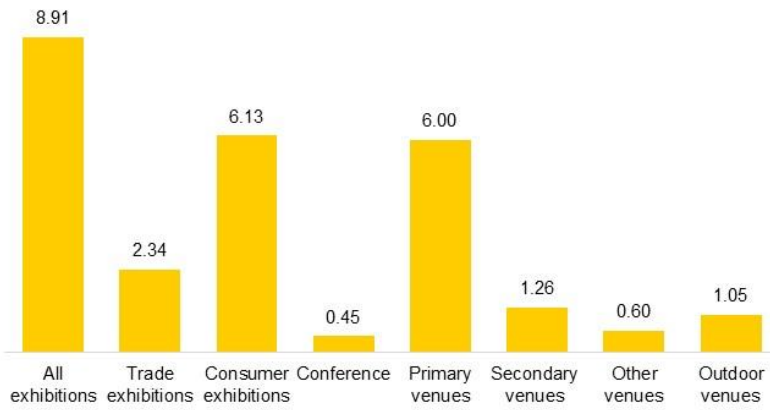
The commonest number of hire days was five to seven days. The commonest exhibition duration, in terms of open days, was two days.

VISITOR NUMBERS

2.

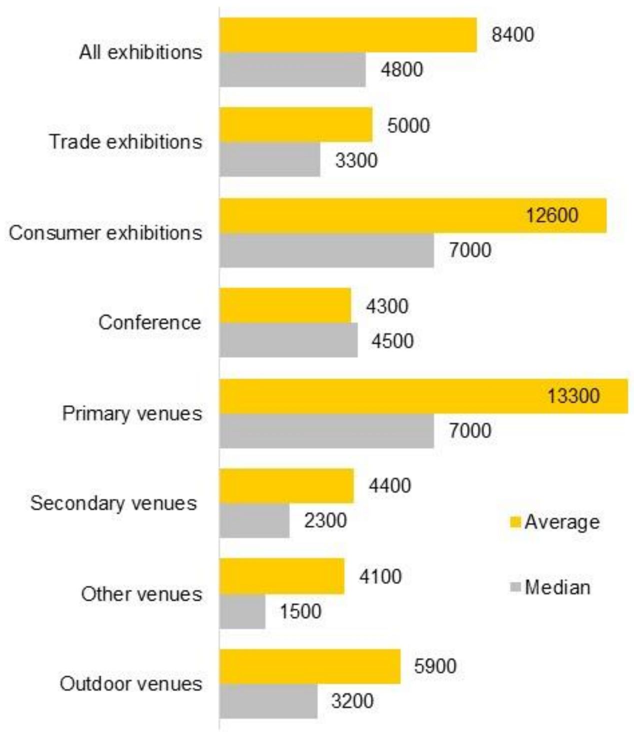
In 2019, there were an estimated 8.91m visits to exhibitions at the UK's main exhibition venues. Average event attendance was 8,400 visitors. The median was 4,800.

VISITOR NUMBERS



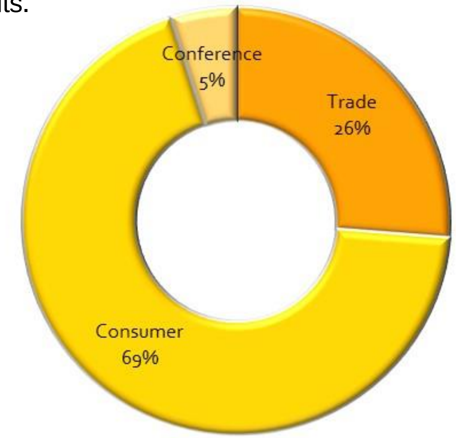
NB. Figures in millions

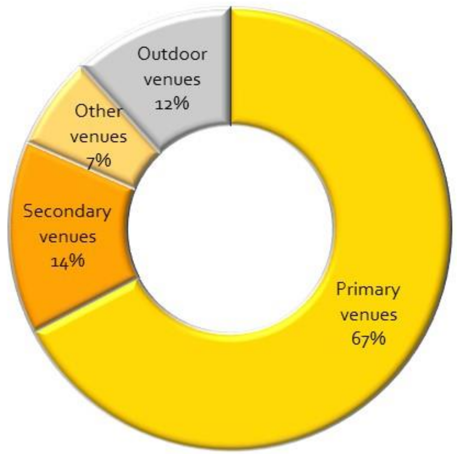
AVERAGE AND MEDIAN VISITOR NUMBERS



NB. Figures rounded to the nearest 100

Consumer exhibitions (69%) and primary venues (67%) accounted for the majority of visits.

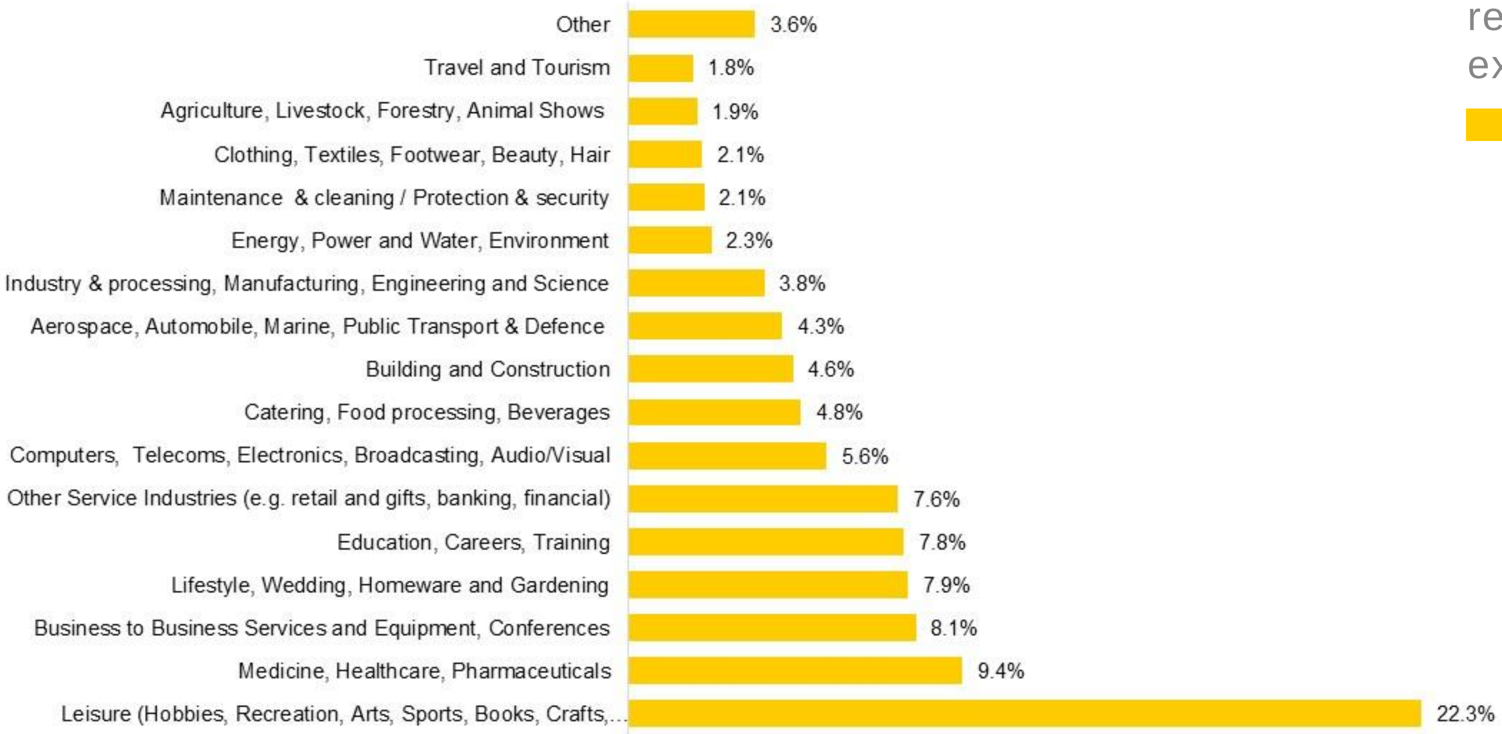




INDUSTRY SECTOR

2.

INDUSTRY SECTOR
(% OF EXHIBTIONS)



The leisure sector was the largest sector for exhibitions – representing nearly a quarter of exhibitions in 2019

INDUSTRY SECTOR

2.

INDUSTRY SECTOR

	All exhibitions (%)	Trade exhibition (%)	Consumer exhibition (%)	Conference (%)
Leisure (Hobbies, Recreation, Arts, Sports, Books, Crafts, Caravans etc.)	22.3	4.1	47.9	3.3
Medicine, Healthcare, Pharmaceuticals	9.4	12.0	2.1	27.0
Business to Business Services and Equipment, Conferences	8.1	14.7	-	9.9
Lifestyle, Wedding, Homeware and Gardening	7.9	4.4	13.2	3.0
Education, Careers, Training	7.8	4.7	11.7	5.9
Other Service Industries (e.g. retail and gifts, banking, financial)	7.6	10.2	4.7	6.6
Computers, Telecoms, Electronics, Broadcasting, Audio/Visual	5.6	6.7	0.6	19.1
Catering, Food processing, Beverages	4.8	6.7	4.0	0.0
Building and Construction	4.6	7.1	2.9	0.0
Aerospace, Automobile, Marine, Public Transport & Defence	4.3	5.2	2.9	5.9
Industry & processing, Manufacturing, Engineering and Science	3.8	6.3	1.2	3.3
Energy, Power and Water, Environment	2.3	3.7	0.4	3.6
Maintenance & cleaning / Protection & security	2.1	4.2	0.4	-
Clothing, Textiles, Footwear, Beauty, Hair	2.1	2.3	2.4	-
Agriculture, Livestock, Forestry, Animal Shows	1.9	2.8	1.4	-
Travel and Tourism	1.8	2.1	1.6	2.0
Other	3.6	2.9	2.6	10.5

The table left summarises industry sector by exhibition type. The circled values indicate the commonest sectors.

Consumer exhibitions were strongly orientated to the Leisure sector (approximately 48% of consumer exhibitions), and the Lifestyle / Wedding / Homeware sector (13%) and the Education / Careers / Training sector (12%). These three sectors accounted for approximately three quarters (nearly 75%) of consumer exhibitions.

Trade exhibitions were more diverse in their industry sector – popular ones were business-to-business services and equipment (nearly 15%), medicine, healthcare and pharmaceuticals (12%) and other service industries (10%).

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 48% of conference exhibitions.

SEASONALITY

2.

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

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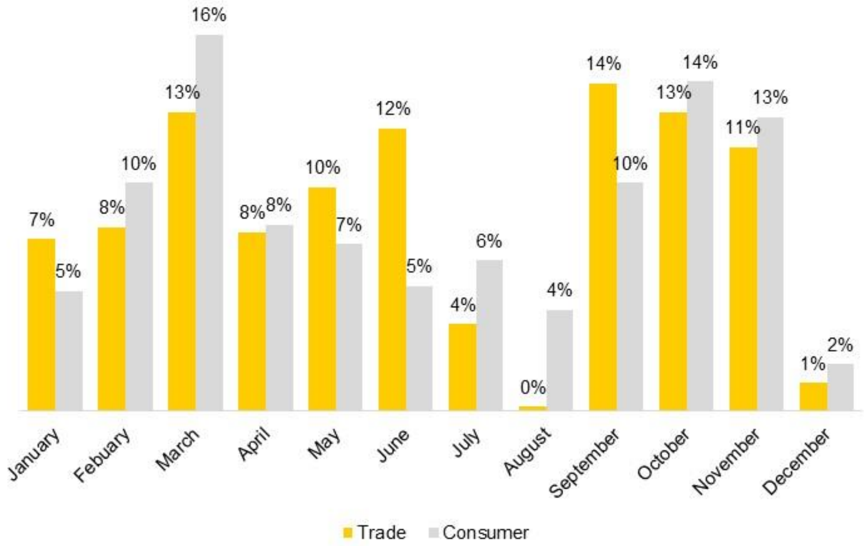
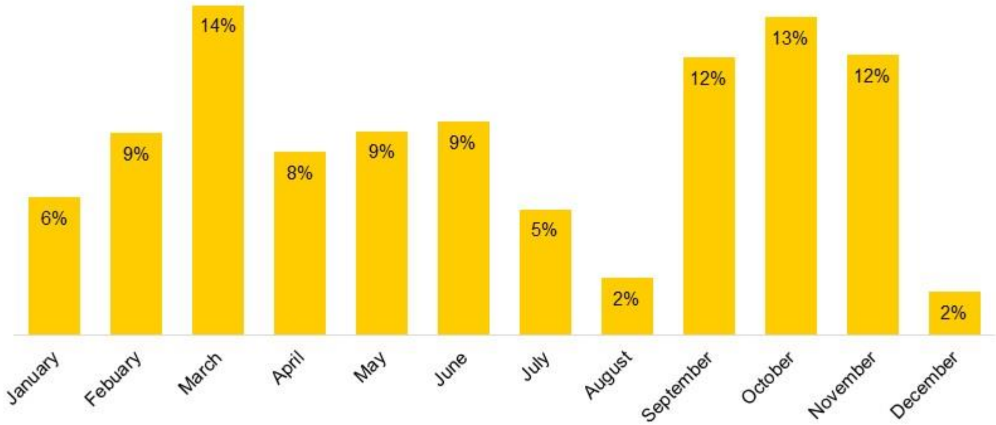
Consumer exhibitions peaked in March, October and November. They were more likely to be held in July, August and December than trade events.

Trade exhibitions peaked in September, March, October and June.

SEASONALITY
(% OF TRADE & CONSUMER EXHIBITIONS)



SEASONALITY
(% OF EXHIBITIONS)



3.

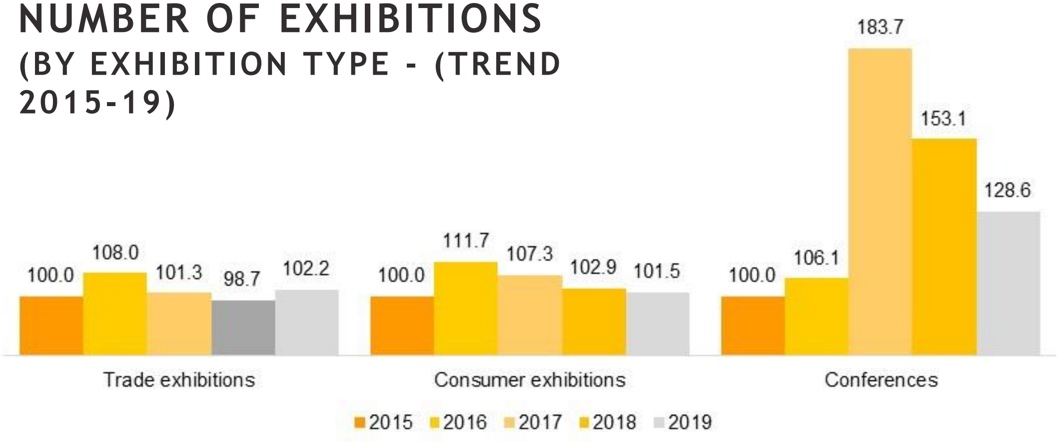
TRENDS

NUMBER OF EXHIBITIONS

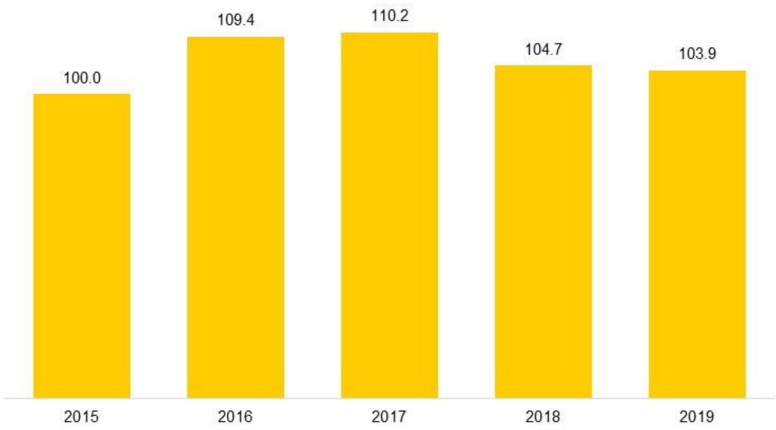
3.

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

NUMBER OF EXHIBITIONS (BY EXHIBITION TYPE - (TREND 2015-19)



NUMBER OF EXHIBITIONS (TREND 2015-19)



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.

Numbers of exhibitions in 2019 were at the same level as 2018. Levels of trade exhibitions were slightly up with a small downturn in consumer exhibitions.

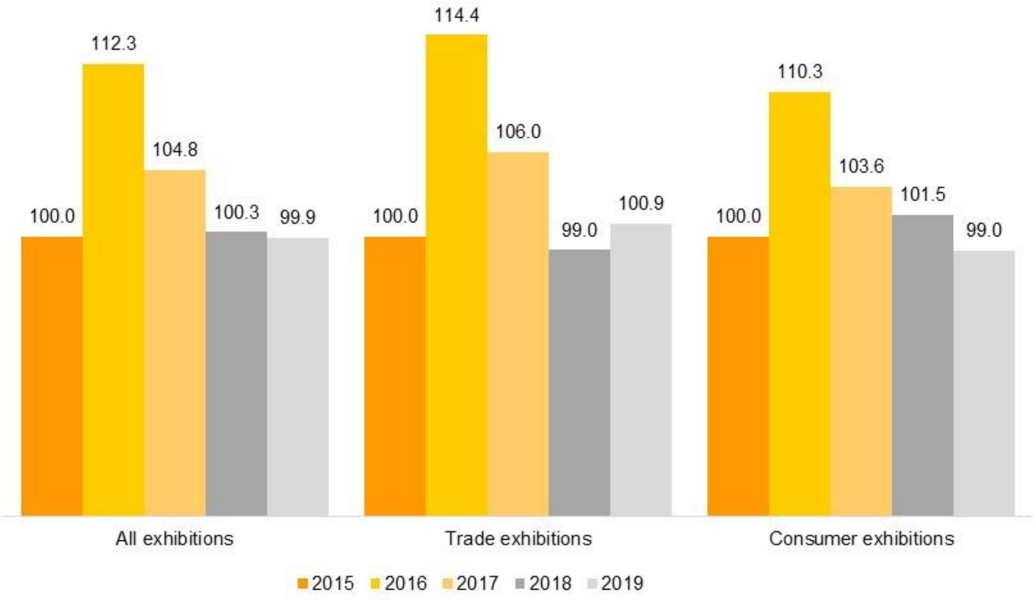
NB. These figures are based on responses from venues that have consistently reported since 2015. These include ACC Liverpool, Alexandra Palace, Business Design Centre, ExCel London, Farnborough International Exhibition & Conference Centre, Harrogate International Centre, the NEC, Olympia London, Scottish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

EXHIBITION SIZE

3.

GROSS EXHIBITION SIZE
(TREND 2015-19)

Overall gross exhibition size in 2019 was broadly the same as 2018. Trade exhibitions were up slightly.

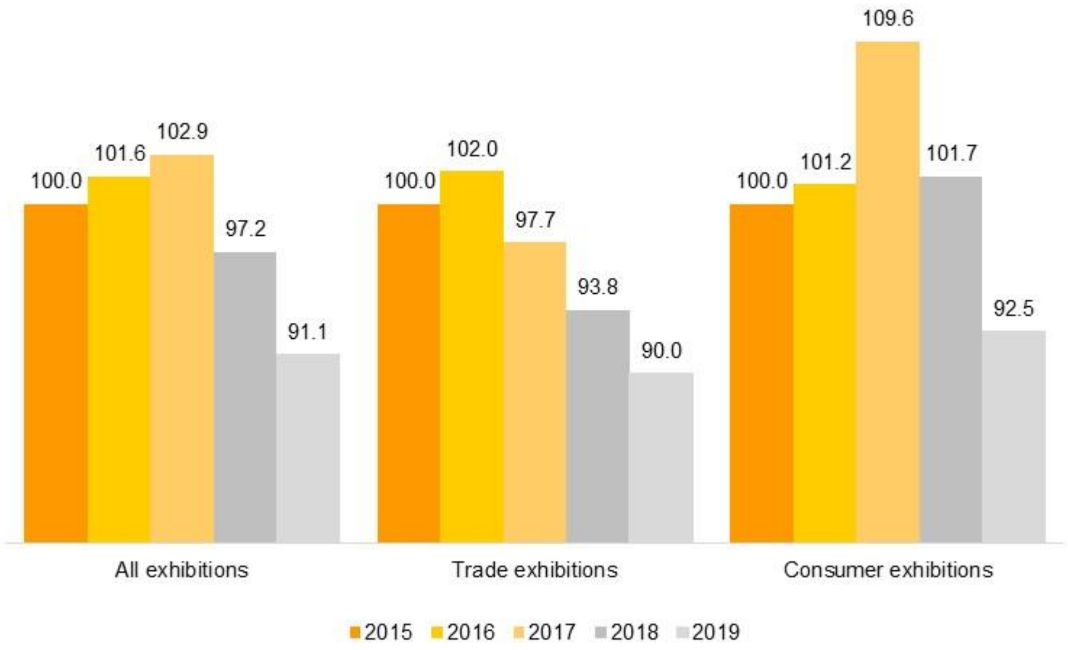


Note: chart shows change in average value relative to 2015. Figures are indexed. 2015 = 100
N=339

EXHIBITORS

3.

NUMBER OF EXHIBITING COMPANIES (TREND 2015-19)



Note: chart shows change in average value relative to 2015. Figures are indexed. 2015 = 100. N=272

The average number of exhibiting companies was down in 2019, particularly among consumer exhibitions.

EXHIBITION DURATION

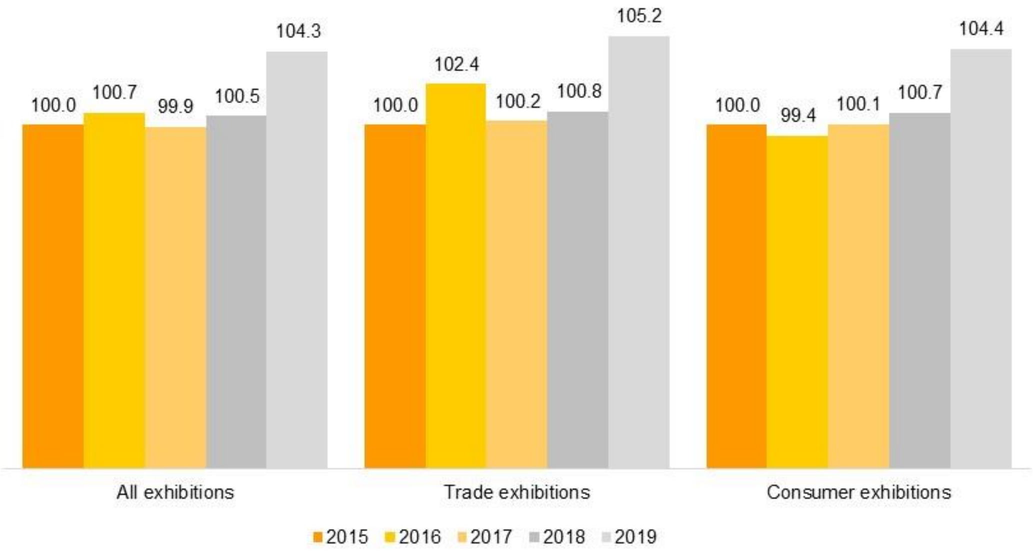
3.

Both venue hire days and exhibition open days were up in 2019.

Venue hire days were at their highest level since 2015 for both trade and consumer exhibitions.

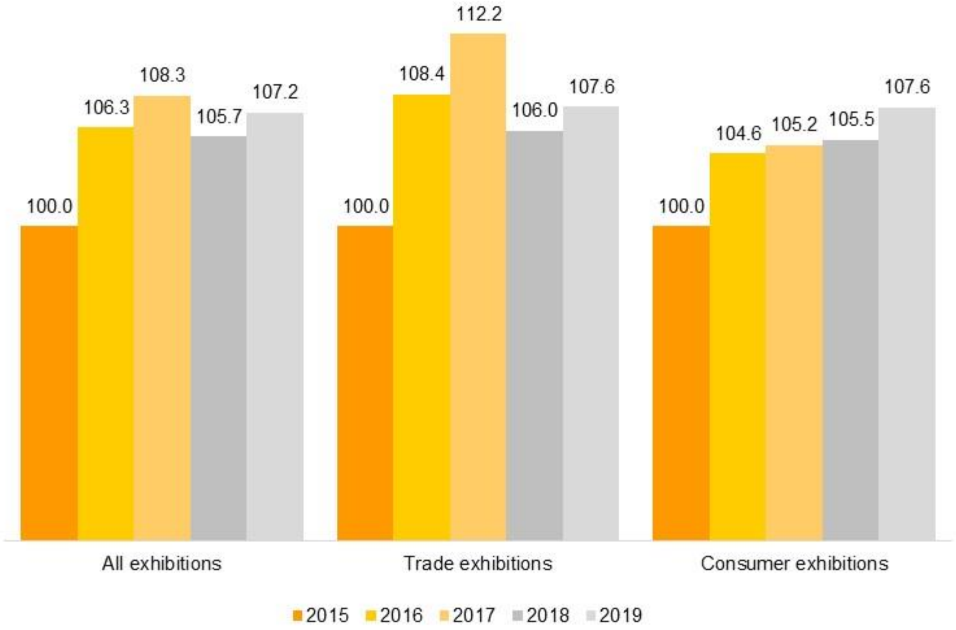
Open days for consumer exhibitions were also at their highest level since 2015.

VENUE HIRE DAYS (TREND 2015-19)



Note: chart shows change in average value relative to 2015. Figures are indexed. 2015 = 100
N=339

EXHIBITION OPEN DAYS (TREND 2015-19)



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

VISITOR NUMBERS

3.

Visitor numbers in 2019 were down on 2018 and at their lowest level since 2015.

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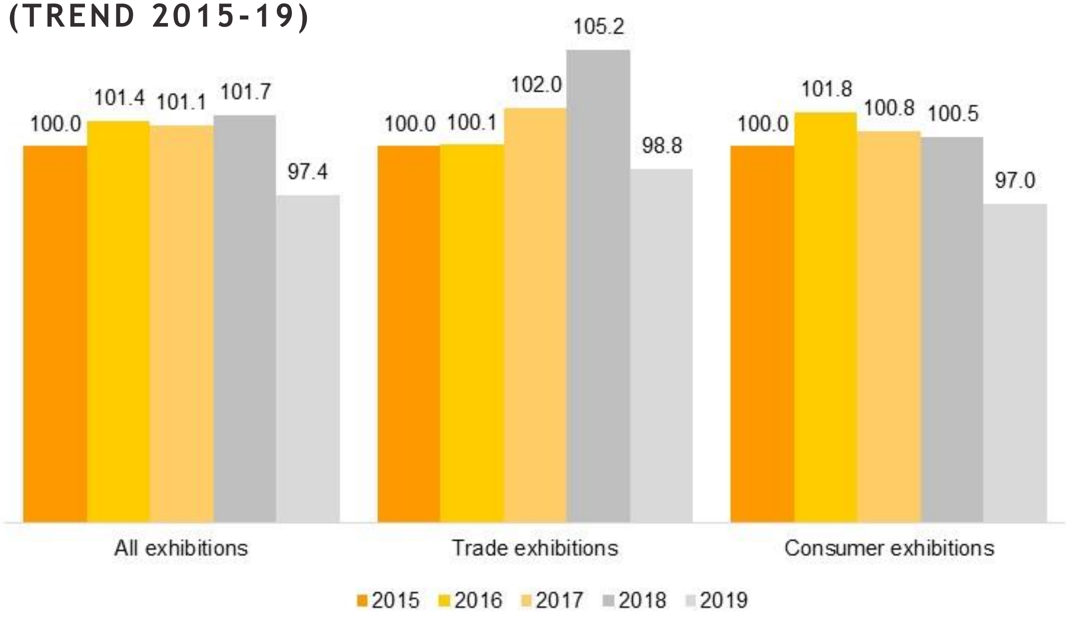
VISITOR NUMBERS
(TREND 2015-19)



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

4.

METHOD

RESEARCH APPROACH

4.

The approach to SASiE included the followingsteps:

- 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 (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.

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 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

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

VENUE CATEGORISATION

Category	Description	Venues
Primary	Primary venues have a capacity of over 20,000m^2. They are those that are proactive in the exhibitions sector and manage a high volume of events. Exhibitions will account for all (or the majority) of their turnover	ExCel London, National Exhibition Centre (NEC), Olympia London, and Scottish Event Campus (SEC)
Secondary	Typically, secondary venues have a capacity of 10,000 to 20,000m^2 (but some may be larger or smaller). They are moderately busy in the market place with approximately a couple of events each month. Exhibitions will form a significant part of their turnover.	ACC Liverpool, Business Design Centre, EventCity, Farnborough International Exhibition & Conference Centre, Harrogate International Centre, International Centre Telford, Manchester Central, P&J Live, Ricoh Arena.
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, Brighton Centre, StadiumMK, Eikon, Kia Oval, ICC Wales, Sandown Park Racecourse, Silverstone
Outdoor	Venues where a significant component of their exhibition space is outdoors.	East of England Arena, Stoneleigh Park, Kent Event Centre, Royal Highland Centre, Yorkshire Event Centre

RESEARCH APPROACH

4.

RESPONSE RATES

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

SAMPLE

	Supply (AEV Membership)	Sample
Primary	4	4
Secondary	8	6
Other	12	6
Outdoor	6	4

In addition, responses were received from 34 organisers.

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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 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

	A. No. of venues	B. Average no of exhibitions per venue	C. Estimated exhibitions
Primary	4	112.8	451
Secondary	8	35.5	284
Other	12	12.3	148
Outdoor	6	29.5	177

RESEARCH APPROACH

4.

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' 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 events that took place annually from 2015 to 2019 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.

ABOUT

5.

Association of Event Organisers

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

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

Event Supplier and Services Association

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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