EVENTS INDUSTRY ALLIANCE

AEO AEV ESSA

SASIE

SIZE AND SCALE INDEX FOR EXHIBITIONS 2022

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FOREWORD

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

The calendar year 2022 began with a continuing negative legacy of Covid-19 restrictions, resulting in yet more business event postponements. Initially confidence was in short supply as was the state of the industry's supply chains. The commencement of the war in Ukraine also added to the overall business uncertainty and very quickly the rises in energy costs that it initiated led to huge pressures on the sector, pressures which are expected to continue to have an impact on the industry's recovery in 2023.

Nevertheless, the demand to get back to live and in-person events was overwhelming and, even by March, the release of pent-up demand meant a strong return to volume attendances. While this is undoubtedly a time of enormous challenge for the entire events industry, it is also one of significant opportunity as the UK seeks to adapt to a new post-Brexit trading relationship with Europe and to satisfy the many differing demands from businesses and consumers to meet and enjoy event experiences safely and sustainably.

It is against this backcloth that we publish the SASiE 2022 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 seventh SASiE report shows the state of the industry post-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 in 2022 (an estimated 969 exhibitions) was almost back to pre-Covid levels, despite the industry's lockdown in the early months of the year. The typical (median) gross exhibition size was 5,000m² and, on average, an exhibition occupied a venue for 4.7 days. Although lower than in 2019, the number of visitors to exhibitions was over 6 million, with a typical (median) attendance of 2,800. The leisure sector continues to generate the highest proportion of exhibitions, accounting for almost one-fifth of all exhibitions staged in 2022.

The UK exhibitions industry's resilience and ability to recover better from Covid than many other countries is also confirmed by the latest UFI research, whose results show that UK exhibitions are performing well but highlight different concerns for organisers here from the rest of the world. The biggest pressure for the UK industry for the coming year is the national economy and global economic pressures, whereas worldwide results prioritised issues within management structures and digitalisation.

Exhibitions 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 exhibitions sector is renowned and respected. The industry has a vitally important role in driving international trade, exports and inward investment and in creating community cohesion, social well-being and prosperity to destinations across the UK, while at the same time supporting the government's growth agenda.

Shaun Hinds - Chair, EIA

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 2022, there were an estimated 969 exhibitions at the UK's main exhibition venues.

- These were split evenly between trade (44%) and consumer (42%) exhibitions.
- Half (49%) of these were held on an annual basis.
- In terms of gross exhibition size, a typical (median) exhibition was 5000m² in 2022. The average was 8,500m² in 2022 (including outdoor space).
- Typical (median) net exhibition size was 2,600m² – the average was 5,300m².
- 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 2022, there were an estimated 6.11m visits to exhibitions at the UK's main exhibition venues.

- The typical (median) event attendance was 2,800 – 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 2022.
- There was a slow start to 2022 with a lower number of exhibitions in January and February – the continuing impact of Omicron.
- March, September, October and November were the busiest exhibition months accounting for half of all exhibitions.

EXECUTIVE SUMMARY

2. Trends

Performance among the exhibition sector in 2022, while below pre-Covid levels, showed significant recovery with some indicators on a par or up on 2019.

- While overall numbers of exhibitions were down, the number of trade exhibitions was up on 2019.
- Overall, gross exhibition size in 2022 was also down on pre-Covid levels but consumer exhibition had largely recovered (with a slight increase in size).
- Both venue hire days and exhibition open days were broadly on a par with pre-Covid levels - they were very slightly up for consumer exhibitions.
- However, the average number of exhibiting companies had not recovered to the same extent as other volume indicators (number of exhibitions and visitor numbers) and were below pre-Covid levels, across all exhibition types.

Despite the slow start to the year, average visitor numbers in 2022 had nearly bounced back to 2019 levels and were only 13% down.

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 2022 and includes data on:

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

The second section provides a trend analysis for the period 2015 to 2022. 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 exhibitions.

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 (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.

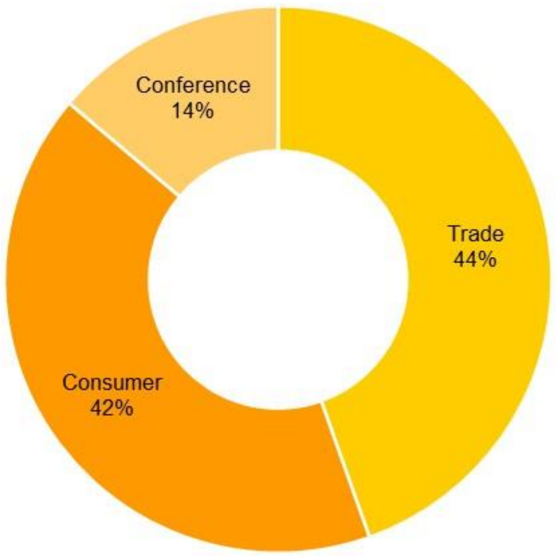
2.

DIMENSIONS OF EXHIBITIONS 2022

NUMBER AND TYPE OF EXHIBITIONS

In 2022, there were an estimated 969 exhibitions at the UK's main exhibition venues.

TYPES OF EXHIBITION



Trade exhibitions accounted for the largest proportion of the market – 44% (i.e. 432 exhibitions).

Consumer (or public) exhibitions had a similar share– 42% (i.e. 403 exhibitions). Conferences that incorporated a significant exhibition element (i.e. 500m^2 plus) accounted for 14% of the market.

NUMBER AND TYPE OF EXHIBITIONS

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 just over a third (36%) of all exhibitions held in 2022.

They hosted a higher proportion of trade exhibitions (48% of all trade exhibitions).

Other / outdoor venues hosted 29% of all exhibitions. They were more likely to host consumer exhibitions (42% of all consumer exhibitions) and conferences (43%).

Trade exhibitions tended to use primary and secondary venues. Consumer exhibitions were likely to use other / outdoor and primary venues.

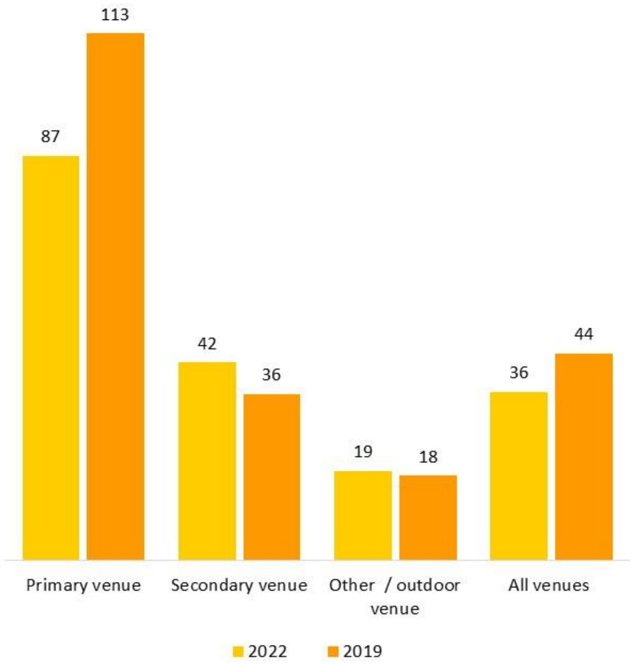
EXHIBITION SHARE -BY VENUE TYPE

Venue type	Trade exhibitions	Consumer exhibitions	Conference	Total exhibitions
Primary venues	206	137	3	346
Secondary venues	166	98	74	338
Other / Outdoor venues	60	168	57	285

Secondary venues also hosted about a third of exhibitions (35%) held in 2022 but a higher proportion of conferences with exhibitions (55%). This was partly a reflection of the positioning of many of these as conference centres, but also a reflection of the limited number of conference events at primary venues in 2022 (three compared to over 30 in 2019).

NUMBER AND TYPE OF EXHIBITIONS

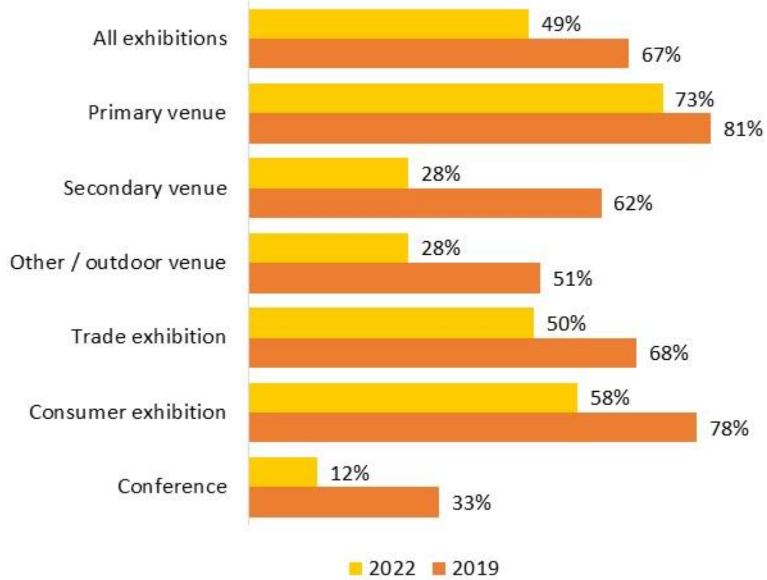
AVERAGE EXHIBITIONS - BY VENUE TYPE



On average, venues hosted three exhibitions a month but this varied significantly, with primary venues hosting four times the number of other / outdoor venues (albeit the number of exhibitions at primary venues was down on pre-Covid levels).

In 2022, 49% of exhibitions had been held on an annual basis. This was down on 2019 (when 67% had been annual events).

ANNUALLY-HELD EXHIBITIONS



Among primary venues, three-quarters of exhibitions were annual in 2022 – a significantly higher proportion than for other venues and a broadly similar level to 2019.

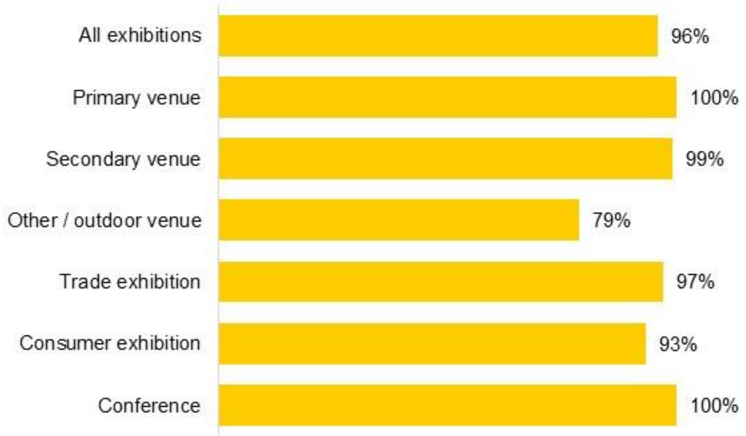
However, levels of annual exhibitions were significantly down in 2022 at secondary and other/outdoor venues compared to pre-Covid levels.

Consumer exhibitions were slightly more likely to be held on an annual basis than trade exhibitions (58% compared to 50%). Conferences were more ad-hoc.

Half of exhibitions were held on an annual basis – down from 2019.

EXHIBITION SIZE

PROPORTION OF INDOOR-ONLY EXHIBITIONS



Most exhibitions (96%) were indoor only with 4% including some outdoor space.

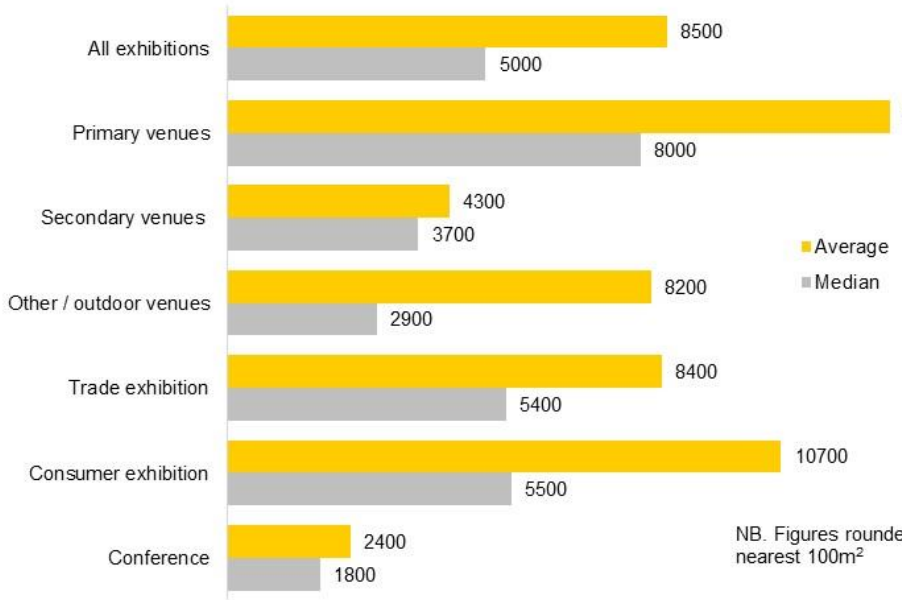
The proportion of exhibitions with an outdoor element was higher at other/outdoor venues (21%) and consumer exhibitions (7%).

Exhibitions at primary venues and consumer were above the All exhibition size.

Trade exhibitions had a higher median (but their average was slightly lower – a reflection of fewer larger events – see next page).

Typical (median) gross exhibition size (including outdoor space) was 5,000m^2. The average was higher at 8,500m^2 in 2022.

TOTAL GROSS EXHIBITION SIZE (AVERAGE AND MEDIAN)



NB. Figures rounded to the nearest 100m^2

EXHIBITION SIZE

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

Typical events were small/medium (i.e. 2,500-5,000m^2) Reflecting this, the median gross size for trade exhibitions was 5,000m^2. It was larger for primary venues (8,000m^2).

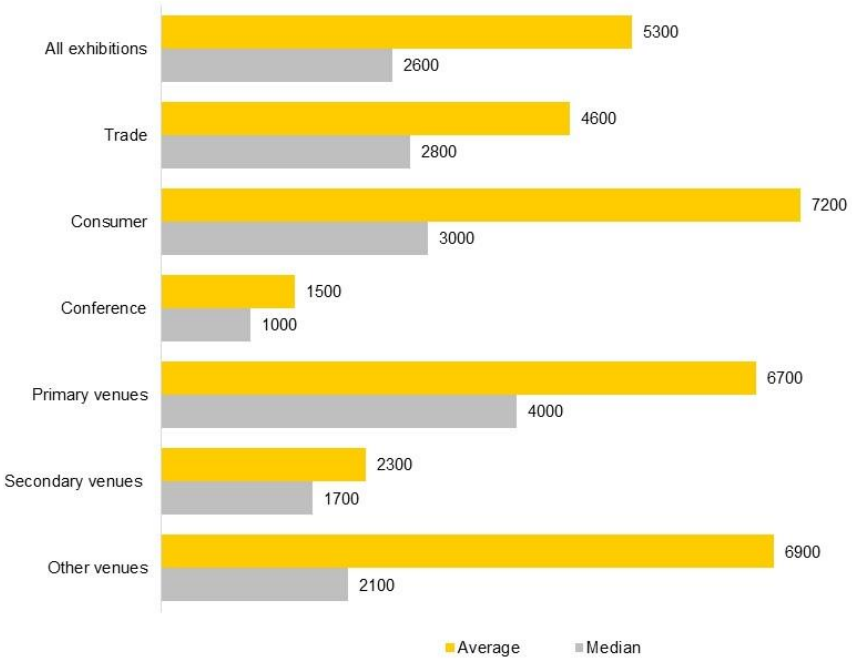
Just over a third of exhibitions (37%) were medium to large (8,000m^2) and these bring the overall average size up (to an average of 8,500m^2).

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)	24%	16%	20%	67%	4%	29%	44%
Small / medium (2500-5000 m^2)	30%	33%	29%	27%	24%	39%	27%
Medium (5000-8000 m^2)	18%	23%	17%	3%	22%	19%	11%
Medium/large (8000-15000 m^2)	15%	17%	18%	3%	27%	12%	7%
Large (15000 + m^2)	12%	11%	17%	0%	23%	1%	12%
Average (gross m^2)							
Indoor gross	7300	7900	8200	2400	12800	4300	4100
Total (indoor and outdoor) gross	8500	8400	10700	2400	12800	4300	8200
Median (based on total gross size)	5000	5400	5500	1800	8000	3700	2900

EXHIBITION SIZE

NET EXHIBITION SIZE (AVERAGE AND MEDIAN)

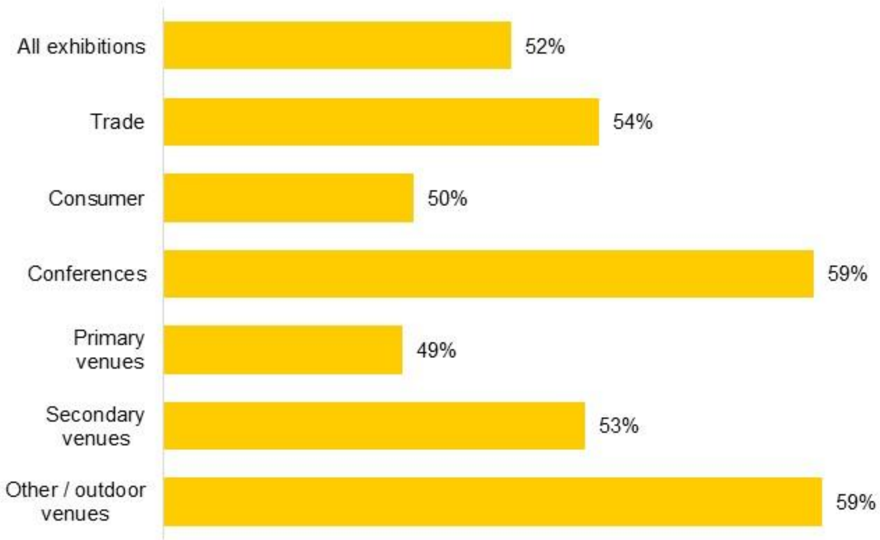


NB. Figures rounded to the nearest 100m²

Net space was typically about half of gross space in 2022. Net space was a slightly higher proportion of gross for trade exhibitions.

Typical (median) net exhibition size was 2,000m² – the average was 5,300m².

TOTAL NET SPACE AS A PERCENT OF GROSS SPACE

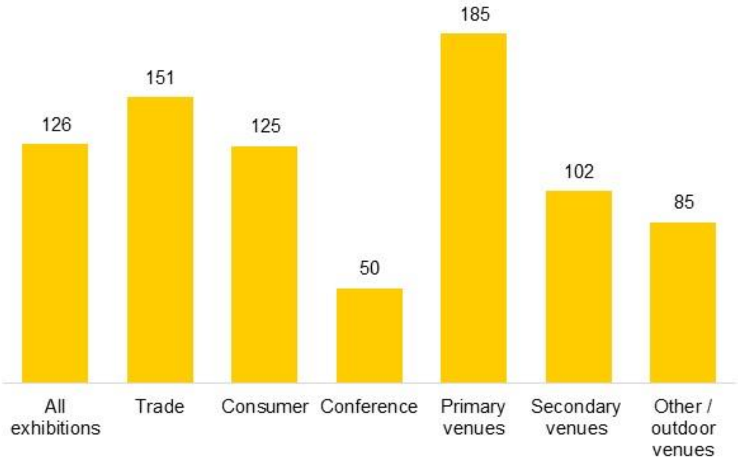


NB This analyis is based on exhibitions where the data is available for both gross and net exhibition sizes. It is based on total (not indoor) size. It is unweighted. The overall sample was 620 exhibitions.

EXHIBITORS

On average there were
126 exhibitors per event.

AVERAGE NUMBER OF EXHIBITORS



Trade exhibitions had significantly more exhibitors than consumer exhibitions in 2022 (151 compared to 125).

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

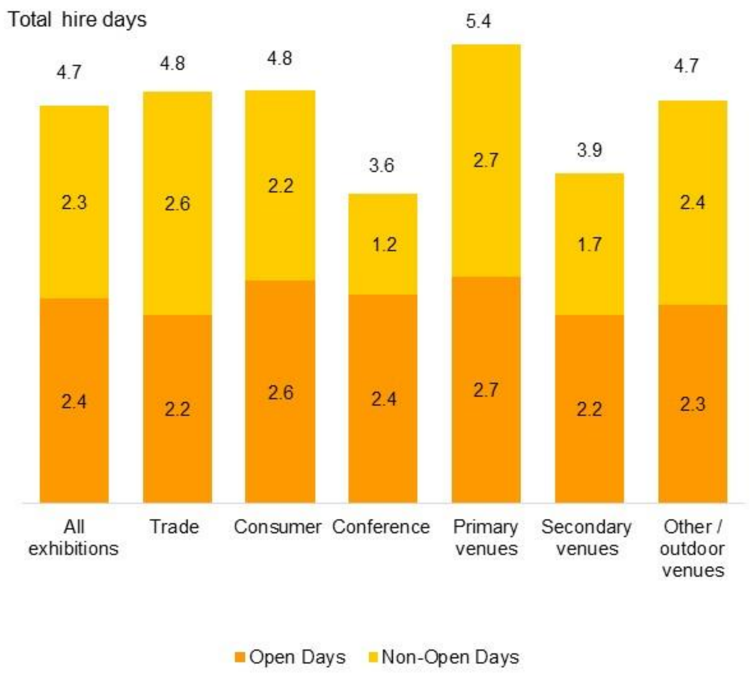
	Small (up to 50 exhibiting companies)	**Medium** (50-150 exhibiting companies)	**Large** (151 - 300 exhibiting companies)	Very **Large** (300+ exhibiting companies)
All exhibitions	23%	42%	25%	10%
Trade exhibitions	17%	45%	27%	12%
Consumer exhibitions	23%	41%	28%	8%
Conference	65%	30%	5%	
Primary venue	10%	38%	36%	16%
Secondary venue	31%	49%	16%	
Other / outdoor venue	42%	40%	14%	4%

A typical exhibition was, in terms of number of exhibitors, medium sized (i.e. 50-150 exhibitors). Primary venues tended to host larger exhibitions – with the highest proportion of large and very large exhibitions (52% of their exhibitions).

EXHIBITION DURATION

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)

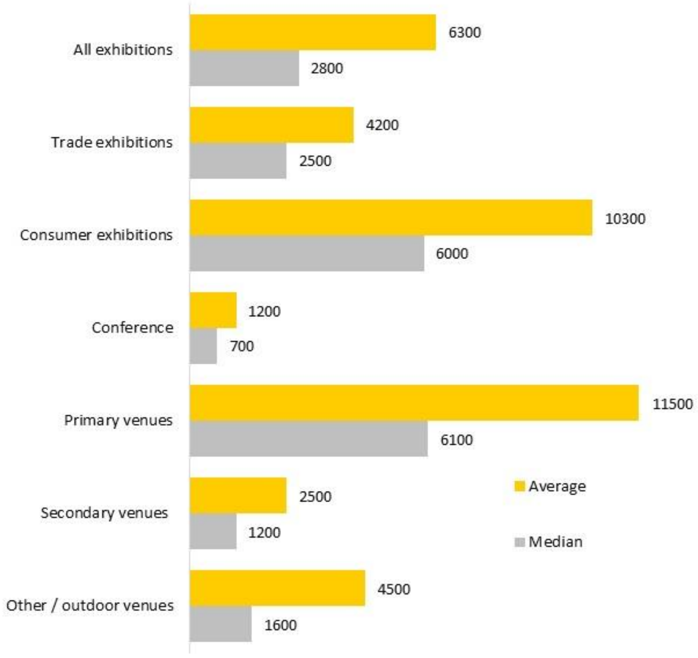
	Trade exhibitions	Consumer exhibitions	Conference	All exhibitions
Venue Hire Days				
1- 2 days	10%	16%	19%	13%
3 days	26%	30%	36%	29%
4 days	25%	13%	22%	20%
5 -7 days	30%	28%	22%	28%
8+ days	10%	13%	1%	10%
Open Days				
1 day	14%	18%	17%	16%
2 days	57%	40%	45%	49%
3 days	23%	21%	21%	22%
4 days	5%	16%	15%	10%
5 + days	2%	6%	3%	3%

The most common number of hire days was three days, and five to seven days. The most common exhibition duration, in terms of open days, was two days.

VISITOR NUMBERS

In 2022, there were an estimated 6.11m visits to exhibitions at the UK's main exhibition venues. Typical (median) attendance was 2,800 visitors.

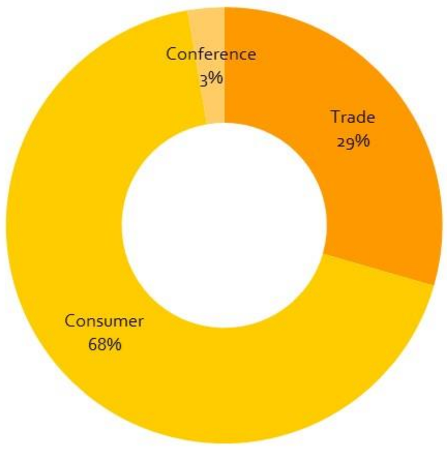
AVERAGE AND MEDIAN VISITOR NUMBERS

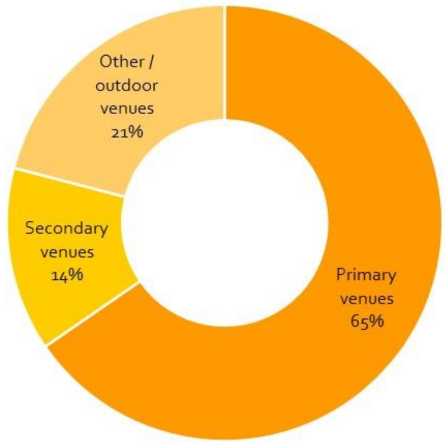


NB. Figures rounded to the nearest 100

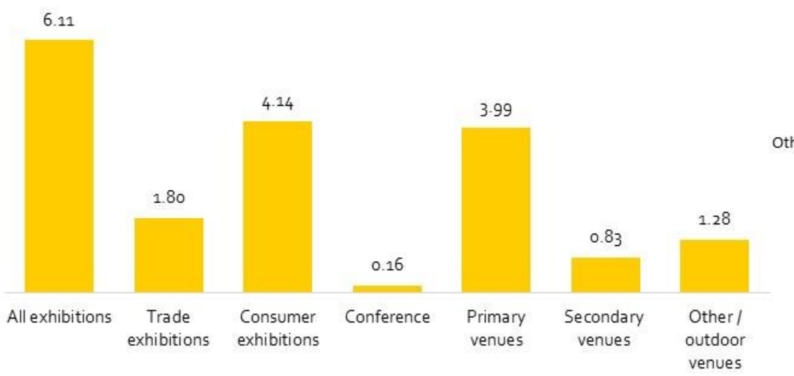
Consumer exhibitions (median 6,000 and an average of 10,3000 visitors) and exhibitions at primary venues (median 6,100 and an average of 11,5000) had the largest average number of visitors.

Consumer exhibitions (68%) and primary venues (65%) also accounted for the majority of visits.





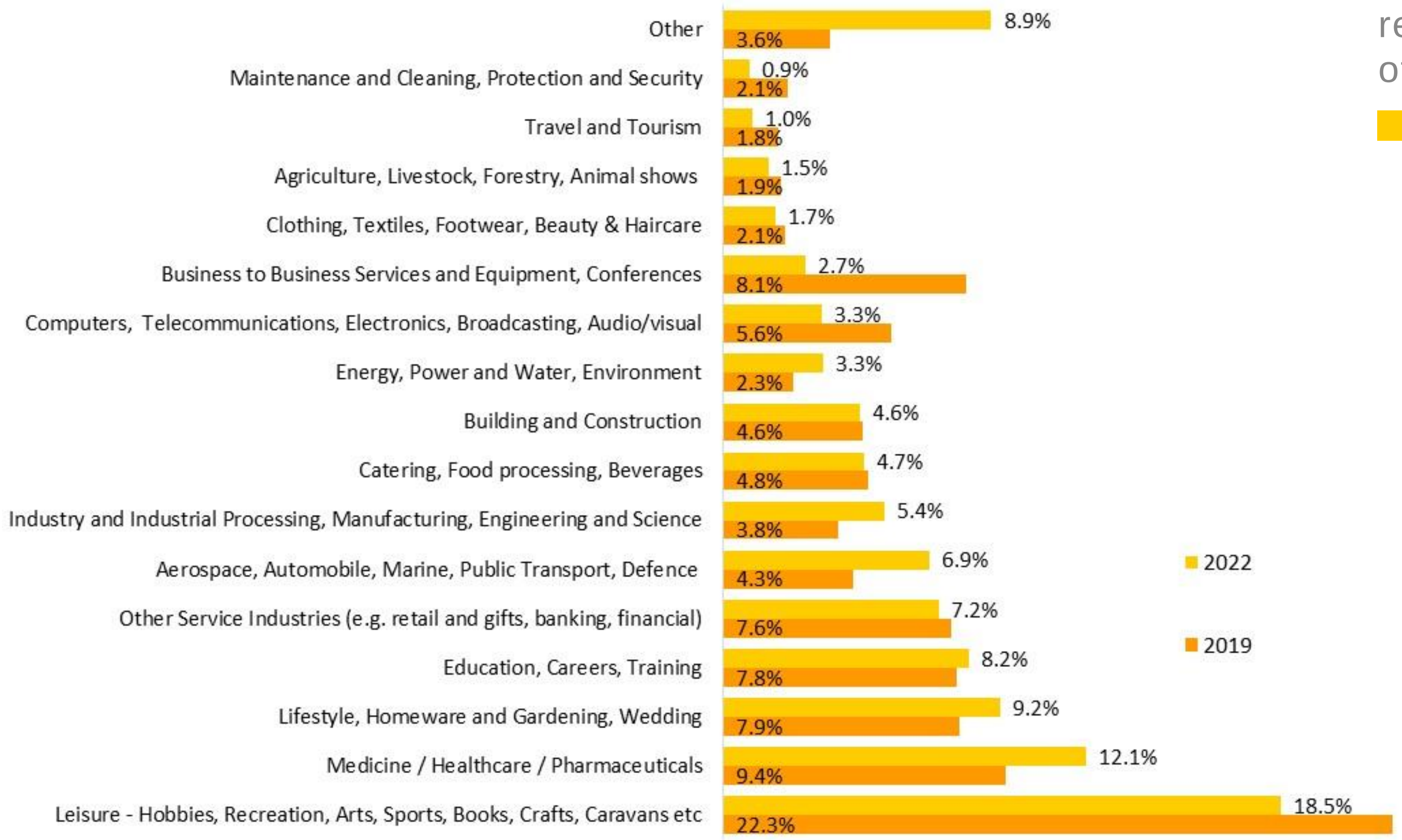
VISITOR NUMBERS



NB. Figures in millions

INDUSTRY SECTOR

INDUSTRY SECTOR (% OF EXHIBITIONS)



The leisure sector was the largest sector for exhibitions – representing just under a fifth of exhibitions in 2022.

INDUSTRY SECTOR

INDUSTRY SECTOR

	All Exhibitions (%)	Trade Exhibition (%)	Consumer Exhibition (%)	Conference (%)
Leisure (Hobbies, Recreation, Arts, Sports, Books, Crafts, Caravans etc.)	18.5%	3.2%	43.1%	0.8%
Medicine, Healthcare, Pharmaceuticals	12.1%	14.4%	2.2%	32.4%
Lifestyle, Wedding, Homeware and Gardening	9.2%	5.5%	16.4%	1.6%
Education, Careers, Training	8.2%	6.5%	9.3%	11.5%
Other Service Industries (e.g. retail and gifts, banking, financial)	7.2%	9.9%	3.8%	8.2%
Aerospace, Automobile, Marine, Public Transport & Defence	6.9%	6.9%	3.3%	15.8%
Industry & processing, Manufacturing, Engineering and Science	5.4%	10.4%	0.5%	2.4%
Catering, Food processing, Beverages	4.7%	6.6%	3.8%	0.8%
Building and Construction	4.6%	6.8%	3.3%	0.0%
Energy, Power and Water, Environment	3.3%	5.5%	0.6%	4.1%
Computers, Telecoms, Electronics, Broadcasting, Audio/Visual	3.3%	5.8%	0.3%	3.3%
Business to Business Services and Equipment, Conferences	2.7%	4.5%	0.8%	2.4%
Clothing, Textiles, Footwear, Beauty, Hair	1.7%	3.0%	0.8%	0.0%
Agriculture, Livestock, Forestry, Animal Shows	1.5%	3.0%	0.3%	0.0%
Travel and Tourism	1.0%	1.2%	1.1%	0.0%
Maintenance & cleaning / Protection & security	0.9%	1.6%	0.0%	0.8%
Other	8.9%	5.3%	10.3%	15.9%

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

Consumer exhibitions were strongly orientated to the Leisure sector (approximately 43% of consumer exhibitions), and the Lifestyle / Wedding / Homeware sector (16%) and the Education / Careers / Training sector (9%).

Trade exhibitions were more diverse in their industry sector – popular ones were medicine, healthcare and pharmaceuticals (14%, Industry & processing, Manufacturing, Engineering and Science (10%) and other service industries (10%).

Conferences with exhibitions also tended to be from a small number of sectors – Medicine / Healthcare / Pharmaceuticals (32%), Aerospace, Automobile, Marine, Public Transport & Defence (16%) and Education, Careers, Training (12%).

SEASONALITY

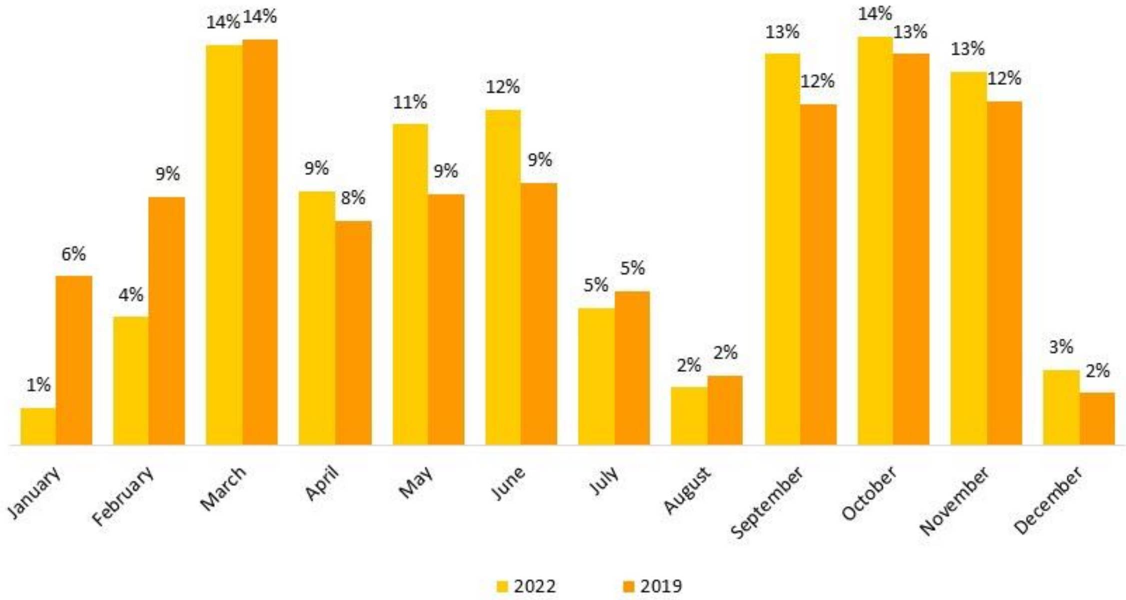
There was a slow start to 2022 with a lower number of exhibitions in January and February - the continuing impact of Omicron, but a robust recovery from March.

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

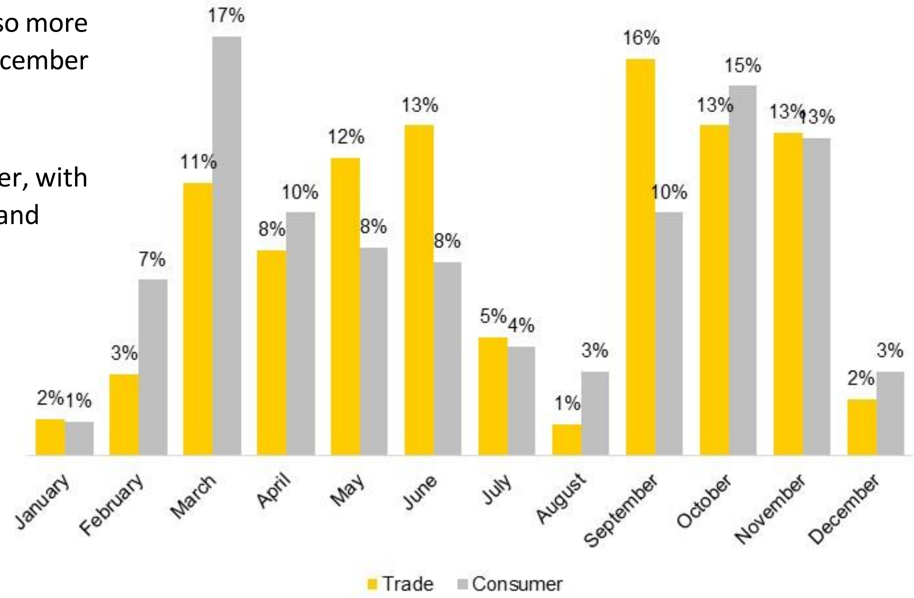
Consumer exhibitions peaked in March, October and November. They were also more likely to be held in July, August and December than trade events.

Trade exhibitions peaked in September, with significant numbers in June, October and November.

SEASONALITY
(% OF EXHIBITIONS)



SEASONALITY
(% OF TRADE & CONSUMER EXHIBITIONS)



3.

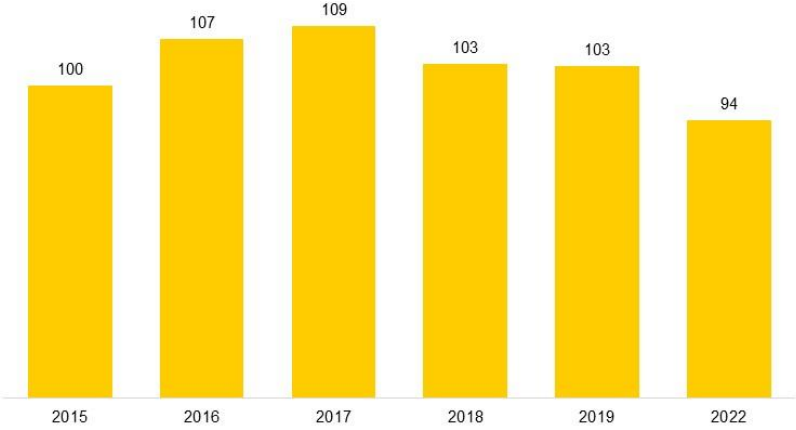
TRENDS

NUMBER OF EXHIBITIONS

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).

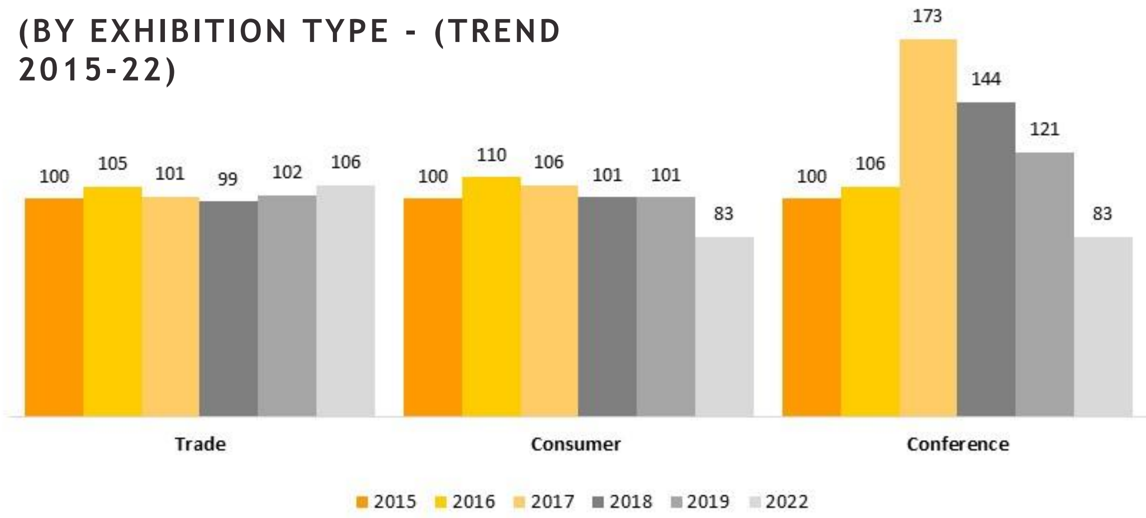
Numbers of exhibitions showed a strong post-Covid recovery in 2022 and were nearly on a par with 2019.

NUMBER OF EXHIBITIONS
(TREND 2015-22)



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.

NUMBER OF EXHIBITIONS
(BY EXHIBITION TYPE - (TREND 2015-22)



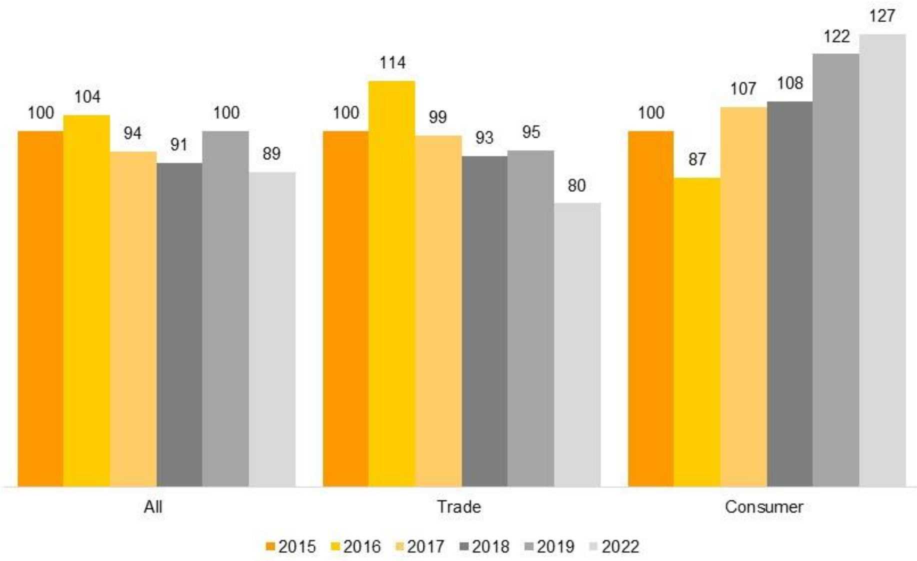
Trade exhibitions were actually up slightly (by 4%) on 2019 levels but consumer exhibitions and conferences experienced a slower recovery (down 18% and 32% respectively).

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 London, Scottish Event Campus, Telford International Centre and Yorkshire Event Centre

EXHIBITION SIZE

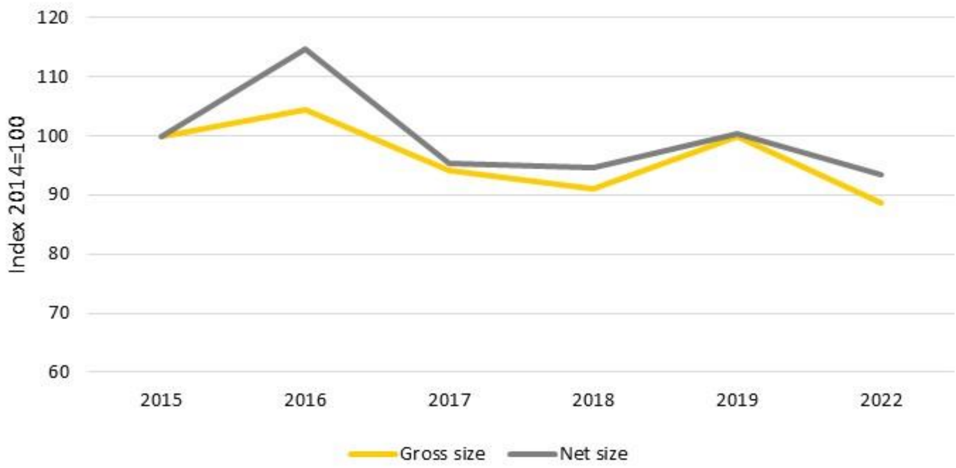
Consumer exhibitions were up slightly, in terms of gross exhibition size. Trade exhibitions were slightly below pre-Covid levels

GROSS EXHIBITION SIZE
(TREND 2015-22)



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

GROSS AND NET EXHIBITION SIZE
(TREND 2015-22)

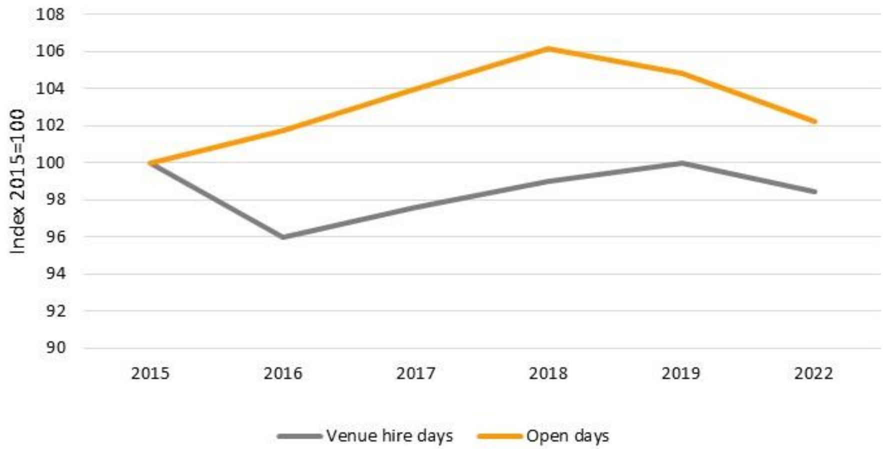


Note: chart shows change in average value relative to 2015. Figures are indexed. 2015 = 100

EXHIBITION DURATION

Both venue hire and exhibition open days were broadly on a par with pre-Covid levels - they were very slightly up for consumer exhibitions.

VENUE HIRE AND OPEN DAYS
(ALL EXHIBITION TREND 2015-22)



Open days, since 2015, have shown a more robust pattern than venue hire days.

VENUE HIRE DAYS
(TREND 2015-22)

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

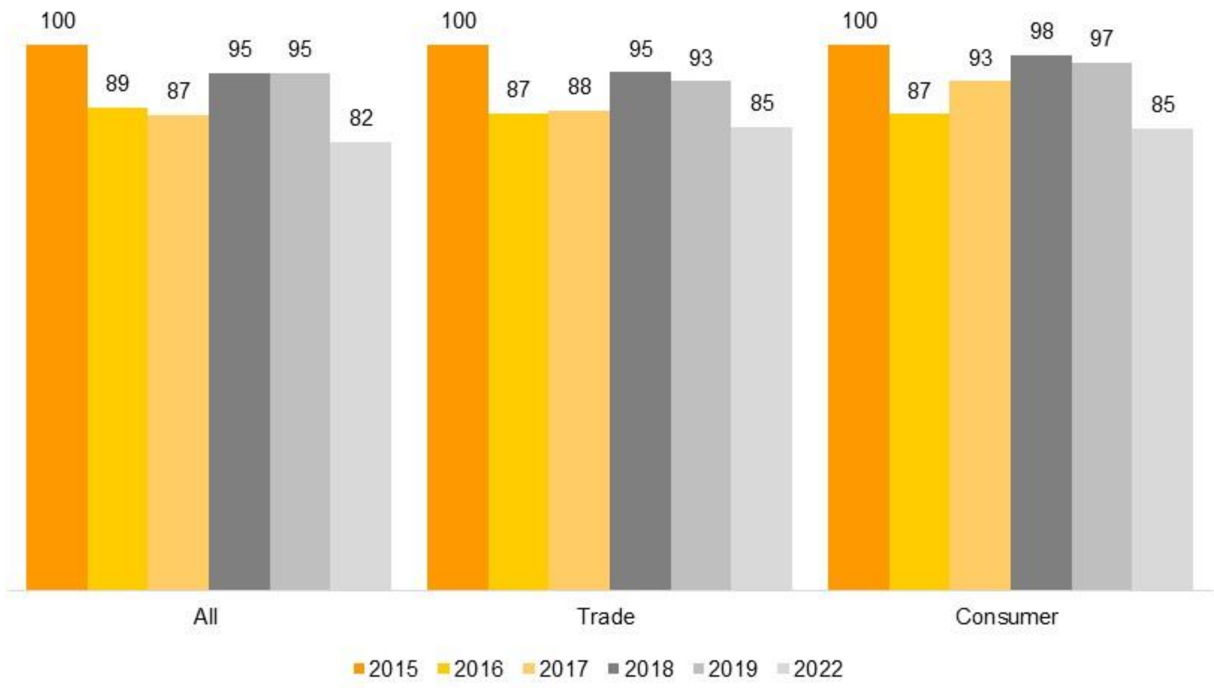
EXHIBITION OPEN DAYS
(TREND 2015-22)

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

VISITOR NUMBERS

Despite the slow start to the year, average visitor numbers in 2022 had nearly bounced back to pre-Covid levels (only 13% down on the year).

AVERAGE VISITOR NUMBERS
(TREND 2015-22)



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 London, NEC and SEC) only

EXHIBITORS

NUMBER OF EXHIBITING COMPANIES (TREND 2015-22)

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

The average number of exhibiting companies did not show the same recovery as other indicators and was significantly below pre-Covid levels.

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, 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, Farnborough International Exhibition & Conference Centre, Harrogate Convention Centre, Telford International, Manchester Central, P&J Live, Coventry Building Society Arena.
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, Brighton Centre, StadiumMK, Eikon Exhibition Centre, The Kia Oval, ICC Wales, Sandown Park Racecourse, Silverstone International Conference & Exhibition Centre, East of England Arena, Stoneleigh Park, Kent Event Centre, Royal Highland Centre, Yorkshire Event Centre

RESEARCH APPROACH

RESPONSE RATES

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

SAMPLE

	Supply	Sample
Primary	4	4
Secondary	8	8
Other /outdoor	15	5

In addition, responses were received from 28 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).

GROSSING UP PROCESS

	A. No. of venues	B. Average no of exhibitions per venue	C. Estimated exhibitions
Primary	4	86.5	346
Secondary	8	42.3	338
Other / outdoor	15	19.0	285

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 - 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 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 London, Scottish Event Campus, Telford International Centre and Yorkshire Event Centre. In 2022, this group hosted approximately two-thirds of total exhibitions.

The analysis on visitors numbers was, however, based on the four primary venues (ExCeL London, the NEC, Olympia London, 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 EVENTS INDUSTY 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 a committed trade body representing venues of all size and type 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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