

November Exhibit Space Grows 1.5%

BY DARLENE GUDEA, president; Carol Andrews, editor-at-large; and Hil Anderson, senior editor

Oceanside, CA – Trade shows slipped back into the familiar slow-growth mode in November, although the presence of plenty of large events resulted in solid raw numbers for exhibit space, exhibitor counts and attendance.

November is something of a three-week month due to the Thanksgiving holiday and its twin distractions of family get-togethers and so many amateur travelers clogging the airports. But the exhibition industry made the most of the tight schedule by welcoming more than a half-million attendees and carpeting more than 4.5 million net square feet (nsf) of exhibit space for the 20 shows surveyed for the Trade Show Executive (TSE) Dashboard of Monthly Trade Show Metrics.

Overall exhibit space ticked up 1.5% higher. Attendance growth was a more-modest 0.8% and the number of exhibitors backtracked slightly by (0.3)%

After calibrating the totals to exclude outliers and those shows on a non-annual schedule, the adjusted totals reached 4,547,735 nsf of exhibit space, 14,028 exhibitors and 502,937 attendees. That boiled down to an average of 239,354 nsf per show along with 738 exhibitors and 27,941 attendees. Of significant note was the fact that PACK EXPO International, the

largest show of the month with more than 1.1 million nsf, was not included in the adjusted totals due to its biennial schedule.

Of the 20 shows that took place this November, 11 were 100,000 nsf in size or larger. Eight shows were featured on the TSE Gold 100 roster of largest U.S. exhibitions, and four were included on the TSE Fastest 50 list of fastest-growing shows.

The Dashboard's performance was largely mixed: Only five of the 20 shows reported growth in all three metrics. Another three events experienced declines in all three categories.

PACKing Them In

Adding a new co-located show geared to the pharmaceutical industry proved to be just what the doctor ordered for the organizers of PACK EXPO International.

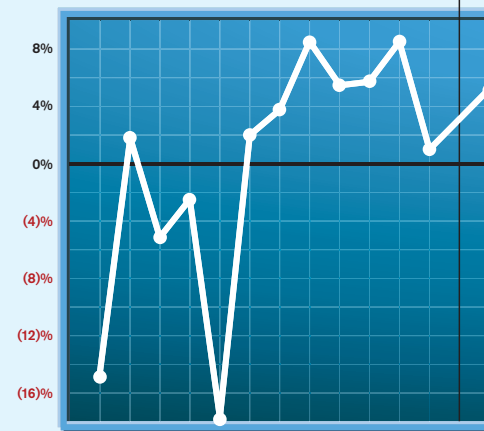
The launch of Pharma EXPO alongside PACK EXPO International at McCormick Place contributed to a 19.7% surge in the number of exhibiting companies specializing in putting things in boxes, bags, bottles and whatever else is needed to get products on the store shelves. PACK EXPO also reported a 9.4% increase in attendance, and exhibit space jumped

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Trade Show Executive Dashboard Snapshot – MONTHLY

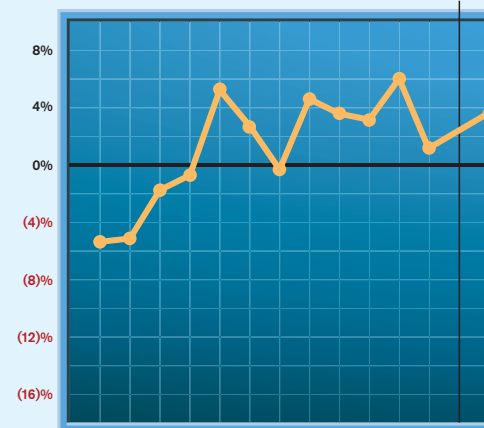
NSF OF PAID EXHIBIT SPACE

2010 JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC 2011



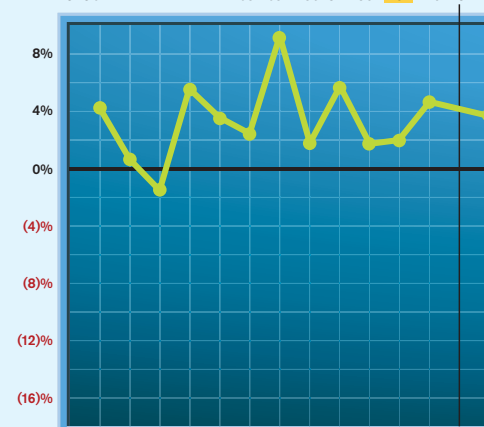
EXHIBITING ORGANIZATIONS

2010 JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC 2011



TOTAL ATTENDANCE

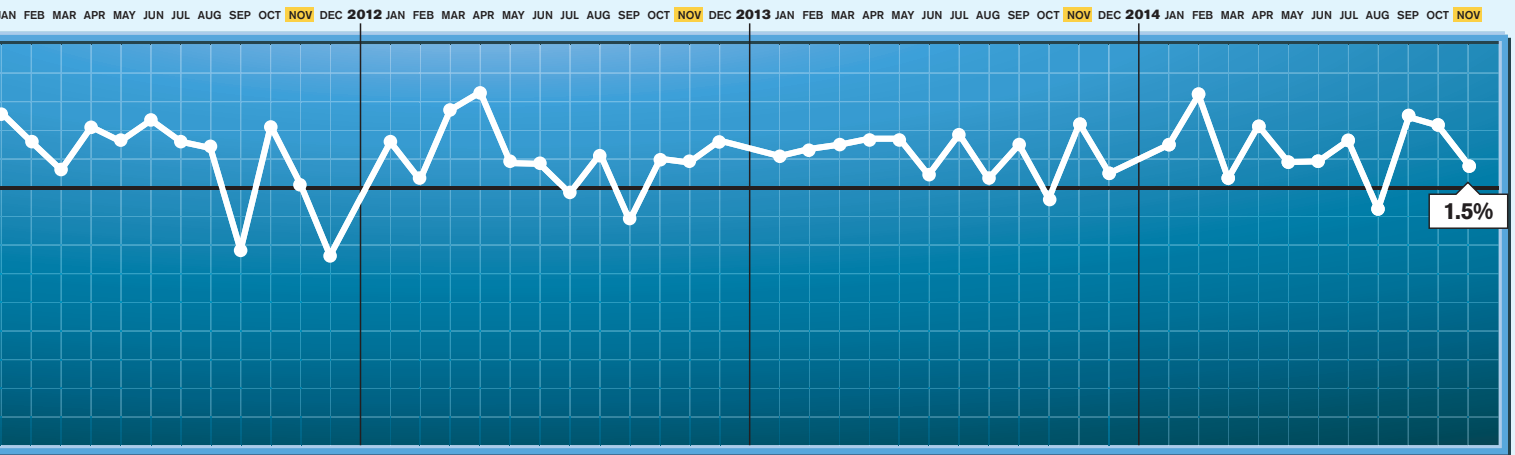
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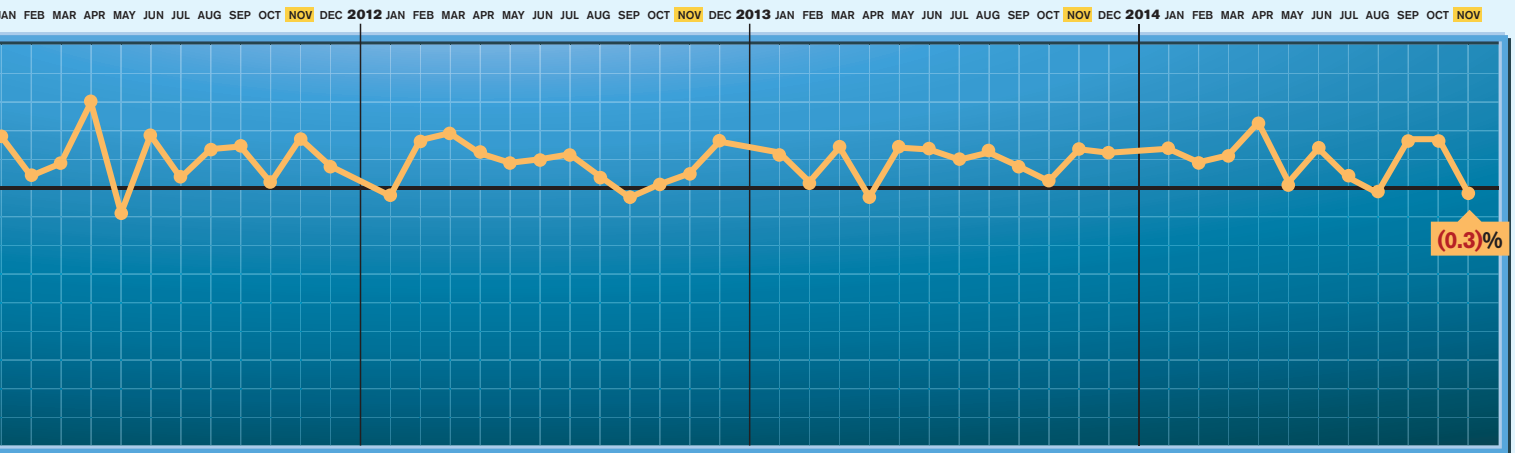
MONTHLY OVERVIEWS

Crowd Density. Exhibit floors were a little larger than 2013, but November attendance was virtually flat and the number of exhibitors retreated slightly.

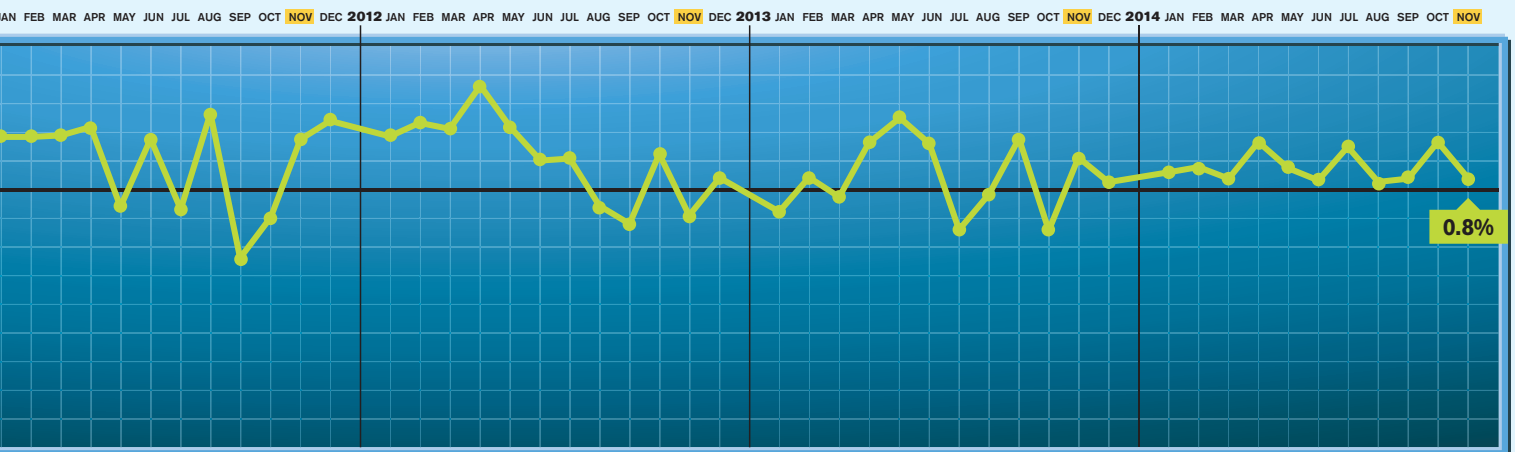
NSF OF PAID EXHIBIT SPACE



EXHIBITING ORGANIZATIONS



TOTAL ATTENDANCE



Continued from page 24

6.7% to 1,206,970 nsf, when compared to its 2012 show.

The continuing growth of the world economy has given biennial shows some robust metrics in recent years, but Pharma EXPO appeared to be particularly enticing to exhibitors and attendees alike. PMMI, The Association for Packaging and Processing Technologies, said twice as many 2014 attendees had listed their primary and secondary markets as “pharmaceuticals” than was the case in 2012.

“The success of the inaugural Pharma EXPO proved the strength of the PACK EXPO brand across all vertical markets and reinforced the industry’s view of PACK EXPO as the pre-eminent packaging and processing show in North America,” said Jim Pittas, senior vice president of PMMI.

Pittas said the nonpharmaceutical exhibitors were also reporting good crowds and brisk business. “Exhibitors sold machines right off the floor and collected leads from a steady flow of attendees,” he said.

PMMI won’t have to wait until 2016 for another crack at the thriving packaging industry. PACK EXPO East launches in February in Philadelphia, the hub of the major Pennsylvania-New Jersey pharmaceutical industry.

Growth Leaders

- Boutique Design New York is co-located with the International Hotel, Motel + Restaurant Show and enjoyed a 20.5% jump in exhibit space this year. The show, which caters to hotel designers, took up 66,750 nsf and has a good shot at an encore appearance on the next TSE Fastest 50. Attendance was up 22.8% and the number of exhibitors grew 14.8% to 410.
- The DEMA Show in Las Vegas also made a case for the Fastest 50 with a 16.4% increase in exhibit space to 144,890 nsf. The number of exhibitors and attendees from the diving industry also grew, but by less than 2.0%. National Trade productions and the Diving Equipment & Marketing Association said that of the 9,308 attendees, 8,300 were qualified buyers.
- The American Institute of Architects (AIA) Minnesota Annual Convention & Product Exposition urged its attendees to allow extra driving time to the Twin

Cities due to the looming likelihood of pre-Thanksgiving snow. And the roads must have been clear since attendance was unchanged from last year at 1,900. The increases, however, were seen on the exhibitor side. The number of exhibitors and the size of the exhibit floor both grew 16% to 232 and 23,200 nsf respectively.

Fabulous FABTECH

FABTECH made its even-year trek out of Chicago and saw some precipitous drops in the metrics from last year that were not unexpected.

There were double-digit drops across the board at the perennial Gold 100 show, including a (24.2)% plummet in attendance from the 2013 show in Chicago. But the five associations that organize FABTECH consider Chicago to be the big event and are used to wild swings in the metrics. The 2013 show at McCormick Place, for example, covered 632,256 nsf, which was up 40.7% from the previous year in Las Vegas.

Exhibit space at the 2014 show in Atlanta was off (12.4)% but still covered an impressive 553,800 nsf and had show managers upbeat. “Attendees said they were impressed with the size and scope of the show and by the large number of new products and technologies on display,” said John Catalano, co-manager. “Our exhibitors also told us they collected high-quality leads and sold machines right off the show floor.”

Catalano and his teammates were already looking forward to November 2015 back in the friendly confines of Chicago. FABTECH is forecasted to span more than 500,000 net square feet and draw 40,000 attendees this year.

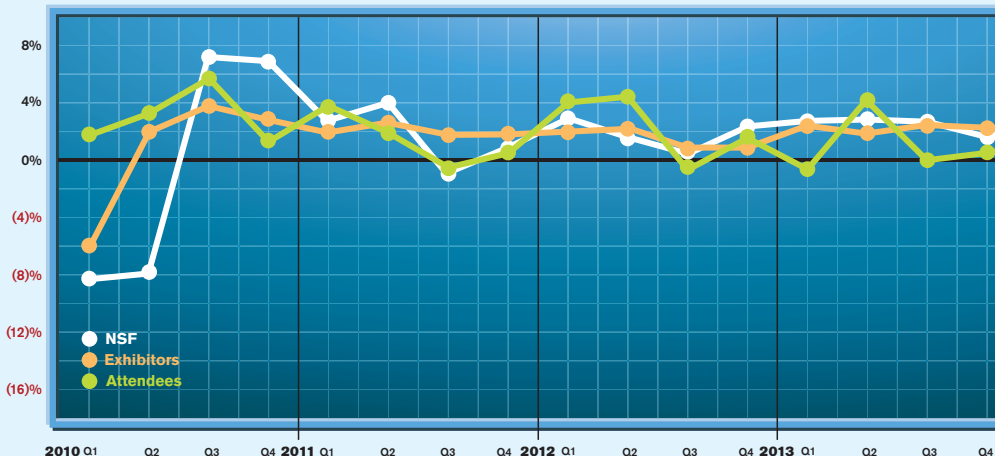
Top Cities

The car crowd hit The Strip in November and helped drive Las Vegas to the top position among Dashboard host cities. Las Vegas hosted a trio of shows, including the huge SEMA Show, AAPEX Auto-

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Dashboard Snapshot – CONSOLIDATED OVERVIEWS

QUARTERLY OVERVIEW



Modest Gains. The Third Quarter of 2014 posted some gains in all three metrics, but failed to cross the 2.0% threshold. The TSE Dashboard of Monthly Trade Show Metrics showed a 1.9% increase in exhibit space over the previous Third Quarter. Attendance perked up slightly by 1.3% and exhibitors grew 1.2%.

motive Aftermarket Products Expo and the DEMA Show, for a total of 1,802,590 nsf. The SEMA Show grew 6.5% this year and hit 1,129,000 nsf.

Chicago took second position with 1,638,470 nsf. The Windy City was led by PACK EXPO International and the Radiological Society of North America (RSNA) Scientific Assembly & Annual Meeting. And Orlando hosted three Dashboard shows totaling 985,795 nsf.

Next Month

Two major Gold 100 shows will open their doors in February under new ownership.

Advanstar Communications hosts the Winter edition of its massive MAGIC Market in Las Vegas for the first time since the company was acquired in the Fall by UBM. The management team that pushed MAGIC into the top 10 of the Gold 100 remained intact; the sprawling Las Vegas apparel event should again push 990,000 nsf.

Las Vegas will also host the largest World of Concrete in the past six years. Hanley Wood Exhibitions said more than 630,000 nsf of exhibit space was booked by 1,300 exhibitors before the New Year was rung in. Hanley Wood was acquired in late 2014 by Britain's Informa plc.

It's never too early to think about holiday shopping, and the American International Toy Fair brings retailers and manufacturers to New York City each February to determine what will be under the tree in 2015. The exhibit floor at the Jacob K. Javits Convention Center was sold out before Christmas 2014 with more than 419,000 nsf booked.

Other Gold 100 events on the calendar for February include Medical Design & Manufacturing West in Anaheim, The Rental Show in New Orleans, and the NADA/ATD Convention & Expo in San Francisco, organized by the National Automobile Dealers Association and the American Truck Dealers. **TSE**

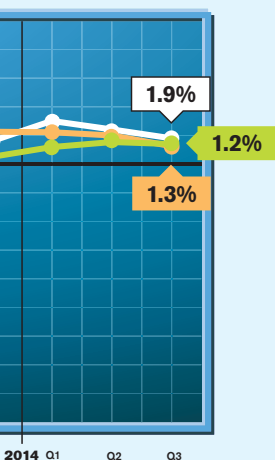


John Catalano

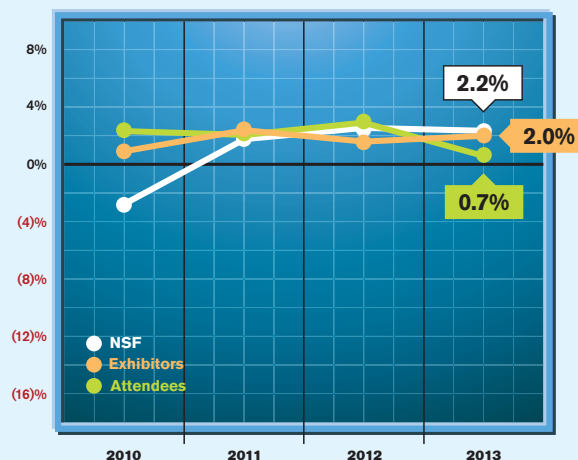


QUARTERLY OVERVIEW

Year	Month	NSF	Exhibitors	Attendance
2010	First Quarter	(6.0)%	(4.1)%	1.1%
	Second Quarter	(6.1)%	2.4%	3.8%
	Third Quarter	5.9%	2.6%	5.5%
	Fourth Quarter	5.1%	3.4%	2.8%
2011	First Quarter	3.2%	2.2%	3.7%
	Second Quarter	4.0%	2.7%	2.4%
	Third Quarter	(0.6)%	2.2%	(0.3)%
	Fourth Quarter	(0.1)%	1.7%	2.1%
2012	First Quarter	3.0%	1.8%	4.1%
	Second Quarter	3.4%	2.1%	4.6%
	Third Quarter	0.4%	0.8%	(0.3)%
	Fourth Quarter	2.1%	0.9%	1.3%
2013	First Quarter	2.5%	2.1%	(0.6)%
	Second Quarter	2.6%	1.8%	4.0%
	Third Quarter	2.4%	2.1%	0.0%
	Fourth Quarter	1.6%	2.1%	0.6%
2014	First Quarter	3.0%	2.3%	1.1%
	Second Quarter	2.4%	2.1%	1.7%
	Third Quarter	1.9%	1.2%	1.3%



ANNUAL OVERVIEW



Back in the Black. Trade shows ended 2013 with across-the-board gains, but not by much. Dashboard metrics for the entire year showed slight gains over 2012 in exhibit space and exhibitor count, and even slighter gains in attendance, which at 0.7% could be considered virtually flat. Exhibit space bumped up 2.2% and the number of exhibitors increased 2.0%.

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Dashboard – NOVEMBER TRADE SHOW METRICS

SPONSORED BY


BY CAROL ANDREWS,
 editor-at-large



**BENCHMARKS:
 AVERAGE GROWTH**

- NSF: 1.5%
- Exhibitors: -0.3%
- Attendance: 0.8%



TOP MANAGEMENTS*

- PMMI
- Specialty Equipment Market Association
- IAAPA



GROWTH LEADERS

- Boutique Design New York (BDNY)
- DEMA Show
- AIA Minnesota



TOP SECTORS*




- Automotive
- Packaging, Processing & Converting Tech
- Manufacturing & Industrial



TOP CITIES*

- Las Vegas
- Chicago
- Orlando

**Based on total nsf*

November 2014	Show Site	Net SF of Exhibits		Exhibitors		Total Attendance		Show Highlights
SHOW INFORMATION	2014/2013	2014/2013	VARIANCE	2014/2013	VARIANCE	2014/2013	VARIANCE	2014 VS. 2013
AAPEX Automotive Aftermarket Products Expo William T. Glasgow, Inc. www.aapexshow.com 	Las Vegas Las Vegas	528,700 521,000	1.5%	2,343 2,394	(2.1)%	145,587 139,587	4.3%	Attendance includes numbers for both AAPEX and SEMA. This was the largest show to date. Continued growth is attributed to globalization, economic indicators, environmental responsibility and technology. Additional factors included the number of vehicles reaching prime aftermarket age, the cost of fuel and the amount of unperformed maintenance.
AIA Minnesota Annual Convention & Product Expo AIA Minnesota www.aia-mn.org	Minneapolis Minneapolis	23,200 20,000	16.0%	232 200	16.0%	1,900 est. 1,900	No Change	The show celebrated its 80th annual event with an Access Excellence theme. Attendees included architects, contractors, engineers, landscape architects, manufacturers, interior designers and others.
American Public Health Association Annual Meeting & Expo American Public Health Assn. www.apha.org/events-and-meetings/annual	New Orleans Boston	57,500 58,700	2.0%	575 587	2.0%	12,752 12,559	1.5%	A new General Session, featuring a former U.S. Surgeon General, was a great success. The opening general session featured a presentation by journalist Isabel Wilkerson to an audience of more than 5,000.
Boutique Design New York (BDNY) HMG (Hospitality Media Group), LLC www.bdney.com 	New York New York	66,750 55,400	20.5%	410 357	14.8%	6,371 5,190	22.8%	The show enjoyed improved quality and quantity of attendees, specifically among hospitality owners/operators. There were more workshops and hubs for networking, inspiration and learning. All contributed to driving booth traffic and enhancing the trade fair experience.
DEMA Show National Trade Productions, Inc. www.demashow.com	Las Vegas Orlando	144,890 124,500	16.4%	641 629	1.9%	9,308 9,203	1.1%	The sold-out show enjoyed tremendous buzz. A highlight was the Image Resource Center, which was an exclusive area of the show floor featuring photo- and video-related exhibitors as well as seminars on underwater photography and videos.
FABTECH Society of Manufacturing Engineers www.fabtechexpo.com 	Atlanta Chicago	553,800 632,256	(12.4)%	1,477 1,513	(2.4)%	30,830 40,667	(24.2)%	The Chicago show in odd-numbered years has traditionally been the larger show. FABTECH consistently delivers high-quality buyers from across multiple industries. An extensive multi-level educational conference, numerous networking opportunities and special events provided added value for attendees from more than 70 countries.

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Dashboard – NOVEMBER TRADE SHOW METRICS

Continued from page 28

November 2014	Show Site	Net SF of Exhibits		Exhibitors		Total Attendance		Show Highlights
SHOW INFORMATION	2014/2013	2014/2013	VARIANCE	2014/2013	VARIANCE	2014/2013	VARIANCE	2014 VS. 2013
Green Industry Show & Conference (GISC) Landscape Alberta Nursery Trades Assn. www.greenindustryshow.com	Edmonton, AB Edmonton, AB	25,400 25,400	No Change	166 166	No Change	1,700 1,800	(5.6)%	The show is Alberta's premier trade show for the horticulture industry. It targets landscape construction and maintenance professionals, greenhouse, nursery and garden center operators, tree and lawn care specialists, turf producers and golf course professionals. Only trade/business personnel are admitted.
IAAPA Attractions Expo International Association of Amusement Parks & Attractions www.iaapa.org 	Orlando Orlando	552,195 528,578	4.5%	1,004 1,098	(8.6)%	30,500 29,000	5.2%	Indoor space was completely sold out in September, and outdoor exhibit space was the largest in show history. There were more than 100 first-time exhibitors. A record 33 press conferences were held during the show, a 74% increase over 2013.
International Pool/Spa/Patio Expo Hanley Wood Exhibitions www.poolsapatio.com	Orlando Las Vegas	148,600 140,850	5.5%	552 539	2.4%	11,103 11,120	(0.7)%	To grow the exhibit hall, show management targeted the commercial segment of the industry. The backyard segment increased as well. The show brought together builders, retailers, service companies, designers and landscape architects for face-to-face interaction, product review, knowledge and connections.
ISSA/INTERCLEAN North America ISSA – The Worldwide Cleaning Industry Association www.issa.com  	Orlando Las Vegas	285,000 292,200	(2.5)%	685 690	(0.7)%	14,123 16,217	(12.9)%	The show featured leading suppliers from 27 countries. 16% of attendees were from 71 countries outside of the U.S. There were more than 800 representatives from firms absent in last year's show. The top reason for attending was access to product lines, market intelligence and executive education. Many seminars were packed to room limits.
MRS (Materials Research Society) Fall Meeting Materials Research Society www.mrs.org	Boston Boston	55,000 EST. 55,000	No Change	259 est. 277	(6.5)%	7,500 EST. 5,858	28.0%	The show was sold out for the fourth consecutive year. 53 countries were represented and more than 40% of attendees were from outside the U.S. Show management reduced the number of booths to allow room for more traffic builders.
National Council for the Social Studies Annual Conference National Council for the Social Studies www.socialstudies.org/conference	Boston St. Louis	30,000 30,000	No Change	211 175	20.6%	5,228 4,300	21.6%	This was the highest attendance in eight years and the third highest ever for the show. It was also the first conference in Boston in 32 years. There were three new sponsor organizations and sponsorship revenue increased by 75%.
The NBM Show (Charlotte) National Business Media, Inc. www.thenbmshow.com	Charlotte Charlotte	19,000 19,000	No Change	91 99	(8.1)%	5,332 5,180	2.9%	Growth was attributed to the consistent quality of the show and attendance in the region as well as the date change from Spring to Fall. 89% of attendees influence and/or have purchasing authority and 70% will make a purchase within 90 days of the show.
Ohio School Boards Association (OSBA) Capital Conference & Trade Show Ohio School Boards Assn. www.ohioschoolboards.org	Columbus Columbus	54,100 60,100	(10.0)%	541 601	(10.0)%	9,700 EST. 10,000 EST.	(3.0)%	The event delivered practical solutions to help school district governance teams improve student learning and achievement. Exhibitors rated the show highly, citing good foot traffic and positive leads collected.

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Dashboard – NOVEMBER TRADE SHOW METRICS

November 2014	Show Site	Net SF of Exhibits		Exhibitors		Total Attendance		Show Highlights
SHOW INFORMATION	2014/2013	2014/2013	VARIANCE	2014/2013	VARIANCE	2014/2013	VARIANCE	2014 VS. 2013
PACK EXPO International PMMI – The Association for Packaging and Processing Technologies www.packexpo.com 	Chicago Chicago	1,206,970 1,131,632 (*12)	6.7%	2,352 1,965 (*12)	19.7%	74,004 67,641 (*12)	9.4%	The addition of Pharma EXPO helped boost attendance, with twice as many attendees identifying their primary or secondary markets as pharmaceutical. The success of the inaugural Pharma EXPO is an indication of the strength of the PACK EXPO brand across all vertical markets.
PLMA's Private Label Trade Show Private Label Manufacturers Association www.plma.com  	Rosemont, IL Rosemont, IL	274,300 253,400	8.2%	1,335 1,233	8.3%	5,000 4,800	4.2%	The 2014 show was the largest ever in the U.S. Growth was attributed to the launch of Sky Hall for large, anchor exhibitors who requested more booth space, an increase in international pavilions, and the addition of service companies that help bring product to market.
RSNA Scientific Assembly & Annual Meeting Radiological Society of North America www.rsna.org 	Chicago Chicago	431,500 EST. 437,675	(1.4)%	655 EST. 662	(1.1)%	54,500 EST. 54,008	0.9%	RSNA celebrated its 100th Annual Meeting with a 9% increase in professional attendance. For the first time, international registration exceeded 10,000. The Virtual Meeting attracted more than 5,700 participants. The economic impact of the show to Chicago is estimated to exceed \$135 million.
SC14, The International Conf. for High Performance Computing, Networking, Storage and Analysis Hall-Erickson, Inc. www.sc14.supercomputing.org	New Orleans Denver	141,800 137,600	3.1%	340 335	1.5%	10,198 10,589	(3.7)%	For the first time ever, the show featured an opening HPC Matters plenary led by Dr. Eng Lim Goh, senior VP and CTO at SGI. He discussed the vital nature of supercomputers across much of the world's economic, cultural, scientific and social accomplishments. Another first was that the Job Fair sold out with 30 organizations represented.
SEMA Show Specialty Equipment Market Association www.semashow.com 	Las Vegas Las Vegas	1,129,000 1,060,000	6.5%	2,380 2,380	No Change	145,587 139,587	4.3%	Attendance figures include numbers for both SEMA and AAPEX. Displays were segmented into 12 sections and a New Products Showcase featured nearly 2,000 newly introduced parts, tools and components.
Win-Door North America Win-Door, c/o Shield Associates Ltd. www.windoorshow.com	Toronto Toronto	27,000 27,000	No Change	131 135	(3.0)%	3,218 3,300	(2.5)%	This fenestration industry show offers direct access to the entire Canadian market. Attendees came from across North America and around the globe to find the products, technology and innovations that drive the market.
DASHBOARD ANALYSIS:		Net SF of Exhibits		Exhibitors		Total Attendance		
Total (Sum of all figures submitted by show management)		5,754,705 5,610,291		16,380 16,035		584,441 572,506		
Adjusted Total (Excludes outliers and shows in which an apples-to-apples comparison is not possible)		4,547,735 4,478,659		14,028 14,070		502,937 499,007		
Averages (Based on Adjusted Totals)		239,354 235,719		738 741		27,941 27,723		
Percentage of Growth (Based on Adjusted Totals)		1.5%		(0.3)%		0.8%		

 **COMING UP NEXT MONTH:**

A review of shows held in December