

Trade Shows Narrowly Avoid Red Ink in Exhibitor Growth in May

BY DARLENE GUDEA, *president*; CAROL ANDREWS, *editor-at-large*; and HIL ANDERSON, *senior editor*

Oceanside, CA – The metrics for May trade shows finished in the black, but the growth rate compared to the month before was modest at best.

In all three metrics categories of the *Trade Show Executive (TSE) Dashboard of Monthly Trade Show Metrics*, growth failed to break through the 2%. That contrasted with a much more robust April where exhibit space and exhibitors topped 4% and attendance was up a healthy 3.3%.

By comparison, May exhibit space was up 1.8% and the exhibitor count increased only 0.3%. Attendance in May perked up by a slight 1.6%.

Some of the Spring slump appeared to be the result of seven shows being excluded from the *Dashboard's* adjusted totals for a variety of reasons, such as a biennial schedule or variances of more

than 25% in their numbers.

There were two dozen shows, including seven medical conferences and annual meetings, surveyed for the *May Dashboard*; eight of them were large enough to be ranked on the *TSE Gold 100* list of largest U.S. trade shows. Four shows were excluded from the adjusted totals altogether and three others were held out of one of the *Dashboard* metrics.

Exhibit space in the adjusted totals finished just shy of 5 million net square feet (nsf) at 4,999,840 nsf. The number of exhibitors totaled 15,134 and attendance reached 424,986. The totals boiled down to an average of 263,149 nsf per show, plus 797 exhibitors and 22,368 attendees.

Despite the flat numbers for May, only two shows reported declines in all three metrics. And eight shows improved in all three categories.

Bullish on Hospitality

Two *Gold 100* shows geared to the hospitality industry reported solid metrics.

Emerald Expositions said its *Hospitality Design Exposition and Conference (HD Expo)* attendance was up 5.8% at 14,664. Exhibitors grew 5.3% and the exhibit floor at Mandalay Bay was up 2.2% at 251,560 net square feet.

"It was clear this year that there is a revitalized state of excitement within the industry," said Group Show Director Liz Sommerville. "We saw our most significant attendance numbers to date and welcomed innovative new exhibitors."

The *National Restaurant Association (NRA) Restaurant, Hotel-Motel Show* in Chicago increased its exhibit space 5.7% to 612,570 nsf and increased its exhibitor total by 4.4% to 2,170. Attendance from the hospitality sector was up nearly 13%.

The *NRA Show* was again co-located with the *International Wine, Spirits & Beer Event (ISWB)*, which this year launched a new pavilion for the growing craft beer industry.

Speaking of the microbrewery industry, VP International launched a new show for up-and-coming brewers in May. The inaugural *Craft Beverage Expo* in San Jose drew 1,300 attendees and spanned 18,000 nsf of exhibit space.

"The turnout was incredible," said Executive Director Kellie Shevlin. "These folks work very hard at their craft and as small business owners, it can be challenging for them to get away, even for networking and educational purposes. We're proud they chose our event to connect with like-minded people," she said.

Growth Leaders

- *AISTech*, which bagged a *Grand Award* for attendance growth at the *Trade Show Executive Fastest 50* this year, turned in another good performance for 2014. The event's exhibit space in Indianapolis spiked 9.0% to a record 93,100 net square feet. At the same time, however,

▼ **Cutting Edge Demo.** Attendees at the *NRA Restaurant, Hotel + Motel Show* at McCormick Place hone their cutting skills at a booth of one of the 2,170 exhibitors. Exhibit space grew 5.7% to 612,570 net square feet.

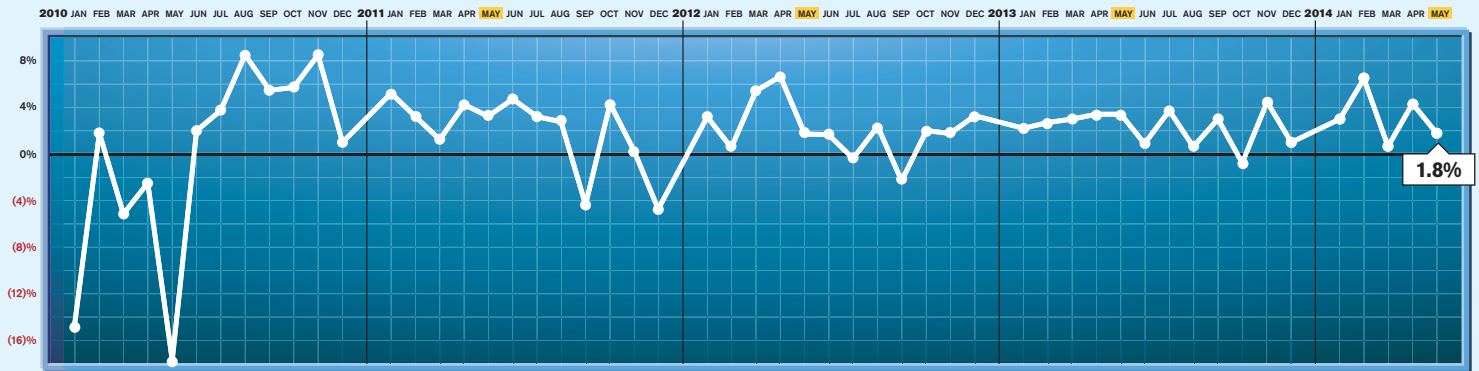


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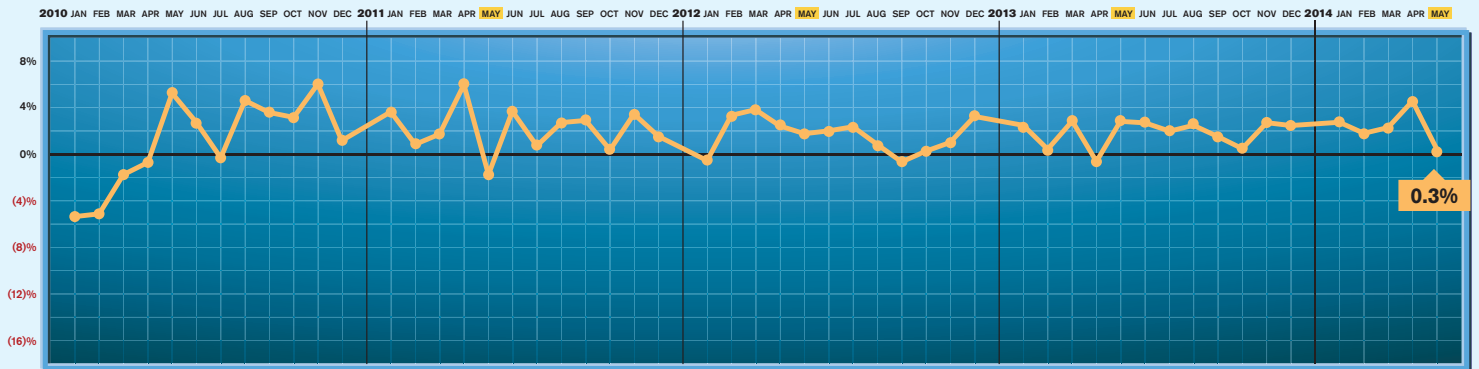
Dashboard Snapshot – MONTHLY OVERVIEWS

Mellow May. This May was about the same as last May in terms of trade show metrics. Exhibit space and attendance grew, but by less than 2% over May 2013. Exhibitor growth was even flatter at 0.3%.

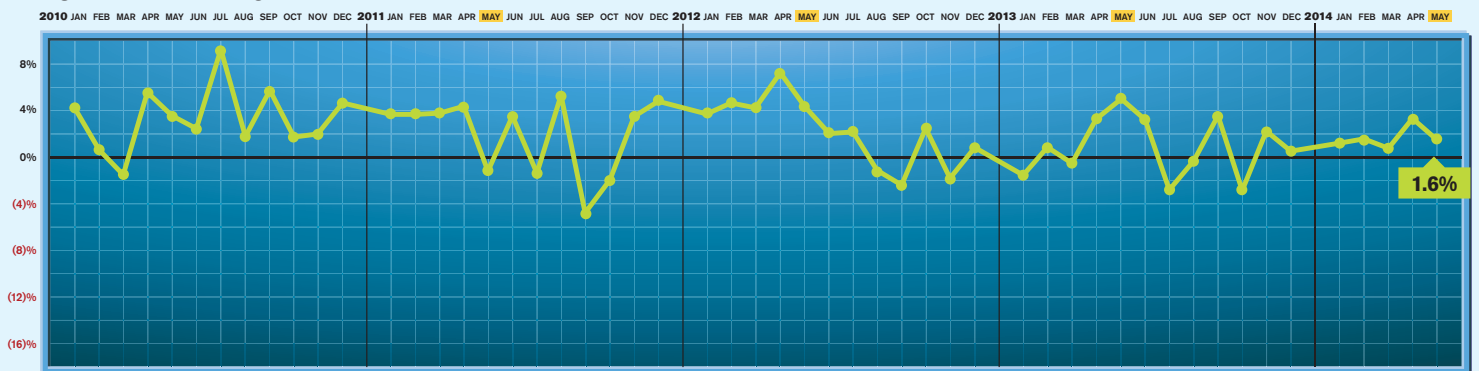
NET SQUARE FEET OF PAID EXHIBIT SPACE



EXHIBITING ORGANIZATIONS



TOTAL ATTENDANCE



attendance was off (15.6)% at 6,982. The slippage was not a huge surprise since last year's AISTech took place in Pittsburgh, the heart of steel country and easily accessible to day trippers.

- *American Thoracic Society International Conference* in San Diego experienced a (5.9)% drop in attendance, but made up for it with the largest exhibit floor since 2008. Exhibitors grew 8.9% and

the exhibit floor grew 15% to 49,100 nsf.

- Nothing micro about growth stats for the *American Society for Microbiology (ASM) General Meeting*. Attendees multiplied 14.3% over last year to 8,415 while exhibit space in Boston grew 10.8% to 48,300 net square feet. Booth sales were at an all-time high, and the schedule was tweaked to add some hours when attendees could walk the aisles without

missing any sessions. The ASM used the meeting to announce the co-location of its chemotherapy conference with the International Society of Chemotherapy for Infection and Cancer's *International Congress of Chemotherapy*. The joint conference will take place in San Diego on September 18-21, 2015.

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• **Montreal Manufacturing Technology Show.** The Society of Manufacturing Engineers reported that its biennial show for the Canadian manufacturing sector grew to 58,055 nsf, a 13.4% jump from 2012. Exhibits included the growing field of 3D printing. Show management held an evening networking event for attendees from small Montreal companies who could not get away from their shops during the day, but overall attendance drifted lower by (0.2)%.

RECon Holds Steady

The largest May show was *RECon*, *The Global Real Estate Convention*, which last year was No. 14 on the *Gold 100* with 793,400 nsf of exhibit space. The 2014 edition grew 2% to 809,400 nsf. Attendance in Las Vegas ticked 1.5% higher at 34,000 and the ranks of exhibitors increased by a grand total of one company, totaling 1,062.

The International Council of Shopping Centers (ICSC) over the years has fashioned *RECon* into a productive networking and deal-making forum for retail chains, shopping center developers,

and financiers. Improving economic conditions in the U.S. has pushed more capital and new lenders into the domestic market at a time when more retail and grocery chains have re-focused and revved up expansion plans.

The ICSC says that about half of the significant shopping center deals struck annually in the U.S. take place at *RECon*, which has prompted brokers and other attendees to increase their company delegations. One brokerage network, Sperry Van Ness International Corp., said it had 100 of its people in Las Vegas for *RECon* with 750 individual meetings with potential clients on its schedule.

Top Cities

Las Vegas was the site for six shows which collectively spanned 2,435,260 nsf of exhibit space, four of which were on the *Gold 100* roster. The *NRA Show* and the *American Society for Clinical Oncology Annual Meeting* put Chicago in the No. 2 slot with 1,134,370 nsf. Houston was in third place, thanks to *Offshore Technology Conference (OTC)* and its 680,025 nsf of exhibit space.

Next Month

The pre-Christmas rush is already underway across the U.S. with major shows in August geared toward consumer products that will fill store shelves this Fall.

NY Now said it expected as many as 600 new exhibitors for its August 16-20 run at the Jacob K. Javits Convention Center and Manhattan's Pier 94. GLM will again be running the venerable gift show, but under its new ownership, Emerald Expositions.

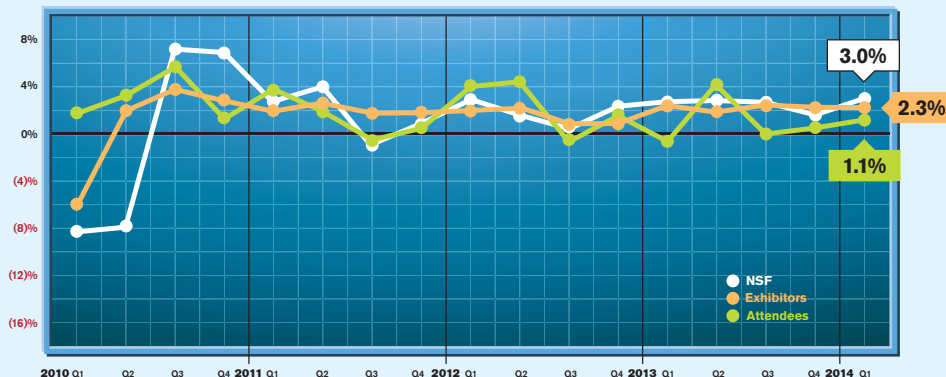
MAGIC MARKET WEEK August brings designers and buyers from the fashion retail sector to Las Vegas in droves. Advanstar Communications broke the 1 million nsf barrier last year and estimated that \$200 million in orders were written at the show each day.

Las Vegas also hosts Emerald's *ASD Las Vegas August* merchandise show, which last Summer covered 664,229 nsf.

And finally, only at *Outdoor Retailer Summer Market* would exhibitors and attendees be able to hit the ground running at dawn for a nine-mile charity relay race around Salt Lake City before the show opens for the day. **TSE**

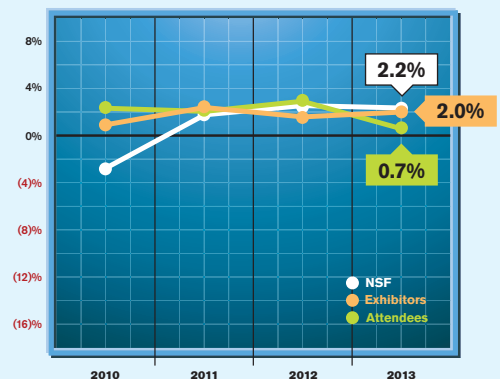
Trade Show Executive Dashboard Snapshot – CONSOLIDATED OVERVIEWS

QUARTERLY OVERVIEW



Promising Start. The 2014 trade show calendar was on a gradual increase after three months. The Q1 metrics included a 1.1% increase in attendance, which was overshadowed by more robust gains of 2.3% in the exhibitor ranks and 3.3% in exhibit space.

ANNUAL OVERVIEW



Flat Year for Attendance. A nagging lack of enthusiasm in the attendance metric was evident all year long. But all three metrics were higher over the course of the year. Attendance rose only 0.7%. Exhibit space bumped up 2.2% and the number of exhibitors increased 2.0%.

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Dashboard – MAY TRADE SHOW METRICS

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BY CAROL ANDREWS,
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BENCHMARKS:
AVERAGE GROWTH
 • NSF: 1.8%
 • Exhibitors: 0.3%
 • Attendance: 1.6%



TOP MANAGEMENTS*
 • Reed Exhibitions
 • International Council of Shopping Centers
 • Offshore Technology Conference



GROWTH LEADERS
 • ATS Intl. Conference
 • Montreal Manuf. Tech Show
 • American Society for Microbiology Meeting






TOP SECTORS*
 • Retail Real Estate
 • Food
 • Medical




TOP CITIES*
 • Las Vegas
 • Chicago
 • Houston

**Based on total nsf*

May 2014	Show Site	Net SF of Exhibits		Exhibitors		Total Attendance		Qualitative Data
SHOW INFORMATION	2014/2013	2014/2013	VARIANCE	2014/2013	VARIANCE	2014/2013	VARIANCE	2014 VS. 2013
AISTech – The Iron & Steel Technology Conference & Exposition AIST – Association for Iron & Steel Technology www.aist.org 	Indianapolis Pittsburgh	93,100 85,400	9.0%	531 506	4.9%	6,982 8,270	(15.6)%	Records were set in net square feet, number of exhibiting companies, average booth size and number of technical presentations. A total of 44 countries were represented.
All Baby & Child Education Conference & Trade Show All Baby & Child Corporation www.allbabyandchildsec.com 	Lake Buena Vista, FL Las Vegas	22,100 21,700	1.8%	150 144	4.2%	831 841	(1.2)%	The show had the largest retailer and exhibitor participation to date. Retailers were given the opportunity to meet with their key suppliers to further develop professional relationships, view new mid-year product introductions, and discuss methods to improve or sustain profitability for all parties.
Allied Beauty Association Show – Edmonton Allied Beauty Association www.abacanada.com	Edmonton, AB Edmonton, AB	26,400 37,600	(29.8)%	50 49	2.0%	3,816 4,348	(12.2)%	Roughly the same number of exhibitors took less space this year, but they were renowned companies featuring a huge range of cosmetic products. Attendees included make-up artists, salon owners, beauty consultants, skin therapists and more.
American Association of Critical-Care Nurses (AACN) National Teaching Institute & Critical Care Exposition (NTI) American Association of Critical-Care Nurses (AACN) www.aacn.org	Denver Boston	95,600 106,500	(10.2)%	354 399	(11.3)%	9,200 est. 10,200	(9.8)%	The attendance decrease from 2013 was expected based on population and geographic factors. There was a record number of exhibitor-sponsored ExpoEd sessions presented in 44 exhibitor displays. More than 160 approved health-care topics were presented in 340 sessions on the exhibit floor all three days of the show.
American Psychiatric Assn. Annual Meeting American Psychiatric Association www.psychiatry.org 	New York San Francisco	39,000 35,600	9.6%	214 199	7.5%	16,517 13,949	18.4%	To give back to the local community where the annual meeting is held, APA established the "APA Gives Back Program." The Doe Fund was this year's recipient of a charitable contribution of nearly \$12,000. The Doe Fund develops and implements programs to break the cycles of homelessness, addiction and criminal recidivism.

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American Society of Clinical Oncology (ASCO) Annual Meeting J. Spargo Associates, Inc. www.asco.org/meetings 	Chicago Chicago	255,100 231,000	10.4%	408 373	9.4%	N/A 32,200	CU	Attendees came from more than 120 countries. The meeting is designed for U.S. and international physicians and researchers involved in multidisciplinary clinical care, including medical, surgical and radiation oncologists; pathologists; radiologists; and other translational-oriented scientists.
American Society for Microbiology General Meeting American Society for Microbiology www.asm.org	Boston Denver	48,300 43,600	10.8%	222 216	2.8%	8,415 7,359	14.3%	Successes included the most booths sold in five years and 40 new exhibitors. New this year: unopposed time each day for attendees to view posters and visit the exhibit hall. Evening receptions allowed attendees to network with colleagues and meet prominent speakers.
American Thoracic Society International Conference American Thoracic Society www.thoracic.org	San Diego Philadelphia	49,100 42,700	15.0%	209 192	8.9%	12,792 est. 13,596	(5.9)%	The show enjoyed the most exhibitors and the most space sold since 2008. There were 42 new exhibiting companies and sponsorship sales increased significantly.
American Wind Energy Association (AWEA) WINDPOWER Conference & Exhibition American Wind Energy Association (AWEA) www.windpowerexpo.org	Las Vegas Chicago	129,300 167,600	(22.9)%	447 600	(25.5)%	7,500 9,500	(21.1)%	Recent WINDPOWERs have been smaller but with more experienced wind professionals and anecdotal reports of more effective business-to-business deals made on-site. The WINDPOWER Green Exhibitor Challenge recognized exhibitors who have taken steps to increase the sustainability of their booths.
California Dental Assn. (CDA) Presents The Arts & Science of Dentistry California Dental Association www.cdapresents.com	Anaheim Anaheim	130,000 130,000	No change	546 540	1.1%	27,733 28,144	(1.5)%	The show featured nearly 100 new products. A table clinic and poster competition, which included five-to-seven minute presentations, was an opportunity for participants to showcase innovative ideas and talents in the field of dentistry.
Craft Beverage Expo Craft Beverage Expo www.craftbeverageexpo.com	San Jose, CA N/A	18,000 N/A	CU	163 N/A	CU	1,300 N/A	CU	This first-time show highlighted the latest innovations, products and services from exhibitors who cater to the branding, marketing and selling needs of craft beer, wine and spirits producers. A Spotlight Stage featured a book signing and presentations on developing a successful packaging launch, attracting female patrons and competing for the retail shelf.
Digestive Disease Week DDW Administration www.ddw.org	Chicago Orlando	101,200 94,700	6.9%	256 256	CU	14,271 14,073	1.4%	There were 62 new exhibiting companies. The event provided a forum for the exchange of research and clinical information on liver transplantation and diseases of the liver and biliary tract.
Electronic Distribution Show Electronic Components Assn. www.edsconnects.com	Las Vegas Las Vegas	180,000 180,000	No change	269 247	8.9%	2,633 2,508	5.0%	The show, a combination of scheduled one-on-one meetings, product exhibits, educational programs and networking opportunities, attracted some 80% of the target audience of companies that distribute electronic components.





Continued on page 26

N/A = Not Available CU = Comparison Unavailable

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Dashboard – MAY TRADE SHOW METRICS

Continued from page 25

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SHOW INFORMATION	2014/2013	2014/2013	VARIANCE	2014/2013	VARIANCE	2014/2013	VARIANCE	2014 VS. 2013
Hospitality Design Expo & Conference Emerald Expositions www.hdexpo.com 	Las Vegas Las Vegas	251,560 246,066	2.2%	790 750	5.3%	14,664 13,865	5.8%	The show saw its most significant attendance numbers to date, and there were many new and innovative exhibitors. New additions to the show included the Social Hub, the epicenter of the floor designed by Morgans Hotel Group, and the Creativity Corner, a place for attendees to connect with their inner creative genius.
JCK Las Vegas Reed Exhibitions www.jckonline.com/lasvegas 	Las Vegas Las Vegas	503,000 501,415	0.3%	2,506 2,536	(1.2)%	39,510 36,850	7.2%	The 23rd annual event had strong attendance and a heightened level of success. Hearty sales were reported across all categories of exhibitors, and buyers gave high marks to the number of new products presented. More than 3,000 buyers attended the show for the first time, and the international community supported the show with strong attendance from Brazil, China, India, Russia and the UK.
Joint Information Environment (JIE) Mission Partner Symposium J. Spargo Associates, Inc. www.jspargo.com	Baltimore N/A	21,129 N/A	CU	150 N/A	CU	3,191 N/A	CU	This event was canceled in 2013 and reconfigured this year from a previous show. Exhibitors brought their products and solutions to decision-makers within the defense and intelligence community.
Montreal Manufacturing Technology Show* SME Canada www.mmts.ca	Montreal Montreal	58,055 51,195 ('12)	13.4%	189 185 ('12)	2.2%	4,150 4,159 ('12)	(0.2)%	MMTS featured education sessions on industry advancements and opportunities, live equipment demonstrations, and relevant keynotes. An Independent Job Shop Night was designed to give small and medium-sized owners and employees a chance to attend the show outside of business hours.
National Hardware Show Reed Exhibitions nationalhardwareshow.com 	Las Vegas Las Vegas	562,000 560,500	0.3%	2,013 1,999	0.7%	31,859 31,254	1.9%	The show celebrated its 69th year, and for the fourth year in a row, it sold out the entire North and Central halls of the Las Vegas Convention Center. Show growth has been driven by new products, categories and networking opportunities.
National Restaurant Association Restaurant, Hotel-Motel Show National Restaurant Assn. www.restaurant.org/show 	Chicago Chicago	612,570 579,330	5.7%	2,170 2,078	4.4%	63,876 62,550	2.1%	This was the third consecutive year of registration growth. Attendees came from all 50 states and 116 countries. The Lodging category grew 12.9% over 2013, and Dealer/Distributor and Press registration grew 9% and 8.5%, respectively. To accommodate ongoing demand, the NRA Show will expand into the Lakeside Center in 2015, joining the International Wine, Spirits & Beer Event in the East Building of McCormick Place.

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Northeastern Forest Products Equipment Expo Northeastern Loggers' Assn. www.northernlogger.com 	Essex Junction, VT Bangor, ME	272,985 272,965	No change	166 199	(16.6)%	6,135 7,023	(12.6)%	The forest products industry is strong, but because of the consolidation of many major suppliers, there are fewer potential exhibitors. However, exhibitors are increasing their space requests. As the potential attendance pool drops (because of fewer people in the industry), the significance of each attendee increases.
Offshore Technology Conference (OTC) OTC www.otcnet.org  	Houston Houston	680,025 654,585	3.9%	2,568 2,728	(5.9)%	108,220 105,255	2.8%	The 2014 show grew 3.9% in net square feet and there was a waitlist of potential exhibitors. Growth was driven by an improved state of the industry and the importance of networking connections made and business conducted at the show.
RECon, The Global Retail Real Estate Convention International Council of Shopping Centers www.icsc.org 	Las Vegas Las Vegas	809,400 793,200	2.0%	1,062 1,061	0.1%	34,000 33,500	1.5%	Show management estimates that roughly 50% of industry deals are conceived or consummated at RECon. Full convention attendees were able to meet and discuss key industry issues with ICSC's Board of Trustees in an interactive, round-table setting at a Meet the Trustees Breakfast.
Sweets & Snacks Expo National Confectioners Assn. www.sweetsandsnacks.com 	Chicago Chicago	165,500 163,300	1.3%	650 617	5.3%	16,032 15,389	4.2%	This was the largest expo to date and the 5th consecutive year of growth in net square feet sold, number of exhibitors and number of sponsors. There were 167 new exhibitors, a record for the show. International attendees came from 90 countries.
Techtextil North America and Texprocess Americas** Messe Frankfurt Inc. www.techtextilNA.com; www.TexprocessAmericas.com	Atlanta Atlanta	106,905 100,860 ('12)	6.0%	529 475 ('12)	11.4%	8,392 4,275 ('12)	96.3%	The event enjoyed a phenomenal increase in attendance over 2012. New pavilions and programs were created to provide added value to the show. Added pavilions included the International Buyers Program Select, a Job Board, the Technology Solutions and Supply Chain USA Pavilions and the Poster Program.
DASHBOARD ANALYSIS:		Net SF of Exhibits		Exhibitors		Total Attendance		
Total (Sum of all figures submitted by show management)		35,230,329 5,099,816		16,612 16,349		442,019 459,108		
Adjusted Total (Excludes outliers and shows in which an apples-to-apples comparison is not possible)		4,999,840 4,910,161		15,134 15,089		424,986 418,474		
Averages (Based on Adjusted Totals)		263,149 258,430		797 794		22,368 22,025		
Percentage of Growth (Based on Adjusted Totals)		1.8%		0.3%		1.6%		

 **COMING UP NEXT MONTH:**
A review of shows held in June