

# Exhibit Space Wanes in August

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

Oceanside, CA – The lazy days of Summer were apparent in August as exhibit space slipped and the attendance and exhibitors metrics ended on a flat note, according to the Trade Show Executive Dashboard of Monthly Trade Shows.

The overall performance for August was a mixed bag. Exhibit space was down (1.4)% as was the exhibitor count, which drifted (0.2)% lower when compared to August 2013. Attendance was the lone gainer, but only by a negligible 0.4%.

There were 18 shows surveyed for the Dashboard. Together, they totaled an adjusted 4,171,869 net square feet (nsf) of exhibit space. The adjusted total of exhibitors settled at 11,863. Attendance was a total of 311,624. The statistics worked out to a per-show average of 245,404 nsf of exhibit space, 741 exhibitors, and 19,477 attendees. The adjusted totals exclude outliers with growth or declines of more than 25% as well as shows without a two-year comparison.

Nine August shows covered 100,000 nsf or more of exhibit space. Five shows were on the TSE Gold 100 rankings of the largest U.S. trade shows, and three were featured on the TSE Fastest 50 roster of shows on the growth fast track.

Despite the seemingly soft statistics in August, only four shows experienced declines in all three metrics. At the same time, six reported growth in all three.

## MAGIC Seen More Clearly

At MAGIC-August, Advanstar Communications Inc. reported a rare decline in exhibit space, but a huge 25.5% jump in exhibitors. A double-digit increase in exhibitors shouldn't coincide with a (3.6)% drop in exhibit space, particularly with 1,023,560 nsf of floor space and 5,645 exhibitors. Advanstar explained the differences were the result of more accurately tallying the number of individual companies that set up exhibits within the confines of international pavilions. Attendance growth was a reasonable 2.9% over last year, with 72,000 people crowding into the show's multiple venues.

## Retail Red

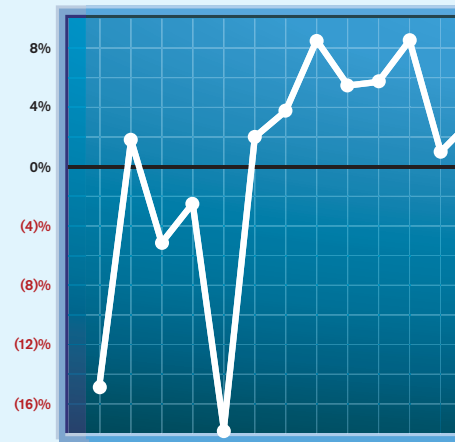
Another large Las Vegas show, ASD Las Vegas – August, also experienced a slowdown in exhibit space. Emerald Expositions said the floor declined (12.0)% to 620,720 nsf, but remained

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## Trade Show Executive Dashboard Snapshot – M

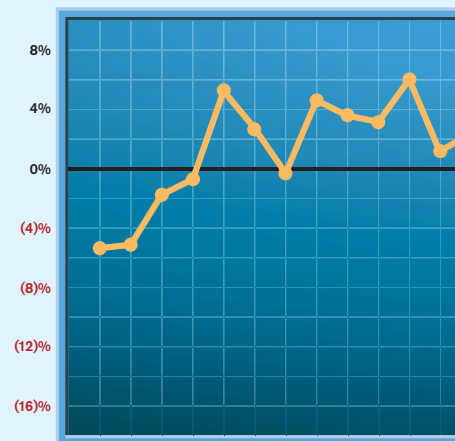
### NSF OF PAID EXHIBIT SPACE

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



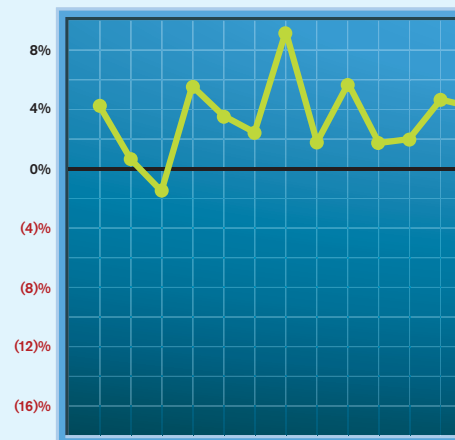
### EXHIBITING ORGANIZATIONS

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



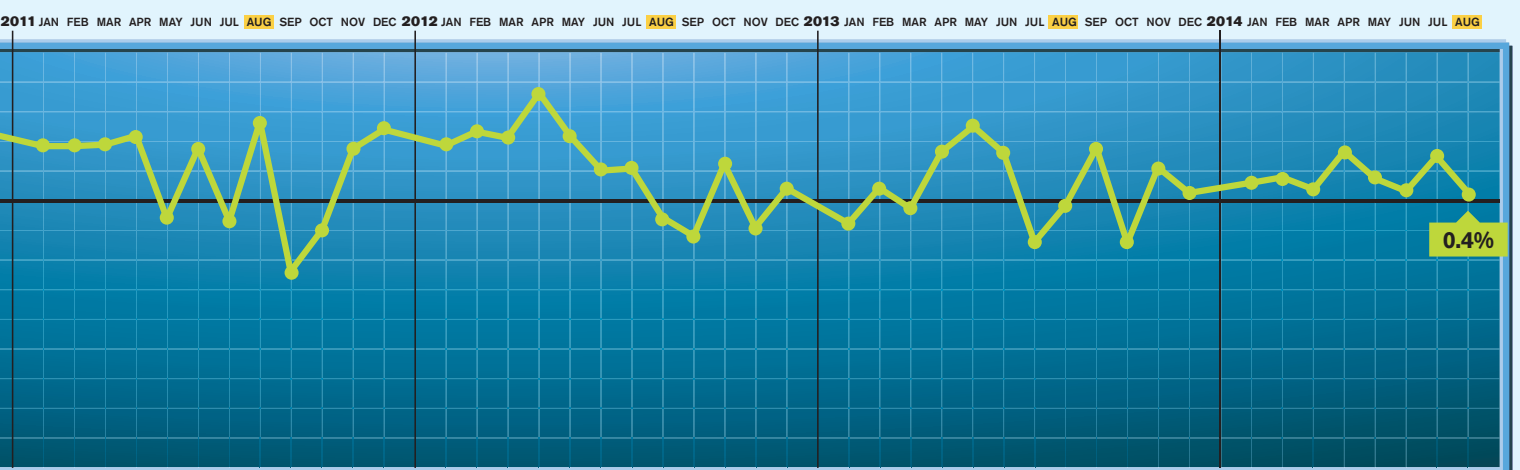
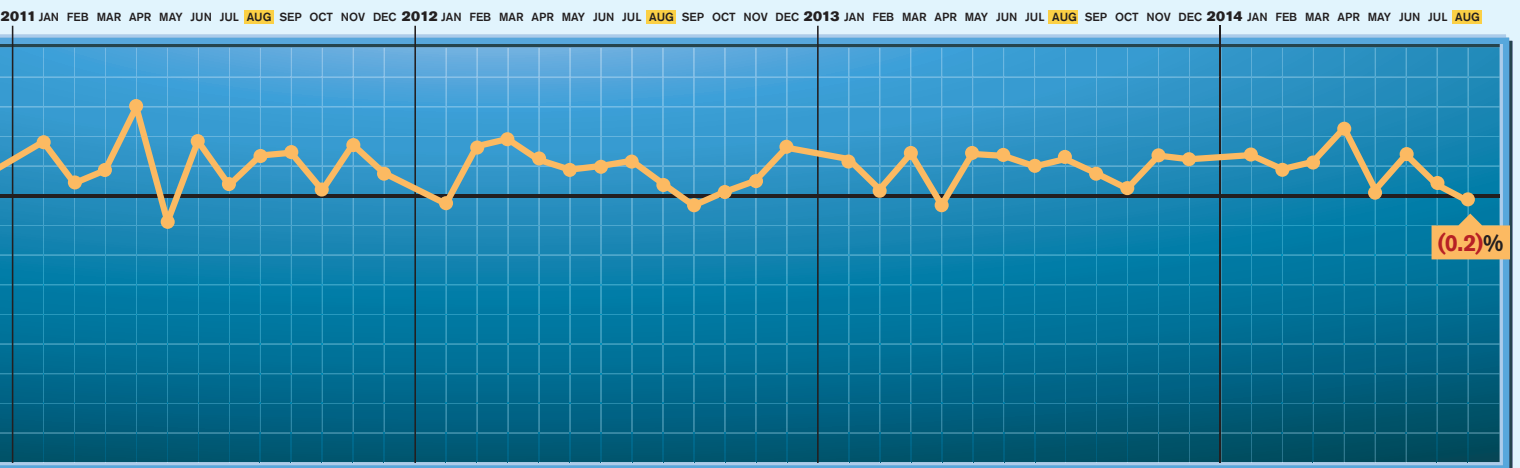
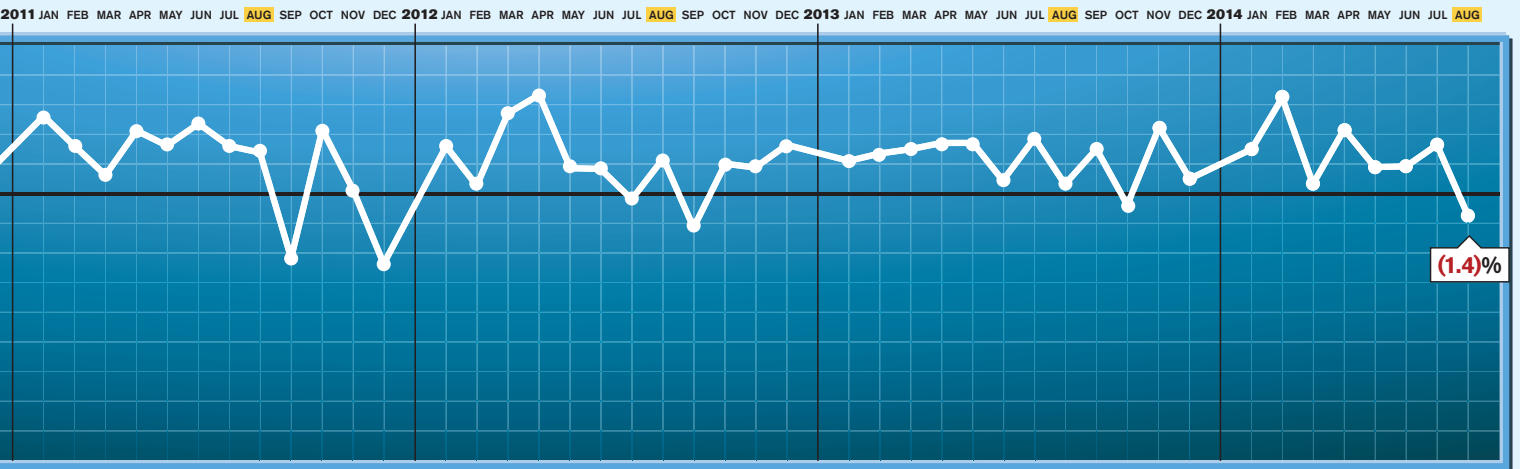
### TOTAL ATTENDANCE

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



# MONTHLY OVERVIEWS

**Sluggish Summer.** Trade show metrics were flat as Summer drew to a close. The only positive in August was a meager 0.4% increase in the number of attendees. Exhibit space and exhibitors declined slightly.



Continued from page 30

large enough for inclusion on the Gold 100 again. The number of exhibitors decreased (5.5)% and attendance was down (6.3)%. The post-show report pointed to softness in the retail sector as the reason for the declines. A large portion of ASD attendees came from brick-and-mortar retail stores, many of whom were able to make direct contact with overseas manufacturers at the show's new SourceDirect feature at ASD.

On the East Coast, NY NOW saw its numbers slump. The big gift show was hit by an (11.8)% decline in attendance while exhibit space fell (2.6)% to 516,000 nsf. The sparser crowds in New York apparently did not erode the quality of the attendees. Emerald Expositions said the show floor was busy, and noted that many exhibitors called it the best of the industry's Summer markets, with brisk business and strong order writing. An increase in international participation was noticeable.

“Innovation in outdoor gear and accessories continues to drive consumer interest, which brings more and more traffic to specialty outdoor retail stores that are the heart and soul of our industry.”

**Kenji Haroutunian**, SHOW DIRECTOR  
AND VP OF EMERALD EXPOSITIONS

## Growth Leaders

- The American Psychological Association's APA Annual Convention moved from Hawaii to Washington, DC this Summer. The dramatic reduction in travel distance for mainlanders resulted in equally dramatic increases in the metrics. Exhibit space shot up 53.7% to 25,200 nsf and the number of exhibitors grew 43.6% to 191.

- The American Academy of Dermatology Summer Academy Meeting in Chicago turned in some puzzling metrics, including a 25% increase in exhibit space to 17,900 nsf. At the same time, the exhibitor count remained virtually unchanged at 135. The only blemish was a (14.2)% drop in attendance to 2,878.

- The International Woodworking Fair in Atlanta was as solid as an oak tree this year. Metrics for the Gold 100 show were up across the board, led by 9.5% growth in exhibit space to 448,693 net square feet. Exhibitors grew by 8.0% to 929, and attendance was up 4.9% to 23,107. Some of the growth seemed to stem from the show's new pavilion for countertop manufacturers and a pre-show symposium on the same topic.

## The Great Outdoors

Emerald scored big in August with the trusty Outdoor Retailer Summer Market. The August edition of the show for the outdoor enthusiast industry was the largest ever with 545,684 nsf, up 5.2% from

last Summer. The number of exhibitors was up 11.7% at 1,473, but estimated attendance slackened (2.7)% to 27,090.

Even with the slightly smaller crowd, Salt Lake City was abuzz during the show. Temporary pavilions provided 95,000 nsf of overflow exhibit space for new and returning vendors.

“Innovation in outdoor gear and accessories continues to drive consumer interest, which brings more and more traffic to specialty outdoor retail stores that are the heart and soul of our industry,” said Kenji Haroutunian, show director and vice president of Emerald.

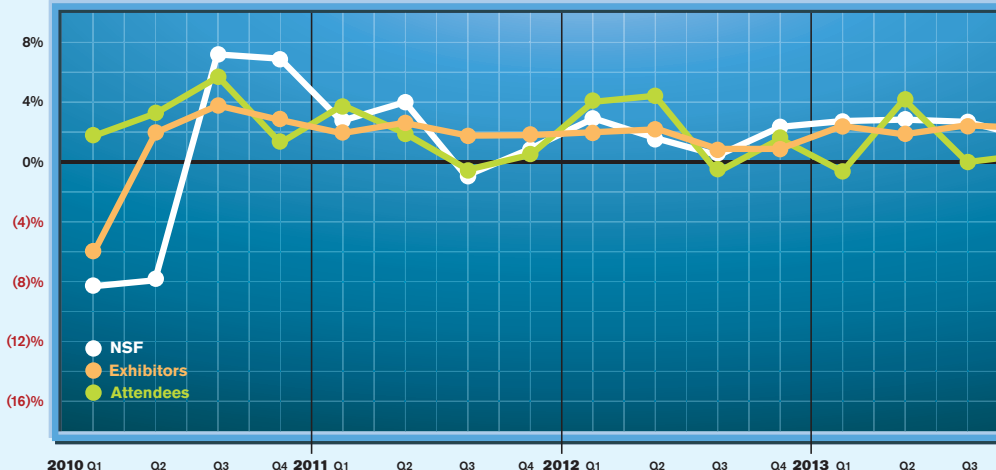
## Top Cities

In fact, the exhibit space at Outdoor Retailer was large enough to put Salt Lake City in second place among the cities that hosted Dashboard shows in August.

And you could bet that Las Vegas was by far the leader with five shows totaling 1,884,215 nsf. And New York was No. 3, thanks to the 516,000 nsf covered by NY Now.

## Trade Show Executive Dashboard Snapshot – CONSOLIDATED OVERVIEWS

### QUARTERLY OVERVIEW



**Q2 Shows Lag Behind.** Show metrics in Q2 of 2014 were on the sluggish side. Growth in exhibit space and exhibitors remained above 2%, but attendance growth lagged behind at 1.7%.



## Next Month

The final few weeks before the holiday slowdown will be crowded with some major exhibitions.

PACK EXPO International in Chicago was expected to be sold out at more than 1 million nsf. Show managers reported that more than 970,000 nsf had been booked for 2014 by the time last year's show closed.

FABTECH, which made the most-recent Gold 100 and Fastest 50 lists, returns to Atlanta for the first time since 2010. The exhibit floor was projected at 500,000 nsf, up 25% from the last Atlanta show.

The SEMA Show and AAPEX Automotive Aftermarket Products Expo will bring the automotive products world to Las Vegas. More than 2,000 exhibitors and 60,000 attendees were expected at The SEMA Show.

Two of the largest medical conferences in the U.S. were also on the November calendar. The Greater New York Dental Meeting opens on a Sunday for the benefit of dentists in the metro area

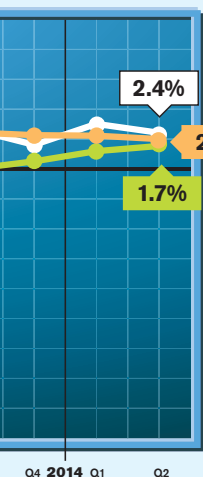


who can't get away from the drill during the week. Wrapping up the month, the Radiological Society of North America

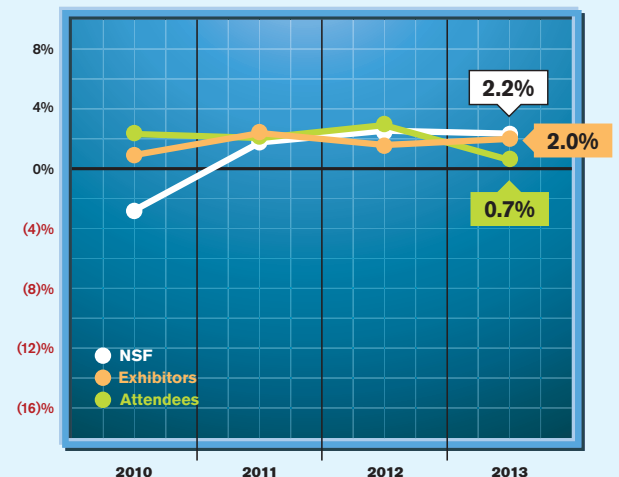
(RSNA) Annual Meeting & Scientific Assembly marks its 100th edition in Chicago November 30-December 5. **TSE**

## 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%       |



## 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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# Trade Show Executive

## Dashboard – AUGUST TRADE SHOW METRICS

SPONSORED BY  


BY CAROL ANDREWS,  
*editor-at-large*



**BENCHMARKS:  
AVERAGE GROWTH**

- NSF: (1.4)%
- Exhibitors: (0.2)%
- Attendance: 0.4%



**TOP MANAGEMENTS\***

- Emerald Expositions
- Advanstar Communications Inc.
- Intl. Woodworking Fair, LLC



**GROWTH LEADERS**

- APA Annual Conv.
- AAD Summer Academy Meeting
- Intl. Woodworking Fair, LLC



**TOP SECTORS\***


- Apparel
- Gift, Home
- Building, Home Construction, & Repair



**TOP CITIES\***

- Las Vegas
- Salt Lake City
- New York

*\*Based on total nsf*

| August 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  |
| <b>American Academy of Dermatology Summer Academy Meeting</b><br>American Academy of Dermatology<br><a href="http://www.aad.org">www.aad.org</a>  | Chicago<br>New York                | 17,900<br>14,320        | 25.0%    | 135<br>136     | (0.7)%   | 2,878<br>3,353   | (14.2)%  | A meeting app enabled attendees to navigate interactive maps, organize meeting session schedules, search for exhibitors, access session evaluations, tweet and more. The exhibit hall offered the latest products in dermatology, the AAD Resource Center, the Industry Expert Theater, and poster exhibits and presentations. |
| <b>APA Annual Convention</b><br>American Psychological Assn.<br><a href="http://www.apa.org">www.apa.org</a>  | Washington, DC<br>Honolulu         | 25,200<br>16,400        | 53.7%    | 191<br>133     | 43.6%    | N/A<br>10,970    | CU       | New this year was a Special Technology Exhibits Section devoted to technology exhibits. A revamped career fair connected job seekers with professional resources and prospective employers. APA's D.C. Food Trucks Festival enabled attendees to sample the best of the city's food trucks during lunch.                       |
| <b>ASAE Annual Meeting &amp; Exposition</b><br>ASAE: The Center for Association Leadership<br><a href="http://www.asaecenter.org">www.asaecenter.org</a>  | Nashville<br>Atlanta               | 70,700<br>69,800        | 1.3%     | 441<br>409     | 7.8%     | 5,975<br>5,431   | 10.0%    | This was the highest number of association executives since 2007. The buyer/seller ratio was 63% buyers to 37% sellers. Attendees who made appointments with suppliers through ASAE's Attendee Service Center were granted access to the Business Connection Lounge, which was open whenever the expo hall was not.            |
| <b>ASD Las Vegas - August</b><br>Emerald Expositions<br><a href="http://www.asdonline.com">www.asdonline.com</a><br> | Las Vegas<br>Las Vegas             | 620,720 EST.<br>705,669 | (12.0)%  | 2,493<br>2,639 | (5.5)%   | 38,579<br>41,162 | (6.3)%   | ASD was an all-in-one event with seven shows for all things wholesale. Exhibitors showcased everything from zebra handbags to the latest electronic gadgets, from car accessories to pet products, and from personal care to housewares.   |
| <b>CVC Kansas City</b><br>Advanstar Communications Inc.<br><a href="http://www.advanstar.com">www.advanstar.com</a>   | Kansas City, MO<br>Kansas City, MO | 40,300<br>39,600        | 1.8%     | 220<br>214     | 2.8%     | 5,246<br>5,240   | 0.1%     | Show management strategically promoted exhibit hall attendance in all convention marketing materials, convention announcements, industry magazines and scheduled activities. Attendees have rated the exhibit hall as good to excellent. Attendees also had access to more than 500 hours of educational programming.          |

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# Trade Show Executive

## Dashboard – AUGUST TRADE SHOW METRICS



Continued from page 34

| August 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  |
| <b>Fire-Rescue International</b><br>International Association of Fire Chiefs<br><a href="http://www.iafc.org">www.iafc.org</a>  | Dallas<br>Chicago       | 133,500<br>134,200     | (0.5)%    | 463<br>442     | 4.8%     | 9,232<br>9,209      | 0.2%     | Attendees were a Who's Who of fire, rescue and emergency services chiefs and officers from all types and sizes of departments from North America and throughout the world. Proceeds from a 9/11 Stair Climb benefitted the Natl. Fallen Firefighters Foundation.   |
| <b>Great American Trucking Show</b><br>Randall-Reilly<br><a href="http://www.GATSONline.com">www.GATSONline.com</a>   | Dallas<br>Dallas        | 171,200<br>167,700     | 2.1%      | 512<br>490     | 4.5%     | 54,197<br>46,536    | 16.5%    | Growth in first-time exhibitors was 15%. Owner-operator and fleet executive registrations increased 16.5%. Attendees came from all segments of the truck industry, and they own and operate more than 247,027 power units and more than 354,905 trailers, according to Randall-Reilly's RigDig Business Intelligence.  |
| <b>Intl. Woodworking Fair</b><br>International Woodworking Fair, LLC<br><a href="http://www.iwfatlanta.com">www.iwfatlanta.com</a><br>   | Atlanta<br>Atlanta      | 448,693<br>409,837     | 9.5%      | 929<br>860     | 8.0%     | 23,107<br>22,027    | 4.9%     | IWF included several events geared for countertop fabricators and others involved in the countertop industry. These included a sold-out Countertop Pavilion designed to bring new suppliers of materials, tooling, machinery, equipment and other products and services together in one area, a Countertop Symposium, and an educational track with six sessions.    |
| <b>MAGIC - August</b><br>Advanstar Communications Inc.<br><a href="http://www.magiconline.com">www.magiconline.com</a><br>  | Las Vegas<br>Las Vegas  | 1,023,560<br>1,062,151 | (3.6)%    | 5,645<br>4,498 | 25.5%    | 72,000<br>70,000    | 2.9%     | Millions of dollars in orders were written daily. Attendees included presidents/owners and CEOs, VPs, GMMs, DMMs and buyers from department stores, mass merchandising, discount stores, specialty stores and chain stores from more than 100 countries around the world.  |
| <b>METROCON Expo &amp; Conference</b><br>Metrocon, Inc.<br><a href="http://www.metrocon.info">www.metrocon.info</a>   | Dallas<br>Dallas        | 90,000 EST.<br>90,000  | No Change | 275<br>274     | 0.4%     | 2,557<br>2,546      | 0.4%     | For the first time, the show had a dedicated Student Programming area featuring portfolio and resume reviews and one-on-one discussions with companies that hire and/or work with interior designers. There were 97 exhibitors that did not exhibit last year. Booths sold out three days ahead of the official close of sales and 17 exhibitors were on a waitlist. |
| <b>NACDS Total Store Expo</b><br>National Association of Chain Drug Stores<br><a href="http://www.tse.nacds.org">www.tse.nacds.org</a>  | Boston<br>Las Vegas     | 187,635<br>185,900     | 0.9%      | 670<br>662     | 1.2%     | 5,721<br>5,937      | (3.6)%   | The Meet the Retailer series featured presentations by key executives of leading retail and healthcare companies. Another highlight: Insight Sessions with topics "Convenient Care - Point of Care Testing in the Pharmacy" and "Retail Vision 2025: Thoughts on the Future Store."  |
| <b>NIGP Annual Forum &amp; Expo</b><br>NIGP - The Institute for Public Procurement<br><a href="http://www.nigp.org">www.nigp.org</a>  | Philadelphia<br>Orlando | 26,000<br>24,100       | 7.9%      | 194<br>184     | 5.4%     | 1,632 EST.<br>1,593 | 2.4%     | This show for public procurement professionals had the most exhibit booths in NIGP's history. Exhibitors, including 37 new companies, showcased the latest products and services available to the government. Exhibit categories included computer hardware/software, building materials, emergency support, finance solutions, facility maintenance and more.       |



# Trade Show Executive

## Dashboard – AUGUST TRADE SHOW METRICS

| August 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  |
| <b>NY NOW</b><br>Emerald Expositions<br>www.nynow.com<br>                                   | <b>New York</b><br>New York             | <b>516,000</b><br>530,000      | <b>(2.6)%</b>    | <b>2,600</b><br>2,800      | <b>(7.1)%</b>  | <b>45,000 EST.</b><br>51,000 | <b>(11.8)%</b>   | There was a full educational program and industry events to add value to the show. Seminars addressed color/design trends, sustainability, social media and retail strategies. Plays and fundraisers and a number of other "Only in New York" activities were available to attendees.  |
| <b>OFFPRICE Show</b><br>Tarsus Expositions/<br>OFFPRICE Show<br>www.offpriceshow.com   | <b>Las Vegas</b><br>Las Vegas           | <b>131,000</b><br>125,000      | <b>4.8%</b>      | <b>490</b><br>470          | <b>4.3%</b>    | <b>10,600</b><br>10,500      | <b>1.0%</b>      | There were 32 new exhibitors and 900 international retailers attended. The show, held twice a year, celebrated its 20th anniversary and its 40th run in Las Vegas. It recognized 15 companies that have exhibited since the first show in 1995. New this year: a Buyer Information and Social Media Room for attendees.            |
| <b>Outdoor Retailer Summer Market</b><br>Emerald Expositions<br>www.outdoorretailer.com<br> | <b>Salt Lake City</b><br>Salt Lake City | <b>544,026 EST.</b><br>517,069 | <b>5.2%</b>      | <b>1,473 EST.</b><br>1,319 | <b>11.7%</b>   | <b>27,090 EST.</b><br>27,830 | <b>(2.7)%</b>    | This was the largest show to date. Show management instituted stricter credentialing processes and the exhibitor base grew with the addition of yoga and fly fishing as major market segments. The show attracted national and international dealers in every product category.  |
| <b>PGA Fashion &amp; Demo Experience</b><br>Reed Exhibitions<br>www.pgallasvegas.com   | <b>Las Vegas</b><br>Las Vegas           | <b>23,935</b><br>27,210        | <b>(12.0)%</b>   | <b>153</b><br>189          | <b>(19.0)%</b> | <b>2,899</b><br>3,918        | <b>(26.0)%</b>   | There were many new product introductions, industry announcements, demonstrations, celebrity appearances and special events. Attendees came from all 50 U.S. states and 25 countries. Attendees previewed and tested new equipment, technology, training aids and accessories. Many took part in short-game instruction workshops. |
| <b>The SAAC Show</b><br>Specialty Advertising<br>Association of California<br>www.saac.net   | <b>Long Beach, CA</b><br>Long Beach, CA | <b>41,700</b><br>44,000        | <b>(5.2)%</b>    | <b>328</b><br>329          | <b>(0.3)%</b>  | <b>1,810</b><br>1,875        | <b>(3.5)%</b>    | Many exhibitors said that this was the best show in years and that the quality of attendees and leads was very good. The show was busy until it closed; in fact, one exhibitor said his best contact was at the end of the show.   |
| <b>WomensWear in Nevada</b><br>Specialty Trade Shows<br>www.wwinshow.com   | <b>Las Vegas</b><br>Las Vegas           | <b>85,000</b><br>85,000        | <b>No Change</b> | <b>487</b><br>466          | <b>4.5%</b>    | <b>6,000 EST.</b><br>6,000   | <b>No Change</b> | The show sold out again this year. It offers womenswear buyers a full selection of clothing and accessories, including shoes, hats, purses, jewelry, belts and scarves.  |
| DASHBOARD ANALYSIS:  |   | Net SF of Exhibits             |                  | Exhibitors                 |                | Total Attendance             |                  |  |
| <b>Total</b><br>(Sum of all figures submitted by show management)  |   | <b>4,197,069</b><br>4,247,956  |                  | <b>17,699</b><br>16,514    |                | <b>314,523</b><br>325,127    |                  |  |
| <b>Adjusted Total</b><br>(Excludes outliers and shows in which an apples-to-apples comparison is not possible)   |   | <b>4,171,869</b><br>4,231,556  |                  | <b>11,863</b><br>11,883    |                | <b>311,624</b><br>310,239    |                  |  |
| <b>Averages</b><br>(Based on Adjusted Totals)  |   | <b>245,404</b><br>248,915      |                  | <b>741</b><br>743          |                | <b>19,477</b><br>19,390      |                  |  |
| <b>Percentage of Growth</b><br>(Based on Adjusted Totals)  |   | <b>(1.4)%</b>                  |                  | <b>(0.2)%</b>              |                | <b>0.4%</b>                  |                  |  |

 **COMING UP NEXT MONTH:**

**A review of shows held in September**