

Metrics Perk Up Noticeably in September after a Disappointing August

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

Oceanside, CA – Trade shows sprang to life in September with some noticeable gains in all three metrics, following a stretch of lackadaisical growth.

The 26 shows in the *Trade Show Executive (TSE) Dashboard of Monthly Trade Show Metrics* enjoyed growth rates of 3% in exhibit space and 3.5% in attendance while the number of exhibitors grew by half that percentage: 1.5%. It was the 12th straight month of growth in net sf and the 5th consecutive month in which exhibitor count increased. Attendance performance has been spotty at best, declining five times in the past 12 months.

Led by a mushrooming of booths at *Gold 100* shows, such as *Interbike*, *Global Gaming Expo (G2E)* and *PACK EXPO*, the exhibitor count for September ticked up 1.5% from the previous year. That growth followed a 2.7% jump tallied in August. “We were thrilled to welcome all of our new exhibitors and our returning exhibitors to *G2E 2013*,” said Courtney Miller, senior vice president of Reed Exhibitions, about her company’s show. “This year’s floor was nearly 9% larger than last year, and the largest since 2008.”

Excluding outliers, the numbers reported to *TSE* reflected an adjusted total of 3,114,322 net square feet (nsf), 11,177 exhibitors and an attendance of 268,521.

Of the 26 shows held in September, 10 were 100,000 nsf or larger. Seven were ranked on the *TSE Gold 100* rankings of largest U.S. trade shows. In fact, *Interbike* was included on both the *Gold 100* list of the largest 100 shows and the *TSE Fastest 50* roster of fastest-growing events.

Interbike, Surf Expo Gain across Board

Interbike has had a lot to cheer about in 2013. Emerald Expositions reported a 1.4% increase in exhibit space to 324,383 nsf. Attendance was virtually unchanged at 25,556, but the exhibitor rolls jumped 12.1% to 908.

Emerald extended an interesting offer to its exhibitors by providing them the opportunity to give their best retail customers an inside look at the newest must-haves on two wheels coming to bike shops everywhere. *Interbike by Invitation* allowed select customers of their exhibitors to roam the aisles at Mandalay Bay on the final day of the show for a mere \$50. The goal was to generate further downstream buzz as the holiday shopping season approached.

“The mystique of *Interbike* from a consumer perspective has been, and still is, very strong,” said Pat Hus, managing director for *Interbike*. “We believe we’ve

found the proper way to include the consumer by showcasing the industry through retailers who attend *Interbike*.”

“It is not designed to open the floodgates to consumers seeking stickers and swag (S.W.A.G. or “stuff we all get”) — but rather as an opportunity for retailers to invite their best consumers with the goal of leaving the show with the invitee feeling closer to both the retailer and the brands they love,” Hus said.

GLM’s *Surf Expo* was also in the black across the board. The popular Orlando show hosted the highest number of buyers in its 37-year history and saw an 11.5% gain in total attendance. “Buyer attendance was up 14% compared to last September, and eclipsed our record-breaking January show by 4%,” Show Director Roy Turner said.

The continuing evolution and intermingling of water sports and skateboarding on the retail level continued to play into *Surf Expo*’s wheelhouse. The result was a 10% increase in new exhibitors and 2.6% increase in the overall exhibitor count. Exhibit space grew 1.9% to 219,000 nsf.

Growth Leaders

- *G2E* cashed in on the growth in international manufacturers in the gaming industry. The show hosted 430 exhibitors

Continued on page 30

QUARTER-OVER-QUARTER ANALYSIS: Q3 Delivers Good, not Spectacular Growth

Oceanside, CA – The Third Quarter of 2013 produced a modest but welcome increase in exhibitors and exhibit space, but attendance levels were basically the same as a year earlier.

The *Trade Show Executive Dashboard of Monthly Trade Show Metrics* revealed

that the number of exhibitors grew 2.1% in the period including July, August and September. Exhibit space performed even better with an increase of 2.4% over the Third Quarter of 2012.

A potential concern, however, was in the attendance metric, which can influence whether or not exhibitors re-sign for the next show in an era when corporate travel budgets can be on the Scrooge side and airfares sky high. Attendance growth was nil in Q3 of 2013 vs. Q3 of 2012, despite the

month of September trending upwards with a 3.5% increase. It was too little, too late.

Although attendance narrowly avoided dipping into red ink during the Third Quarter, it was a bit of a disappointment after a robust Second Quarter which kicked off the Summer with a 4% increase in attendance.

But since a quarterly analysis levels out the peaks and valleys and the growth spurts and pullbacks, when it’s all said and done, Q3 of 2013 delivered a decent performance in what is traditionally a weak quarter.

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INTERNATIONAL

Led by a mushrooming of booths at *Gold 100* shows, such as *Interbike*, *Global Gaming Expo (G2E)* and *PACK EXPO*, the exhibitor count for September ticked up 1.5% from the previous year. That growth followed a 2.7% jump in August.

Continued from page 28

in Las Vegas, up 6.2% from 2012. Of that number, 125 were first-time exhibitors from overseas, representing 32 nations.

Reed has also expanded its exhibits into nongaming product lines and has now added conference sessions for the F&B side of the casino business. "G2E featured specialized exhibit space, special events, dedicated conference programming, and the latest entertainment acts to address the growing importance of the food, beverage, hospitality and entertainment sectors to the casino industry's bottom line," Muller said.

• *Gear Expo* rolled into Indianapolis this year. The venue, in the heart of the U.S. manufacturing region, paid off with a

12.7% boost in exhibit space to 52,500 nsf and 3,400 attendees, a 4.6% boost.

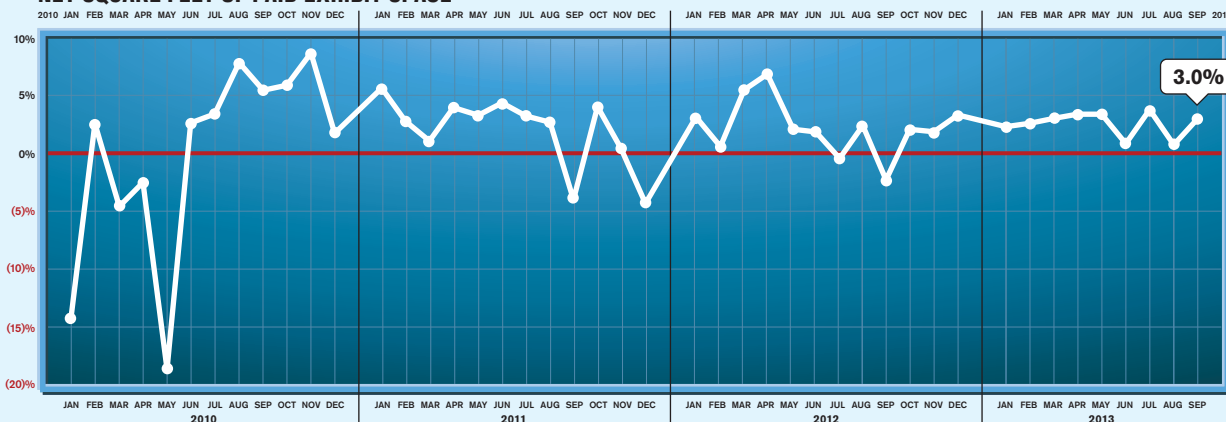
• *ATCE 2013* moved to the heart of the Gulf Coast offshore oil industry and the Society of Petroleum Engineers was rewarded with an 8.4% increase in attendance to 12,028, the biggest crowd since 1999. The exhibit space grew 20.8% to 150,500 nsf. Exhibitor count was up 17.2% to 552.

Leading the Pack

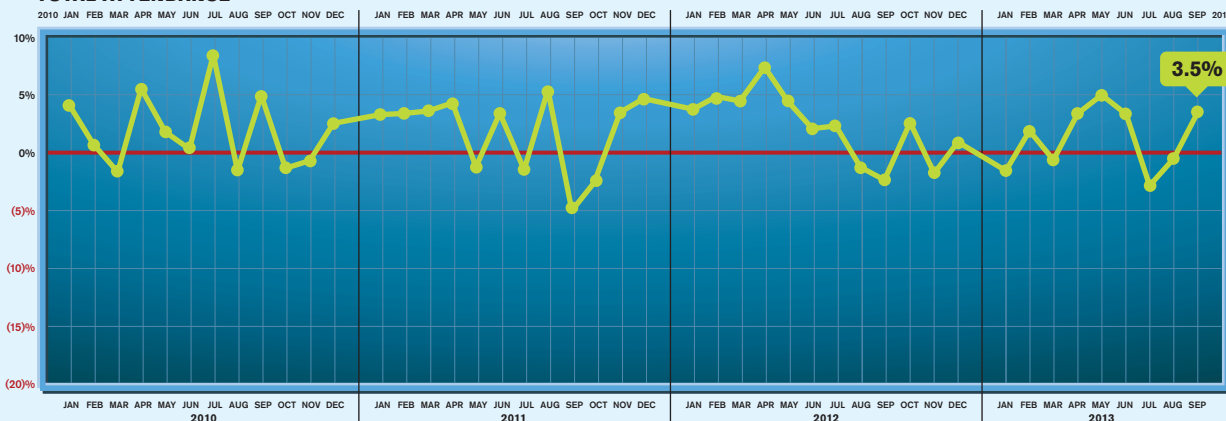
PACK EXPO Las Vegas was the largest of the September *Dashboard* shows and also one of the most robust. Show managers at PMMI, the Association for Packaging and Processing Technologies, grew "out-

Trade Show Executive Dashboard Snapshot – MONTHLY AND CONSOLIDATED OVERVIEWS

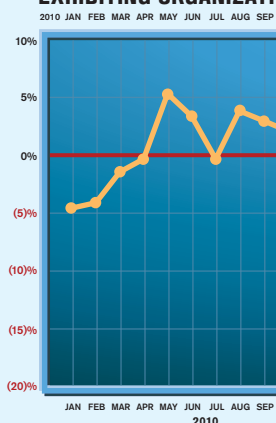
NET SQUARE FEET OF PAID EXHIBIT SPACE



TOTAL ATTENDANCE



EXHIBITING ORGANIZATION



◀ **The Big W.** An up-and-down trend in exhibit space in the past few months returned to the upside in September. Floor space bounced 3.0% higher and topped 3.4 million nsf.

◀ **Slow Summer Ends.** Attendees were back at work in September after a flat August. Crowds were up 3.5% over the previous September.

side the box” and called 2013 its largest Las Vegas show in history. “PMMI’s mission is to convene the entire packaging and processing supply chain in one location, and that is exactly what *PACK EXPO Las Vegas* accomplished,” said Charles Yuska, president & CEO of PMMI.

A customer survey conducted last Fall inspired Yuska and his team to relocate the educational sessions to the exhibit hall, which paid off handsomely in the form of standing-room only crowds at hourly intervals in the main hall. “Attendees said they valued education, but still wanted to maximize their time on the show floor,” Yuska said.

Top Cities

PACK EXPO Las Vegas was one of five *Dashboard* shows held on The Strip in September. Together, all five of the shows totaled 1,434,344 nsf of exhibit space.

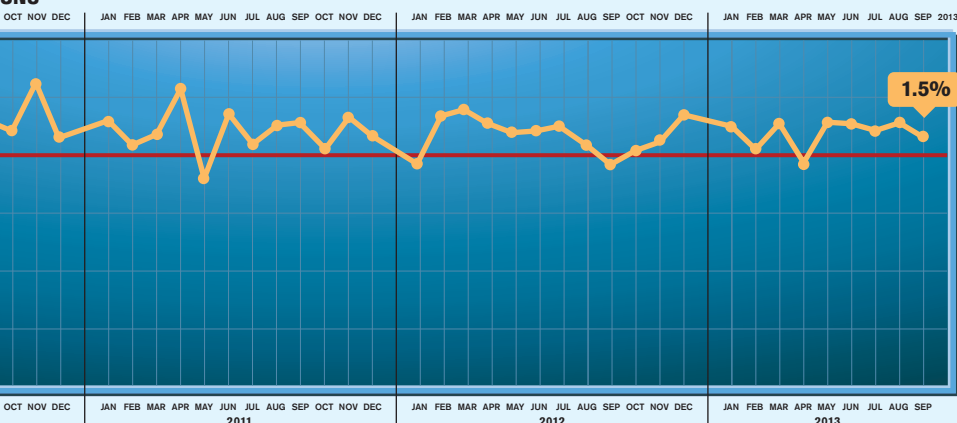
Chicago was second on the leaderboard with four *Dashboard* events totaling 603,608 nsf. One of the Windy City shows, however, was the quadrennial *PRINT 13 & CPP Expo*, which ended up losing more than (25)% of its exhibit space and was not included in the adjusted *Dashboard* totals.

Orlando also reached the podium, thanks to *Surf Expo* and *The Landscape Show* with 293,500 nsf.

Next Month in Dashboard

The *National Business Aviation Association (NBAA) Convention & Exhibition* in Las Vegas highlighted the October U.S. trade show calendar. The NBAA was expecting 25,000 attendees and more than 1 million nsf of indoor exhibits at the Las Vegas Convention Center. And Orlando hosted the Specialty Graphic Imaging Association and also the American Academy of Pediatrics. Also in October, *High Point Market Fall* took place in North Carolina and Louisville was the site of the always-expansive *GIE + Expo, Green Industry & Equipment Expo*, the must-attend gathering for the landscaping industry. **TSE**

ONS



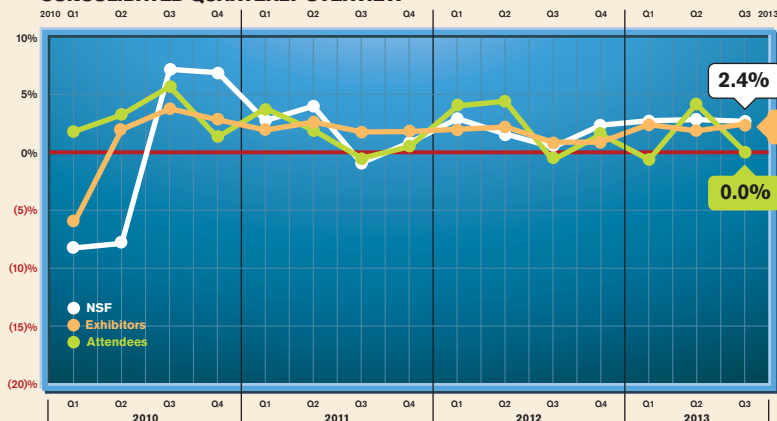
YEAR-OVER-YEAR GROWTH

	Sep. 2013	Sep. 2012
Net Square Feet	3.0%	(2.2)%
Exhibiting Organizations	1.5%	(0.8)%
Total Attendance	3.5%	(2.4)%

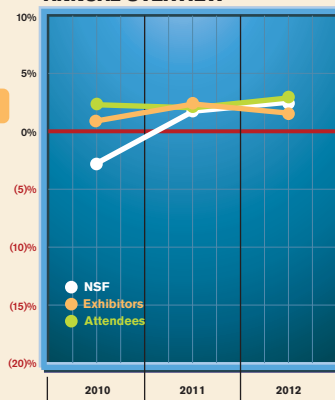
◀ **Bumping Along.** Exhibitor numbers increased in September, but only slightly. The 1.5% hike continued a trend of very modest growth that began in the Spring.

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CONSOLIDATED QUARTERLY OVERVIEW



CONSOLIDATED ANNUAL OVERVIEW



◀ Quiet Quarter (left).

The Third Quarter was not much changed from the quarter before. No metrics grew much more than 2.0% and attendance growth was flat.

◀ Respectable Growth (right).

2012 took the trade show industry on the same moderate growth path as 2011. Of the three metrics, attendance growth was in the lead.

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Dashboard – SEPTEMBER TRADE SHOW METRICS

SPONSORED BY


BY CAROL ANDREWS,
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**BENCHMARKS:
AVERAGE GROWTH**

- NSF: 3.0%
- Exhibitors: 1.5%
- Attendance: 3.5%



TOP MANAGEMENTS*

- PMMI
- Emerald Expositions
- Graphic Arts Show Co., Inc.



TOP CITIES*

- Las Vegas
- Chicago
- Orlando

**Based on total nsf*




GROWTH LEADERS

- ATCE 2013
- Gear Expo
- G2E Global Gaming Expo





TOP INDUSTRY SECTORS*

- Packaging and Processing
- Sports
- Printing

September 2013	Show Site	Net SF of Exhibits		Exhibitors		Total Attendance		Qualitative Data
SHOW INFORMATION	2013/2012	2013/2012	VARIANCE	2013/2012	VARIANCE	2013/2012	VARIANCE	2013 VS. 2012
American Public Transportation Assn. Annual Meeting American Public Transportation Association www.apta.com	Chicago Seattle	13,900 13,600	2.2%	133 109	3.7%	2,197 2,089	5.2%	There was a 17% increase in new exhibitors. The event focused on current issues facing public transportation and featured thought leaders and transit experts. Attendees included transit personnel, policymakers, board members, government agencies, manufacturers, suppliers and consultants.
ASIS International Annual Seminar and Exhibits ASIS International www.asisonline.org 	Chicago Philadelphia	230,000 227,500	1.1%	640 721	(11.2)%	N/A 19,431	CU (Comparison Unavailable)	This event for security management professionals included more than 200 educational sessions. A donation of \$42,450 was made for security enhancements to a Chicago public school, and 60 students from Chicago high schools attended a career day during the show.
ATCE 2013 - Society of Petroleum Engineers Annual Technical Conference and Exhibition Society of Petroleum Engineers www.spe.org	New Orleans San Antonio	150,500 124,624	20.8%	552 471	17.2%	12,028 11,095	8.4%	This year's show had the highest attendance since 1999. It attracted oil and gas professionals from around the world. Exhibitors came from 17 countries including Angola, Germany, France, Kuwait, Mexico, United Arab Emirates, China, Argentina and The Netherlands.
Backer's Total Pet Expo H. H. Backer Associates Inc. www.totalpetexpo.com	Rosemont, IL Rosemont, IL	69,200 86,000	(19.5)%	409 535	(23.6)%	6,501 7,456	(12.8)%	The show was recently renamed and rebranded in an effort to bring in more top quality buyers. Show dates were moved to allow for more holiday buying, which resulted in more sales for exhibitors and a more successful show overall. New show features included a VIP buyer program, show floor education stations, a complete pet store on the floor, a job placement service and additional networking opportunities.
BusCon Bobit Business Media www.busconexpo.com	Chicago Chicago	58,462 57,030	2.5%	146 143	2.1%	1,732 1,724	0.5%	More buses than ever in all shapes and types were on display, including several electric buses. Many new vehicles make their debut on the show floor. Educational sessions covered alternative fuels, electric buses, updates on ADA and DOT regulations, safety, paratransit and new technology. Next year the show moves from Chicago to Indianapolis.

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Dashboard – SEPTEMBER TRADE SHOW METRICS


September 2013	Show Site	Net SF of Exhibits		Exhibitors		Total Attendance		Qualitative Data
SHOW INFORMATION	2013/2012	2013/2012	VARIANCE	2013/2012	VARIANCE	2013/2012	VARIANCE	2013 VS. 2012
CEDIA Expo Custom Electronic Design & Installation Association www.cedia.org/expo 	Denver Indianapolis	193,973 188,590	2.9%	476 457	4.2%	17,930 16,913	6.0%	There was a 20% increase in new exhibitor participation, 50% growth in first-time attendees and a 50% jump in CEDIA training participation. Last year, 98% of exhibitors rated the show a success.
Comcast Connecticut Women's Expo Connecticut Expos www.CTexpos.com	Hartford Hartford	32,000 31,000	3.2%	290 280	3.6%	21,000 20,000	5.0%	Exhibitors at this consumer show included apparel and fashion companies, financial institutions, law firms, universities, medical services, technology companies and others. Sessions included dance classes, fashion shows and a comedy show.
EMS World Expo Cygnus Business Media www.emsworldexpo.com	Las Vegas New Orleans	80,900 82,300	(1.7)%	310 303	2.3%	5,580 4,366	27.8%	There were 37 countries represented at the show. The event also included the first annual Latin American Summit on emergency medical services and an "active shooter" response demonstration.
G2E Global Gaming Expo Reed Exhibitions and American Gaming Association www.globalgamingexpo.com 	Las Vegas Las Vegas	282,474 260,131	8.6%	430 405	6.2%	25,861 24,823	4.2%	More than 125 exhibitors from 32 countries exhibited for the first time. A new video series "Inside the Industry: Insights from Today's Movers and Shakers" debuted. Non-gaming amenities continued to be an important and growing part of the show.
Gear Expo American Gear Manufacturers Association www.agma.org <i>This show is biennial; therefore, we interpolated the data for 2012, the in-between year. Numbers for 2013 and 2011 were averaged to determine a usable number for 2012.</i>	Indianapolis Cincinnati	52,500 46,600	12.7%	219 197	11.2%	3,400 3,250	4.6%	When 2013 numbers were compared to 2011 data for this biennial show, net square feet grew 29%, the number of exhibitors increased 25% and total attendance was up 9.7%. There was an 82% rebook rate for the 2015 show that will celebrate AGMA's 100-year anniversary.
GlassBuild America: The Glass Window & Door Expo National Glass Association www.GlassBuildAmerica.com	Atlanta Las Vegas	111,580 103,500	7.8%	364 338	7.7%	6,243 6,669	(6.4)%	There were 69 first-time exhibitors and 109 international exhibitors representing 15 countries. While the show is considered national, 15.6% of participants were international.
Health + Fitness Business Expo Emerald Expositions www.healthandfitnessbiz.com	Las Vegas Las Vegas	24,150 est. 26,000	(7.1)%	89 est. 82	8.5%	N/A N/A	CU <i>(Comparison Unavailable)</i>	While there were more exhibitors in 2013, they utilized less exhibit space. In an effort to improve exhibitor ROI and deliver an enhanced experience for attendees, the show signed a three-year agreement with the Mandalay Bay Convention Center to host the show through 2015.
Hospitality Design Americas Exposition & Conference Emerald Expositions www.hdamericasexpo.com	Miami Miami	38,600 est. 54,710	(29.4)%	203 est. 355	(42.8)%	3,424 est. 4,681	(26.9)%	Formerly HD Boutique, the show was rebranded with a focus on Latin America. There was an influx of new exhibitors including luxury lighting and high-end art companies.
HSMIA's MEET National J. Spargo & Associates www.hsmia.org	Washington, DC Washington, DC	12,900 18,400	(29.9)%	114 153	(25.5)%	1,500 est. 1,800	(16.7)%	According to past surveys, three of five attendees attend no industry event other than HSMIA's MEET National. Nine of ten of these attend seeking new resources and new providers, and collectively, their budgets total more than \$1.5 billion.

Continued on next page

Trade Show Executive




Dashboard – SEPTEMBER TRADE SHOW METRICS

Continued from page 33

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SHOW INFORMATION	2013/2012	2013/2012	VARIANCE	2013/2012	VARIANCE	2013/2012	VARIANCE	2013 VS. 2012
ICSC (Intl. Council of Shopping Centers) Canadian Convention International Council of Shopping Centers www.icsc.org	Toronto Toronto	42,237 43,071	(1.9)%	142 152	(6.6)%	2,900 2,900	No change	Attendees discussed how competition in Canada's retail industry is intensifying as international retailers open stores in Canada. Special events included the presentation of the 2013 Maple Leaf Canadian Shopping Centre Awards.
Imprinted Sportswear Show - Fort Worth Emerald Expositions www.issshows.com	Ft.Worth Ft.Worth	37,170 est. 35,600	4.4%	174 est. 177	(1.7)%	4,566 est. N/A	CU (Comparison Unavailable)	This show has become the place where exhibitors, business owners, artists and manufacturers can exchange ideas and develop new techniques. Although the number of exhibitors was down slightly, participating exhibitors utilized more space.
Interbike International Bicycle Expo Emerald Expositions www.interbike.com 	Las Vegas Las Vegas	324,383 est. 319,936	1.4%	908 est. 810	12.1%	25,556 est. 25,536	0.1%	This huge bicycle event saw increases in all three measurements of growth. A new initiative, Interbike by Invitation, was designed to drive sales activity. It enabled registered retail bike shops to invite their most loyal customers to the final day of the show.
Interscience Conference on Antimicrobial Agents & Chemotherapy American Society for Microbiology www.asm.org	Denver San Francisco	14,500 14,400	0.7%	70 82	(14.6)%	5,323 7,024	(24.2)%	The breakdown of attendees was 52% U.S. and 48% international. Although attendance was down, exhibitors reported better quality leads and were so pleased with their results that 20% of them doubled their booth space for next year's conference in Washington, DC.
The Landscape Show Florida Nursery Growers & Landscape Association, Inc. (FNGLA) www.fngla.org	Orlando Orlando	74,500 73,000	2.1%	396 387	2.3%	6,219 6,539	(4.9)%	Exhibitors showcased plants, trees, hardscape and horticulture-related supplies. The show also featured The Knowledge College, an educational conference for those seeking in-depth knowledge from industry professionals and experts. Other features included a pre-show tour and demonstrations inside the exhibit hall each day of the show.
Modern Day Marine Emerald Expositions www.marinemilitaryexpos.com	Quantico, VA Quantico, VA	81,636 est. 106,956	(23.7)%	384 est. 469	(18.1)%	4,848 N/A	CU (Comparison Unavailable)	Special events included a golf tournament to benefit the Young Marines of the Marine Corps and the U.S. Marines Youth League Foundation; an enlisted awards parade; a grand banquet and reception; and a Family Day.
National Pet Industry Trade Show PIJAC Canada www.pijaccanada.com	Mississauga, ON, Canada Mississauga, ON, Canada	87,000 87,000	No change	265 est. 270	(1.9)%	1,955 1,830	6.8%	In its 25th year, a record was set in the number of attendees. The show provided a forum for manufacturers and distributors to showcase the latest in pet care to retail and service providers. There were seven pet workshops, compared to six last year and four in 2011.
Natural Products Expo East New Hope Natural Media, a division of Penton www.expoeast.com	Baltimore Baltimore	161,820 155,000	4.4%	1,202 1,112	8.1%	24,000+ est. 21,662	10.8%	There were more than 450 first-time exhibitors. NEXT, a portfolio of data and analytics tools, was launched at the show. Products were awarded in many categories, including packaging, innovation, green, health and beauty and supplements and herbs.

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Omaha Products Show for Business & Industry Mid-America Expositions, Inc. www.showofficeonline.com <i>This show is biennial; therefore, we interpolated the data for 2012, the in-between year. Numbers for 2013 and 2011 were averaged to determine a usable number for 2012.</i>	Omaha Omaha	50,000 50,000	No change	321 339	(5.3)%	5,000 est. 6,250 est.	(20.0)%	The show was one of the largest business and industrial expos in the Midwest for 2013. The Nebraska Chamber of Commerce, Society of Manufacturing Engineers, Society of Quality and Manufacturing, and Downtown Omaha Inc. were all involved with the show. The show is both a marketplace and a technical center where suppliers and vendors displayed products, materials, and services for area users and buyers.
PACK EXPO PMMI, the Association for Packaging and Processing Technologies  <i>This show is biennial; therefore, we interpolated the data for 2012, the in-between year. Numbers for 2013 and 2011 were averaged to determine a usable number for 2012.</i>	Las Vegas Las Vegas	722,437 675,973	6.9%	1,788 1,674	6.8%	42,887 est. 40,906	4.8%	As a result of a post-show survey conducted last year, education was provided on the show floor with standing room only attendance. The show donated \$62,000 to K9s for Warriors, a non-profit organization that trains and provides service dogs. When 2013 numbers are compared directly to 2011 numbers, net square feet increased 15.1%, exhibitors were up 14.7% and visitor attendance grew 10.2%.
PRINT 13 & CPP EXPO (Converting & Package Printing Expo) Graphic Arts Show Co., Inc. www.print2013.com  <i>Quadrennial show, with data interpolated for 2012</i>	Chicago Chicago	301,246 424,940	(29.1)%	612 646	(5.3)%	24,695 26,687	(7.5)%	There was an increase in participation by high-level decision makers as this quadrennial event showcased the latest profit-enhancing technologies and applications for a diverse spectrum of attendees. The show co-located with CPP EXPO for the first time and there was a record 67 co-located conferences, meetings, user groups and other activities to give attendees new and a expanded networking and education opportunities.
Surf Expo GLM www.surfexpo.com 	Orlando Orlando	219,000 215,000	1.9%	877 855	2.6%	27,028 24,236	11.5%	There were across the board increases in net square feet, number of exhibitors and total attendance. The show featured The Boardroom, an open to the public event with more than 40 exhibitors, live shaping, glassing, music and tributes to legends of East Coast shaping.
DASHBOARD ANALYSIS:		Net SF of Exhibits		Exhibitors		Total Attendance		
Total (Sum of all figures submitted by show management)		3,467,068 3,520,861		11,494 11,522		282,373 287,867		
Adjusted Total (Excludes outliers and shows in which an apples-to-apples comparison is not possible)		3,114,322 3,022,811		11,177 11,014		268,521 259,389		
Averages (Based on Adjusted Totals)		135,405 131,427		466 459		12,787 12,352		
Percentage of Growth (Based on Adjusted Totals)		3.0%		1.5%		3.5%		

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