

Headwinds Pick Up in October; Attendance and Exhibit Space Backtrack

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

Oceanside, CA – The results of this year's October trade show calendar were virtually a rerun of October 2012 with a rather flat and mushy performance in all three categories of the *Trade Show Executive (TSE) Dashboard of Monthly Trade Show Metrics*.

The number of exhibitors increased slightly while at the same time, attendance and exhibit space drifted lower in a fairly confounding performance for a roster that included many "Gold-chip" shows including the return of the large non-annuals *ICUEE* and *International Baking Industry Exposition*.

For the 23 shows surveyed for the *Dashboard*, net square feet of exhibit space declined (0.9)% in October in a same show comparison to last year. The number of exhibitors improved a modest 0.5%, but attendance slipped (2.8)%. The tallies continued a streak in which growth has been stuck in first gear or falling under water. However, the September *Dashboard* metrics (published in the November issue of *TSE*) were one of the most positive of recent months, with increases of 3% or more for exhibit space and attendance.

Growth Sputters Despite High Volume

October was a busy month, with roughly twice the exhibit space than the 26 shows surveyed in September. The October totals included 6,681,723 net square feet (nsf) of exhibit space, 13,802 exhibitors and 382,737 attendees. The numbers boiled down to a per-show average of 245,503 nsf, 599 exhibitors and 17,873 attendees.

Fourteen of the 23 shows were 100,000 nsf or larger, and 13 were large enough to make the *TSE Gold 100* rankings of largest U.S. trade shows. Four were part of the *TSE Fastest 50* list of shows that have been growing by leaps and bounds.

Eight shows bounded upwards with size increases in all three metrics. Five shows headed in the opposite direction, reporting declines across the board.

Right on ICUEE

The October numbers received a timely boost from *ICUEE, The International Construction & Utility Exposition*.

The biennial construction equipment show returned to Louisville with larger crowds and an exhibit area that covered a record 1,173,957 nsf, making it the largest show in the *Dashboard*. The show grew in all three metrics: exhibit space increased 2.7% over the 1,142,858 nsf calculated for 2011; exhibitor count grew 7.6% to 862 and attendance grew 5.7% to 17,505, thanks to a solid showing by international visitors.

The growth was deemed encouraging by the Association of Equipment Manufacturers not only for their benefit to the show's bottom line, but also as a sign that things were continuing to improve for the construction sector. "We hope the great turnout this year points to more sustainable and broader industry growth," said Show Director Sara Truesdale Mooney. "There were numerous product introductions and we heard many favorable comments from both attendees and exhibitors," Mooney added.

The lively exhibit area was complemented by an enhanced educational program. Mooney said ticket sales to the sessions were 40% above 2011.



Growth Leaders

- The *International Baking Industry Exposition (IBIE)* hit 400,000 nsf, a 14.0% increase over exhibit space in 2010, the last year the triennial event for the commercial baking industry took place.

The number of exhibitors also grew 14.0% and the attendance of 21,000 was pegged 8.6% higher than 2010. Smith-Bucklin and its association partners made a concerted effort to recruit international attendees, and it paid off with 26% of the total attendance coming from Canada, Mexico, Asia and Europe.

- *ABC Kids Expo* returned to Las Vegas and saw its attendance shoot up 40.0% to 14,123. The number of exhibitors increased a whopping 38.0% and the exhibit floor grew 17.1% to 351,000 nsf.

All Baby & Child, Inc. tied its show record for countries represented on the exhibit floor with 66. Show managers paved the way during the Summer with online webinars for overseas exhibitors that dealt with the nuts and bolts of moving in as well as strategies for connecting with prospective U.S. buyers and following-up on promising leads.

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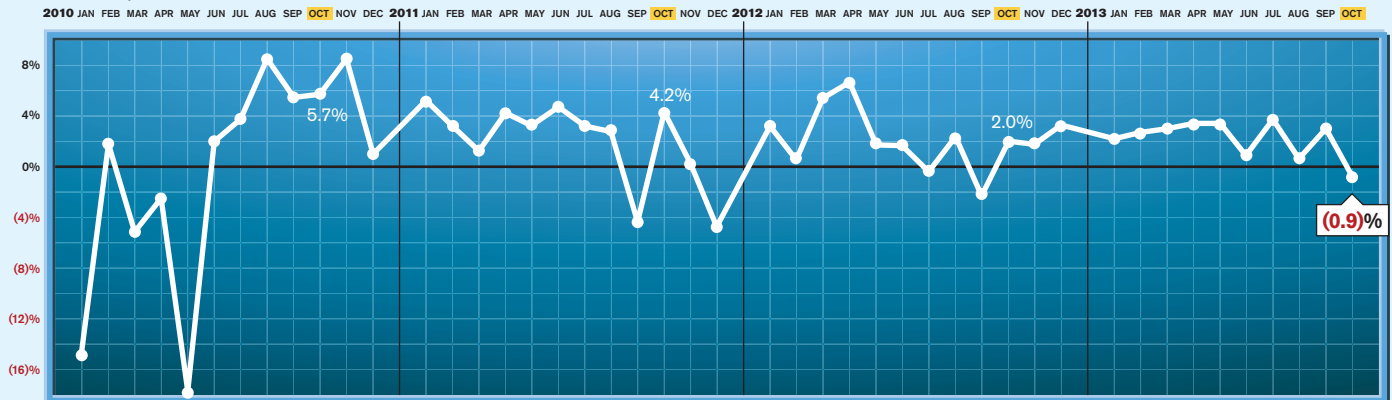
Bumper to Bumper. The exhibit area at *ICUEE* was as crowded as a shopping center on the day after Thanksgiving. A 7.6% jump in the number of exhibitors displaying the latest construction equipment helped push the exhibit floor past 1.1 million nsf.

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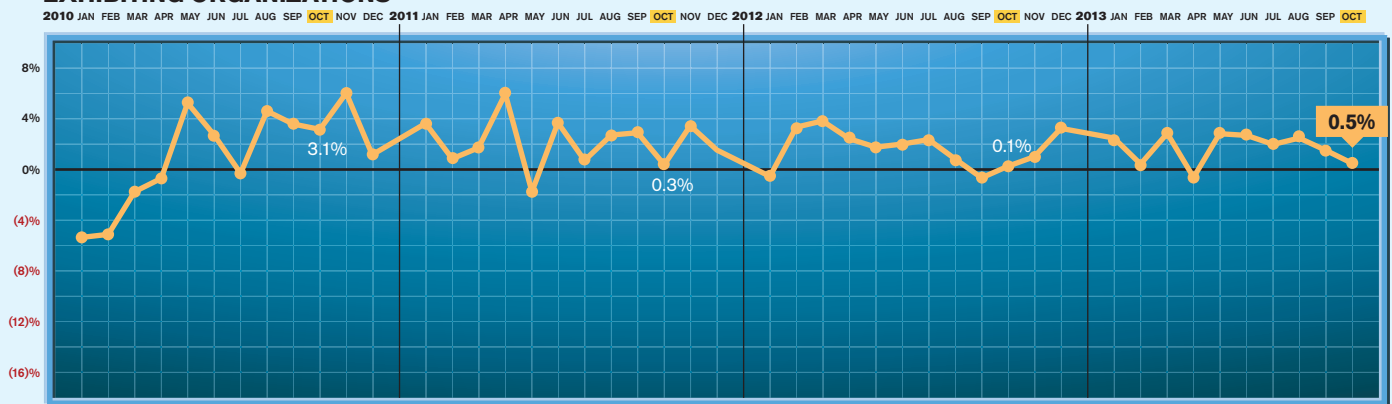
Dashboard Snapshot – MONTHLY OVERVIEWS

Triple Dip. Trade show metrics softened in October after a nice bounce in September. The average growth in exhibitors was largely flat at 0.5% but growth in nsf fell into the red at (0.9)% and attendance slipped (2.8)% compared to October 2012.

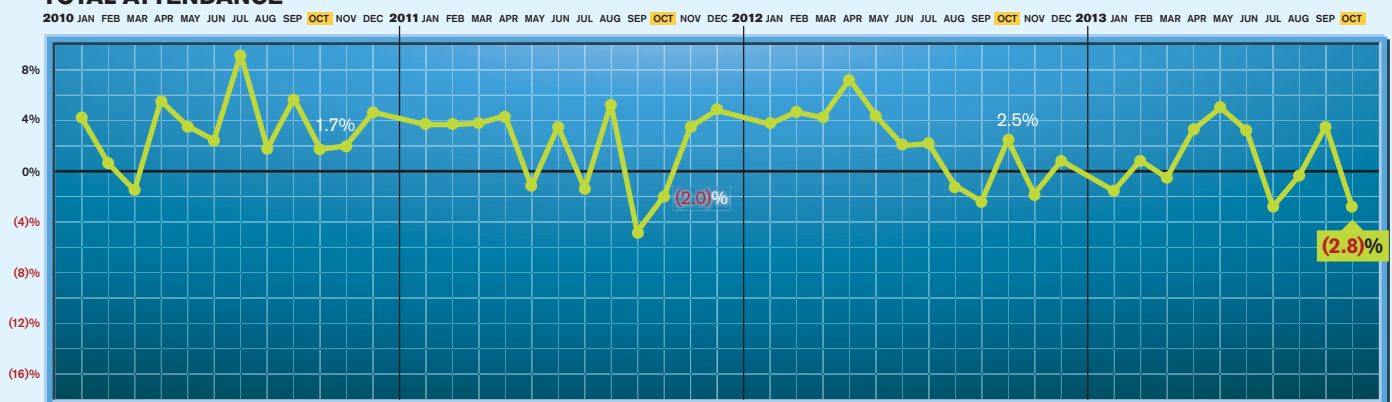
NET SQUARE FEET OF PAID EXHIBIT SPACE



EXHIBITING ORGANIZATIONS



TOTAL ATTENDANCE



Methodology

Survey questionnaires were sent to October shows listed in *TSE's ZOOM Trade Show Locator* and *Gold 100 directory*. All responses were cross-checked by *TSE* editors for discrepancies.

The *Trade Show Executive Dashboard* was created to give show organizers and

CEOs a fast read on trade show performance at a time when up-to-date, quality information is paramount to making decisions in today's business world. We recognize that simple statistics don't tell the full story about a show, and year-over-year growth is not the key factor in a show's value to the industry it serves. The *TSE Dashboard* still provides

the traditional metrics of show growth but also lists other significant characteristics and accomplishments such as quality of attendees, international attendance, sales transactions and conference and sponsorship growth.

We are grateful to the organizers who shared both quantitative and qualitative data.

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• *Academy 2013*, produced by the American Academy of Optometry (AAO) and held in Seattle, featured a 34,000 nsf exhibit floor, but that was 13.3% larger than last year.

The show created a comprehensive agenda of research and held its opening session and luncheons in the exhibit hall to ensure the eye specialists all got an up-close look at the newest products in their specialty.

Landings and Landscaping

The *National Business Aviation Association's NBAA2013* landed in Las Vegas with the latest in corporate planes and helicopters. The show, which was on both the latest *TSE Gold 100* and *Fastest 50*, split its exhibit space between the Las Vegas Convention Center, where a dozen aircraft were on display, and the Henderson Executive Airport on the outskirts of town where another 83 birds were parked in a sold-out static display area. The total exhibit space actually slipped (5.6)% from last year's show in Orlando, but still totaled a hefty 978,200 nsf.

Attendance and exhibitor count enjoyed some modest gains, prompting Ed Bolen, president and CEO of the National Business Aviation Association, to conclude, "Any way you look at it, this year's show was a success."

The exhibit space for Sellers Expositions' *Gold 100* ranked *GIE+Expo* in Louisville was also split between indoor and outdoor areas, and reached the high-six

figures. Exhibit space ticked up 3.0% to 726,947 nsf. The exhibitor numbers were up 5.0% and attendance among landscaping professionals increased 6.1% to 18,449.

While the Kentucky Exposition Center has space to spare, Sellers Expositions didn't confine the attendees to the exhibit halls and scheduled three free concerts for attendees at an outside venue and recruited a number of restaurants and local attractions that offered discounts to customers wearing the show name badge.

Top Cities

October was indeed a heady month for Louisville, which hosted *GIE+EXPO* and *ICUEE*. The two shows combined for 1,900,904 nsf and some good times along the city's Bourbon Trail. Las Vegas generally tops the site rankings. Las Vegas hosted four *Dashboard* shows totaling 1,808,700 nsf.

The *World Dairy Expo* covered 558,512 nsf and brought Madison, WI to the podium in third place.

Looking Ahead

A crowded field of major shows was featured in November as the exhibition industry raced to the finish line for 2013. The events crowded into the weeks ahead of the Thanksgiving holiday break included a solid representation from the *Gold 100*.

FABTECH returned to Chicago with expectations of a record crowd with

about 600,000 nsf of exhibit space. "Just by counting the record number of companies exhibiting at *FABTECH* shows you that the U.S. manufacturing sector is experiencing growth and optimism," said show co-manager John Catalano.

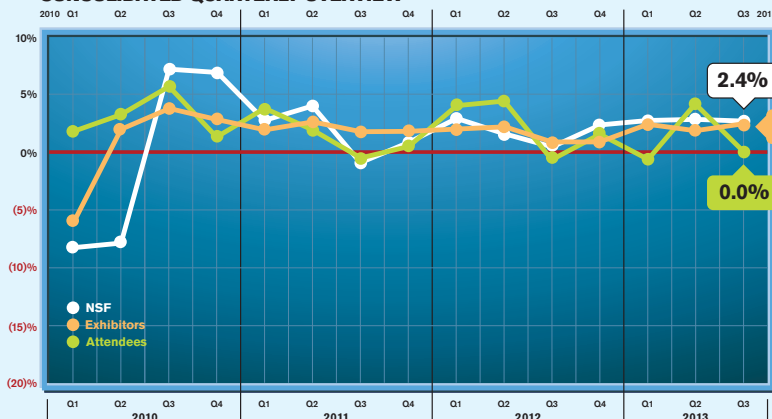
IAAPA Attractions Expo in Orlando moved into the largest exhibit floor it has enjoyed in some 10 years covering approximately 522,000 nsf. The show was bolstered by 110 first-time exhibitors. "Wear your comfortable shoes," *IAAPA* President and CEO Paul Noland advised before the show. "There are many business-building ideas to cover in the nine miles of aisles."

Orlando also played host to *POWER-GEN International*, which predicted a record crowd of more than 22,000 attendees representing 92 nations. *ISSA/InterClean* swept into Las Vegas with unique features including a school *Janitor of the Year* contest and the opportunity for attendees to do their best lip-synching to a Bon Jovi song.

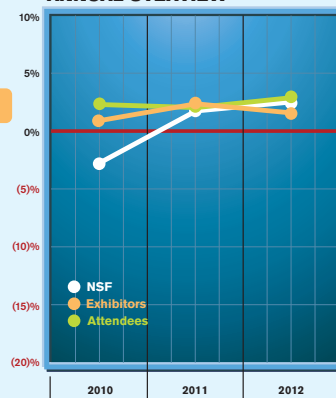
And the winter auto show season kicked-off in Los Angeles with the *LA Auto Show*. The *Greenbuild International Conference and Expo* took over the Pennsylvania Convention Center in Philadelphia.

Together, they have a significant impact on Fourth Quarter trade show performance and will be reported on next month. **TSE**

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 – OCTOBER TRADE SHOW METRICS

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**BENCHMARKS:
AVERAGE GROWTH**

- NSF: **(0.9)%**
- Exhibitors: 0.5%
- Attendance: **(2.8)%**



TOP MANAGEMENTS*

- Assn. of Equipment Manufacturers
- National Business Aviation Association
- Sellers Expositions



TOP CITIES*

- Louisville
- Las Vegas
- Madison

**Based on total nsf*




GROWTH LEADERS

- ABC Kids Expo
- International Baking Industry Exposition
- Academy 2013 Gaming Expo








TOP INDUSTRY SECTORS*

- Utility Construction
- Food
- Business Aviation

October 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
ABC Kids Expo Schur Management & Consulting www.theabcshow.com 	Las Vegas Louisville, KY	351,000 299,800	17.1%	1,050 761	38.0%	14,123 10,123	40.0%	With its move back to Las Vegas, the show was the second largest ever for ABC. Attendees came from 66 countries, tying a previous record. The show enabled attendees to see all resources under one roof. The educational conference continued to serve the independent specialty store market.
Academy 2013 American Academy of Optometry (AAO) www.aaopt.org	Seattle Phoenix	34,000 30,000	13.3%	160 150	6.7%	6,004 5,514	8.9%	The exhibit hall was sold out with 17 new exhibiting companies and more professional optometric attendees than at any other meeting this year. New this year were Hot Topics sessions on the latest discoveries in macular degeneration and low vision, scleral lenses and dry eye, as well as new integrated paper and poster sessions.
American Academy of Pediatrics National Conference & Exhibition American Academy of Pediatrics (AAP) www.aap.org	Orlando New Orleans	60,500 60,100	0.7%	339 341	(0.6)%	15,400 11,867	29.8%	At 1,900, international attendance was the highest ever. The show also had the most exhibit booths ever, reaching 636. The well-attended non-CME product theaters in the exhibit hall expanded this year from 12 slots to 18. The Welcome Reception, considered a must-attend event, drew 3,800 attendees.
American College of Surgeons Annual Clinical Congress American College of Surgeons www.facs.org	Washington, DC Chicago	50,500 63,900	(21.0)%	209 268	(22.0)%	12,407 13,024	(4.7)%	The American College of Surgeons celebrated its centennial at the show with special exhibits, special guests, and events that showcased the College's history and the accomplishments of surgeons over the past 100 years. Approximately 25% of attendees were from outside the United States.
American Trucking Associations Management Conference & Exhibition American Trucking Assns. www.trucking.org	Orlando Las Vegas	40,000 38,100	5.0%	172 179	(3.9)%	2,016 2,651	(24.0)%	The show included dedicated exhibit hours on the first two days and extended exhibit hall hours on the final day. Attendees were top-level executives representing major nationwide fleets. Educational and general sessions addressed industry topics, including trucking technology and natural gas, the economy, legal and advocacy issues, and government regulations.

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Dashboard – OCTOBER TRADE SHOW METRICS







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SHOW INFORMATION	2013/2012	2013/2012	VARIANCE	2013/2012	VARIANCE	2013/2012	VARIANCE	2013 VS. 2012
AUSA Annual Meeting & Exposition Association of the United States Army www.ausa.org 	Washington, DC Washington, DC	268,678 323,926	(17.1)%	568 660	(14.0)%	28,349 29,098	(2.5)%	For the first time, AUSA featured a Small Business Pavilion on the show floor. Qualifying companies were required to be first-time exhibitors and classified as a small business by the Small Business Administration. Professional development forums were held throughout the three days.
GIE+EXPO Sellers Expositions www.gie-expo.com 	Louisville, KY Louisville, KY	726,947 est. 705,998	3.0%	646 est. 615	5.0%	18,449 est. 17,391	6.1%	OPEI (Outdoor Power Equipment Institute) launched a Look Before You Pump education campaign at the show. The main part of the initiative focuses on changing the prevailing attitude that the same fuel a landscaper puts in his pickup can also go into the mowers and blowers on his trailer. The program warns that use of fuel with more than 10% ethanol is both illegal and unsafe.
ICUEE, The International Construction & Utility Equipment Exposition* Association of Equipment Manufacturers www.icuee.com 	Louisville, KY Louisville, KY	1,173,957 1,142,858 ('11)	2.7%	862 801 ('11)	7.6%	17,505 16,559 ('11)	5.7%	The 2013 biennial show, which included the co-located H2O-XPO and iP Utility Safety Conference & Expo, was one of the largest ever. A record 11 co-located education programs and events was more than double the previous benchmark. 2013 numbers were compared to 2011's figures.
International Baking Industry Exposition** Smith Bucklin (sales and operations) www.smithbucklin.com 	Las Vegas Las Vegas	400,000 350,802 ('10)	14.0%	813 713 ('10)	14.0%	21,000 19,340 ('10)	8.6%	Intl. attendance was 26% of total attendance. Exhibitors reported satisfaction with the number of bakers and allies who wanted to conduct business during the show. Some said this was their most successful show to date. 2013 numbers were compared to 2010 data.
Intl. WorkBoat Show Diversified Business Comm. www.workboatshow.com 	New Orleans New Orleans	218,770 218,395	0.2%	1,074 924	16.2%	14,349 14,788	(3.0)%	The show set records in net square feet and number of exhibitors. International participation was strong, and bellwether and long-standing exhibitors remained loyal, providing continued support. Attendees represented every facet of the commercial marine market.
Interop New York UBM Tech, Interop www.interop.com	New York New York	21,825 21,080	3.5%	125 120	4.2%	4,934 4,250	16.1%	There were more than 40 new exhibitors, including Verizon and Samsung. At least 15 exhibitors announcements at the show. Thousands of IT professionals learned new skills, tackled common problems and checked out the newest IT solutions.
Medtrade Emerald Expositions www.medtrade.com	Orlando Atlanta	112,300 est. 136,785	(17.9)%	513 est. 544	(5.7)%	6,870 est. 8,300	(17.2)%	The show introduced the 6-4-18 series to provide attendees with vital information to use while strategizing for survival and success through the next 18 months. These six sessions, included with a conference pass, addressed effective collections, purchasing and cash flow management; reducing risk; diversification and operational efficiencies; and leading transformation in business.

*Biennial show **Triennial show

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SHOW INFORMATION	2013/2012	2013/2012	VARIANCE	2013/2012	VARIANCE	2013/2012	VARIANCE	2013 VS. 2012
NACS Show 2013 The Assn. for Convenience and Fuel Retailing (NACS) www.nacsshow.com 	Atlanta Las Vegas	396,600 381,050	4.1%	1,160 1,176	(1.4)%	22,263 24,056	(7.5)%	The 2013 show was the largest ever in terms of net square feet. The show included a Cool New Products Preview Room with new products. Attendees chose from more than 50 educational sessions that addressed everything from foodservice and operations to category management.
Natl. Industrial Fastener & Mill Supply Expo Bannister & Associates www.fastenershow.com	Las Vegas Las Vegas	79,500 77,000	3.2%	609 603	1.0%	2,103 1,935	8.7%	The show brought together manufacturers and master distributors of industrial fasteners and related products or services with distributors and sales agents. A mobile customer service and productivity application, Concierge Elite from Freeman, offered exhibitors the convenience of self-service through their mobile devices or PC, while providing show management real-time visibility of move-in and move-out activities.
NBAA Business Aviation Convention & Exhibition National Business Aviation Association www.nbaa.org  	Las Vegas Orlando	978,200 1,036,600	(5.6)%	1,098 1,073	2.3%	25,425 25,150	1.1%	A sold-out static display of aircraft featured 83 fixed-wing aircraft at Henderson Executive Airport, while an all-new indoor static display of aircraft at the Las Vegas Convention Center featured 12 light business airplanes and helicopters. The show hosted representatives from all 50 U.S. states and more than 90 countries around the world.
NECA Convention & Trade Show National Electrical Contractors Association www.necaconvention.org 	Washington, DC Las Vegas	70,000 est. 70,200	(0.3)%	300 est. 306	(2.0)%	5,500 est. 5,411	1.6%	Post-show surveys have revealed that 75% of NECA Show attendees are the final decision-makers or part of the decision-making team, and approximately the same percentage attend no other trade show. C-level executives and electrical construction decision-makers come from across the nation and more than 17 countries.
PDN PhotoPlus Conference + Expo Emerald Expositions www.photoplusexpo.com	New York Las Vegas	73,674 est. 75,619	(2.6)%	224 est. 220	1.8%	22,032 est. 22,277	(1.1)%	Attendees included professional photographers and enthusiasts. A post-show survey indicated that 76% of attendees felt the show was an important part of their product sourcing and buying process, and 93% planned to purchase products or services from an exhibitor within the year. 60% planned to spend up to \$10,000 with exhibitors they saw at the show.
Produce Marketing Assn. Fresh Summit International Convention & Exposition Produce Marketing Assn. www.freshsummit.com  	New Orleans Anaheim	252,100 251,800	0.1%	703 673	4.5%	18,113 21,104	(14.2)%	The show enjoyed record-breaking growth with the most exhibitors and net square feet ever. The increases were attributed to industry growth and support and the New Orleans location. The show had not been held there in more than 10 years. Exhibitors donated more than 373,000 pounds of fresh produce to a food bank in the New Orleans area.

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SGIA Expo Specialty Graphic Imaging Association www.sgia.org 	Orlando Las Vegas	212,600 203,100	4.7%	523 529	(1.1)%	22,500 est. 22,101	1.8%	There were 102 first-time exhibitors, including 68 from the U.S. and 19 from China. The attendance record set in 2012 was broken this year. A large part of the show's success was the overwhelming support of the exhibitor community. More than 30% of attendees were from exhibitor referrals facilitated by SGIA's VIP and Exhibitor Invites Programs.
Solar Power International Solar Energy Trade Shows, LLC (SETS) www.solarpowerinternational.com 	Chicago Orlando	200,000 est. 278,000	(28.1)%	600 est. 900	(33.3)%	13,000 est. 15,000	(13.3)%	This was the first time the show was held in the Midwest. Approximately 25% of attendees were regional and 35% attended for the first time. After rapid early growth, the show has stabilized but continues to deliver quality buyers from all renewable markets.
Special Delivery New York Emerald Expositions www.ja-newyork.com	New York New York	63,025 est. 59,285	6.3%	439 est. 403	8.9%	6,482 est. 3,568	81.7%	The show experienced phenomenal growth in attendance, and to help attendees find exhibitors, the show offered JA New York Connect, a free online tool that allowed attendees to view exhibitors and products, navigate floor plans and access booth numbers, contact exhibitors directly, schedule appointments in advance of the show and create a personalized show planner.
WEFTEC (Water Environment Federation Technical Exhibition & Conference) Water Environment Federation www.weftec.org 	Chicago New Orleans	297,400 296,725	0.2%	974 980	(0.6)%	22,589 17,442	29.5%	The 2013 show in Chicago was the history. The last time the show was held in Chicago (in 2008), it broke the previous attendance record. Highlights of the show included the Innovation Showcase, the first-ever Stormwater Congress, and a community service project that replaced concrete with green infrastructure at a school playground.
World Dairy Expo World Dairy Expo www.worlddairyexpo.com 	Madison, WI Madison, WI	558,512 560,600	(0.4)%	843 863	(2.3)%	70,903 71,788	(1.2)%	Of the more than 70,000 attendees, 2,905 were registered international guests from 92 countries. Exhibitors from 29 countries represented all aspects of the dairy livestock industry, including feed, genetics, milking systems, forage and waste handling, animal health supplies, pharmaceuticals, construction and facilities management, and more.
DASHBOARD ANALYSIS:		Net SF of Exhibits		Exhibitors		Total Attendance		
Total (Sum of all figures submitted by show management)		6,640,088 6,681,723		14,004 13,802		392,316 382,737		
Adjusted Total (Excludes outliers and shows in which an apples-to-apples comparison is not possible)		4,866,131 4,910,063		10,679 10,627		295,217 303,838		
Averages (Based on Adjusted Totals)		243,307 245,503		562 559		17,366 17,873		
Percentage of Growth (Based on Adjusted Totals2)		(0.9)%		0.5%		(2.8)%		


COMING UP NEXT MONTH:
A review of shows held in November