



World Summit 2017

Montpellier, La Grande-Motte

21-24 June 2017

UK Exhibitions

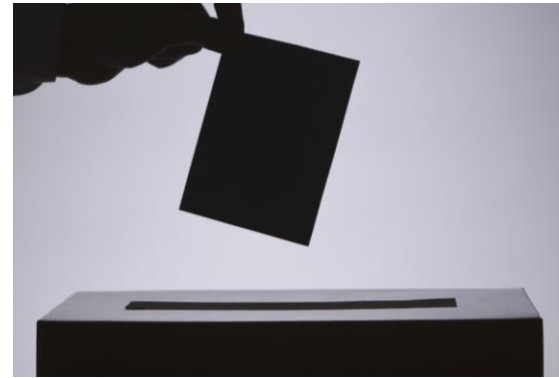
Sizing and Scaling

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Director Event Supplier and Services Association

External Impact

- Brexit
- Elections
- Terrorism



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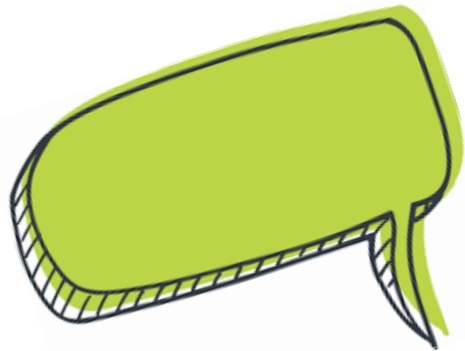


Brexit



Rob Sherwood, managing director of Forest Exhibitions, organiser of Automechanika Birmingham said: It's a hugely disappointing result from a referendum which should never have taken place. I have deep concern for export for SME's in particular, and for the UK Automotive industry. Let's hope that the coming months will offer some hope of trade deals and economic stability."

David Pegler, CEO, ExCeL London said: "ExCeL London is pleased that the uncertainty and unpredictability of the referendum campaign is now over. Although we do not yet know the full details of what Brexit will mean in terms of trade, access to the single market or free-flowing business travel, we are confident of a bright future for the London economy and for ExCeL.



Nick Moss, CEO of Prysm Group kept it short and simple, and said: "Very disappointing but we are postponing shock and searching for opportunity."



Paul Thandi, CEO of the NEC Group said: "As a business we've been vocal about our support for the Remain campaign, and while I still believe that would have been the best possible outcome for us, we are now faced with a new challenge which we must embrace."

Andrew Harrison, ESSA director commented: "While the referendum result might be a bitter pill to swallow for many people across the industry and the country at large, I feel strongly that we must accept this resolution to leave the EU quickly and decisively. Of course, as the process of disengaging from the EU begins in earnest, there will be a direct impact on the industry in many ways, but it is important to remember that there will be no immediate change in the way the UK event industry operates.

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Elections (more voting!!)

Post EU referendum we have a new Prime Minister

Called snap election which put the country on hold

Led to a hung parliament

Probably lead to a further General Election later in the year

Further stall EU exit negotiations



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Terrorism



2017, 22 March: 2017 Westminster attack

- 5 dead, 49 injured

2017, 22 May: 2017 Manchester Arena bombing

- 22 dead , 122 injured

2017, 3 June: June 2017 London attack

- 8 dead, 48 injured

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Executive Summary

One of the defining characteristics of the trade show/exhibition industry in the UK is that virtually no one knows anything about it.

It's a stunningly fact free environment - Phil Soar 2017



Approx. 860 exhibitions hosted by the UK's main exhibition venues.

Trade exhibitions accounted for the largest proportion of these – 49%.

Approx. 9.5m visitors, 64% of these visitors attending consumer shows.

Average attendance per show 10,500

Consumer delivering on average twice the number of visitors than trade shows.

The average gross exhibition size was 10,000m².

UK exhibitions of at least 500m²

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An average exhibition had 170 exhibiting companies.

Conference exhibitions were much smaller (an average of 58 exhibiting companies).

On average an exhibition occupied a venue for 5.1 days – on average exhibitions were open for 2.4 days.

The Leisure Sector was the largest generator of exhibitions.

This was followed by the Lifestyle sector and the Medicine / Healthcare and Pharmaceutical sector

Consumer exhibitions were strongly orientated to the Leisure sector (accounting for approximately two-fifths of consumer exhibitions).

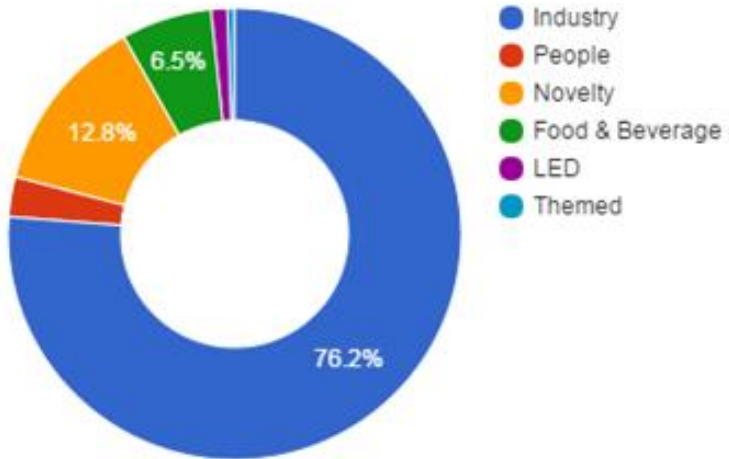
March, September, October and November were the busiest months for exhibitions in 2015.

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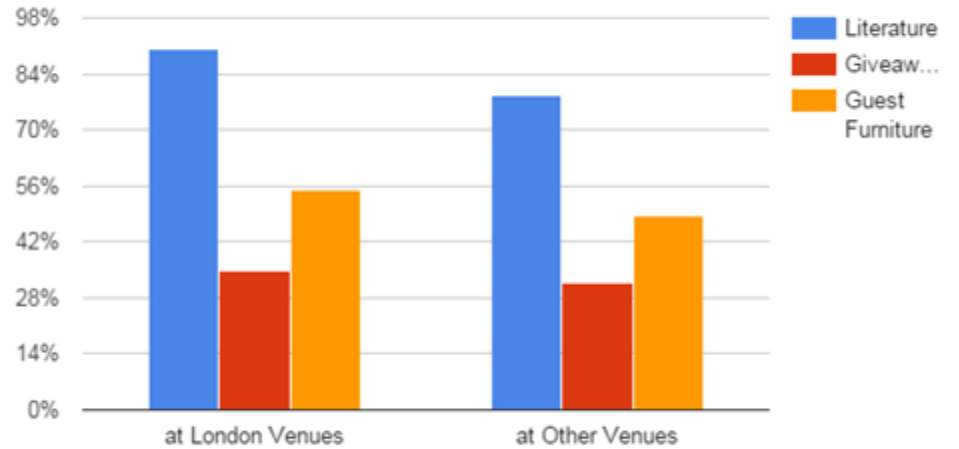


Quiz

Breakdown of Key Features on Exhibition Stands



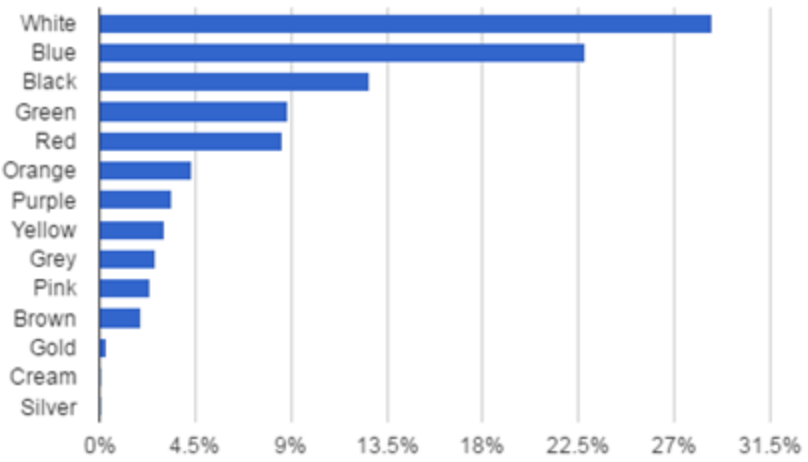
% of Stands Offering Literature, Giveaways and Furniture



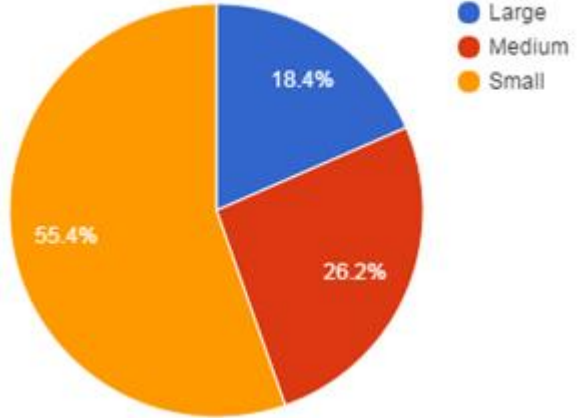
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Predominant Colours of UK Exhibition Stands



Size of Stand - Breakdown

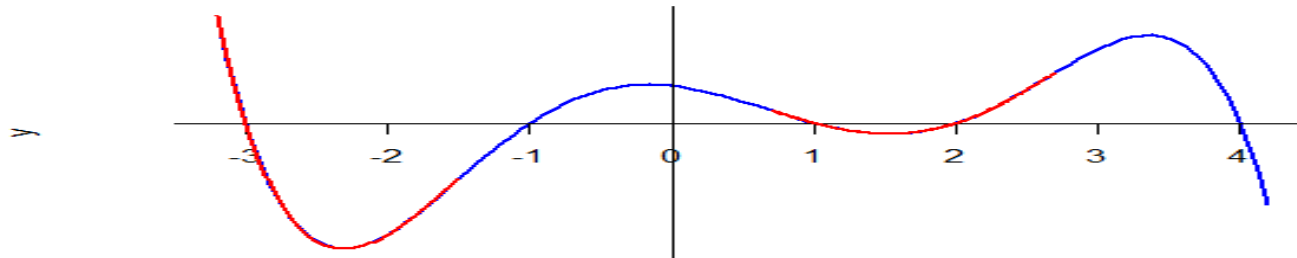


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Long term view

- In real terms in the UK over the last 17 years, exhibitions have shrunk with regard to net square meters sold
- Trade shows (makes up approx. 72% of revenue) having lost 18% of their net sqm since 2000
- Compare this to a 60% decline in magazine and 70% decline in newspaper revenues, it actually appears ok
- This is all in the face of changing habits and growth of digital



- However, I would argue that although the long term net sqm figure has dropped, should the real figure of measurement be revenue and profitability. Many would argue yes
- If this is the case, then the sqm cost has risen by approx. 48%. Even with the reduction in size of shows, this reflects a higher than inflation increase
- Seen in these terms, the Trade Show Industry looks very healthy. It is little wonder that every major private equity company in the world is so keen to invest in our UK-based exhibition groups - which continue to be (with the exception of inside Germany) the largest players in the world

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Food for thought...

- When working in the UK are you correctly insured in the event of a postponed event due to a terror attack or death of a Monarch
- it's difficult to comprehend until it happens and the financial implications might not be at the forefront of everyone's mind, but the implications are a growing and serious threat

- Changes and enhancement to Health and Safety laws and guidance

A large awareness campaign regarding working safely in the UK exhibition industry took place last year – www.stop-the-drop.co.uk

UK H&S law and guidance has changed recently and in many respects the enforcement powers of the governing body (HSE) have led to a huge increase in the size of fines that can be levied and increased powers to bring about prison sentences against those involved in the most serious of cases.



...Thanks andrew@essa.uk.com

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