

The Canadian 50 Analysis

by Candice Yang

Attendance: Only Index Down In Canadian 50

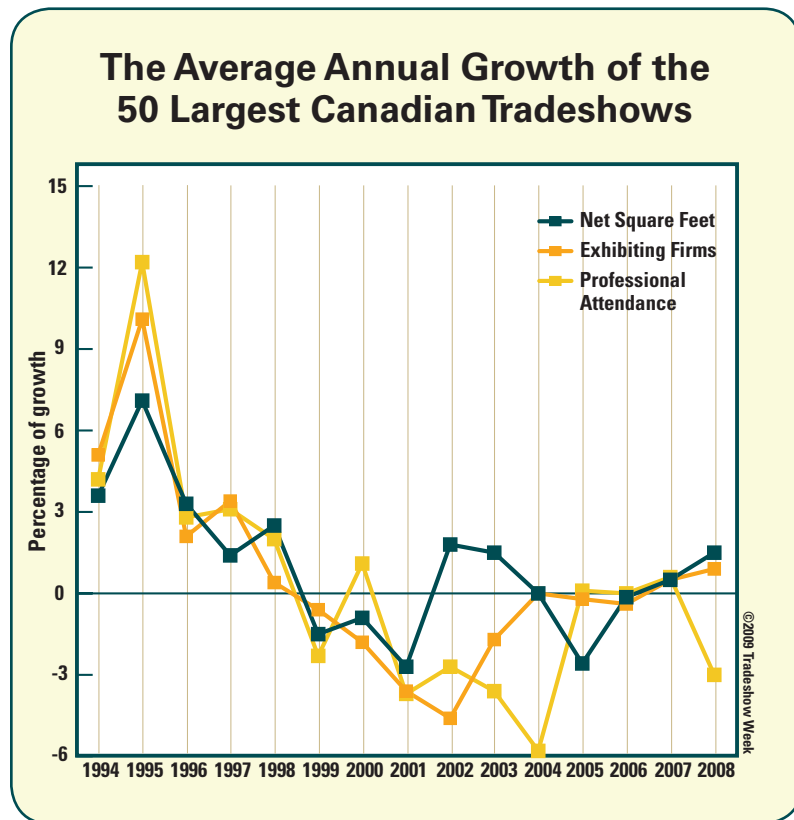
In a troubled global economy, the largest shows in Canada post overall growth in two indexes

While all indexes were down for the U.S. shows, our Canadian neighbors fared better, with only attendance taking a negative turn and both the net square footage and number of exhibiting companies staying in the black.

The overall number of exhibitors registered a small bump of 0.9 percent and total net square footage correspondingly went up 1.5 percent. After holding steady since a 5.8-percent dip in 2004, attendance declined 3 percent among the 2008 Canadian 50 shows. All told, while there are some concerns of how the struggling U.S. economy might affect Canadian shows, it seems that the shows have come away fairly clean despite the overall attendance taking a small cut, and 2009 is already off to a good start.

"I know of many events recently – in the last 90 days – (that are) proving to be holding their own very well," said Stephen Dempsey, general manager of IncentiveWorks and president of the Canadian Assn. of Exposition Management. "We're holding fairly strong up here."

IncentiveWorks had more luck with attendance in 2008 than most



other shows that were tracked by TSW overall, let alone the Canadian 50. The index soared 35.6 percent from 1,870 attendees in

2007 to 2,536 in 2008. Most of the increased traffic was witnessed on the first day of the show, according to Dempsey, but he could think of

The Canadian 50 Analysis

Canadian 50 Totals		FIG. B	
	2008	2007	% Growth
Total net sq. ft. of paid exhibit space	5,386,910	5,088,508	NA
Adjusted* net sq. ft. of paid exhibit space	3,828,441	3,773,474	1.5%
Total number of contracted exhibitors	18,678	18,208	NA
Adjusted* number of contracted exhibitors	14,002	13,878	0.9%
Total professional attendance	424,485	412,170	NA
Adjusted* professional attendance	287,960	296,964	-3.0%
Total value of exhibit space	\$100.05 MIL **	\$90.79 MIL **	10.2%
Space rate range per sq. ft.	\$750-\$40.50**	\$750-\$38.00**	NA

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*Adjusted totals are based only on shows with a consecutive two-year comparison.

**Rates are in Canadian dollars, based on inside space.

NA=not applicable

Canadian 50 Averages		FIG. C	
	2008	2007	% Growth
Average net sq. ft. of paid exhibit space	100,748	99,302	1.5%
Average number of contracted exhibitors	368	365	0.9%
Average professional attendance	7,578	7,815	-3.0%
Average space rate per net sq. ft.	\$18.57*	\$17.84*	4.1%
Average ratio of attendees to exhibitors	21 to 1	21 to 1	0.0%
Average sq. ft. used per exhibitor	273	272	0.6%

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All averages are based on the adjusted totals.

*Rates are in Canadian dollars, based on inside space.

A Comparison of Percentages of Growth: Canada & U.S.		FIG. D	
	Canada	U.S.	
Net square feet	1.5	-1.6	
Exhibiting companies	0.9	-2.7	
Attendance	-3.0	-3.0	

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no definitive reason for the surge, a problem many would not mind having these days.

"People are funny to predict," Dempsey said. "I wish I had a really good answer as to why, but I don't have a really good answer."

Buildex Vancouver featuring Design Northwest & The BC Construction Show saw a

4.2-percent decline in showfloor size (from 60,000 net square feet in 2007 to 57,500 net sq. ft. in 2008) while its number of exhibitors remained flat at 327 for both years, but still pulled out a 9-percent increase in attendance, with 9,642 attendees at the 2008 show, up from 8,846 in 2007. According to Show Director Dave Tyldesley, some of

the fallout from the current economic state happened to benefit the show, as attendees chose to travel less on a national level and more on a regional level.

"Some of the attendees that come to our show traditionally also go to some of the national and international shows," said Tyldesley. "We think our domestic attendance basically increased to offset some of the decrease (of the) national people."

Tyldesley said he observed a positive vibe on the 2008 showfloor. With the less-than-great news that has been floating around in the past year or so, and not confined to the tradeshow industry, those who took part in the show, whether exhibitors or attendees, may have been uncertain about what kind of turnout they would find at the show.

"I think we're all victims at times of kind of succumbing to the negativity you hear in the news, so I think a lot of my exhibitors had really no idea what to expect. And they were, in general, very pleased with the attendance," said Tyldesley.

With the 2009 show already behind them, preparations for 2010 are already under way. And with all eyes on Vancouver for the 2010 Winter Olympics, Buildex Vancouver is gearing up for a good year.

While show managers are very aware of the effects of a less stable global economic environment, they are taking the Canadian 50's small successes as good signs.

"I think there's kind of a positive vibe in the market that this is just a recession just like we've seen before and (we) just continued to work through it," said Tyldesley.

And especially in tough times, the need for tradeshow will not go anywhere. "People want to network, people want to get face to face," said Dempsey. "It's relationships (and) networking that will get us through this."

The Canadian 50 Analysis

Winners

The biennial **Global Petroleum Show** again reigned as Canada's largest tradeshow of 2008. With the advantage of the anticipation factor accompanying a biennial show, **Global Petroleum Show** managed to grow the showfloor by 16.8 percent since the 2006 show, from 510,664 net sq. ft. to 596,262 net sq. ft., despite a 10.6-percent dip in exhibitors (from 1,578 in 2006 to 1,411 in 2008). Attendance grew on par with the growth rate of the showfloor, with 16 percent more attendees at the 2008 show (up from 39,843 in 2006 to 46,235 in 2008).

The **CGTA Gift Shows (Canadian Gift & Tableware Assn.)** sit comfortably in the second and third slots, with the 2008 August show spanning 492,802 net sq. ft. and the January show occupying 423,802 net sq. ft. The Canadian Home Furnishings Market came in fourth with 320,825 net sq. ft. in 2008.

Averages

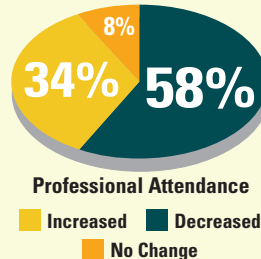
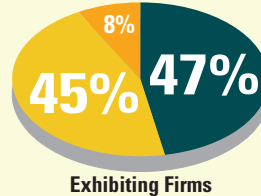
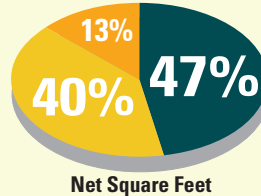
The average 2008 Canadian 50 show spanned 100,748 net sq. ft. of exhibit space, hosting 368 exhibiting companies and 7,578 attendees on the showfloor. The average booth size was 273 sq. ft. – down from 291 sq. ft. in 2007 – and there were 21 attendees to every exhibitor. The average space rate was \$18.57, having climbed 4.1 percent in 2008 following a 4.4-percent increase in 2007.

Fastest-growing

As with every year, this year's Canadian 50 had some standouts, exhibiting growth that puts them in a league of their own. The following shows registered growth of 20 percent or more in at least one index in 2008:

- Net square feet**
- **Salon Rendez-vous HRI Show (Hotel Restaurant Institution)**, 41.8 percent

Percentages of Canadian Shows That Grew in 2008



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FIG. E

Month/City

Always the city to beat, Toronto maintained a stronghold on its status as the most popular destination for Canadian 50 shows. Half of the Canadian 50 took place in Canada's largest city, seizing 56.7 percent of the net exhibit space market (3,056,033 net sq. ft.), down from 2007's 63-percent share.

Montreal, the second most popular city in terms of number of shows with seven, is third in line for overall net square footage with a 10.6-percent share of the market. Vancouver, British Columbia, hosted five Canadian 50 shows, and Edmonton, Alberta, hosted three shows. The Global Petroleum Show launched Calgary to the second spot in terms of the net square footage market, with a 12-percent share (646,452 net sq. ft.), although it is tied for fifth, along with Quebec City and Laval, Quebec, in number of shows (two shows).

Canadian tradeshow activity spiked in the first quarter, with 42 percent of the shows taking place over the first three months of the year. January's shows had the largest share of the overall net square footage market, registering 1,075,131 net sq. ft., which amounts to a 20-percent share. March's 10 shows brought it in first in terms of number of shows, but came in second in terms of total showfloor space, with its 873,244 net sq. ft. totaling a 16.2-percent market share. June barely squeaked past August with 596,262 net sq. ft. and 11.1 percent of the overall exhibit space market. August clocked in 587,002 sq. ft. in 2008, a 10.9-percent market share.

Industry

As far as number of shows, the food and beverage sector took the cake with six shows, while the gifts, building and construction, industrial, and beauty and hair care industries engaged in a four-way tie for second with four shows each.

- **Allied Beauty Assn. – Edmonton**, 39.8 percent

- **PDAC Intl. Convention, Trade Show & Investors Exchange (Prospectors & Developers Assn. of Canada)**, 34.5 percent

Exhibiting companies

- **Salon Rendez-vous HRI Show (Hotel Restaurant Institution)**, 52 percent

- **PDAC Intl. Convention, Trade Show & Investors Exchange (Prospectors & Developers Assn. of Canada)**, 32.2 percent

Professional attendance

- **IncentiveWorks**, 35.6 percent
- **Salon Rendez-vous HRI Show (Hotel Restaurant Institution)**, 31.2 percent
- **Ontario Fashion Exhibitors (Sept.)**, 20.8 percent

The Canadian 50 Analysis

Leading Show Management Organizations by Number of Canadian 50 Shows and Share of Market

FIG. F

Organization	Number of Top 50 Shows	Share of Market
dmg world media*	5	10%
Allied Beauty Assn.	4	8%
GLM, a dmg world media business	3	6%

*Includes shows managed by GLM, a dmg world media business

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Leading Show Management Organizations by Net Sq. Ft. of Canadian 50 Shows and Share of Market

FIG. G

Organization	Net Sq. Ft., Top 50 Shows	Share of Market
dmg world media*	1,047,784	19.5%
Canadian Gift & Tableware Assn.	916,608	17.0%
GLM, a dmg world media business	376,522	7.0%

*Includes shows managed by GLM, a dmg world media business

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The china and glassware industry had the largest market share of exhibit space, with 916,608 net sq. ft., which equated to a 17-percent share. The petroleum, oil and gas sector took 11.1 percent of the market share, thanks to the 596,262-net sq. ft. total of the Global Petroleum Show. A total of 493,535 net sq. ft. puts the food and beverage grouping in the top three with 9.2 percent of the market share.

Vs. U.S.

This year's crop of Tradeshow Week 200 shows unfortunately saw overall losses in all indexes, ending the four-year streak of surpassing the growth exhibited by the Canadian 50. The drop in U.S. attendance mirrored the 3-percent drop posted by Canada's largest shows. TSW 200 shows saw an overall decrease in net square footage of 1.6 percent and 2.7 percent fewer exhibiting companies.

Sitting on a strong Canadian dollar and with the turbulent U.S. economy, it remains to be seen

how U.S. involvement in Canadian shows will modify. Both IncentiveWorks and Buildex Vancouver see high U.S. turnout, with about 35- to 40-percent involvement for IncentiveWorks and nearly 20 percent for Buildex Vancouver.

"We'll have to work hard to keep (the American companies) spending their important budgets on this show," said Tyldesley. And according to Dempsey, IncentiveWorks is seeing the economic crunch in 2009 as tightening budgets are leading to longer periods of time before approval, with booth reservations slowing, but not necessarily stopping.

Management

Dmg world media maintained its position on the show management company leader board, although its net square footage market share has slipped considerably. Dmg produced 1,047,784 net sq. ft., giving it a 19.5-percent share, down from the 25-percent share of overall exhibit space in 2007. (Dmg world media declined to submit the summer/autumn install-

ments of its Alberta Gift Show, Montreal Gift Show and Vancouver Gift Show.)

Shows No. 2 and 3 of this year's Canadian 50, both of the semiannual CGTA Gift Shows, combined to give Canadian Gift & Tableware Assn. 916,608 net sq. ft. of produced exhibit space, which comes to 17 percent of the national market share. Although down from a 13.9-percent share of the market in 2007, GLM, a dmg world media business's total of 376,522 net sq. ft. (7 percent of market share), manages to keep it settled in third.

General service contractors

No shake-ups or surprises in general service contractors, as GES Canada led the others by a mile. The 19 shows handled by the company totaled 2,324,304 net sq. ft., giving GES Canada a 43.1-percent market share, showing a slight decline from 2007's 47.2-percent.

Freeman and Stronco Show Services fell into their usual spots in the familiar lineup. Freeman took a 28.9-percent market share of net square footage, amounting to 1,557,908 net sq. ft. Stronco Show Services claimed 618,010 net sq. ft., 11.5 percent of market share, to round out the top three.

How it's done

The Canadian 50 is compiled using shows from the Tradeshow Week database. A report is submitted upon completion of each show, whereupon the data is checked for inconsistencies and exclusions by Tradeshow Week editors. In the event that such inconsistencies are found, questions and concerns are brought to the attention of the show management company. These figures are then compared to those of the previous year. Inclusion in the Canadian 50 requires a signed letter be submitted, verifying the figures for each show in question. **TSW 200**