

ceir INDEX

Center for Exhibition Industry Research

AN ANALYSIS OF THE 2009 EXHIBITION INDUSTRY AND FUTURE OUTLOOK



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FOREWORD

The Great Recession of 2008 and 2009 has been described as the most significant economic downturn since the Great Depression that began in 1929. Although the exhibition industry as we know it today did not exist some 80 years ago in the United States, it is hard to imagine that it would have experienced worse declines than those of the past two years.

Prior to last year, the largest single year decline ever recorded by the U. S. exhibition industry was 3.1%... and that was in 2008. The 12.5% decline recorded in 2009 and reported in this, the *2010 CEIR Exhibition Industry Index Report (CEIR Index)*, is four times greater than the downturn the industry experienced in 2008. The *2009 CEIR Index*, which reported on the 2008 outcome, predicted that the industry would not grow until well into 2010.

When Dr. John Silvia, Chief Economist for Wachovia Bank spoke at the meeting unveiling the first *CEIR Index* in 2004, he told the audience, "It is not the performance of your sector that is most important; it is the fact that you know how it is performing and can direct energy and resources to the areas that need improvement." The *CEIR Index* is one of the tools CEIR provides that are your roadmap to improved performance.

To properly utilize this new, 2010 edition, you will want to review the overall analysis of our contributing economists as well as each industry sector that touches your organization.

The *2010 CEIR Index* provides exhibition industry performance from 2000 to 2009 across 11 key industry sectors. More than 300 events contributed data for this report, and the number of submissions from these business-to-business exhibitions grows each year. The *CEIR Index* is an extension of the *CEIR Exhibition Industry Census (CEIR Census)*, which was originally conducted in 2000 and repeated in 2005. The *CEIR Census* provides a wealth of information about the exhibition industry, such as the number of business-to-business and business-to-consumer exhibitions held each year, the breakdown of exhibitions by size and season, the percent of exhibitions owned by associations versus media companies and entrepreneurs and much more. The 2010 update of the *CEIR Census* is scheduled for publication this fall and may be purchased at www.ceir.org.

Because the *CEIR Census* does not provide any performance indicators or predictive values for the exhibition industry, the *CEIR Index* was launched in 2004 to fill this very wide gap. Now in its seventh iteration, the *CEIR Index* is truly the exhibition industry's tool for measuring performance. Exhibition owners can be confident in using the trend analysis provided in the report to predict industry sector performance in the years ahead.

Annual *CEIR Index* reports and periodic updates of the *CEIR Census* represent the most significant tools ever produced for the exhibition industry, and your continued support of these reports and other research projects is vital to ensuring a healthy, growing industry.

We invite all exhibition organizers to participate in the eighth annual *CEIR Index*, which will provide analysis through 2010 and will be released in 2011. A sample Data Information Form is located on Page 88 of this report and can be retrieved online at www.ceir.org. In order to be included in the *CEIR Index* going forward, data for an event must be submitted for the years 2008 through 2010. Additional information on participation requirements is available from Veris Consulting, which collects and sorts the data and calculates the *CEIR Index*. It is important to note that all data provided is held in strict confidence, and no event-identifiable information will be published.

We would like to hear your thoughts on how the *Index* could be improved to better meet your needs. CEIR is sincerely grateful to the participants and sponsors of this report and to the readers for their continued support of CEIR and the exhibition industry.

Sincerely,



Carrie Freeman Parsons
2010 CEIR Chairman



Center for Exhibition Industry Research

12700 Park Central Drive, Suite 308
Dallas, Texas 75251 U.S.A.

Telephone: +1 (972) 687-9242

Fax: +1 (972) 692-6020

www.ceir.org

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Introduction

ABOUT THE *CEIR INDEX*

The *CEIR Index* was developed to provide an objective measure of the annual performance of the exhibition industry. The *CEIR Index* measures year-over-year changes in four key metrics:

- Net Square Feet of Exhibit Space Sold
- Professional Attendees
- Exhibiting Companies
- Total Event Gross Revenue.

The results of these metrics' performance were calculated from data provided from over 300 events, which were divided into 11 sectors. The data was then aggregated by sector. The year-over-year changes were then translated into an "index value," using a base value of 100 in the base year of 2000. The 2010 *CEIR Index* displays and analyzes this data from 2000 through 2009.

Veris Consulting, LLC collected all of the event data and created the *CEIR Index* from the compilation of this data. Rich Harrill, Ph.D., Director of the **Alfred P. Sloan Foundation Travel & Tourism Industry Center at the University of South Carolina**, wrote the "Economic Overview of 2009" and "2010 Outlook" for the Overall Exhibition Industry and each of the 11 sectors. **The Jordan, Edmiston Group, Inc. (JEGI)**, a leading provider of investment banking services for the media and information industries, utilized its years of experience analyzing the exhibition industry to provide year-over-year analysis of exhibition performance in each of the 11 industry sectors covered in this report. JEGI also oversaw preparation of the full report. ***Trade Show Executive***, a leading magazine for show organizers, provided design services for the infographs and has been very supportive in providing design services and production since the inception of the *Index*.

ABOUT CEIR

CEIR (www.ceir.org) of Dallas, Texas, is a nonprofit organization that represents the entire exhibition industry. Founded in 1978 as the Trade Show Bureau, CEIR's mission is to generate research and communications programs that promote the value and benefits of exhibitions as a primary component in a company's integrated marketing communications program. CEIR is a leading source of research, information and communications regarding exhibitions.

PRIMARY GOALS OF CEIR

- To advance and expand the exhibition industry
- To promote exhibitions and other face-to-face events as a primary marketing tool
- To serve a committed and involved membership
- To provide comprehensive research and information related to the exhibition industry.

ABOUT VERIS CONSULTING, INC.

Veris Consulting, Inc., a leading trade show research consultancy, has been the primary research firm for such groundbreaking industry studies as the Center for Exhibition Industry Research's *Index* and *Census*, the Convention Industry Council's *Economic Impact Study*, and Destination Marketing Association International's "ExPact" study. Veris, an EEIAC-certified trade show auditor, also conducts business surveys focusing on financial and operating ratios, compensation and benefits, benchmarking, needs assessments and demographics. Veris' statistical programs track highly confidential production, sales, inventory and capacity data that is used to monitor and compare performance relative to competitors. Veris has offices in Virginia and New Jersey. (www.verisconsulting.com)

ABOUT ALFRED P. SLOAN TRAVEL AND TOURISM INDUSTRY CENTER

The University of South Carolina's College of Hospitality, Retail and Sport Management prepares students for careers in travel and tourism, events and exhibitions, and destination management and marketing. In 2003, funding through the Alfred P. Sloan Foundation made possible an industry center focusing on travel and tourism.

Recognizing that exhibitions are a significant contributor to the overall meetings, incentives, conferences, and events (MICE) economy, the Sloan Travel and Tourism Industry Center has a research focus on the exhibition industry. Without the economic clout of the exhibition industry, many U.S. destinations would be without one of the most consistent performers related to leisure and business travel. Recently, the center conducted a national study on the cost of exhibition participation. In addition to being an industry center focusing on travel and tourism, the Sloan Industry Studies program funds 26 centers at 19 universities across the nation. The first industry center was established in 1990 at MIT. Each center consists of a multidisciplinary group of students and faculty with versatile backgrounds including economics and other business and technical disciplines, as well as students who are studying many aspects of a single industry, which is especially important as it relates to the *CEIR Index*.

Sloan Center associates involved in preparation of the 2010 *CEIR Index* include Dr. Rich Harrill, Sloan Center Director; Dr. Matt Brown, Project Director; Dr. Mark Nagel, and Dr. Peter W. Cardon.

In preparing the 2010 edition of the *CEIR Index*, the Sloan Travel and Tourism Industry Center added several economists to its team from OSKR, LLC. This firm provides economic and financial consulting in dozens of industries to clients involved in complex litigation, mergers and acquisitions, and business strategy. OSKR's staff has worked on hundreds of consulting projects in technology, insurance, banking, energy, sports, entertainment, agriculture and transportation. These economists are Dr. Dan Rascher, Andy Schwarz, Doug Kidder, Chris Groves, Lisa Zue, Johnny Chau and Ronald Park.

The Industry Center is quickly becoming recognized as a leader in the travel and tourism industry, providing useful, practical and unbiased analyses and cross-industry linkages. The exhibition industry is important to the center's research program, and the research is a valued resource for the tourism industry and its various segments, including events and exhibitions. It is a recognized partner locally, regionally, nationally and throughout the world.

ABOUT JEGI

The Jordan, Edmiston Group, Inc. (JEGI) of New York, N.Y. is the leading provider of independent investment banking services for the Exhibitions and Conferences sector. Since 2000, JEGI has successfully completed more than 70 transactions with a total value in excess of \$2 billion, involving more than 1,000 events, for large domestic and international business-to-business and business-to-consumer media corporations, leading private equity firms, and entrepreneurially owned companies.

Recent notable transactions include the sale of The Economist Group's CFO to Seguin Partners; the sale of Reed Business Information's Television Group to NewBay Media; the sale of dmg world media's California Gift Show to Merchandise Mart Properties; the sale of Gartner's Vision Events to United Business Media (UBM); the sale of Fierce Markets to Questex; the sale of Think Service to UBM; the sale of 101 Communications to 1105 Media; the \$155 million acquisition of the remaining 51 percent of George Little Management by dmg world media; and many others.

For more information, contact Managing Director Richard Mead (richardm@jegi.com) or Chief Marketing Officer Adam Gross (adamg@jegi.com), both at 212-754-0710 or visit JEGI's Web site at www.jegi.com.

ABOUT TRADE SHOW EXECUTIVE MAGAZINE

Trade Show Executive magazine (www.tradeshowexecutive.com) of Oceanside, Calif., is an award-winning magazine audited by BPA and the producer of the TSE Gold Gala, honoring the 100 largest shows that set the gold standard for the exposition industry. Now in its 11th year, *Trade Show Executive's* mission is to provide news, views and tools to help trade show and event organizers grow, increase profits and enhance customer satisfaction. *Trade Show Executive* is a sponsor of numerous industry events and its editors have served on the boards of directors and foundations of the International Association of Exhibitions and Events, the Trade Show Exhibitors Association, the Center for Exhibition Industry Research and the Exhibit Designers and Producers Association. In the past five years, *Trade Show Executive* was honored with 31 editorial and design awards from the leading publishing industry associations.

FOUNDING SPONSORS OF THE *CEIR INDEX*

- The American Business Media (ABM), which was founded in 1906, is the association for business-to-business information providers, including producers of print publications, Web sites, exhibitions and other media.
- The Exhibition Industry Foundation (EIF) was formed in 2003 from the two existing foundations of the International Association of Exhibitions and Events (IAEE) and CEIR. Through the consolidation of these two foundations, a single, stronger foundation was created to promote the exhibition industry.
- The International Association of Exhibitions and Events (IAEE) was organized by exhibition organizers and exhibition managers in 1928 as the National Association of Exposition Management (NAEM). As the industry evolved, the association expanded and today serves as the leading voice for professionals in the exhibitions and events industry. Currently, IAEE is composed of 1,400 member organizations which represent more than 8,000 individuals who plan, manage and support exhibitions and events around the world.
- The Professional Convention Management Association (PCMA) Education Foundation was established in 1985 and supports educational initiatives to advance meetings management professionals in the conference and exhibition industry. In addition to funding ongoing research to identify key industry issues, the PCMA Education Foundation provides grants for educational programs within the conference and exhibition industry.
- The Society of Independent Show Organizers (SISO) is an organization exclusively dedicated to meeting the needs of for-profit exhibition producers, CEOs and senior management. SISO provides the opportunity and forum for producers of exhibitions and conferences to maximize profit potential and growth through peer support, strategic positioning, networking, educational programs, research studies and communications.

GLOSSARY OF TERMS

Attendees: Number of professionals or “buyers” attending an event. For business-to-business exhibitions, this number excludes exhibiting company personnel, friends and family and other non-business attendees.

Business-to-Business Exhibitions: Exhibitions produced for the primary purpose of displaying products and services for use by businesses and government. These events are industry specific and are not open to the public.

Business-to-Consumer Exhibitions: These events are open to the public and display goods and services of interest to the consumer market.

Exhibition: An event with 3,000 or more net square feet of exhibit space and 10 or more exhibiting companies.

Exhibitors: Number of companies and other organizations occupying exhibit space at an exhibition. This includes exhibit space traded for in-kind services and other non-cash consideration.

Net Square Feet (NSF): Exhibition space sold for revenue or in-kind services (does not include aisle space or meeting rooms).

Revenue: Gross exhibition revenue generated from all sources, including the sale of exhibit space, conference fees, advertising, sponsorships and other sources.

Total: The non-weighted average of the four *CEIR Index* component values – NSF, Exhibitors, Attendance and Revenue.

Methodology

The *CEIR Index* is designed to be representative of the entire universe of business-to-business exhibitions. Exhibitions are defined as any event with at least 3,000 NSF of exhibit space and 10 or more exhibiting companies. The basis for this universe is the *Exhibition Industry Census*, which catalogued over 13,000 events, of which approximately 10,000 are business-to-business exhibitions, comprising (in round numbers):

- NSF – 500 million
- Attendees – 60 million
- Exhibitors – 1.5 million
- Revenue – \$11.2 billion.

The remaining 3,000+ events are business-to-consumer shows. The *CEIR Index* is designed to offer a representative sample across 11 industry sectors. The universe of 10,000 business-to-business exhibitions is broken out in the table below.

COLLECTION OF DATA

Veris Consulting collected the data with the goal of compiling results for each year an event was held between 2000 and 2009. For the majority of the events, Veris Consulting was able to collect data for all eight years. The data comprised the following six key pieces of information:

- Event Date
- Event Location (City, State)
- Total NSF of Exhibit Space
- Total Exhibiting Companies
- Total Professional Attendance
- Total Revenue.

Completed surveys were returned to Veris Consulting and each event was placed in a “sector” based on an extensive list of sub-categories that make up each top-level sector. The data was then entered into a database and reviewed for completeness, data quality and reasonableness. The data was also reviewed in the aggregate to ensure there was a statistically significant sample in each sector.

THE UNIVERSE OF BUSINESS-TO-BUSINESS EXHIBITIONS			
INDUSTRY SECTOR		UNIVERSE	
		# of Events	% of Total
BZ	Professional Business Services	1,440	14.4%
CG	Consumer Goods and Retail Trade	580	5.8%
EN	Sports, Travel, Entertainment, Art and Consumer Services	920	9.2%
FD	Food	370	3.7%
GV	Government, Public and Nonprofit Services	1,190	11.9%
HM	Building, Construction, Home and Repair	240	2.4%
ID	Industrial/Heavy Machinery and Finished Business Inputs	440	4.4%
IT	Communications and Information Technology	1,270	12.7%
MD	Medical and Health Care	2,340	23.4%
RM	Raw Materials and Science	810	8.1%
TX	Transportation	390	3.9%
TOTAL EVENTS		10,000	100.0%

Source: CEIR Exhibition Industry Census 2000

YEAR-OVER-YEAR PERCENT CHANGE

The building blocks for the *CEIR Index* are the percent change numbers (year-over-year) in each of the four metrics for an individual event. Therefore, only events that have data points in consecutive years can be included. More than 90 percent of the events surveyed were held on an annual basis. For events that were held biennially, Veris Consulting interpolated the data for the “in-between” year. For example, if an event reported NSF of 7,000 in 2005 and 9,000 in 2007, Veris Consulting estimated NSF of 8,000 for 2006. This enabled biennial events to be included in the *CEIR Index*. Any event held less often than biennially was not included. Next, for each “pair” of numbers (the same metric for the same event in two consecutive years), a percent change value was calculated. For example, if an event’s professional attendance went from 12,000 in 2005 to 13,200 in 2007, a percentage change of +10 percent was recorded. For revenue, the only metric measured in dollars, inflation was taken into account in the percent change calculation. The following inflation rates were used:

YEAR	INFLATION RATE
2000 to 2001	2.80%
2001 to 2002	1.60%
2002 to 2003	2.20%
2003 to 2004	2.60%
2004 to 2005	3.30%
2005 to 2006	3.10%
2006 to 2007	2.80%
2007 to 2008	3.70%
2008 to 2009	-0.65%

Source: Oregon State University

OUTLIERS

For the *CEIR Index*, outliers are considered any year-over-year change of more than +100 percent or less than -50 percent. To prevent an outlier from significantly skewing the *CEIR Index* or a sector within the index, year-over-year percent change values for any metric were capped at +100 percent or -50 percent. For example, if an event’s attendance increased by 150 percent, from 1,000 in 2006 to 2,500 in 2007, the change was capped at the maximum value of +100 percent. Less than 0.2 percent of all year-over-year percent change values fell outside this range and required adjustment.

WEIGHTS APPLIED TO OVERALL *CEIR INDEX* CALCULATION

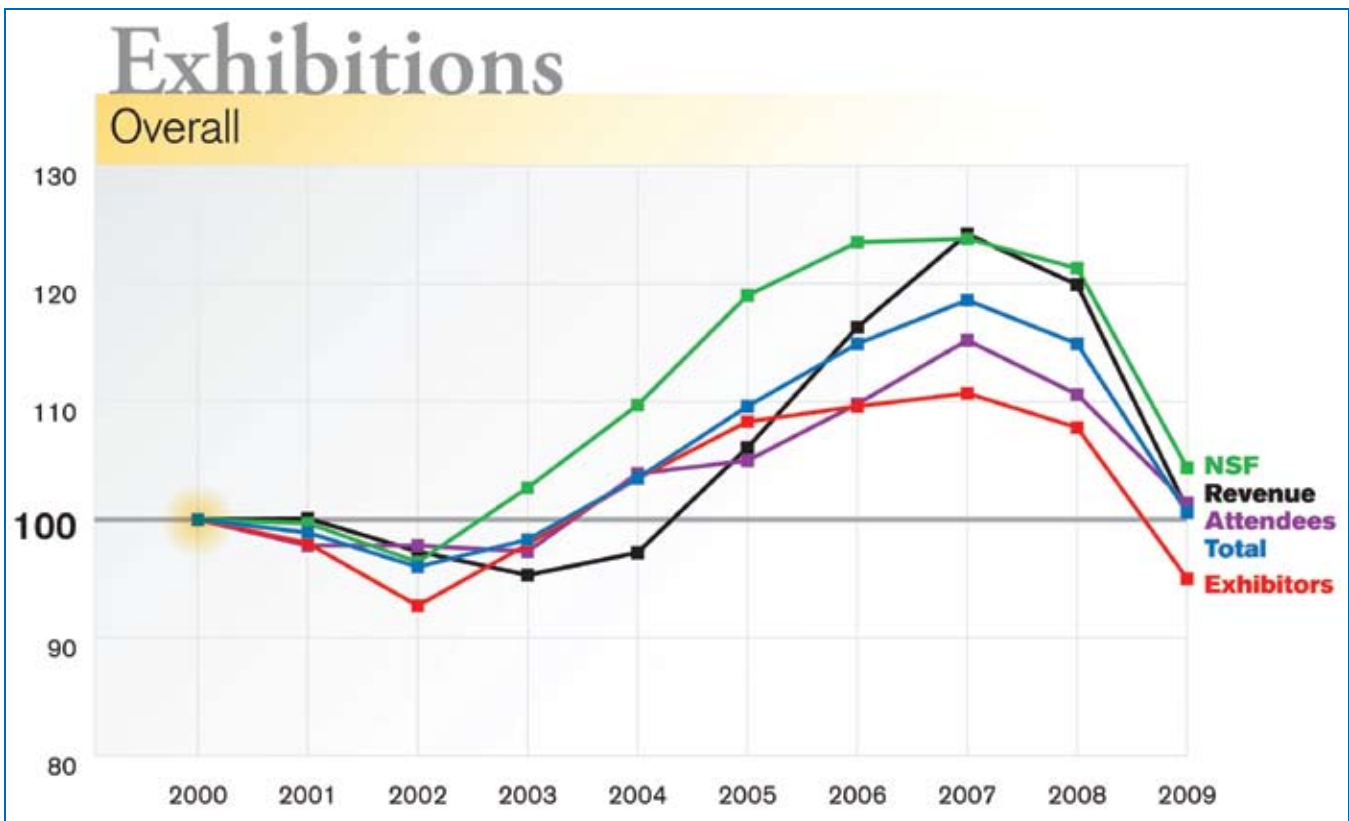
As shown in an earlier table, each sector represents a percentage of the total universe of exhibitions. For example, Professional Business Services represents 14.4 percent of the total universe of exhibitions. However, if data submitted within a sector represented less than the percentage of the total universe of exhibitions, statistical weights were applied to bring the sector in line with its percentage. For example, only 17 Professional Business Services events reported NSF for 2000 and 2001, while the total number of events that reported NSF over this two-year period was 202. As a result, Professional Business Services represented only 8.4 percent of the events to report NSF during this period, far below its representation in the total universe of exhibitions. As a result, a weight of 1.73 (14.5 percent/8.4 percent) was applied to the NSF percentage change for Professional Business Services. Under-represented classifications have weights greater than 1.00, and over-represented classifications have weights under 1.00. These weights were only used in calculating the overall *CEIR Index* and were not used in the breakdown by sector.

FOUR COMPONENTS MAKE THE AVERAGE

For each year, the four component *CEIR Index* values – NSF, Exhibitors, Attendance and Revenue – are calculated independently from each other. The average of these four values is used to calculate the fifth *CEIR Index* value called “Total.”

Overall Exhibition Industry

The following graph shows the *CEIR Index* metrics for the overall exhibition industry from 2000 to 2009.



PERFORMANCE OVERVIEW

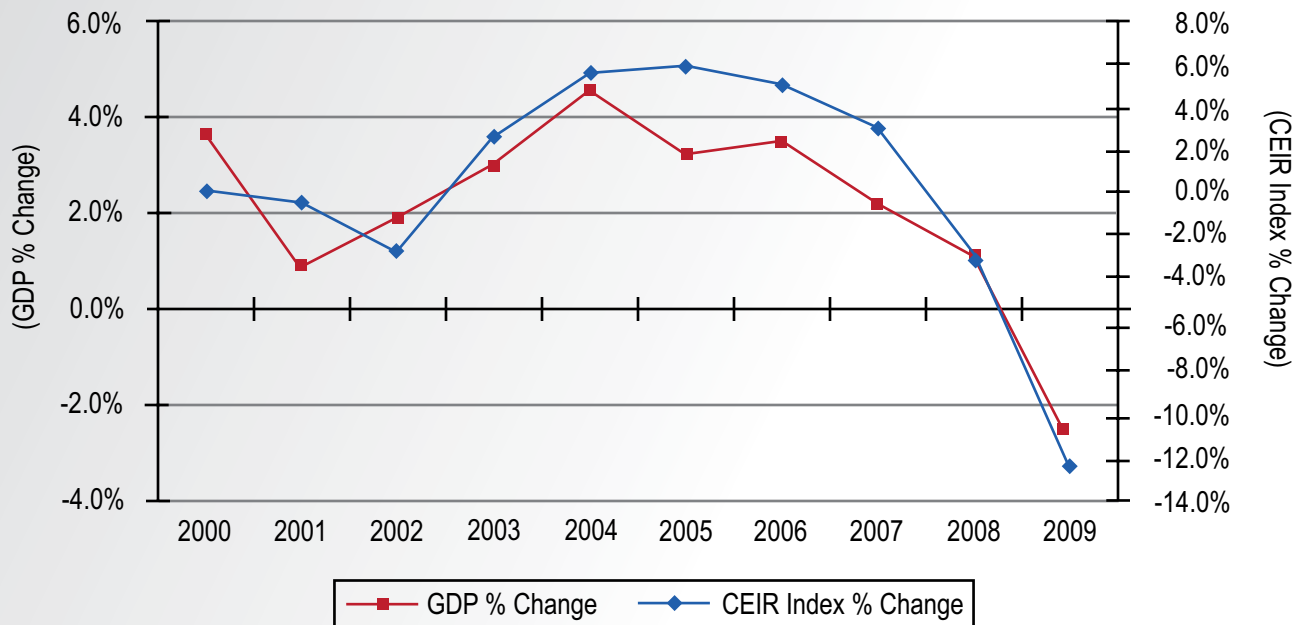
- The U.S. economy began to show signs of recovery in late 2009, as GDP grew in both the third and fourth quarters of the year.
- The exhibition industry followed the rebounding U.S. economy. While the industry was down in the first three quarters of 2009, it showed some improvement in Q4.

The exhibition industry declined for the second straight year in 2009, decreasing (12.5%) as compared to 2008, according to the *CEIR Index*. Over the same period, Gross Domestic Product (GDP) was down (2.4%). Despite the loss in GDP last year, the U.S. economy has been in recovery since mid-2009, and GDP grew over the last two quarters of the year. There are still fears, however, among some economists, of a “double dip” recession, as the unemployment rate is expected to remain high throughout 2010.

During the first quarter of 2009, GDP decreased (6.4%), but the second quarter of 2009 was the last for GDP loss, at a rate of (0.7%). GDP increased 2.2% in the third quarter of 2009 and expanded more rapidly in the fourth quarter, by 5.9% on an annualized basis. GDP began to rebound in the third quarter partially due to spending on new cars and trucks, resulting from the federal “Cash for Clunkers” program, which was in effect for July and August. According to the Department of Transportation, 690,114 old cars and trucks were traded in for new ones over the two-month period, costing the federal government approximately \$2.9 billion. Under the program, cars and trucks purchased were eligible for a refund voucher worth between \$3,500 and \$4,500, if an eligible car or truck was traded in at the time of purchase.

The following graph shows U.S. GDP v. Exhibition Industry performance on an annual basis from 2000 to 2009. The exhibition industry tends to track fairly well with GDP on a year-over-year percentage change basis.

CEIR Index Results Compared to U.S. GDP



The 2009 quarterly results for the overall exhibition industry reflected the quarterly pattern of GDP, as the industry contracted over each of the first three quarters of the year, down (4.5%) in Q1, (8.8%) in Q2, and (11.1%) in Q3, before rising 17.7% in Q4. However, on a year-over-year basis, Q4 2009 was down (8.9%) versus Q4 2008. Additionally, all four key industry metrics declined in Q4 2009 versus Q4 2008: NSF, Exhibitors, Attendees and Revenue were down (12.3%), (5.8%), (4.1%), and (13.2%), respectively.

All 11 industry sectors measured by the *CEIR Index* declined in 2009. GV (the Government, Public and Nonprofit Services sector) was the best performing sector, having declined only (0.4%) in 2009 versus 2008. The other 10 sectors decreased between (3.7%) and (16%) in 2009. The MD (Medical and Health Care) and GV sectors were the only ones with growth in any metric in 2009: MD Revenue was up 1.2%, and GV Exhibitors and Attendees were up 2.9% and 5.9% respectively.

OVERALL ECONOMY

Unquestionably, 2009 was a historically challenging year for the economy. Even the incredibly resilient exhibition industry could not escape the impact of what has been labeled the Great Recession. The exhibition industry suffered its second consecutive declining year, but, more remarkably, the 2009 year-over-year decline of 12.5% is four times greater than in any prior year.

As the exhibition industry begins a new year, after seven consecutive negative quarters, the industry is poised to launch a recovery. The ability to recover will likely depend on what happens to the economy, which will be contingent on many of the factors analyzed in the discussion that follows.

THE ECONOMY: What Is a Healthy Economy?

Most economists view a healthy economy as one that does not grow fast enough to cause inflation, nor slow enough to cause a recession. Typically, economists agree that the ideal Gross Domestic Product (GDP) growth rate ranges between 2% and 3.5%.

During the economic downturn that began December 2007 and lasted approximately 20 months, quarterly GDP growth ranged from an increase of 1.5% to a decrease of (6.4%). Growth was not fast enough to avoid a recession.

In a healthy economy, consumer and business spending leads to job creation and low unemployment (approximately 5%). Therefore, today's economy will fully recover only when the enhanced levels of government spending provided by various stimulus programs is replaced by increases in consumer and business spending.

ECONOMIC INDICATORS: What Is Looked At and Why?

Economists monitor changes in several key indicators to forecast the future health of an economy, including changes in stock market indices, manufacturing and trade inventories and sales, advanced monthly sales for retail and food services, information sector revenue, international trade, monthly wholesale trade, new orders for manufactured goods, construction activity, orders for manufactured durable goods, sales of new homes, housing starts, housing vacancies, changes in retail trade, and changes in manufacturing, mining and trade. Additionally, economists monitor changes in inflation and prices, employment/unemployment, pay and benefits, productivity, and trade.

Given the breadth of indicators that economists are faced with analyzing to determine what a healthy economy looks like, it is no wonder why many of them fail to accurately predict an economy's performance. Additionally, it is more than likely that some of these indicators will be moving in different directions – some up, some down – raising the question of which ones should be used to validate overall economic health?

The Conference Board tries its best to project economic performance by consistently measuring the movement of leading economic indicators through its Leading Economic Index (LEI). Ideally, the leading economic indicators will change before the economy changes, helping to predict the overall health of the economy. These indicators include initial jobless claims, manufacturers' new orders for consumer goods and materials, building permits, the performance of the S&P 500, and changes in the expectations portion of the Consumer Sentiment Index.

Changes in the LEI foretold the Great Recession. In July 2007, the LEI was near 105 and fell to 103 by December, a (1.9%) decline that marked the beginning of the Great Recession. Over the first three months of 2008, the LEI fell an additional (1%) before stabilizing at 102 through June 2008. Then, in July 2008, the LEI began to fall again and continuously dropped through March 2009, decreasing an additional (4.1%) over that period. For the entire 21-month period of decline, the LEI dropped (7.1%) to a low of approximately 98.

However, since March 2009, the LEI has increased rapidly, reaching 107.6 in March 2010. Over the six-month period of September 2009 to February 2010, the LEI increased 4.4%. Though the LEI continues to rebound, growth has begun to moderate, with a 0.1% gain in February 2010 after rising 0.3% in January and 1.2% in December. The performance of the LEI indicates to economists that there will likely be moderately improving economic conditions over the next six to nine months.

GIVEN THE BREADTH OF INDICATORS THAT ECONOMISTS ARE FACED WITH ANALYZING TO DETERMINE WHAT A HEALTHY ECONOMY LOOKS LIKE, IT IS NO WONDER WHY MANY OF THEM FAIL TO ACCURATELY PREDICT AN ECONOMY'S PERFORMANCE.

TODAY'S KEY INDICATORS: What Should You Monitor in This Economy?

As the Great Recession was triggered by the collapse of the housing market and the impact of that collapse on the financial markets, there are several key economic indicators that must be monitored closely at this time, including those related to housing, employment, personal consumption, inventory investment, manufacturing, and liquidity. Without stronger consumer demand, job growth will remain minimal and the economy will struggle to grow at a healthy rate. Increases in housing and personal consumption will trigger increased manufacturing and inventory investment. In turn, these increases will lead to new job creation, and substantial job creation will trigger more personal spending and be a strong sign that the economy has recovered. However, current high unemployment levels and the tightened restrictions on consumer credit will continue to hinder economic recovery.

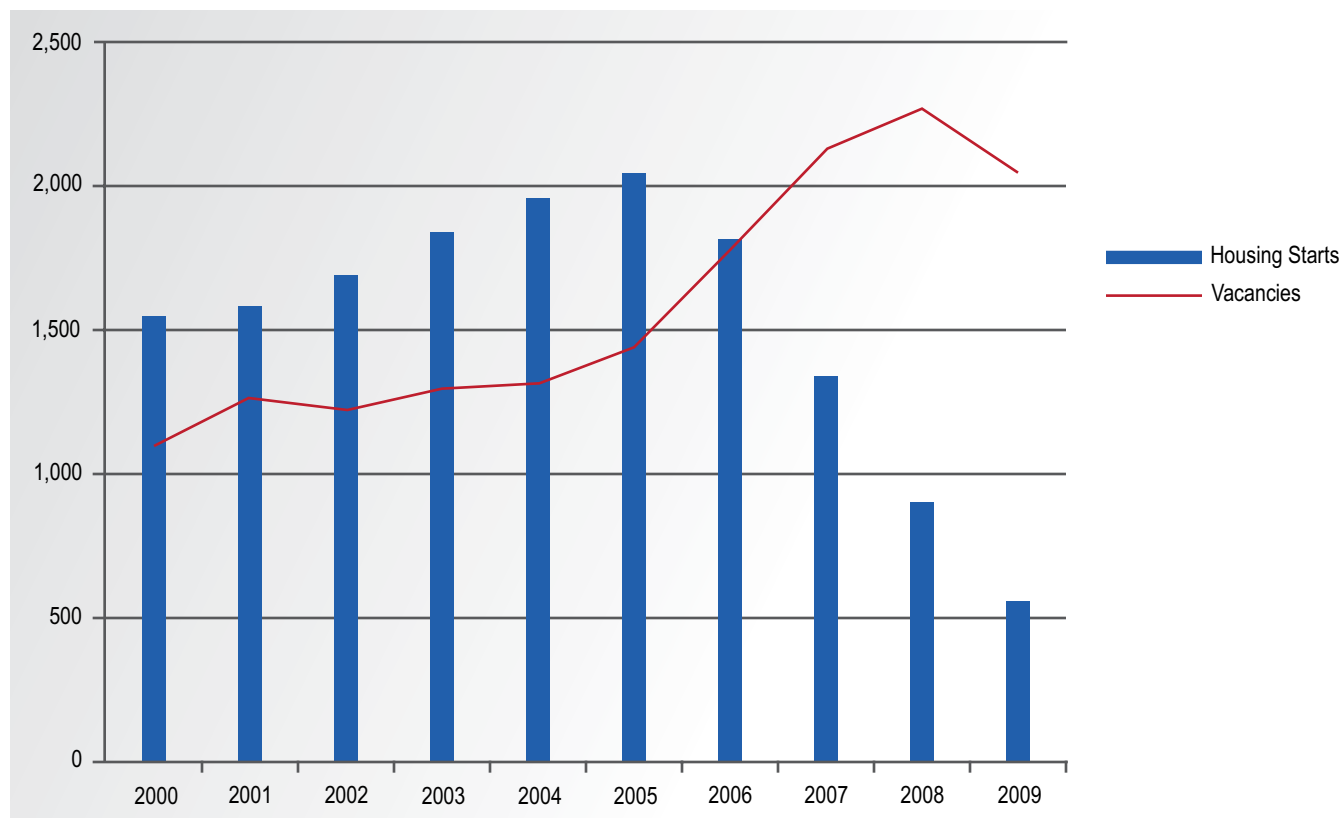
WITHOUT STRONGER CONSUMER DEMAND, JOB GROWTH WILL REMAIN MINIMAL AND THE ECONOMY WILL STRUGGLE TO GROW AT A HEALTHY RATE.

Housing

According to the Congressional Budget Office (CBO), housing starts must average 1.5 million units annually to maintain the demand created by population growth. In 2009, there were 554,000 housing starts, significantly lower than the CBO's recommended amount, due to the overabundance of empty homes on the market. According to the CBO, it is estimated that there were two million excess vacant housing units, on average, during the second half of 2009 (see Figure 1).

Growth in housing starts will not begin until the excess available housing is absorbed by the marketplace. Congress has acted to stimulate the housing market by offering a tax credit to first-time home buyers through the Worker, Homeownership, and Business Assistance Act of 2009. Qualified first-time home purchasers can receive up to \$8,000 for buying a principal residence. A tax credit of \$6,500 was authorized for qualified repeat home buyers as well. The number of vacant homes on the market decreased by 187,000 in 2009, due in part to this government program. Additional factors leading to the reduction of vacant homes include significant price adjustments on housing units and historically low mortgage rates.

Figure 1. New Privately Owned Housing Unit Starts and For Sale Housing Vacancies (in Thousands)



Employment

Hiring is often a lagging indicator. During the initial stages of economic recovery, firms increase output first by increasing productivity and the number of hours worked by existing employees. This is reflected in data released by the Bureau of Labor Statistics (BLS), per the chart labeled *Figure 2*. In 2009, output per hour (productivity) increased 3.8% over 2008 levels, following 2% and lower annual increases from 2005 to 2008. Meanwhile, the unemployment rate reached 9.7% in January 2010, up from 7.7% in January 2009. During the preceding eight years (2000 to 2008), the highest unemployment rate was reached in 2003, of 5.8%.

As a result of productivity gains made in 2009, there may be little additional productivity to be had from current employees. Additionally, temporary help has increased 284,300 since September 2009. These measures taken together may indicate job growth is on the horizon.

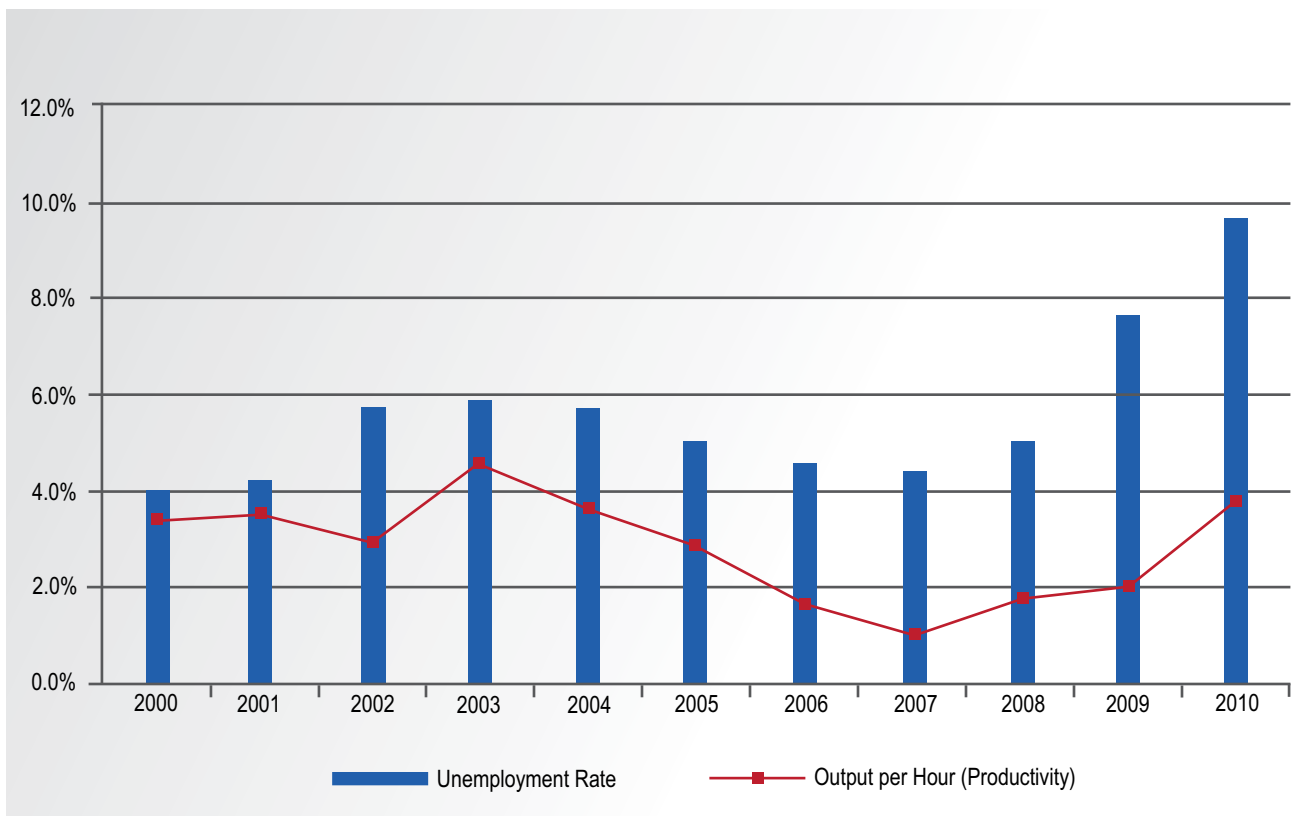
Diane Swonk, chief economist at Mesirow Financial, cautioned, "Creating jobs is tougher in this economy." In the early 1980s, the last time unemployment passed 10%, the recession that led to the high unemployment was caused by increased interest rates used by the Federal Reserve to tame inflation.

To revive the economy, the Federal Reserve reversed course and cut rates. Today, the Federal Reserve has cut rates to near zero and infused the markets with cash. But the financial system is still suffering from its near collapse, and the infusion of cash into the monetary system has not led to an increase in new loans and resulting economic growth.

Economists have suggested that the government should do more to create job growth in light of the strains that remain on the financial system. Suggestions for governmental action have included suspending the payroll taxes for both Social Security and Medicare, increasing spending on infrastructure, enacting a flat tax on income, and extending jobless benefits. President Obama and Congress acted, and a new federal jobs bill was signed in March 2010.

The \$38 billion bill contains a mix of tax breaks (\$18 billion) and spending (\$20 billion) designed to stimulate private sector hiring. Businesses hiring employees who have been out of work for at least 60 days are exempt from paying the 6.2% Social Security payroll tax on those employees through December 2010. Employers also receive an additional \$1,000 tax credit for each worker remaining in his or her position for a full year. The \$20 billion increase in spending is for infrastructure improvements, specifically highway and transit programs.

Figure 2. Annual Unemployment Rate in January; Annual % Change in Output per Hour (Productivity)



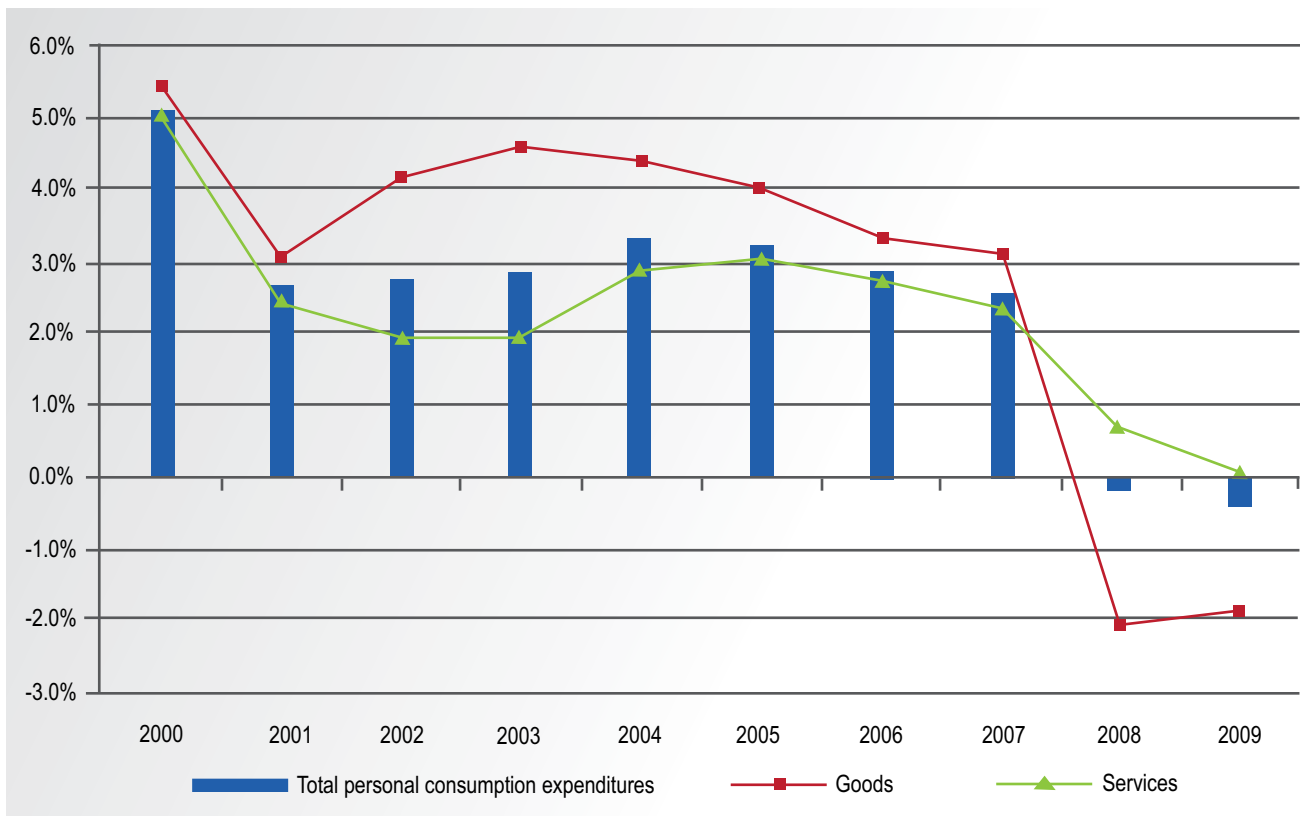
Source: Bureau of Labor Statistics (BLS)

Personal Consumption Spending

Over the past two years, personal consumption spending has posted negative growth due to increasing unemployment, large decreases in household wealth, and tighter credit conditions.

The amount spent on goods showed more than (2%) negative growth in 2008 and just better than (2%) negative growth in 2009. Meanwhile, personal consumption for services was basically flat in 2009 versus 2008 (see Figure 3). As personal consumption is correlated with employment, output in personal consumption expenditures is expected to grow slowly as new jobs are created. However, consumer spending may be weakened as households pare down debt.

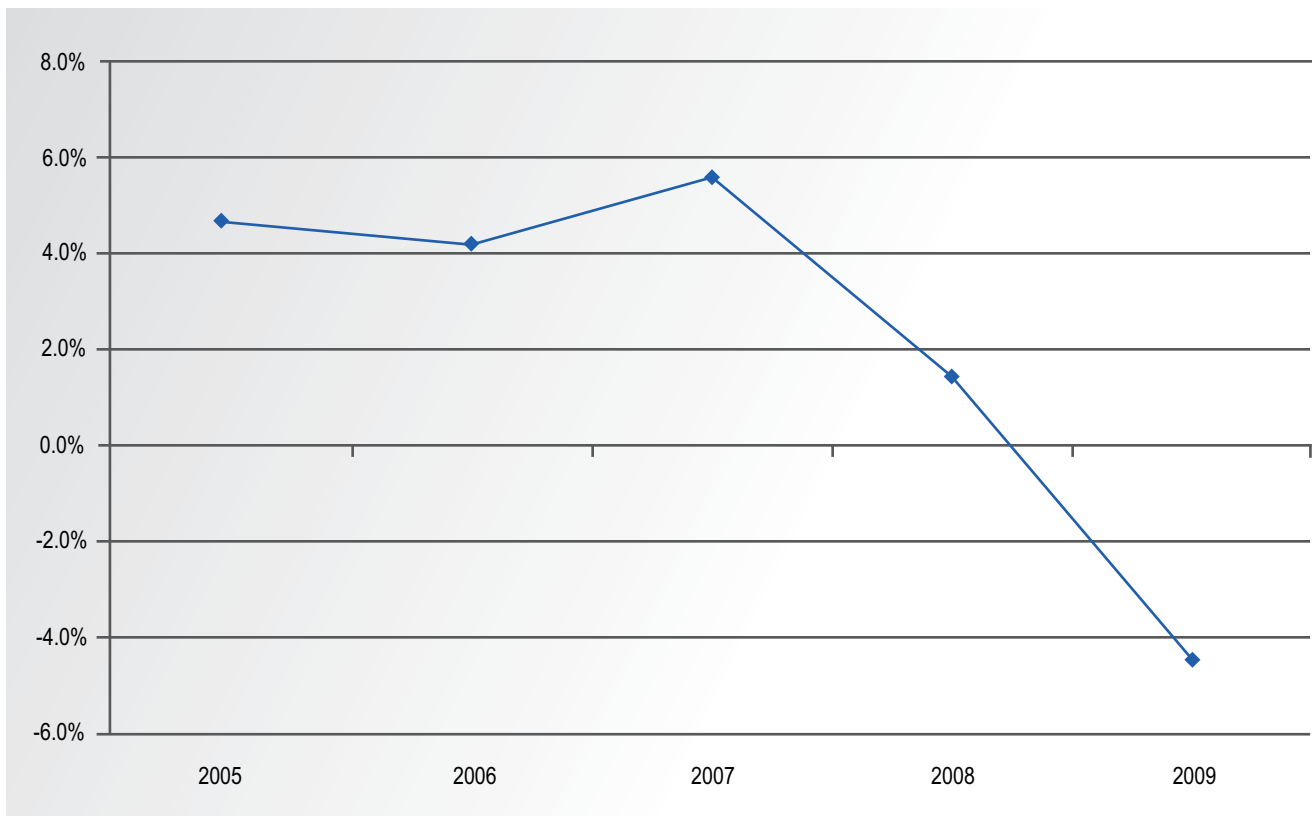
Figure 3. Annual % Change in Personal Consumption Expenditures: Total, Goods, Services



Consumer Credit Market

The American Recovery and Reinvestment Act of 2009 (ARRA) and programs such as “Cash for Clunkers” were designed to increase consumer spending. But changes in the credit markets have created “fiscal strangulation.” As millions of consumers are no longer considered creditworthy, demand for credit has weakened. Household debt, which surged during the housing boom, is now being reduced significantly. According to the Federal Reserve, household debt to disposable income has decreased from 136% to 122% in just over a year. As consumers pay off debt, families are left with little to spend on goods and services. In 2009, consumer credit decreased (4.3%) (see Figure 4).

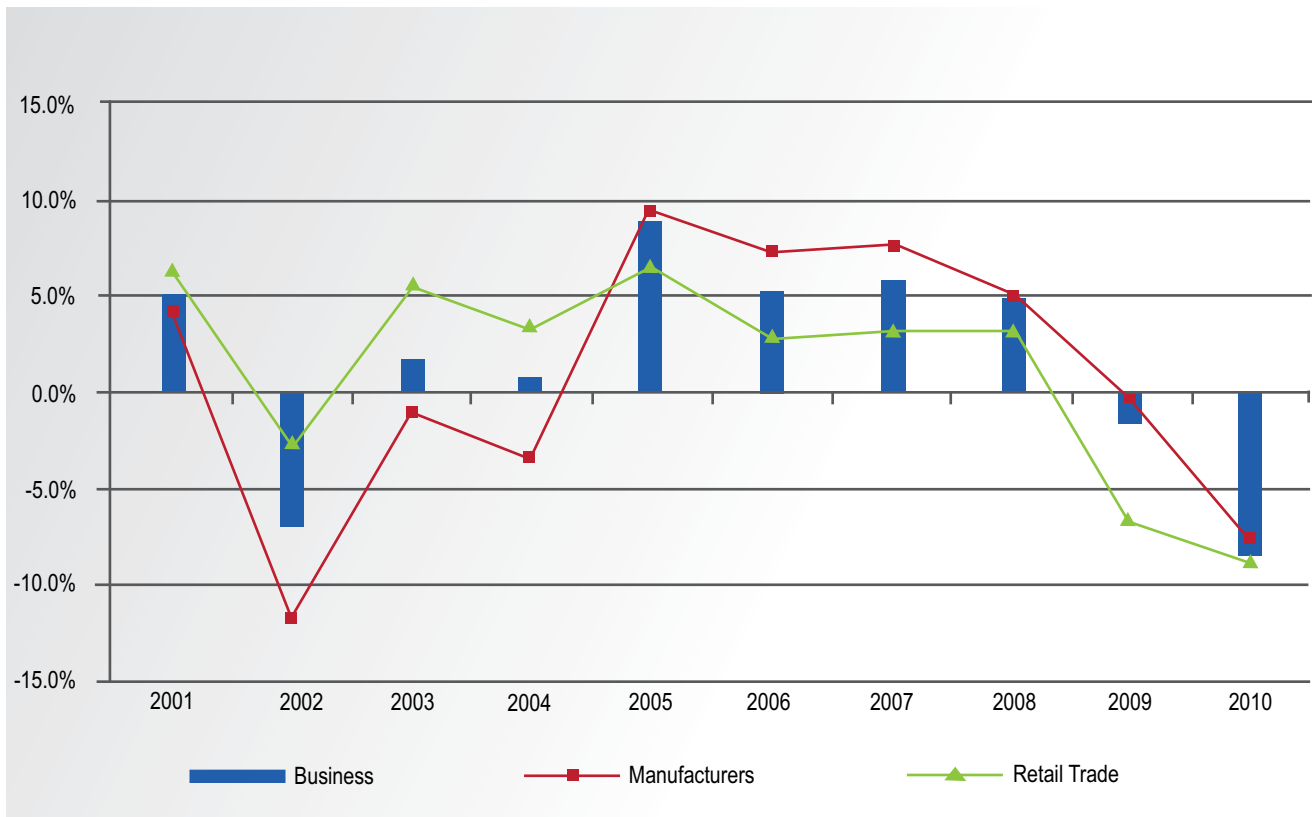
Figure 4. Annual Percent Change in Consumer Credit



Inventory Investment and Manufacturing

In 2008, personal consumption declined and sales decreased, but business inventories continued to rise. In response, businesses reduced production, but historically it takes approximately one year for inventory levels to be reduced to match demand. Total business inventories were down (8.6%) on a year-over-year basis in January 2010. Manufacturers' inventories were down (7.5%) and retail trade inventories declined (8.7%) over that same period. *Figure 5* depicts historical changes in inventory levels on a year-over-year basis.

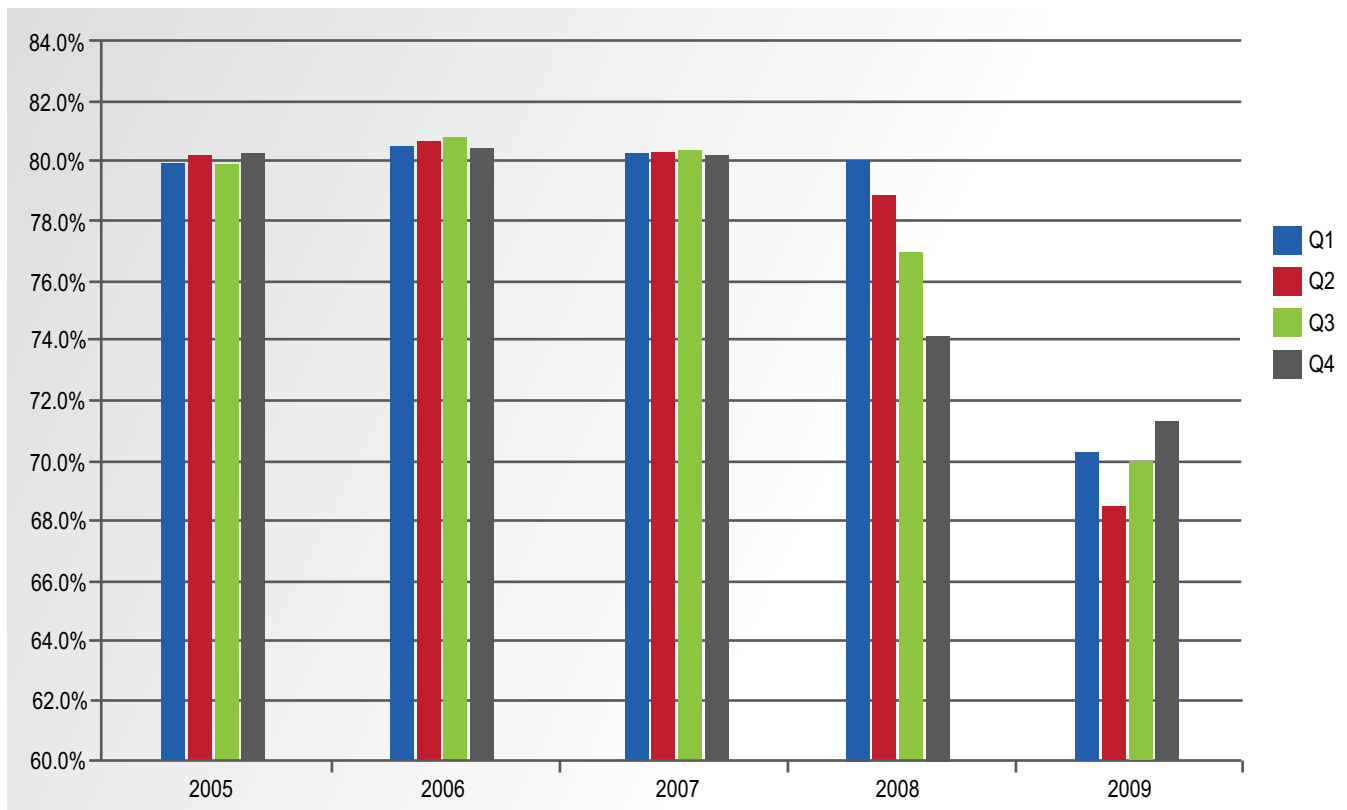
Figure 5. January Year-Over-Year Inventory Change (%)



Manufacturing Capacity Utilization

Typically, as the economy rebounds, U.S. manufacturing capacity utilization increases as inventories are restocked. Increased capacity utilization improves employment and creates new investment opportunities, which then spur the financial markets. This process then feeds the demand for corporate services and other “soft” services. A sign that the economy is recovering occurs when manufacturing shipments, orders and inventories increase. Due to the slack in manufacturing capacity created during the Great Recession, it may be some time before capacity rebounds to pre-recession levels (*see Figure 6*).

Figure 6. Quarterly Capacity Utilization (%)



Liquidity in the Credit Market

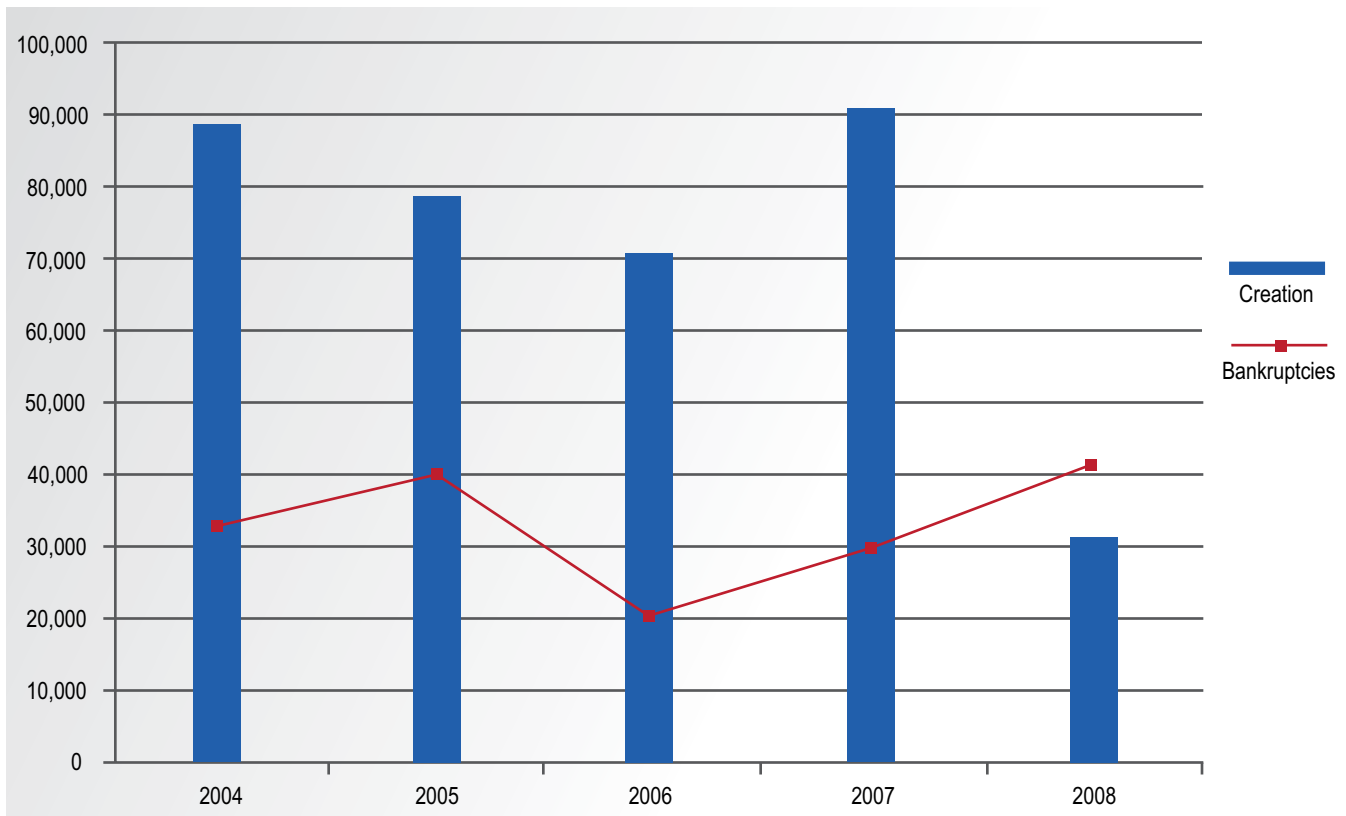
The lack of liquidity in the credit market impacts the growth of small businesses (firms with fewer than 500 employees). According to the U.S. Small Business Administration (SBA), these businesses employ just over 50% of private sector employees. Over the past 15 years, they have generated 64% of new jobs. Whereas large businesses have access to a wide array of credit markets, including the bond market and the commercial paper market to finance growth, small businesses rely on bank financing, which provide nearly 65% of total credit to small businesses, with credit cards accounting for most of the remaining 35%. Commercial bank financing, however, is still challenging to arrange in today's market, due to tightened lending standards and a generally hesitant lending environment that is risk averse. As a result, small businesses that are under financial pressure are fighting to keep their doors open, never mind taking advantage of growth opportunities, hiring new people, investing in new ideas, etc.

The most recent data (*see Figure 7*) show that more than 40,000 small businesses went bankrupt in 2008, while only a little over 30,000 new small businesses were created. The end result is a net loss of more than 10,000 small businesses for the year. Compare these results to 2007, when 60,000 more small businesses were created than went bankrupt.

It is expected that due to the tight credit market, small business closures will continue to outpace small business openings and that the number of bankruptcy filings will again increase in 2009. *Note: 2009 data was not available at the time of this publication.*

... MORE THAN 40,000 SMALL BUSINESSES WENT BANKRUPT IN 2008, WHILE ONLY A LITTLE OVER 30,000 NEW SMALL BUSINESSES WERE CREATED.

Figure 7. Small Business Creation and Closure with Bankruptcies



2010 OUTLOOK

- It is expected that modest growth in the economy will continue through 2010, with GDP increasing at an annual rate between 2% and 3%.
- The unemployment rate was 10% and the underemployment rate was 17.3% at the end of 2009. Without job creation in 2010, economic growth will not be sustained in the long term.
- With industry capacity underutilized and a relatively high unemployment rate, the Federal Reserve Bank should maintain low interest rates in the year ahead, which will encourage slow growth.

GDP declined (2.4%) in 2009, after being relatively flat in 2008 (up 0.4%). However, the overall U.S. economy appears to have stabilized, after declining five of the past eight quarters. For Q1 2008, GDP declined 0.7%, but GDP grew 1.5% in Q2 2008. GDP then declined each quarter from Q3 2008 through Q2 2009 at rates of (2.7%), (5.4%), (6.4%), and (0.7%) respectively, on a seasonally adjusted annual rate. As reported by the U.S. Census Bureau, many of the most important economic indicators were trending downward for much of the second half of 2008 and the first half of 2009.

The economy began to expand during the second half of 2009, following the worst recession in 70 years. GDP growth was 2.2% in Q3 and 5.9% in Q4 on an annualized basis. It is expected that modest growth in the economy will continue through 2010 and that the economy will continue to expand slowly, with GDP growing at an annual rate between 2% and 3%. This growth forecast is based on weighted regressions and the use of historical GDP data and changes in leading economic indicators. Higher rates of GDP growth are unlikely to occur, with the U.S. unemployment rate expected to remain at 10% for most of the first half of 2010, if not the entire year.

The December 2009 unemployment rate of 10% reflected a large number of people leaving the workforce. Overall, the U.S. economy shed 4.2 million jobs in 2009, and the U.S. Labor Department's survey of households indicated that 661,000 people left the workforce in December alone.

"2010 is our opportunity year. After a challenging 2009, we can benefit from the U.S. government's new focus on growing exports, by positioning our shows as opportunities to expand international sales."

– Gary Shapiro, President & CEO, Consumer Electronics Association/CES

WITHOUT JOB CREATION BEING STIMULATED BY CURRENT GOVERNMENTAL ECONOMIC PROGRAMS, ECONOMIC GROWTH WILL NOT BE SUSTAINED IN THE LONG TERM.

Also, there were 929,000 discouraged workers who had given up searching for a job, an increase from 642,000 recorded in December 2008. If the broadest measures of unemployment were used – including discouraged workers and those working part-time for economic reasons – the unemployment rate would be 17.3%. Without job creation being stimulated by current governmental economic programs, economic growth will not be sustained in the long term.

Although many businesses are expected to begin replenishing inventories that have been kept low due to shrinking demand over the past 18 months, unused industrial capacity will likely be able to satisfy the increased demand without substantial new hiring in the short term. The underutilized industrial capacity and relatively high unemployment rate should encourage the Federal Reserve Bank to maintain low interest rates, which will encourage slow growth.

Currently, the overall improvement in the U.S. economy seen over the past few quarters has primarily been due to enhanced government spending. For the economy to fully recover in addition to creating jobs, consumer and business spending must rise to replace government spending. This process, which began slowly at the end of 2009, is likely to continue in 2010, but unlikely to result in significant changes in spending allocations before 2011.

In addition, the massive amount of government borrowing to fuel the current spending increases may delay the eventual economic recovery once the economic environment for individuals and businesses has improved. Although higher inflation rates across the entire economy are likely to occur at some point in the future, prices of most goods and services should remain relatively unchanged in 2010, with a slight chance of increases.

If the credit markets remain tight and prevent the stimulation of business creation and growth, which ultimately triggers putting people back to work, it is unlikely that the U.S. will experience a significant economic recovery in the short-term.

2010 OUTLOOK FOR EXHIBITIONS

- The economy is expected to grow modestly in 2010, and the exhibition industry may begin to grow at the end of 2010. However, there are concerns regarding the stability of the forecasted economic expansion.
- The exhibition industry has rebounded from previous recessions, though the industry tends to lag behind the economy's recovery.

The 10,000 business-to-business exhibitions will still be affected in the near-term by the Great Recession. However, it is expected that as spending from the American Recovery and Reinvestment Act (ARRA) increases in 2010 and as the government responds with additional stimulus programs, several key exhibition sectors will be positively impacted, as indicated in the sector-by-sector analyses.

The Great Recession has led to deflationary fears among economists, and deflation will significantly hinder economic expansion, as companies will be unlikely to increase operations or add workers. In the U.S., industrial capacity was operating at 72.6% in January 2010. This was actually up from the 40-year low of 68.3% reached in June 2009, but is still well below the 40-year monthly average of 81%. With this excess industrial capacity, companies are fearful of losing customers to competitors based on price. Therefore, there is deflationary risk in the economy. According to the Federal Reserve, industrial capacity will not recover fully until 2013.

"The CEIR Index has grown from an interesting read at its beginning 10 years ago to an important barometer for the health of the exhibitions industry. Based on the Index's most recent results, it would appear the industry has reached a bottom and should show marginal improvement over the next 12-24 months. That being said, it is unfortunate that the current economic downturn has returned the overall Index to its baseline levels, last seen when the Index started in 2000."

– Galen Poss, Partner, G2 & Associates

EXHIBITION INDUSTRY REBOUNDED FOLLOWING PREVIOUS RECESSION

The previous U.S. recession, which lasted approximately nine months – from March 2001 to November 2001 – was relatively shallow and brief. Still, it negatively impacted the business-to-business exhibition industry, which declined starting in Q2 2001. By Q3 2001, the industry had decreased (7.7%), and in Q4 2001, the industry posted another (3.3%) decline.

Contraction on a year-over-year basis continued for the exhibition industry through the first three quarters of 2002 until a 3.6% growth rate was reported in Q4 2002.

In all, it took approximately three quarters for the exhibition industry to start growing again following the end of the 2001 recession. However, since the 2001 recession was significantly shallower and briefer than the Great Recession, the exhibition industry is expected to take longer to recover in today's economic environment. With economic forecasters predicting slow growth in 2010, the exhibition industry may not see year-over-year growth until Q4 2010.

At the end of 2009, the exhibition industry had declined seven straight quarters on a year-over-year basis. However, Q4 2009 decreased less than the previous quarters, indicating a possibly positive sign. Furthermore, some sub-sectors of the exhibition industry are positioned for more immediate growth due to spending provisions set in the ARRA. For example, billions of dollars are earmarked for projects in education, renewable energy, construction, infrastructure and technology. Additionally, tax cuts contained in the plan are expected to help stimulate consumer spending, and the \$75 billion mortgage rescue plan has provided some stability in the housing market, although it is still extremely volatile.

KEY TRENDS OF THE CEIR INDEX

The *CEIR Index* has now accumulated nine years of data, and some key trends have emerged that are worth watching as potential predictors of what lies ahead:

- Attendance (professional attendees) is a leading indicator of recovery and decline.
- Two other metrics – Net Square Feet (of space sold) and Revenue – are parallel lagging indicators.
- The number of exhibiting companies (Exhibitors) is subject to counting nuances and variations that make it a less important measure of performance.
- Three exhibition industry sectors – the BZ (Professional Business Services), CG (Consumer Goods and Retail Trade), and HM (Building, Construction, Home and Repair) sectors – have historically acted as "guideposts" for the overall industry. Since 2000, the industry has followed the same pattern as these sectors in regards to year-over-year performance. However, the exhibitions that serve the industries most impacted by the government stimulus programs may be the best performers in 2010.

2009 *CEIR Index* Participants

AAOS Annual Meeting
 ABC Kids Expo
 ABPA Annual Convention
 ACI Fall Convention
 ACI Spring Convention
 ACME Annual Meeting
 ADA Annual Session
 AEJMC Convention
 AGD Annual Meeting & Exhibits
 AHRMM Annual Conference & Exhibition
 Alberta Gift Show (Spring)
 All Candy Expo
 American College of Cardiology Annual Scientific Session
 Exposition
 American College of Medical Genetics (ACMG) – Annual
 Clinical Genetics Meeting
 American Diabetes Association Scientific Sessions
 American International Toy Fair
 America's Food and Beverage
 AMI International Meat Poultry & Seafood Expo
 Annual Clinical Congress (ACS)
 Annual National RV Trade Show
 AORN Annual Congress
 AOTA Annual Conference and Expo
 AS3
 ASCO Annual Meeting
 ASD/AMD Gift Las Vegas
 ASD/AMD Jewelry Las Vegas
 ASD/AMD Las Vegas - Summer
 ASD/AMD Las Vegas - Winter
 ASD/AMD Value Las Vegas
 ASD/AMD Variety Las Vegas
 ASHE Annual
 ASHE PDC
 ASIS International Annual Seminar & Exhibits
 ASR (Action Sports Retailers) Fall
 ASR (Action Sports Retailers) Spring
 ASUG Annual Conference & Vendor Fair
 Atlantic Canada Petroleum Show
 AudiologyNOW!
 AUSA Annual Meeting & Exposition
 Automation Fair
 Baseball Trade Show
 BookExpo America
 CAHF Annual Convention & Expo
 California Gift Show (January)
 CAMEX
 Canada's Tourist, Resort & Imprinted Product Show
 Canadian Waste & Recycling Expo
 Car Care World Expo
 Cattle Industry Trade Show
 CEDIA
 Central Valley Facilities Expo
 Central Veterinary Conference West
 Central Veterinary Conference
 Central Veterinary Conference East
 CHA Summer Show and Convention
 CHA Winter Show and Convention
 COE Annual PLM Conference & TechniFair
 COLLABORATE - IOUG Forum
 Comic Con
 CONEX Connecticut
 CONEX Wisconsin
 Construct
 Couture Collection
 Coverings
 Dakotafest
 Dealer Expo
 DEMA Show
 Dscope Annual Conference
 EASA Annual Convention & Exposition
 EASTEC
 Environmental Laboratory Convention & Exposition
 Expo! Expo! IAEE Annual Meeting & Exhibition
 FABTECH & AWS Welding Show and METALFORM
 Family Medicine Forum
 Farmfest
 Firehouse Central
 Firehouse Expo
 Firehouse World
 Fly Fishing Retailer World Trade
 Fresh Summit International Convention & Exposition
 Global Gaming Expo - G2E
 Global Pet Expo
 GlobalShop
 GO-EXPO: Gas & Oil Exposition
 Golf Industry Show
 Government Video Expo
 Greater Philadelphia Facilities Expo
 Greenbuild Expo
 GSE
 HD Boutique
 Health & Fitness Business Expo
 Healthcare Convention & Exhibitors Association
 High Point Market Fall
 High Point Market Spring
 Holiday Showcase
 Hospitality Design
 HOUSTEX
 IAAPA Attractions Expo

2009 CEIR Index Participants (continued)

ICAST (Int'l Convention of Allied Sportfishing Trades)
 ICUEE - The Demo Expo
 IDUG--North America
 IFT Annual Meeting & Food Expo
 Imprinted Sportswear Show - Atlanta
 Imprinted Sportswear Show (Midwest)
 Imprinted Sportswear Show (Northeast)
 Imprinted Sportswear Show (South)
 Imprinted Sportswear Show (Southeast)
 Imprinted Sportswear Show (Southwest)
 InfoComm International
 INNVA's Global Connect
 Interbike International Bicycle Expo
 Interbike Outdoor Demo
 International Air-Conditioning, Heating, Refrigerating
 Exposition
 International Autobody Congress & Exposition
 International CES
 International Contemporary Furniture Fair
 International Hotel Motel and Restaurant Show
 International Housewares Show
 International Jewelry & General Merchandise Show -
 Spring
 International Motorcycle Show - Bay Area
 International Motorcycle Show - Cleveland
 International Motorcycle Show - Dallas
 International Motorcycle Show - Long Beach
 International Motorcycle Show - Minneapolis
 International Motorcycle Show - New York
 International Motorcycle Show - Seattle
 International Motorcycle Show - Washington DC
 International Pool & Spa Expo
 International Poultry Expo and International Feed Expo
 International Roofing Expo
 International Security Conference & Expo (ISC) West
 International Vision Expo East
 International Vision Expo West
 Interop New York
 IPC Printed Circuits Expo, APEX and the Designers Summit
 IRCE - Internet Retailer Conference & Exhibition
 IRgA Convention and Trade Show
 JA International Summer Show
 JA International Winter Show
 JCK Show - Las Vegas
 Kehe Food Show
 Kitchen/Bath Industry Show
 La Cumbre
 Las Vegas Antique, Jewelry & Watch Show
 Licensing International
 Magic International - Summer (includes Sourcing Zone)
 Magic International - Winter
 Marine South
 Marine West
 MASCON
 MD&M West
 Medtrade
 Medtrade Spring
 Memphis Gift & Jewelry Show/Spring
 Memphis Gift & Jewelry Show/Fall
 Mid-American Beauty Classic
 Mid-South Jewelry & Accessories Spring Fair
 Midwest Facilities Expo
 Midwest Petroleum and Convenience Show
 Modern Day Marine
 Montreal Gift Show (Spring)
 Motorcoach Expo
 NAB Show
 NACS Show
 NAFCU Annual Conference & Exhibition
 NAILBA Annual Meeting
 NAMM Show
 NAON Annual Congress
 NASSP Annual Convention & Exposition
 National Automobile Dealers Convention Exposition
 National Hardware Show
 National Pavement Expo West
 National Pavement Exposition
 National Stationary Show
 National Teaching Institute & Critical Care Exposition ®
 Natural Products Expo West
 NBAA Annual Meeting & Convention
 New England Facilities Expo
 New Orleans Gift & Jewelry Show - Fall
 New Orleans Gift & Jewelry Show - Spring
 New York International Gift Fair (Winter)
 NGWA Ground Water Expo
 NIPA Annual Forum & Expo
 North Texas Facilities Expo
 Northeastern Forest Products Equipment Expo
 Northern California Facilities Expo
 Northern Illinois Farm Show
 Northwest Facilities Expo
 Northwest Machine Tool Expo
 NSBA Annual Conference
 Ohio Safety Congress & Expo
 Ohio Turfgrass Conference and Show
 Outdoor Retailer Winter Market
 PACK EXPO Las Vegas/Food Processing Machinery Expo/
 CPP EXPO
 Performance Racing Industry Trade Show

2009 CEIR Index Participants (continued)

PGA Fall Expo
PGA Merchandise Show
Photo Plus Expo
PhotonXpo, The Exhibit at CLEO
PITTCON
Pool Tradeshow Fall
Pool Tradeshow Spring
Portland Gift & Accessories Show (January)
PPAI Expo
Premiere Birmingham
Premiere Orlando
Project Las Vegas Feb/Winter
Project Las Vegas Summer
Project New York Jan/Winter
Project NY Summer
RECon
RIMS Annual Conference & Exhibition
Salon Rendez-Vous HRI Show
San Francisco International Gift Fair (February)
Satellite
Seattle Gift Show (January)
SEMICON WEST
SGNA Annual Course
SHARE Technology Exchange (Summer Show/Space Limit)
SHARE Technology Exchange (Winter Show)
SIA SnowSports Tradeshow
Sign World USA
South Florida Facilities Expo
Southeast Building Conference
Southern Building Show
Southern California Facilities Expo
Southwest Facilities Expo
Southwest Regional Home Care Conference and Exhibition
Sports Licensing & Tailgate Show
StonExpo
Summer International Fancy Food & Confection Show
SuperZoo
Supply Side
Surf Expo (January)
Surfaces
SURTEX (R)
Texas Association for Home Care's Annual Meeting
Texoma Farm & Ranch Show
Texworld USA - Summer
Texworld USA - Winter
The International Builders Show
The NAFEM Show
The National NeedleArts Association Trade Show
The New Chem Show
The Original Miami Beach Antique Show
The Remodeling Show
The SHOT Show
Triple Play Realtor Convention & Expo
Vancouver Gift Show (Spring)
VMS Fall
WEFTEC 2009
WESTEC
Western Foodservice & Hospitality Expo
World of Asphalt
World of Concrete USA

Data Information Form

Center for Exhibition Industry Research • Exhibition Industry Growth Index

All information provided will be held in strict confidence. No event-identifiable information will be published.

If you organize or manage more than one similar event per year (i.e., spring event and an autumn event), please indicate information on the same occurrence of your event for each year listed below in order to maintain year-to-year comparability (i.e., only the spring event).

You have four options for submitting data:

- Complete this form and return to Toby Palmer, Veris Consulting, Fax: +1 (703) 796-1331
- Submit the data by e-mailing it directly Veris at CEIRIndex@verisconsulting.com
- Submit the data by entering it into the online tool at <https://secure3.verisconsulting.com/CEIR/Login.aspx?ReturnUrl=/CEIR/Default.aspx>
- Mail to:
CEIR Index
c/o Veris Consulting, Inc.
11710 Plaza America Dr, Suite 300
Reston, VA 20190

Organization Name: _____

Mailing Address: _____

Contact Person: _____

Daytime Phone: _____

E-mail: _____

Event Name:

2010

2009

2008

Event Dates: _____

Event Location (City): _____

Total Net Exhibit Space: _____

Please list total exhibit net square feet sold for your event, including space provided for non-cash consideration (does not include aisle space or meeting rooms).

Total Exhibiting Companies at the Event: _____

Please list number of companies and other organizations with exhibit space at your event. Include exhibit space swapped or provided for other non-cash consideration.

Total Professional Attendance at the Event: _____

Please tell us the number of professionals attending your event. Exclude exhibiting company personnel, friends and family, staff, or other non-business attendees.

Total Revenue of the Event: _____

Please list the total revenue for your event from all sources: the sale of exhibit space, conference fees, advertising, sponsorships and all other revenue.

Signature _____

Date _____

Thank you for participating in The CEIR Exhibition Industry Index Report!

