



IAEE

Exhibitions and Events Mean Business

www.iaee.com

The U.S. Trade Show Market

David DuBois, CMP, CAE, FASAE, CTA
President and CEO

ceir

Center for Exhibition Industry Research





- Published in April 2019. Next edition April 2020.
- Measures:
 - NSF/NSM
 - # of Exhibitors
 - # of Attendees (buyers)
 - Real Revenue
 - = Total Index



\$97 Billion

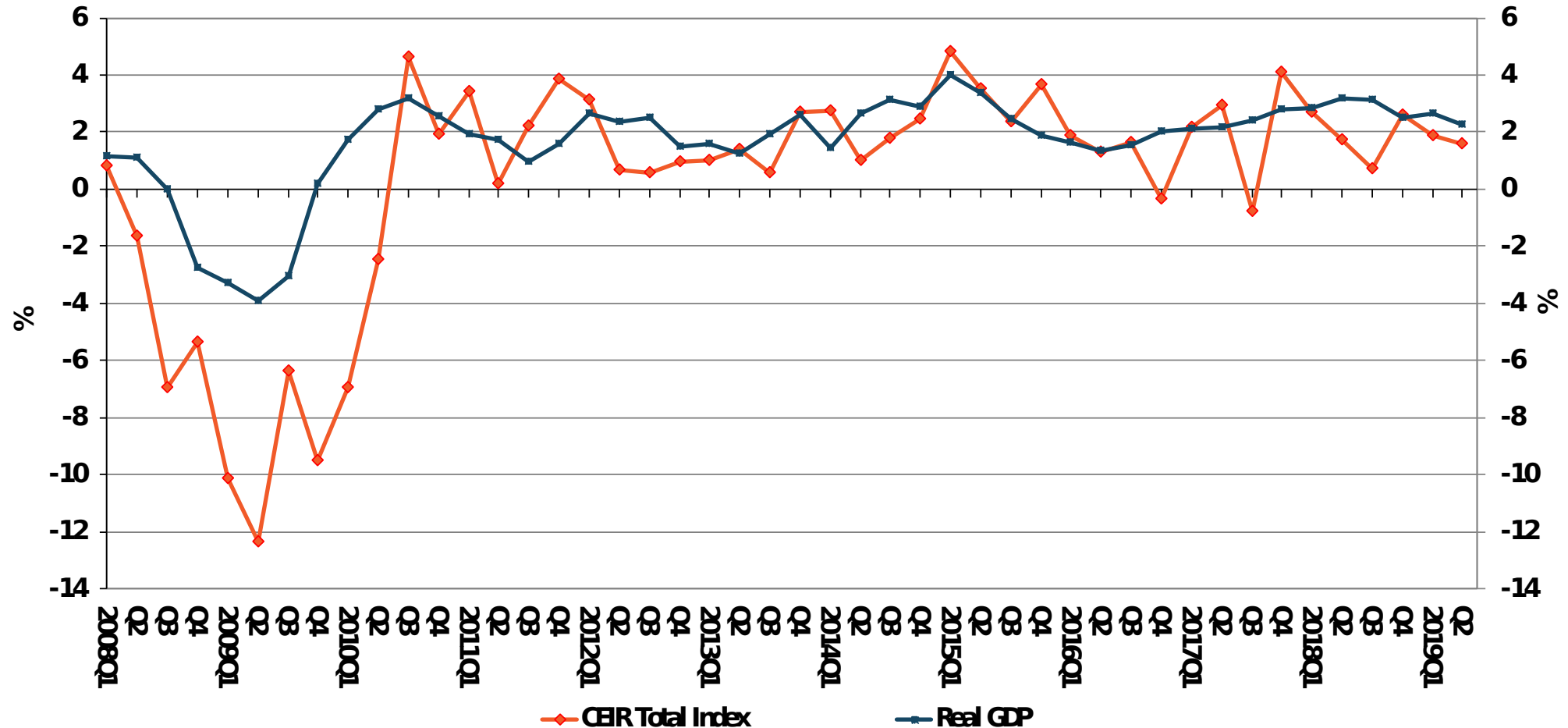
2019 – 6 Month Results

Q2 Survey Results for the Overall Exhibition Industry

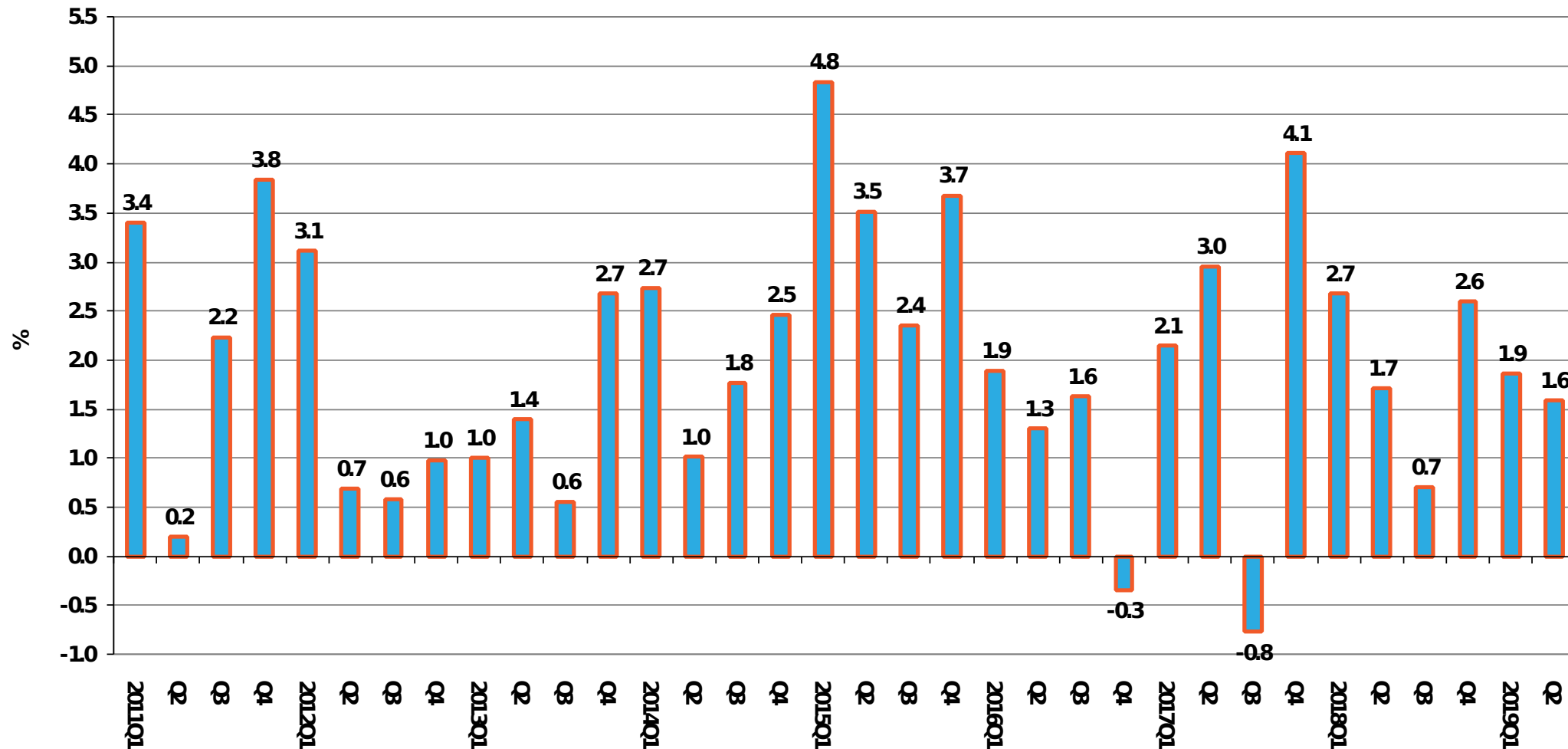
H1 Survey Results by Industry

Summary and Key Findings

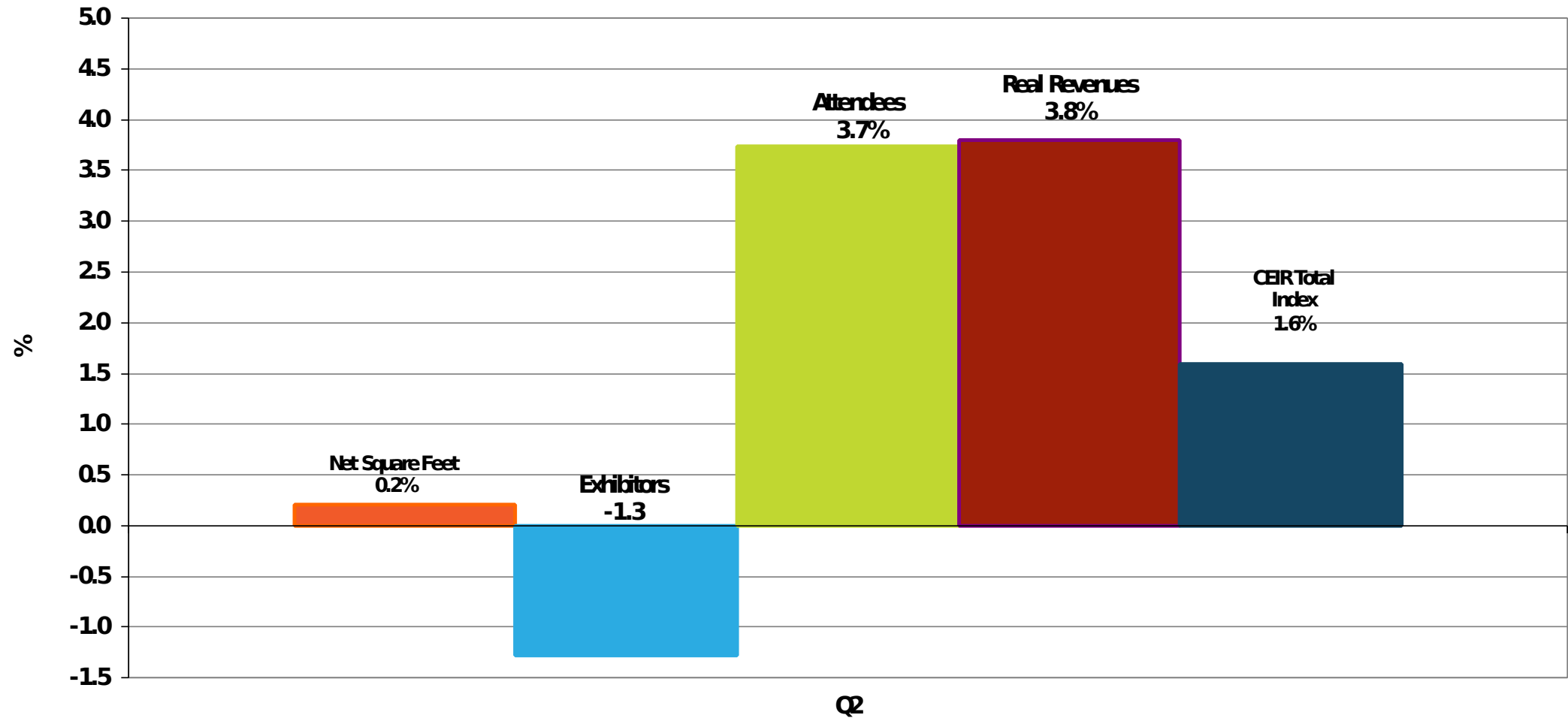
The Total Index still underperformed real GDP



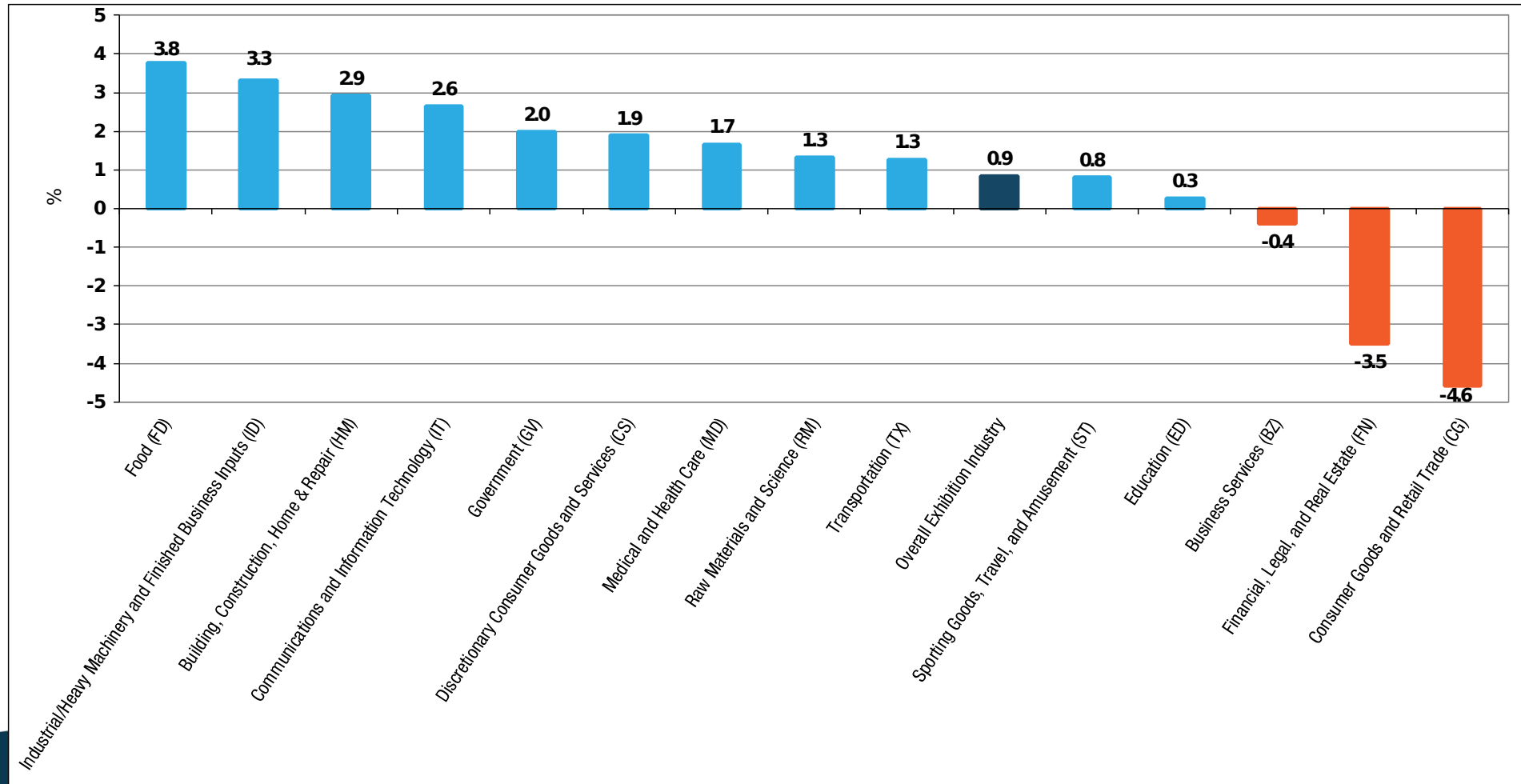
CEIR Total Index growth continued at 1.6% in Q2



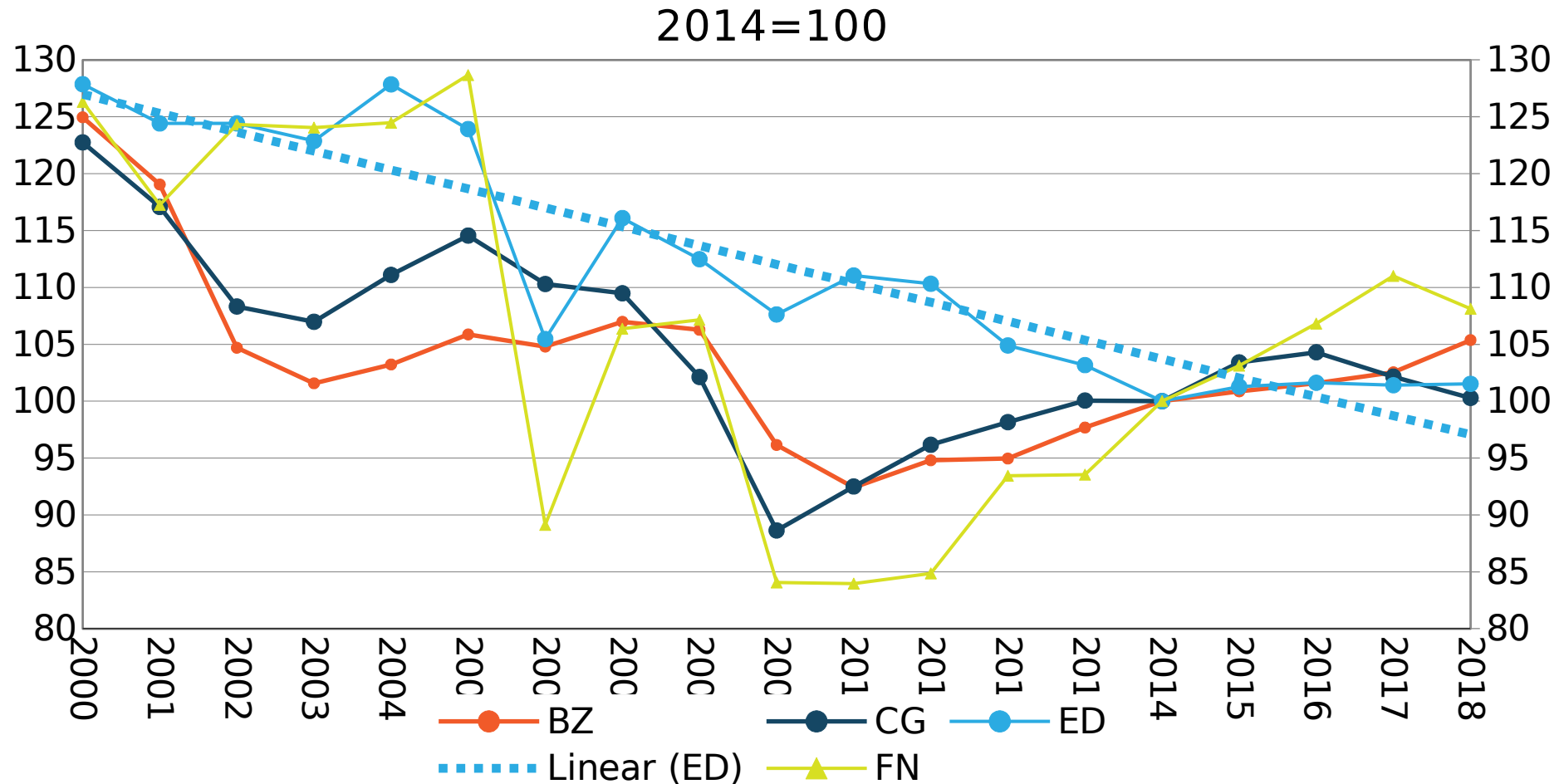
...boosted by robust gains for attendance and real revenues



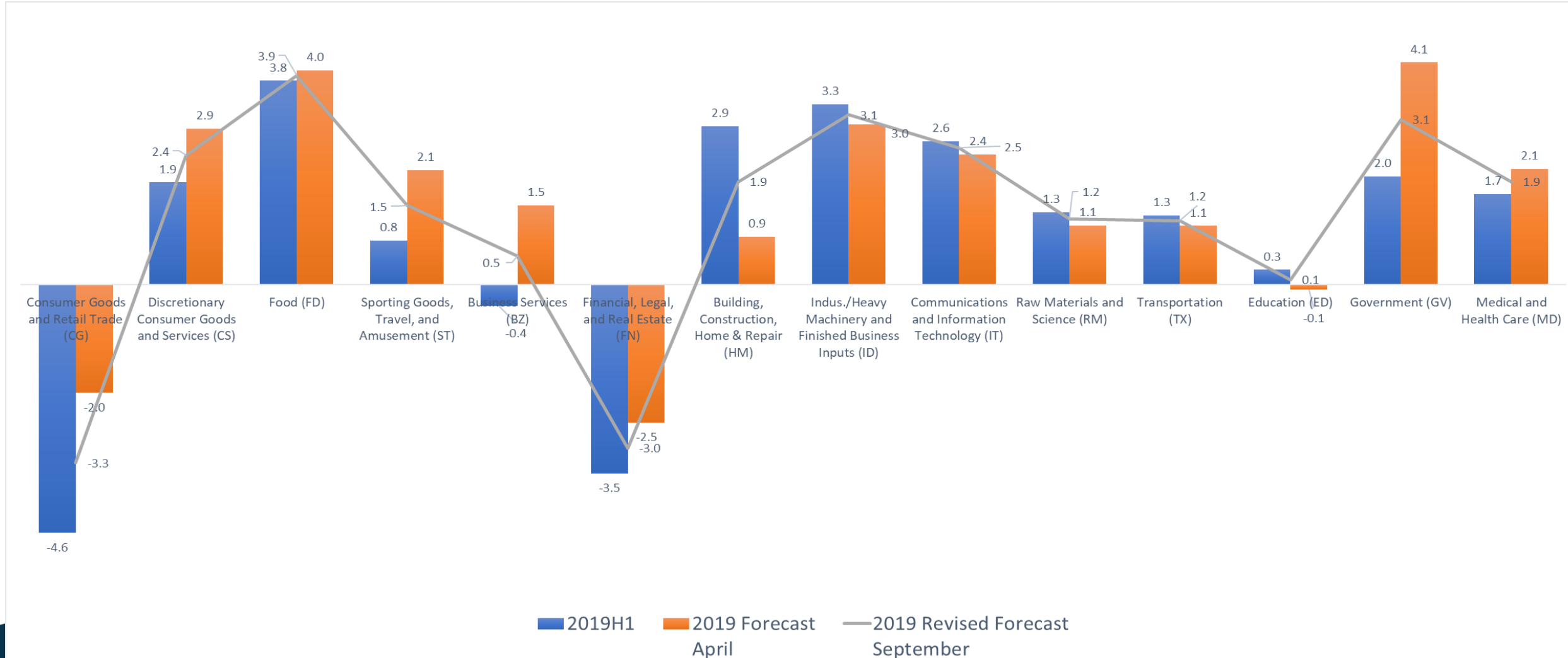
By industry, the Total Index shows mixed performance in H1



BZ, CG, FN & ED have been on a secular decline since 2000



CEIR Index 2019 Sector Forecasts and H1 Results



Growth prospects for the exhibition industry remain moderate

- The exhibition industry has finally entered into an expansion phase that passed the previous peak as the CEIR Index predicted.
- Growth should continue at a modest pace in H2. Total Index is likely to be 1.2% for the year as a whole, 0.2 percentage point shy of the forecast of 1.4%.
- Exhibition performance will further slow modestly to 1.1% in 2020 and 0.8% in 2021 as the economy settles into a slower growth path.

CEIR Research

ROI of Attending
Heads of Marketing Study

Attendees: Research Says!

Trade show are top ranked for meeting business information and purchasing decision needs (57%)



Shop 97%

- See New Technology, 84%
- New Product Introductions, 82%
- See, Touch, Interact with New Products, 81%
- Ability to Talk to Experts, 79%
- Idea Generation/Planning, 75%
- Build/Maintain Relationships with Suppliers, 71%
- Brand Comparisons, 66%
- Gather information for Upcoming Purchase, 65%
- Prospecting for Suppliers, 61%
- Find a Solution for an Existing Problem, 60%

Learn 96%

- Keep up-to-date with Industry/Trends, 87%
- Professional Networking, 76%
- Personal Development, 75%
- Better Job Performance, 68%
- Seminars, Speakers, 60%

Experience, 73%

- To Get Inspiration/Motivation 66%

2019 HEAD OF MARKETING INSIGHTS SERIES

Report One: Overview of Marketing and Sales Approaches, Most Urgent Objectives, and Brand Image of the B2B Exhibition Channel to Support Needs



THE BRAND IMAGE OF THE B2B EXHIBITION CHANNEL IS STRONG

The majority of heads of marketing have a positive image of the channel.

HEADS OF MARKETING FIND THE B2B EXHIBITION CHANNEL DELIVERS WHERE IT COUNTS



64%+ of surveyed heads of marketing agree the B2B exhibition channel is highly effective for multiple marketing/sales activities:

- ✓ F2F meetings with prospects and customers
- ✓ Relationship selling efforts
- ✓ Sales lead generation
- ✓ Prospect engagement with products
- ✓ Branding activities
- ✓ In-person brand experience that outperforms digital
- ✓ New product promotions



B2B EXHIBITION CHANNEL OFFERS UNIQUE VALUE - IMPACTFUL IN-PERSON EXPERIENCE UNMATCHED BY DIGITAL



Not everyone [in our target audience] goes on Facebook or LinkedIn. *[The B2B exhibition channel] gives us the opportunity to put all of our tactics before the industry.* They visit the displays, [see] our equipment, talk to reps... Service, parts, equipment, every aspect of our business, can affect the customer, right there on the trade show floor. As opposed to other sales or marketing media 'one thing here, one thing there.'



B2B EXHIBITIONS ENJOY SOLID NET PROMOTER SCORE (NPS)



What is the Net Promoter Score?



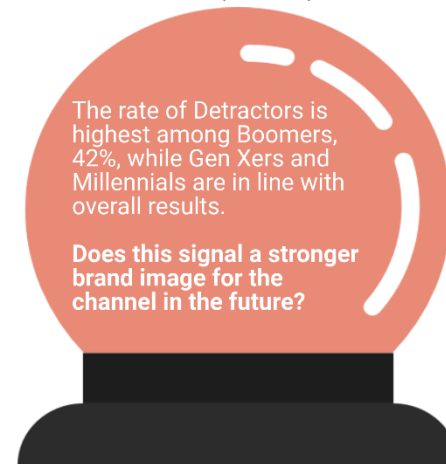
32% NPS among Heads of Marketing at Exhibiting Companies

Download the full report for specific explanations from respondents in each category.



The rate of Detractors is highest among Boomers, 42%, while Gen Xers and Millennials are in line with overall results.

Does this signal a stronger brand image for the channel in the future?



www.ceir.org

Retently 2019 NPS Benchmark

average NPS score per industry



2019 NPS Benchmarks



Cite and link to the source when using this data.

2019 NPS Benchmarks

What is a good NPS score?



What is a good NPS score?

Attendees

50%
Grea

t!

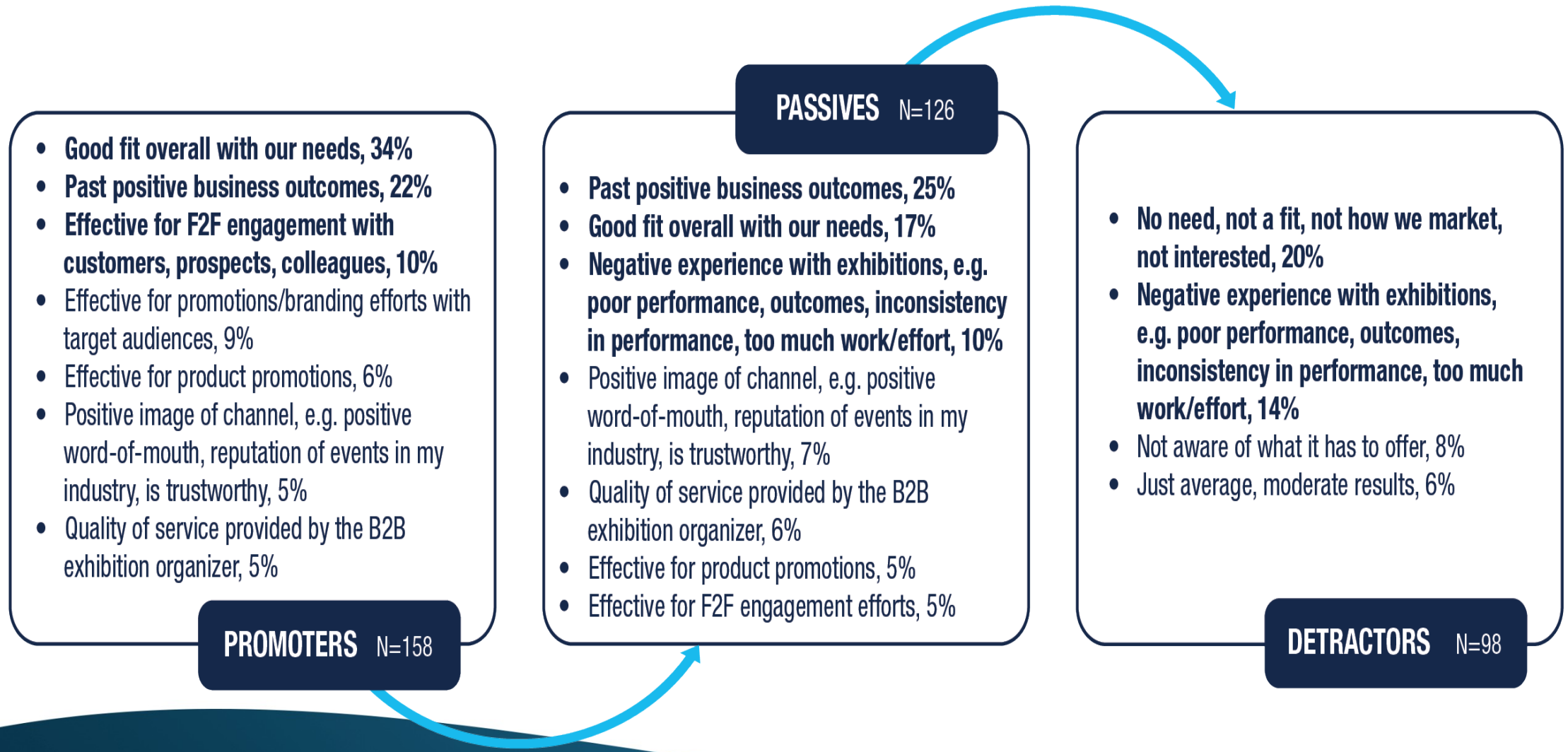


Exhibitors

Promoters: 49%
Overall 32%

Non-exhibitors
Overall: -1%





Reasons for Not Exhibiting

Opportunities

Beyond Your Control

#1

Use or Prefer Other F2F Setting - 54%

- Consumer shows, 17%
- Small target audience, engage F2F in other ways, 17%
- One-on-one hosted buyer events, 16%
- Corporate events, 14%

#2

Negative Perceptions of B2B Exhibitions - 37%

- Too expensive, not enough ROI, 17%
- Negative past experience - poor attendance volume or quality, 14%
- Organizational leadership does not support, 14%

#3

Prefer/Shift to Digital - 26%

- Our selling process is changing, moving to online sales, no need, 16%
- Digital channels meet our needs, no need for F2, 14%

#4

Sector or Company Challenges - 26%

#5

No need to exhibit - 23%

- High market penetration, 14%
- Moving away from distributors, reps, no need to support, 11%

#6

There are no B2B exhibitions in our markets or that meet our needs - 19%

What Would Convince Them to Exhibit?

Offer 1+ Ways
to Convince
Them - 76%

Cannot be
Convinced -
24%

Reduce cost, 28%

Digital elements that
enhance attendee
engagement throughout
event lifecycle, 22%

Shorter move-in/out, 19%

Integrate digital to
maximize broadcast,
promotional impact of
exhibiting, 17%

Attracting U.S. Organizers

Associations vs. Independent Organizers

Associations

- Exist to serve the mission of the organization
- Represents an industry or a profession
- Governed by a Board of Directors
- Revenue generated from membership fees, events, publications, etc.
- Associations less likely to hold events outside their home country

Independents

- Typically media companies
- Reed, Informa, Clarion, Messe Frankfurt, as an example
- Some are private, others are public
- Profit driven



Strategic Moves

- Approach larger groups to collaborate
- Create strategic relationships in the market
- Too protective of your show/ market and don't want to change, you risk to have competitors grab surrounding markets that could be yours
- Markets shift and exploring the potential of cloning your show in other countries is a good defensive move as well as a growth opportunity if a thorough market research is done.

Evaluating Opportunities

- What industries are in the country?
- Where are the buyers?
- Is there a regional market?
- Where do the exhibitors want to be?
- Regional/Trusted Partners
- Culturally a good fit



Evaluating Markets

- Will the event support the anchor brand,
if there is an anchor show in the U.S.
- Other industry events / Competition
- Are there better secondary/emerging markets
- Visa requirements
- Recession/Health of Economy



Evaluating Markets

- Exports/imports
- Stability and strong government
- Is there funding from the government
- Market forecast for region – 5 years
- Corruption
- Buyers/contractors within country or surrounding countries





Consideration S

- Rotation of events from country to country
- Grow attendance over time
- Partner with local associations
- Partner with publications
- Database and connections
- References

Summary

- Industry Segment
- Market Shifts
- Competition
- Venues
- Relationships
- Market Research
- Political Climate
- Market Research
- Business Culture/Philosophy





IAEE

Exhibitions and Events Mean Business

www.iaee.com