UFI & Explori Global Exhibitor Insights

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WELCOME: **KAI HATTENDORF**

Dear industry colleagues,

When we launched the "UFI/Explori Global Visitor Insights" report in 2016, the feedback was overwhelming. And we were asked frequently to provide similar data on "the flip side of the coin" – the exhibitors.

So here we are with a close and analytical look at the other customer group our industry depends on – the exhibitors.

UFI has again teamed up with our research partner, Explori, to analyse post show surveys from over 1,000 shows that took place in over 40 countries, from a cross section of sectors and sizes. We have analysed this dataset and can draw robust conclusions about the experiences and intentions of exhibitors around the world. We then went a step further, as we wanted to add the perspectives of the exhibition organisers as well. Therefore, we added in depth interviews with 57 exhibition directors from 17 countries.

The results of all of this is this report. Of course, not one show, one organiser, one region are alike, and as expected, the results show a large diversity. It also shows that there is, overall, room for improvement in terms of exhibitor advocacy. The detailed analysis shows some good practices in order to contribute to satisfaction and growth.

We hope that this kind of research will help you and our industry.

It would not have been possible without the support from our friends at SISO. I would like to thank them very much for being a part of this project!

Finally, I invite you to share any feedback you have about this report with us. You can reach us at research@ufi.org.

I wish you an enjoyable and fruitful read.

Yours sincerely,

Kai Hattendorf
UFI Managing Director / CEO

ABOUT UFI - THE GLOBAL ASSOCIATION OF THE EXHIBITION INDUSTRY:

UFI is the leading global association of the world's trade show organisers and exhibition centre operators, as well as the major national and international exhibition associations, and selected partners of the exhibition industry. UFI's main goal is to represent, promote and support the business interests of its members and the exhibition industry.

UFI directly represents around 50,000 exhibition industry employees globally, and also works closely with its 58 national and regional association members. More than 700 member organisations in 86 countries around the world are presently signed up as members. Over 900 international trade fairs proudly bear the UFI approved label, a quality guarantee for visitors and exhibitors alike. UFI members continue to provide the international business community with a unique marketing media aimed at developing outstanding face-to-face business opportunities.

PURPOSE OF REPORT

This report gives an overview of the experience and intentions of exhibitors at trade shows across the world. It aims to give event organisers a deeper understanding of the patterns and trends that drive positive and negative exhibitor experiences and the objectives and behaviours that underlie them.

METHODOLOGY & SAMPLE SIZES

This report has been created in two stages. The first part utilises exhibitor feedback held in the Explori database. The results have been complied using survey data collected from visitors and exhibitors via Explori's dedicated research platform. In total 1,040 trade shows from over 40 countries have conducted post show research through Explori.

What all the surveys have in common, is the inclusion of four key questions, asked of their exhibitors in a standardised format. This allowed the anonymised results to be aggregated and compared to draw robust conclusions about the experience and intentions of our exhibitors.

The second part was executed using depth interviews with trade show event directors. Following a global call for participants, event directors were asked a series of open and closed questions to determine their attitude and behaviours around the exhibitor relationship and bringing innovation to their shows.

This data was then compared against show performance and exhibitor satisfaction metrics reported by the participants.

57 trade show directors from 17 different countries participated in the depth interviews.

"How satisfied are they?"

"How likely are they to return to the event in future?"

"How likely are they to recommend the event to colleagues in the industry?"

"How important is the event to them?"

Exhibitor advocacy is low across the globe

Low advocacy is one of the biggest challenges facing the industry globally. Trade show exhibitors have a global Net Promoter Score (NPS) of -17. 25% of shows have an NPS of less than -36. This is the same percentage that have a positive NPS score.

Larger shows have more advocates, but size isn't everything

Unsurprisingly, exhibitors are more likely to recommend events with more visitors. But there is no correlation between visitor numbers and exhibitor satisfaction, leading to larger events having more participants who exhibit high loyalty but low satisfaction. (18% vs. 13% showing high loyalty but low satisfaction in smaller shows)

Shows with high exhibitor Net Promoter Score are more likely to experience growth

When exhibitor NPS was compared with growth metrics, shows with a higher NPS were performing better across all metrics. 71% of shows with positive NPS are experiencing growth in exhibitor numbers compared to 32% of shows with negative exhibitor NPS.

More than twice as many high NPS shows are experiencing notable revenue growth as low NPS shows.

Organisers can counter poor performance by educating exhibitors

Many exhibitors face significant challenges in engaging visitors. This can lead to low exhibitor satisfaction, even at shows with very high visitor numbers. Organisers can counter poor exhibitor performance by offering training programmes and actively working with exhibitors to showcase innovation and launch products. Shows that offered exhibitor training to all or most, saw a 23 point boost in NPS vs. shows that did not.

A proper "newness" strategy boosts both visitor and exhibitor satisfaction

The 2016 report highlighted the importance of "newness" in driving visitor satisfaction. It is now also clear that shows with a well-defined "newness" strategy are more successful at satisfying both visitors and exhibitors. Shows that actively promote "newness" have notably higher exhibitor satisfaction scores than shows who do not. (3.71 vs. 3.35 out of 5)

REGIONAL OVERVIEW

Americas

In-line with the rest of the world, trade shows in the Americas are not as successful at satisfying their exhibitors as their visitors. However, this trend is more pronounced in this region. Whilst the Americas enjoy the highest levels of visitor satisfaction, their exhibitor satisfaction is amongst the lowest.

Importance of event remains in-line with the rest of the world, potentially protecting the likelihood of return which remains on par with other regions. Advocacy is also not as poor as could be expected, given the lower satisfaction scores, but the region does show the biggest disparity between exhibitor advocacy and visitor advocacy.

Asia / Pacific

Exhibitor satisfaction scores in the APAC region compare slightly more favourably to other regions than their visitor satisfaction scores, with only Europe delivering higher scores. However this has not been reflected in improved levels of advocacy, with the region showing the lowest Net Promoter Scores.

As with visitors, a large proportion of exhibitors are recommending against the events they attend. Lack of choice in this developing region may be protecting likelihood of return, which remains in-line with the rest of the world.

Europe

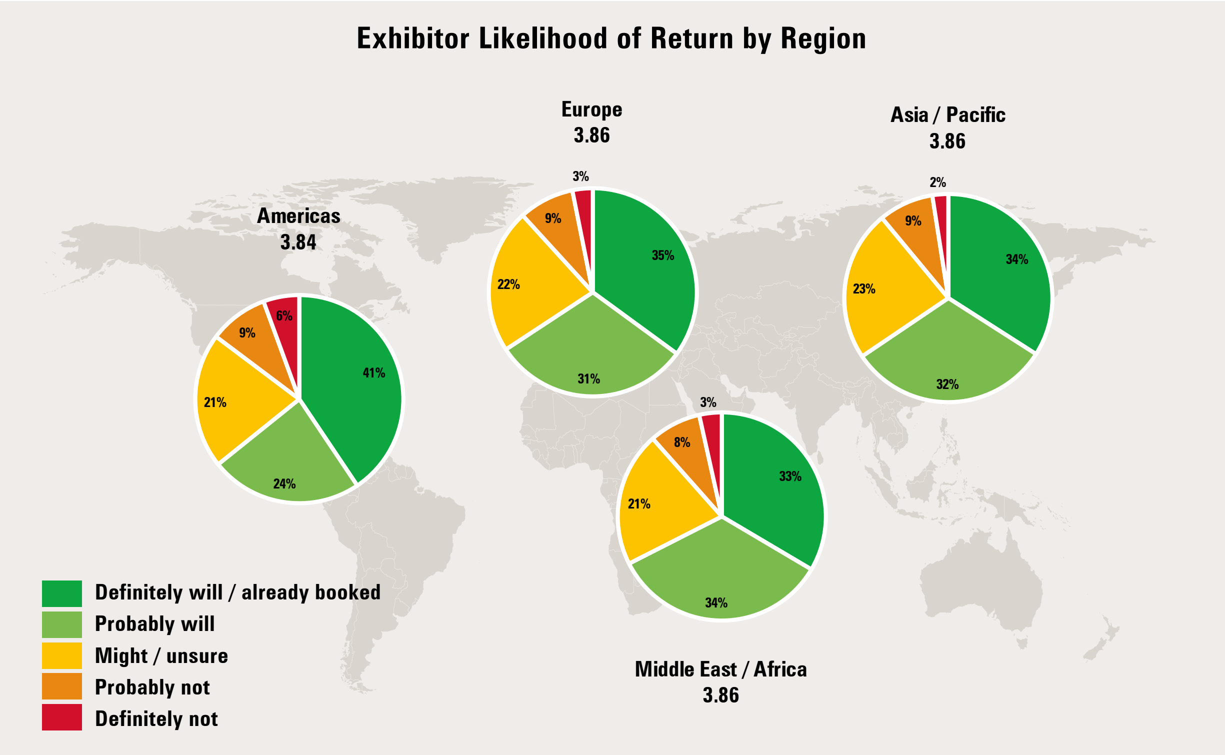
Events in Europe are comparatively successful in satisfying both their exhibitors and their visitors. However in this mature market, the perceived importance of each event is lower than the other regions. Exhibitors benefit from a wide choice of events and other marketing channels.

Higher satisfaction can be seen to deliver better advocacy and more loyalty in Europe compared to other regions.

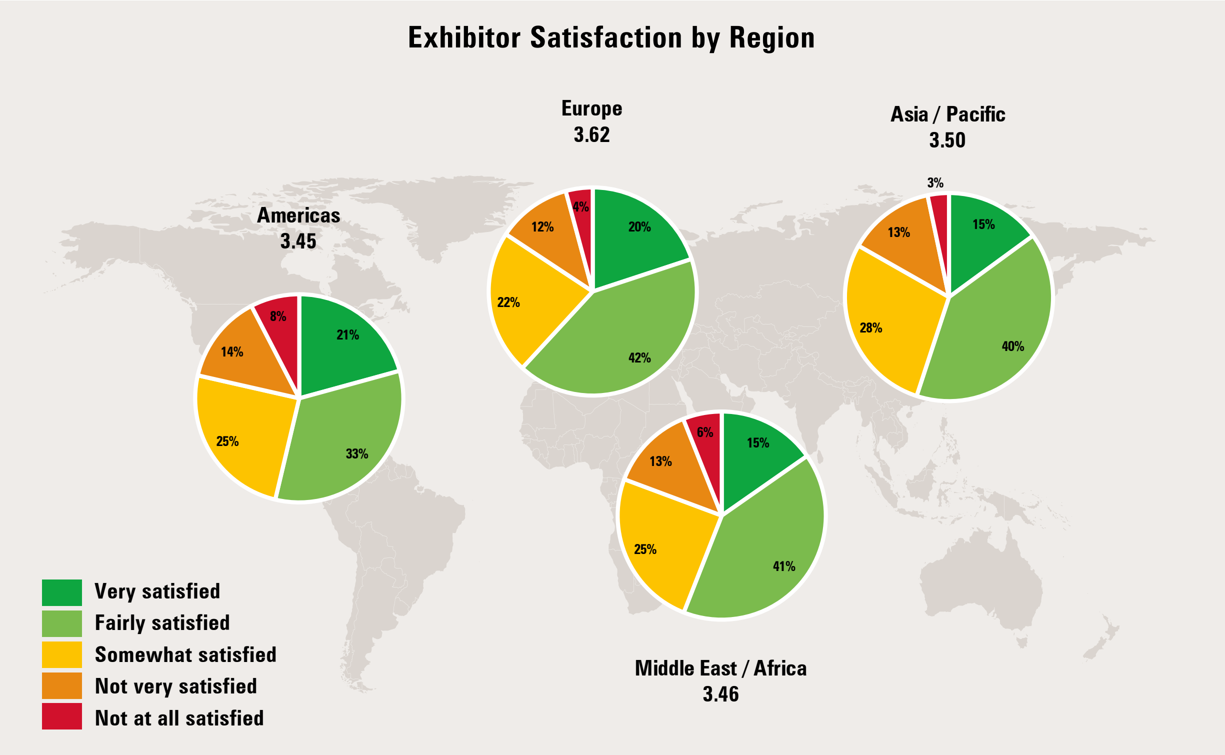
Middle East / Africa

Satisfaction levels are low amongst exhibitors in this region and this can also be seen in very low levels of advocacy, with one of the lowest NPS. However loyalty remains un-affected, sitting at similar levels to the rest of the world.

As with visitors, exhibitors at events in the region perceive individual events as being very important, possibly driven by lack of choice in this developing region.

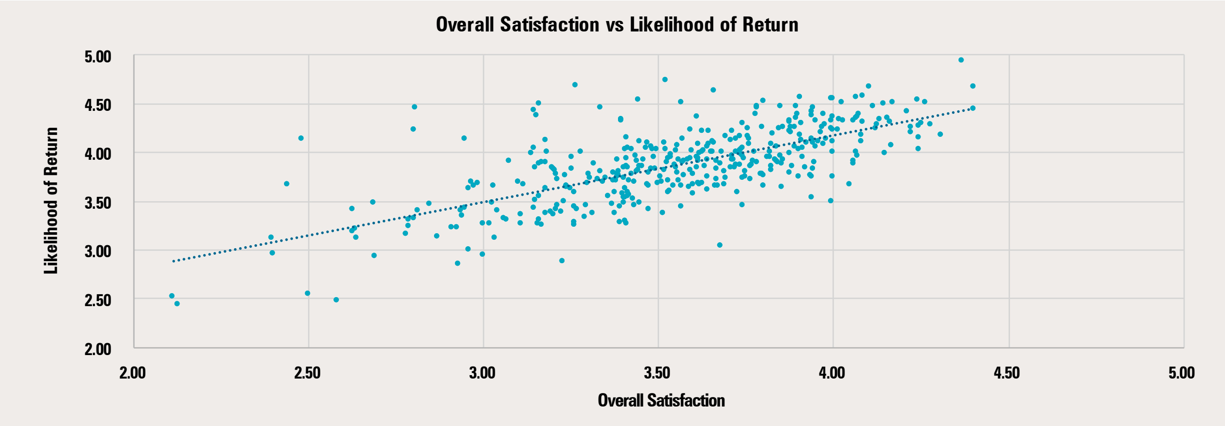


Whilst total scores for likelihood of return are very similar across regions, we can see exhibitors in the Americas have a more polarised view, with more respondents falling into both the "definitely will / already booked" and "definitely not' categories than other regions.



HOW DO SATISFACTION AND IMPORTANCE WORK TOGETHER TO DRIVE LOYALTY?

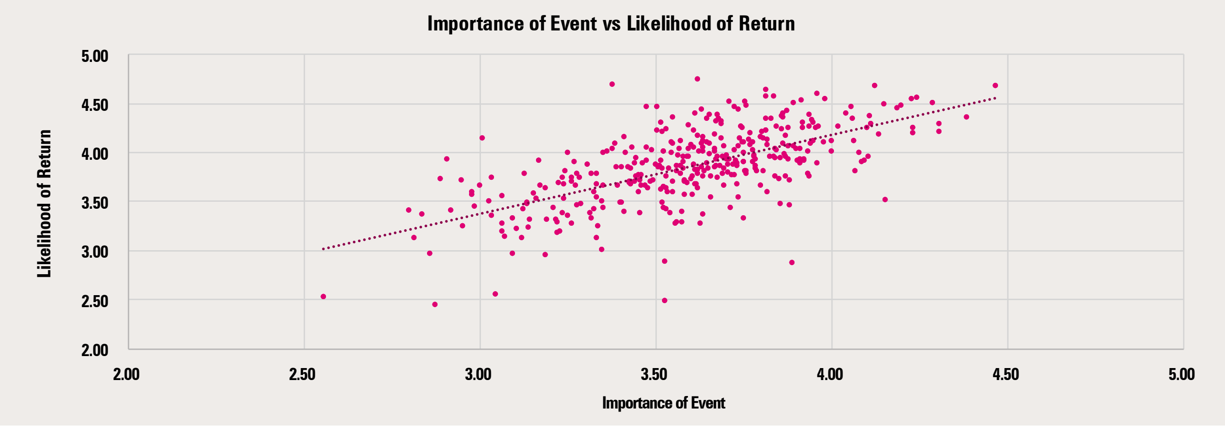
Overall Satisfaction vs. Likelihood of Return



As we saw when studying visitor behaviour in 2016, we can see a correlation between satisfaction with the experience of the event and loyalty, measured by likelihood of return. But as satisfaction varies between regions, loyalty is similar, we can see other factors at play when determining whether exhibitors will support an event in future.

We can see that both satisfaction and importance are core in driving loyalty. An event can experience high levels of loyalty when they deliver high exhibitor satisfaction, **or** when the event is considered important. Where an event is seen as important, exhibitors are more likely to return even if the event did not particularly satisfy their objectives.

Importance of Event vs. Likelihood of Return



If an event lacks competition, because of its scale and heritage, venue factors, or because it operates in a less developed market, it may continue to be successful without delivering high levels of satisfaction. However it will be vulnerable to disruption if a competing shows enters the market.

MEET YOUR “HOSTAGES” AND “APOSTLES”

The relationship between exhibitor satisfaction and loyalty is key to predicting the future growth of a show and its resistance to disruption.

In the diagram below, global exhibitor responses are plotted on a matrix based on their scores for satisfaction and loyalty (measured by their likelihood to return to future editions). They are then allocated a segment based on which quadrant of the matrix they fall into. This segment can be used to infer their future behaviour in relation to the event in question. Global visitor numbers are also shown for reference.

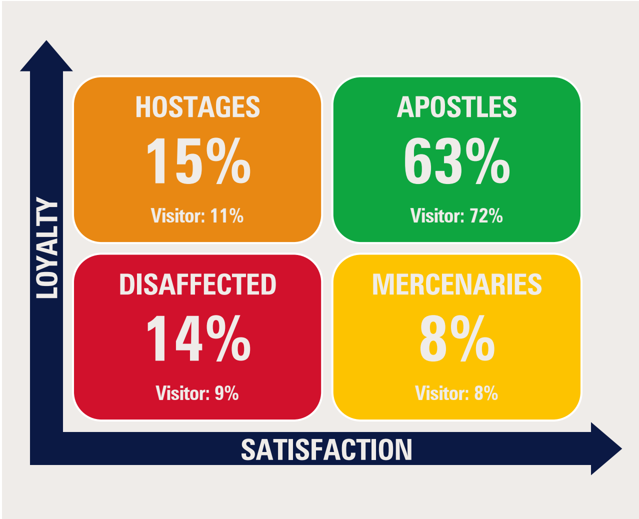
Satisfaction-Loyalty Matrix

“Apostles” = High satisfaction and high loyalty. “Apostles” are likely to return to an event with little persuasion and to encourage others to exhibit and attend.

“Hostages” = Low satisfaction and high loyalty. “Hostages” are likely to return, but possibly due to a perceived lack of alternative rather because the event satisfies their needs.

“Mercenaries” = High satisfaction and low loyalty. “Mercenaries” are satisfied with the event, but will not commit to returning in future, often because they see the event as low importance.

“Disaffected” = Low satisfaction and low loyalty. “Disaffecteds” are on their way to becoming ex-exhibitors. They are also likely to actively recommend against your event to others.



37% of exhibitors globally fall into a negative category

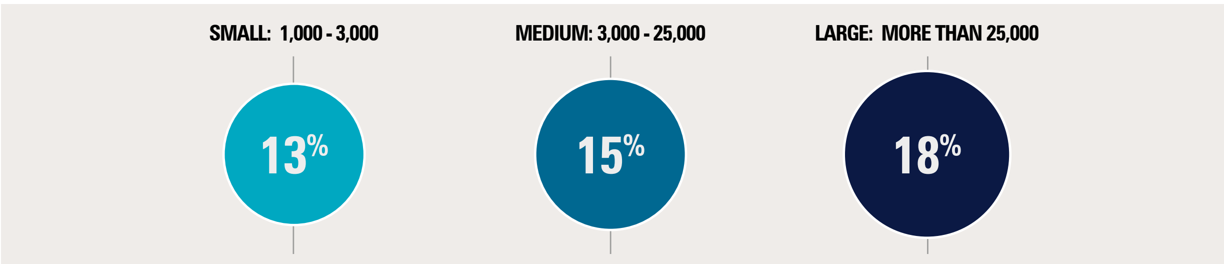
Understanding where exhibitors fall on the matrix can help organisers understand the environment they will be selling into in the next cycle. This intelligence can form a key part of target setting.

THE COST OF NOT EXHIBITING

The number of exhibitors who fall into the “Hostage” category increases as visitor numbers increase, with the largest shows counting some 18% of their exhibitors as “Hostages”.

This could be indicative of the perceived cost of not exhibiting - the negative brand perception that a company may experience through not being present at event deemed important by their industry, regardless of whether that event was meeting their objectives.

Number of Visitors vs. Percent of Exhibitors as “Hostages”



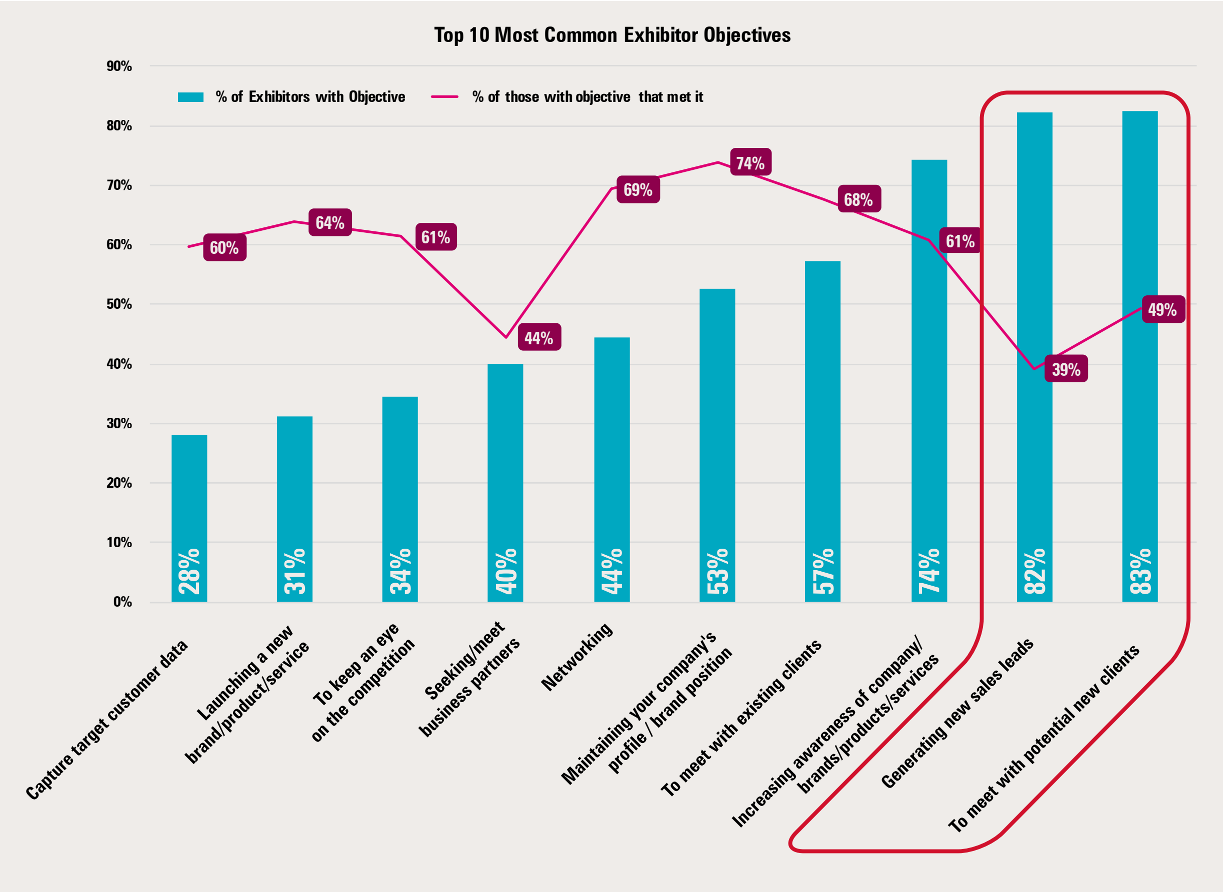
ARE WE DELIVERING ON WHAT EXHIBITORS REALLY WANT?

HOW SUCCESSFUL ARE EVENTS IN MEETING EXHIBITOR OBJECTIVES?

The bars of this chart indicate how frequently each objective is cited by exhibitors as being important to them, whilst the line indicates how successfully they felt they had achieved that objective.

Here we can see that objectives around networking and brand awareness are being met successfully, but as we move right along the chart, more sales focussed objectives are not being met by over half of our exhibitors.

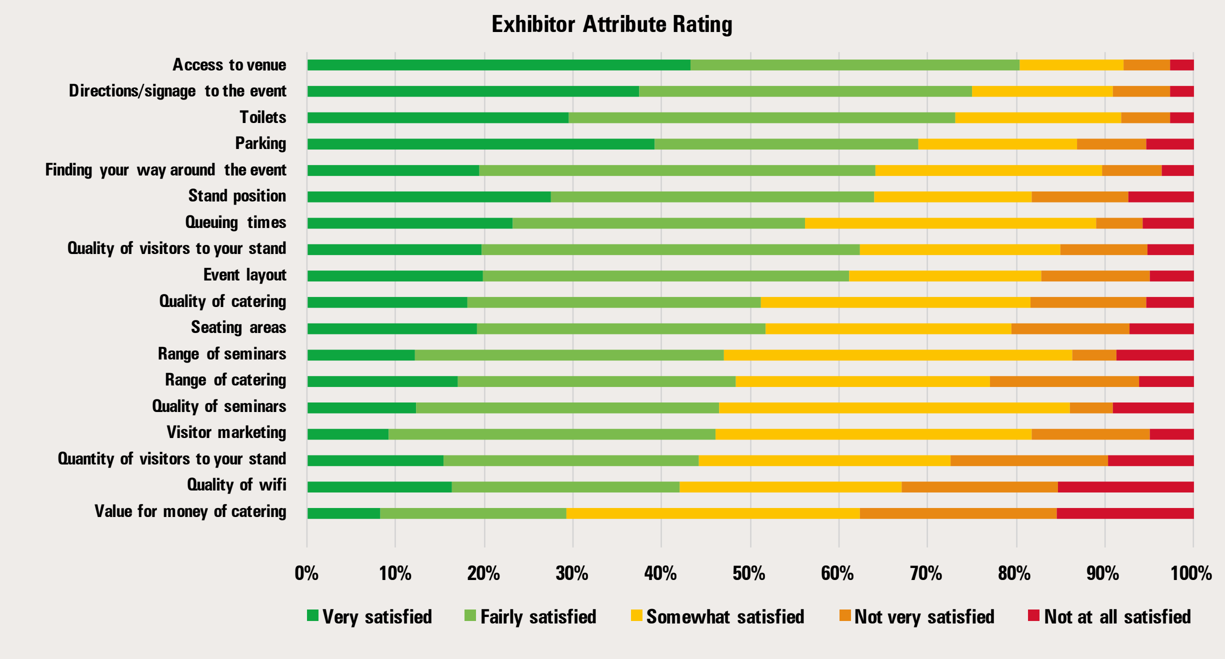
Objective vs. % of those who met their objective



The team looked at the interplay between the importance of an objective to an exhibitor and how successful they were at meeting it. This allowed us to identify some key areas where many exhibitions were underperforming for their exhibitors.The sales-focussed objectives around leads and new business (shown here in yellow) are important to a large number of exhibitors, but they are some of the least likely to be met.

This data suggests exhibitions that can improve their exhibitors' success at generating new sales leads and meeting new clients will experience higher levels of satisfaction, leading to greater advocacy and loyalty.

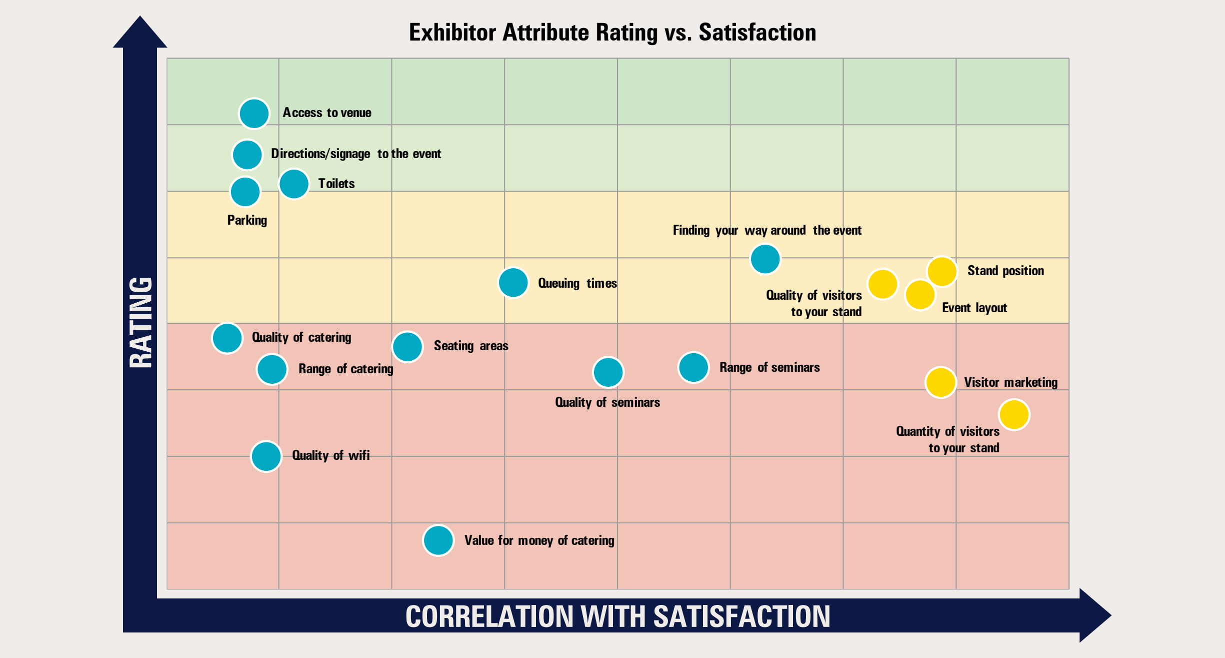
WHAT MATTERS MOST TO EXHIBITORS?



Some discussion around the exhibitor experience has focussed on the complaints organisers may hear most frequently; catering, Wi-Fi or ease of getting around the venue. The exhibitor experience should be understood in the context of the overall importance of each of these elements. This will allow organisers to focus their efforts on the areas that can most impact exhibitor satisfaction.

Here we can see that aspects relating to the number of visitors and the business of the exhibitor stand or booth are the are areas of poorer performance that really matter most.

Exhibitor "Pains and Gains"



WHAT DO EXHIBITORS SAY ABOUT THEIR EXPERIENCE?

In preparation of this research, thousands of free text responses were analysed to the question: How would you improve the event?

These were tagged to categories based on the areas of improvement mentioned. If more than one area was mentioned in a comment, this was tagged to multiple categories.

The highest proportion of suggestions were for improvements to the footfall to their stand, typically from exhibitors who had experienced a quiet zone or hall, or a quiet period of time during opening. This was followed by exhibitors who commented that they wanted overall visitor numbers to be improved.

Comments relating to areas generally within the venue's control such as quality of food outlets, location of parking and ease of build-up and break down generated 20% of improvement suggestions whilst comments relating to areas within the organisers control, such as communication or exhibitor manuals attracted 16% of comments.

Cost of exhibiting also received frequent mention, with 7% of comments relating to the cost of the stand or of contractor services such as electrics or drayage.

Interestingly, what many organisers believe are exhibitor's biggest complaints such as catering, Wi-Fi and being "sold to" by other attendees, only generated less than 3% of the comments.

Most Common Improvements Suggested By Exhibitors

But this does not tell the complete story. Comments were then compared with exhibitor satisfaction to gain a more detailed picture. We can see that the type of improvements suggested vary greatly depending on how satisfied the exhibitor was with the show overall.

	Not at all satisfied	Not very satisfied	Somewhat satisfied	Fairly satisfied	Very satisfied	All
Footfall	29%	29%	26%	24%	23%	25%
Quantity of visitors	36%	35%	25%	19%	11%	23%
Venue	7%	12%	21%	24%	25%	20%
Organisers	25%	13%	14%	16%	18%	16%
Quality of visitors	19%	16%	11%	6%	6%	10%
Price or quality of other aspects	2%	5%	7%	9%	7%	7%
Price of the stand	8%	6%	4%	6%	3%	4%
Catering	0%	2%	4%	4%	3%	3%
Hosted buyer	3%	3%	3%	3%	3%	3%
Wi-Fi	1%	1%	3%	4%	2%	3%
Being "sold to"	1%	3%	2%	1%	1%	2%
Badges	1%	2%	1%	1%	1%	1%

Whilst overall 23% of exhibitors suggest improving visitor numbers, this is much higher among the most dissatisfied exhibitors (36%), and much lower among the most satisfied (11%).

Conversely we see far fewer comments regarding aspects such as the venue, Wi-Fi or catering from those who are dissatisfied compared to those who are satisfied. The indication therefore is that while these things are commonly complained about, they are seen as "hygiene factors", rather than core factors driving satisfaction.

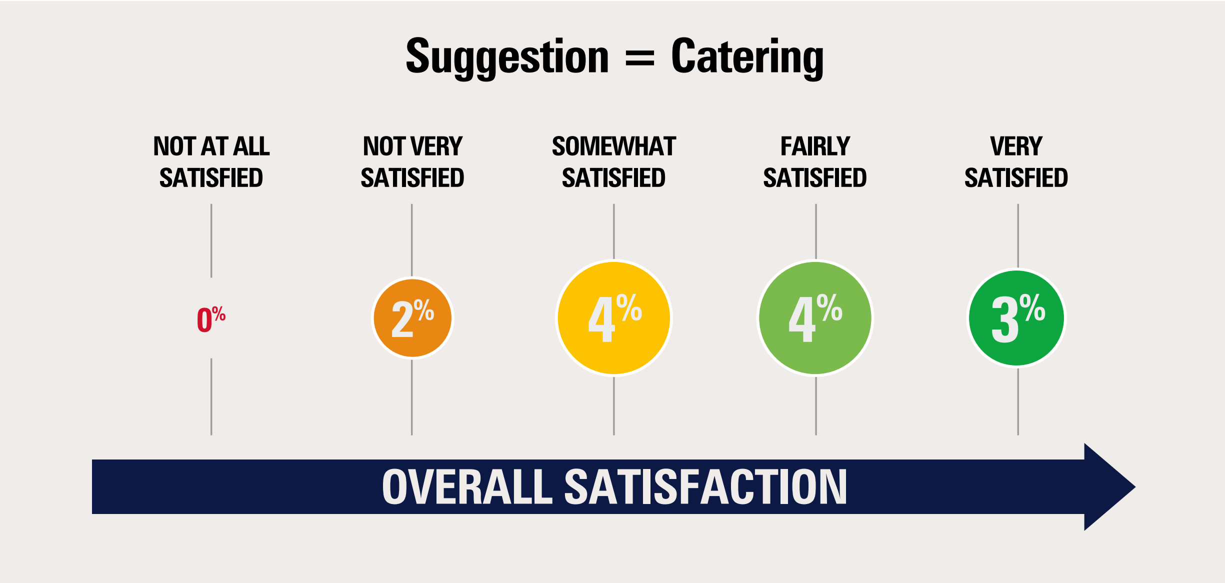

Suggestion = Quantity of Visitors
NOT AT ALL SATISFIED
NOT VERY SATISFIED
SOMEWHAT SATISFIED
FAIRLY SATISFIED
VERY SATISFIED
36%
35%
25%
19%
11%
OVERALL SATISFACTION

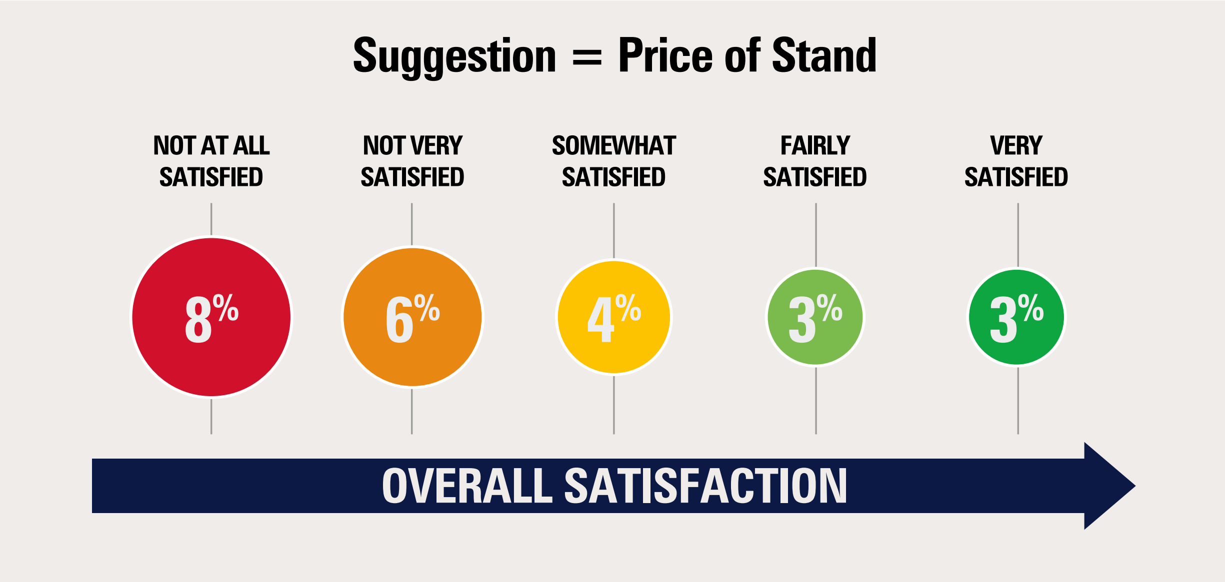

Suggestion = Quality of Visitors
NOT AT ALL SATISFIED
NOT VERY SATISFIED
SOMEWHAT SATISFIED
FAIRLY SATISFIED
VERY SATISFIED
19%
16%
11%
6%
6%
OVERALL SATISFACTION

THE SQUEAKY WHEEL – WHAT DIFFERENCE DOES CATERING, WI-FI ETC. REALLY MAKE?

In the sample, not a single exhibitor who described themselves as "Not at all satisfied" cited the catering as an area of improvement. It is important as an industry that we distinguish between the apparent fundamentals for creating a successful exhibitor experience (visitor numbers and stand traffic) and areas which generate ad-hoc feedback from otherwise satisfied exhibitors.

Eating, Pricing and Satisfied Exhibitors



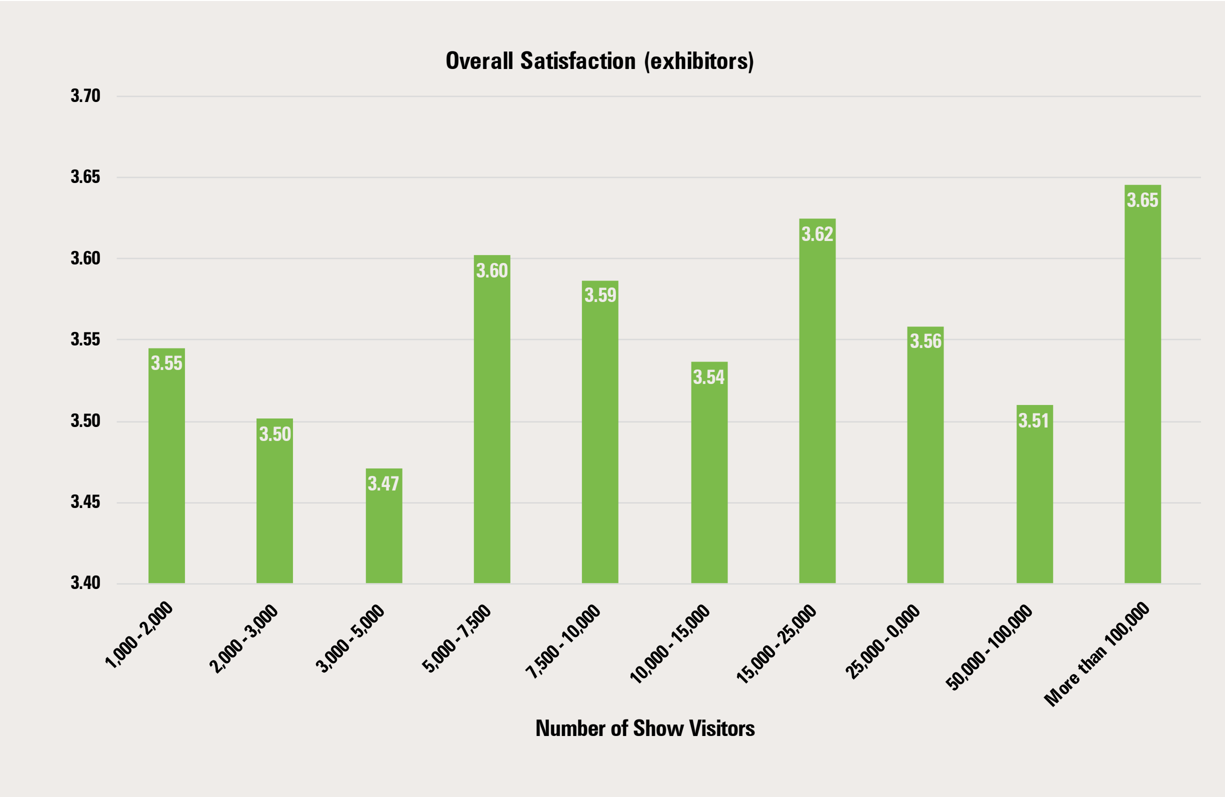


THE MYSTERY OF VISITOR NUMBERS – ALONE IN A CROWD?

The prevalence of complaints about visitor numbers amongst dissatisfied exhibitors presents an interesting conundrum. All of the events included in the study are scale events, with thousands if not many thousands of visitors. We know 'quantity of visitors to your stand' is a core driver of overall exhibitor satisfaction - however if busy halls were all it took to generate exhibitor satisfaction, then we would expect to see satisfaction increase broadly in-line with visitor numbers.

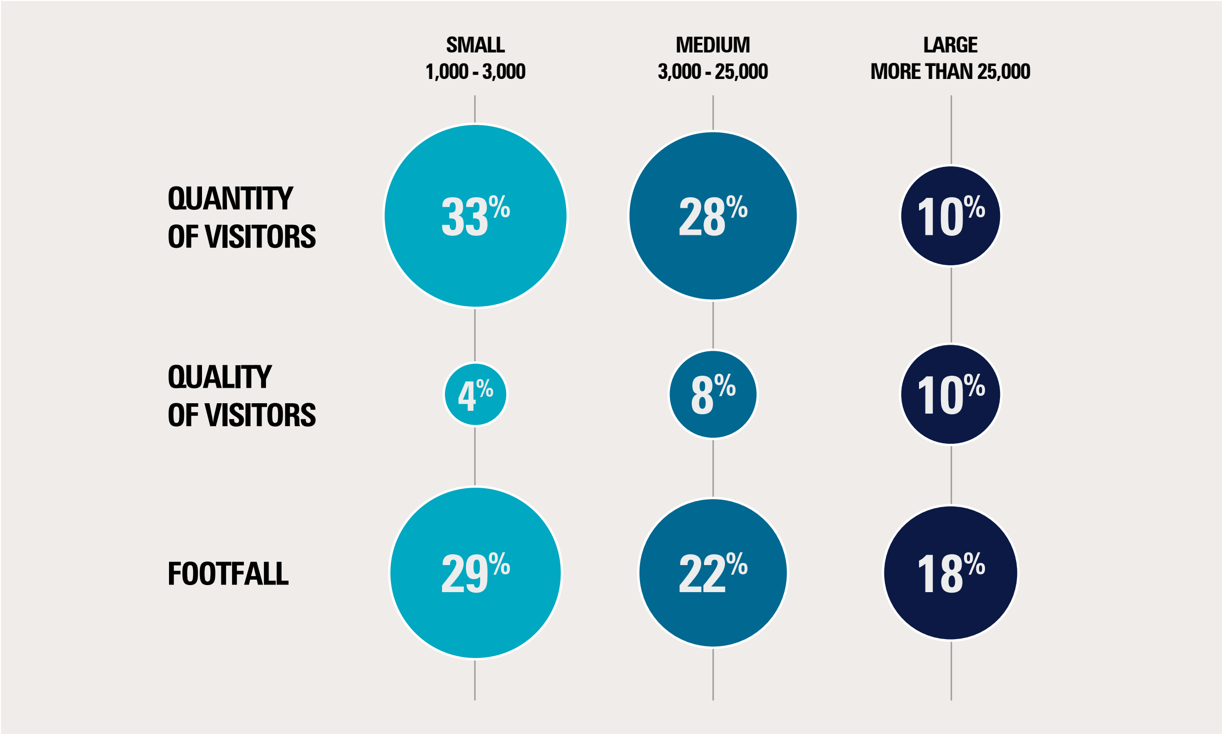
From the chart below, we can see that overall visitor numbers bear little relation to exhibitor satisfaction.

Do Higher Visitor Numbers Equal Greater Satisfaction?



ALONE IN A CROWD – WHY ARE VISITOR NUMBERS AN ISSUE EVEN AT "HUGE" EVENTS

Percent of Exhibitors Suggesting Improving...



Here we can see that even at shows with tens of thousands of visitors, quantity of visitors and more importantly, booth traffic are still issues. 10% still ask for more visitors and 18% would like to improve traffic to their booth.

These exhibitors are in halls with many times more visitors than they could possibly hope to speak to, yet they are not able to access them effectively.

They are effectively "alone in a crowd" and this may be because they do not fully appreciate what would attract visitors to their booth. They suggest simply "more visitors" as a solution

This laser focus on visitor numbers is also under-appreciated by many organisers. When event directors were asked to cite what the most important factor was for their exhibitors to consider their event a success, most thought visitor quality was more important than visitor quantity.

Whilst it is very likely an exhibitor in a hall full of poor quality visitors would quickly become frustrated, organisers need to consider that many of their exhibitors are unable to engage the visitors that are clearly present, so have no way of assessing, or benefiting, from their quality. Where exhibitors are unable to have meaningful conversations with visitors, increasing visitor numbers and quality has limited impact on their satisfaction.

This could suggest why so many (18%) of exhibitors at large-scale events feel that footfall can be improved. Whilst they acknowledge that there are many visitors at the event, they do not understand why their own booth is quiet. Helping exhibitors develop strategies that better serve visitor objectives may be one way organisers can address this.

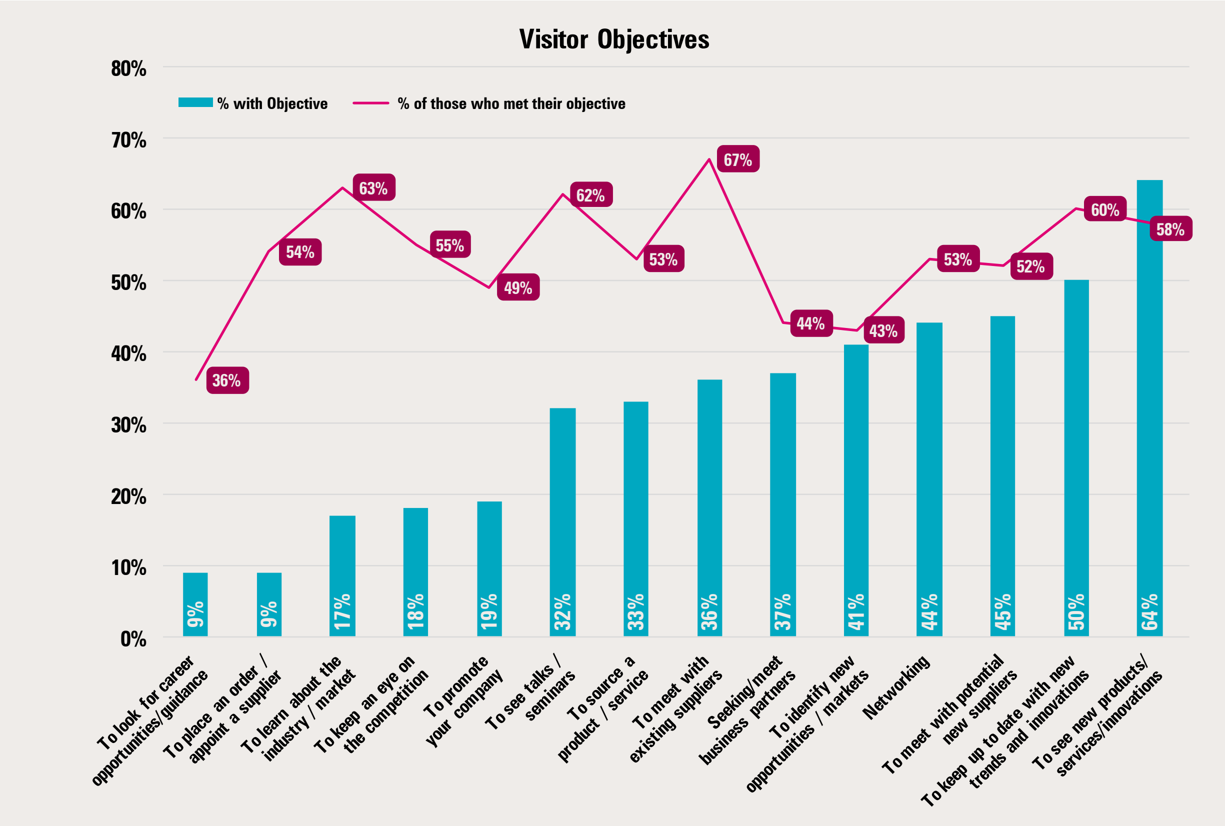
VISITOR OBJECTIVES REVISITED

From the 2016 UFI & Explori Global Visitor Insights report we identified areas where exhibitions globally were less successful in meeting the objectives of their visitors. The most important visitor objectives were:

1. To see new products / services / innovations
2. To keep up to date with new trends and innovations
3. To meet with potential new suppliers

However visitors were less successful at meeting these objectives than networking or educational objectives, which they placed less importance on.

Furthermore, the 2016 report identified "newness" and innovation, driven through the exhibitors on the show floor was as critical factors in engendering satisfaction and advocacy amongst visitors. Event attendees want to see the most innovative players and newest solutions in their field.



Yet exhibitors place more importance on transactional objectives such as gathering leads and new business opportunities. Without an appreciation of visitor objectives they may not be developing effective strategies for their stands or booths, focussing on lead capture rather than allowing visitors to discover their most innovative solutions.

This may make it hard for exhibitors to engage with visitors even at the busiest of events.

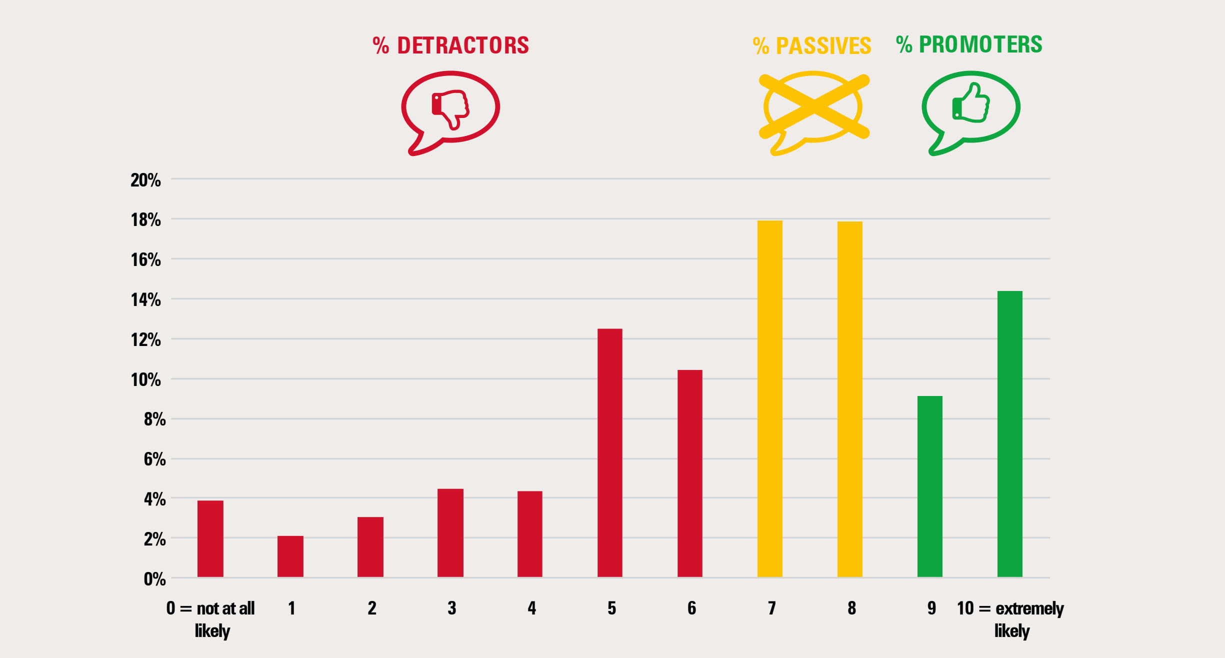
EXHIBITOR NET PROMOTER SCORE
A MAJOR CHALLENGE FOR OUR INDUSTRY

NET PROMOTER SCORE EXPLAINED

Developed by Bain & Company and Satmatrix, Net Promoter Score (NPS) is a way to understand a customer's perception of your product or service. It's widely used across many industries and allows different sectors to benchmark themselves against each other.

It leverages advocacy – the likelihood to recommend to a friend or colleague – as a way of understanding many different drivers of perception including satisfaction, ease of customer journey and return on investment in a single question. Respondents, in this case exhibitors, are asked to rate how likely they are to recommend the event to a friend or colleague in the industry.

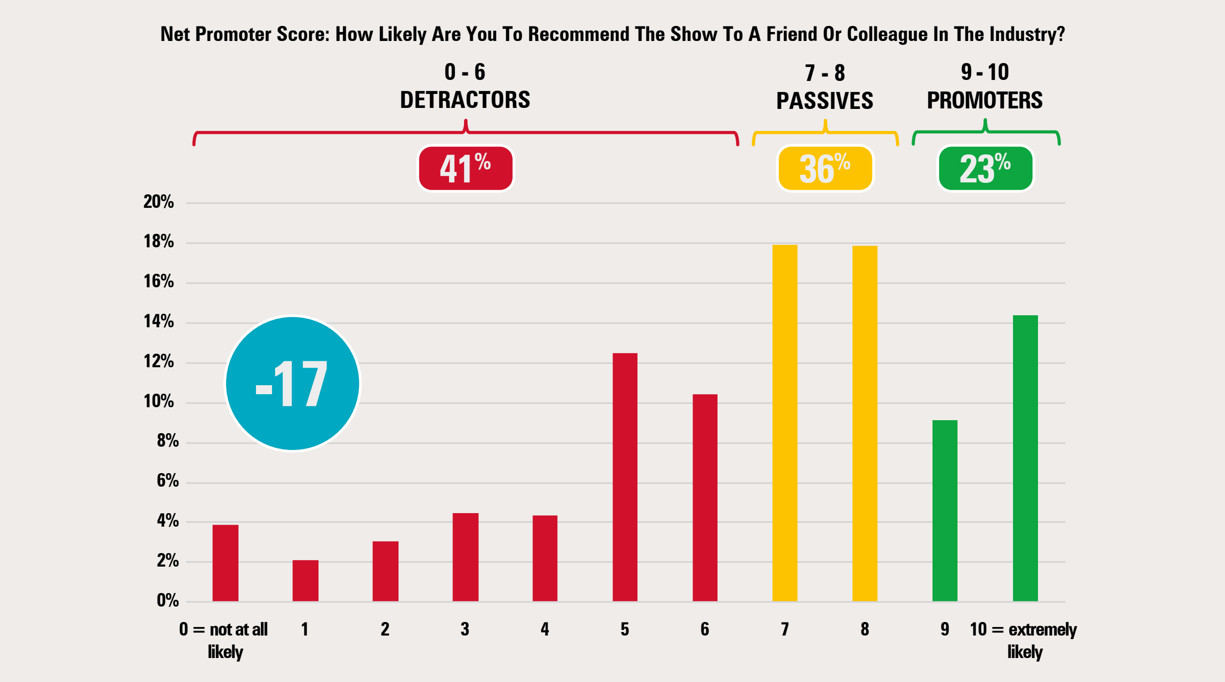
Net Promoter Score: How Likely Are You To Recommend The Show To A Friend Or Colleague In The Industry?



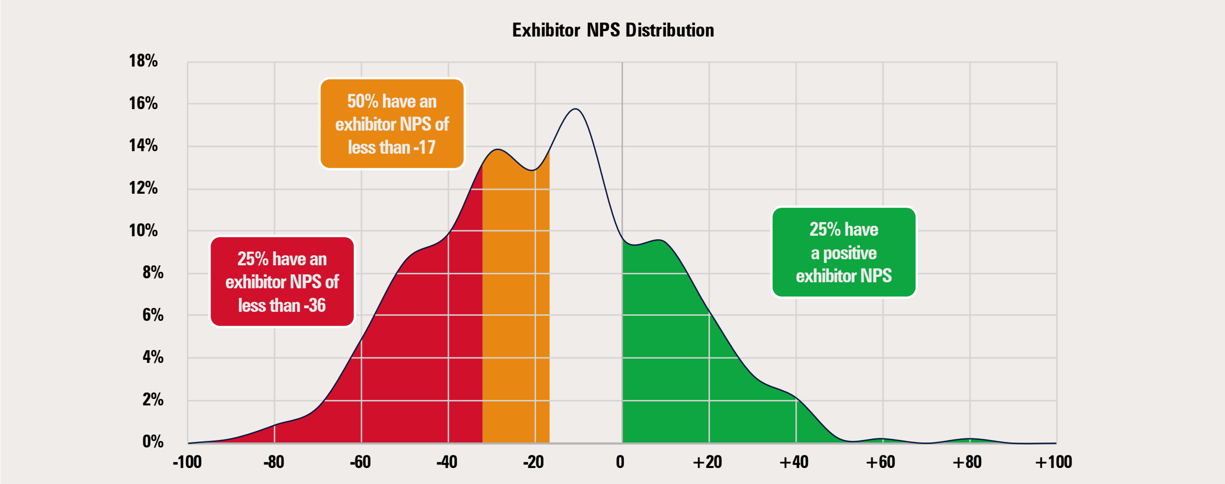
This graph is an example of how respondents are categorised based on their response as Promoters, Passives or Detractors. Net Promoter Score is then calculated as the difference between the proportion of promoters and the proportion of detractors and is expressed on a scale from -100 to +100. So an event with a positive score has more promoters than detractors, whilst an event with a negative score has more detractors than promoters.

So as you can see, for the event industry average to be -17, on balance, we have more exhibitors who will recommend against the event they have just supported, than advocate for it.

Detractors, Passives and Promotors: How Do Our Exhibitors Feel?



Where Do Shows Fall By Average NPS?

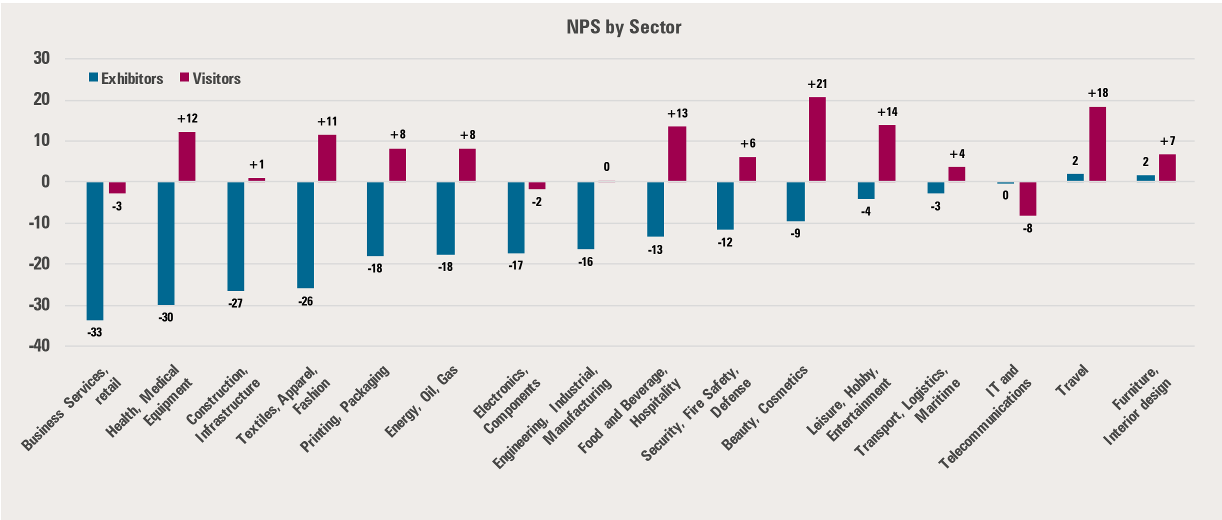


Only 25% of trade shows achieve a positive NPS, the same number who have and NPS of -36 or less.

The impact of NPS has been extensively researched across many industries. With a finite number of potential exhibitors in most sectors, when advocacy is low, it will get harder and harder to attract new exhibitors and the existing customers will be increasingly sensitive to any price rise and over time may even withdraw their support.

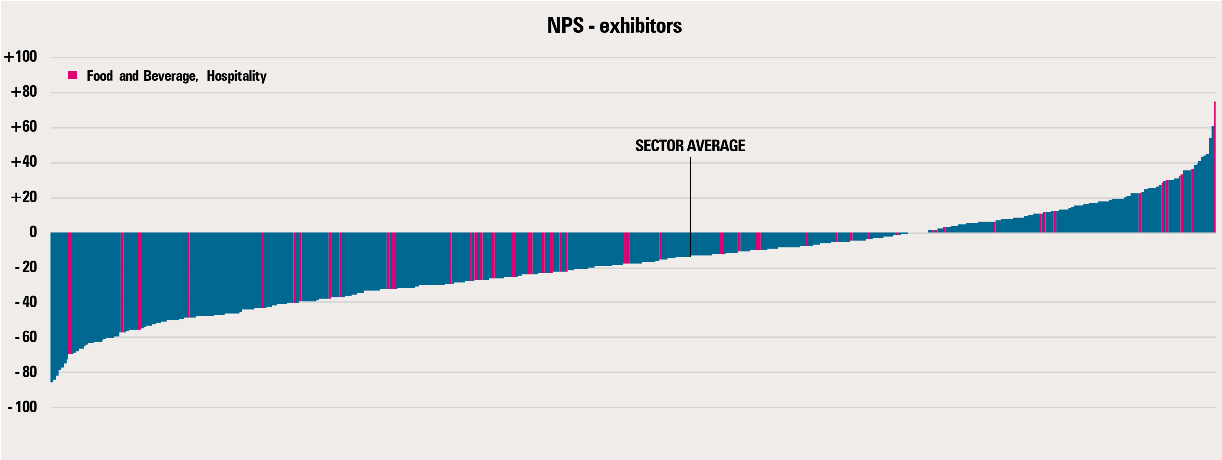
NET PROMOTER SCORE BY REGION

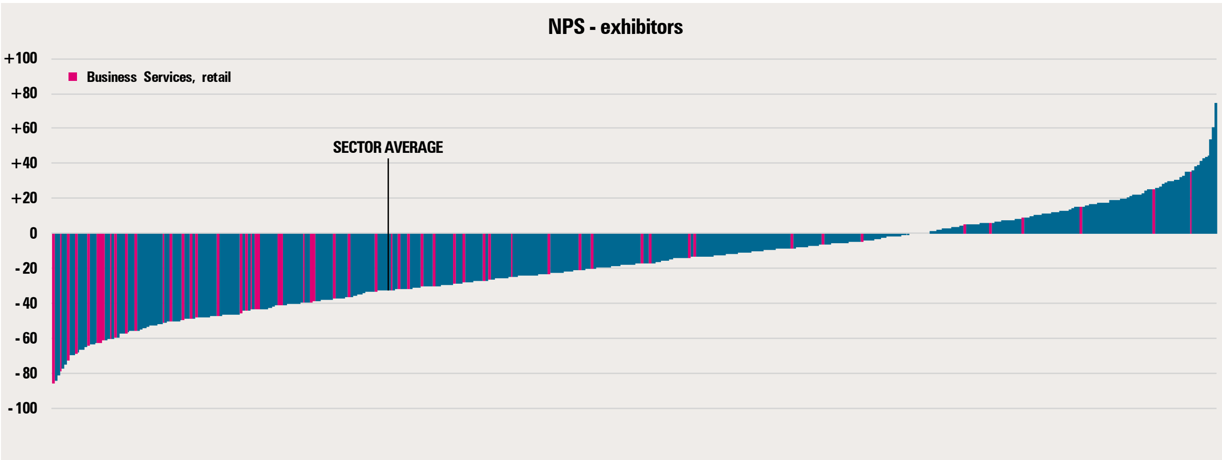
HOW DO DIFFERENT SECTORS COMPARE



GOOD AND BAD SECTORS? NPS SPREAD BY EXAMPLE SECTORS

Exhibitor NPS Sector Spread



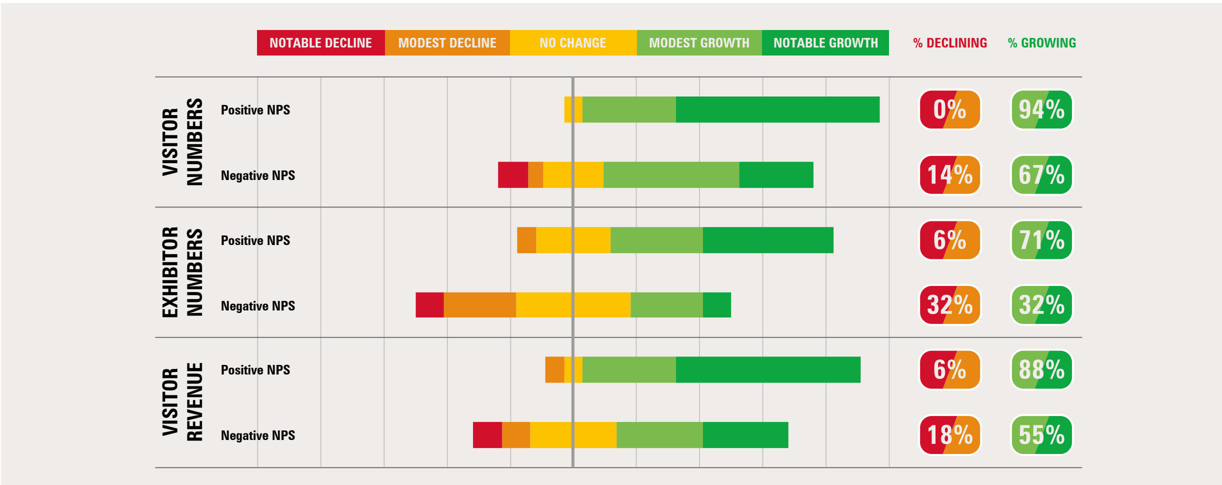


Whilst average NPS varies, most sectors show a wide spread of results between each shows. In each sector, there are some events engendering the highest levels of advocacy, whilst others experience virtually no advocacy at all, with their exhibitors actively recommending against the event to their peers. This also reflects the pattern we see with visitor NPS.

This suggests that in every sector there is the potential for well executed events to generate "word of mouth" in any sector. In crowded sectors, satisfied exhibitors who will actively promote the event to their peers will be a key competitive advantage.

WHAT IS THE RELATIONSHIP BETWEEN NPS AND GROWTH?

Exhibitor NPS - Impact on Growth



Whilst the relationship between Net Promoter Score and growth has yet to be explicitly defined, it is widely believed that increased net promoter score is linked to increased growth across all business sectors. Businesses who can depend on their existing customers to recommend them amongst their peers with be more effective at attracting business from new customers.

When we compared exhibitor NPS with growth metrics, we could see the exhibition industry also benefitted from this relationship. Across all growth KPI's, shows with a higher NPS were performing better.

94% of high performing shows are seeing **growth in visitor numbers**, compared to 67% of low performing shows

High performing shows are also almost 3 times more likely to be seeing **notable growth in visitor numbers**

15% of low performing shows are seeing **declining visitor numbers**

High performing shows are more than 4 times as likely as low performing shows to be experiencing notable **growth in exhibitor numbers**

Low performing shows are also over 5 times more likely to be experiencing a **decline in exhibitor numbers**

More than twice AS many high performing shows are experiencing **notable revenue growth** than low performing shows, With 18% of low performing shows experiencing **revenue decline**

ORGANISER ATTITUDES TOWARDS EXHIBITOR RELATIONSHIP

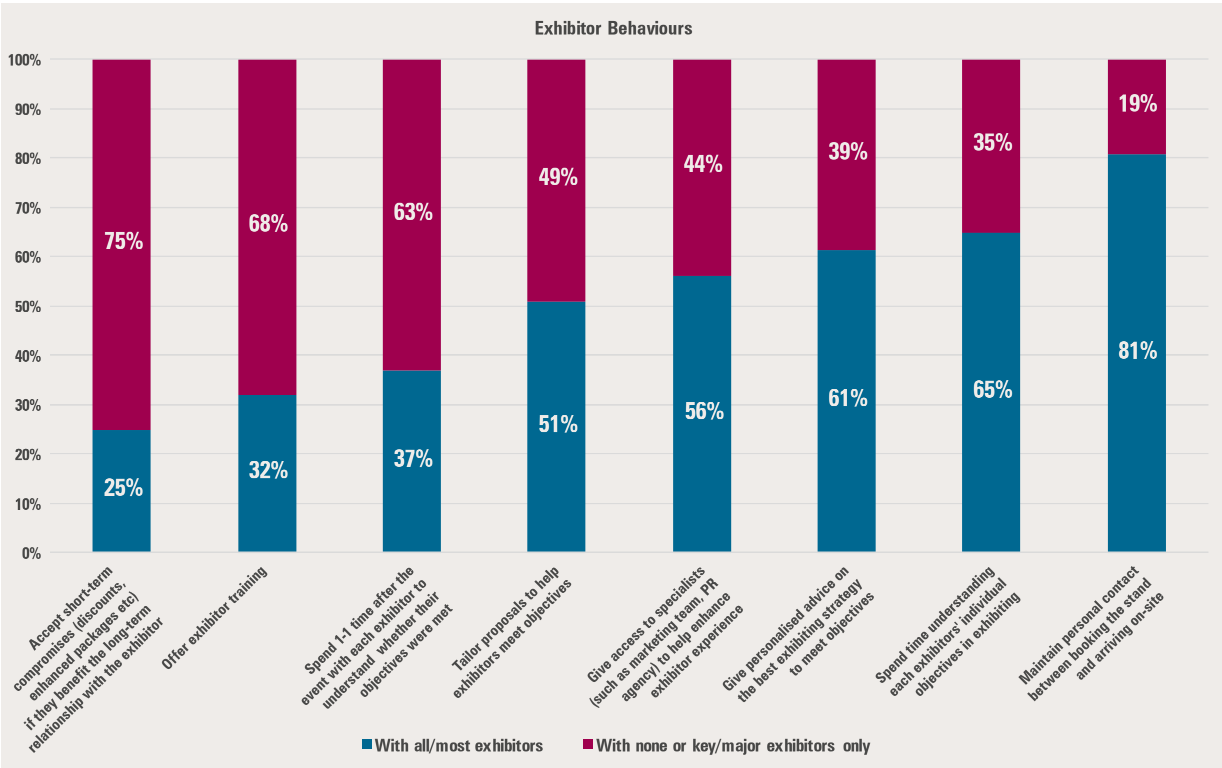
In this section, we explore the outcomes of depth interviews with 57 event directors on tradeshows around the world.

Following a global call for participants, event directors were asked a series of open and closed questions to determine their attitude and behaviours around the exhibitor relationship and bringing innovation to their shows.

This data was then compared against show performance and exhibitor satisfaction metrics reported by the participants.

WHAT BEHAVIOURS HAVE THE MOST IMPACT ON ADVOCACY?

Behaviours - Which of the following does your team do to improve the exhibitor experience?

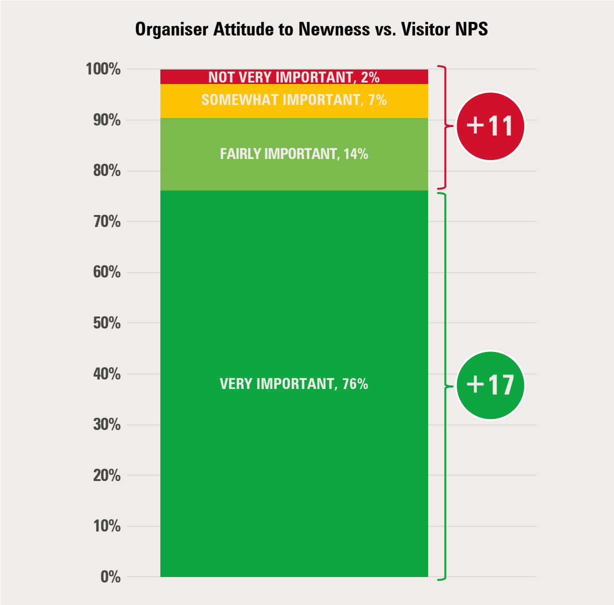


We presented participants with a set of collaborative behaviours and asked them to assess how they applied them in their own exhibitor relationships. From left to right, the chart shows increasingly common collaborative behaviours in organizer teams globally.

It seems that as an industry our execution of the exhibitor relationship is inconsistent. Only 10 out of 57 event directors (18%) undertook all of these behaviours with at least some exhibitors. All these shows concerned showed an improved NPS score (+3) than those who only undertook some behaviours with some exhibitors. Only one event director reported they undertook all the behaviours with most or all of their exhibitors.

THE IMPACT OF A STRONG "NEWNESS" STRATEGY ON VISITOR NPS

"Newness" - How important do you think it is to deliver something new in each cycle of your show?



Following on from the Global Visitor Insights report prepared by Explori and UFI in 2016, where "newness" on the show floor was identified as being a key driver of visitor satisfaction; depth interviews also considered event directors' attitude and behaviours towards delivering "newness". These were considered in relation to visitor advocacy (measured by NPS).

Where event directors considered "newness" as "very important" there is a notable shift in visitor NPS score when compared to events that place less importance on "newness". These high performing events typically have a clearly defined strategy for ensuring the latest sector innovation are incorporated each cycle, including dedicated time as part of the planning process. In contrast, shows that performed less well, could typically name some individual tactics they had implemented in relation to the delivery of the show, but did not have a strategy in place to capture the innovation from the sectors they served.

ATTITUDES AND STRATEGIES FOR "NEWNESS"

A clear difference could be seen between shows with high and low visitor NPS when event directors were asked to describe their "newness" strategy:

Shows with the lowest Visitor NPS

"There is no formal process for bringing 'newness' to the event"

Shows with the highest Visitor NPS

"We question 'newness' throughout all touch points and channels"

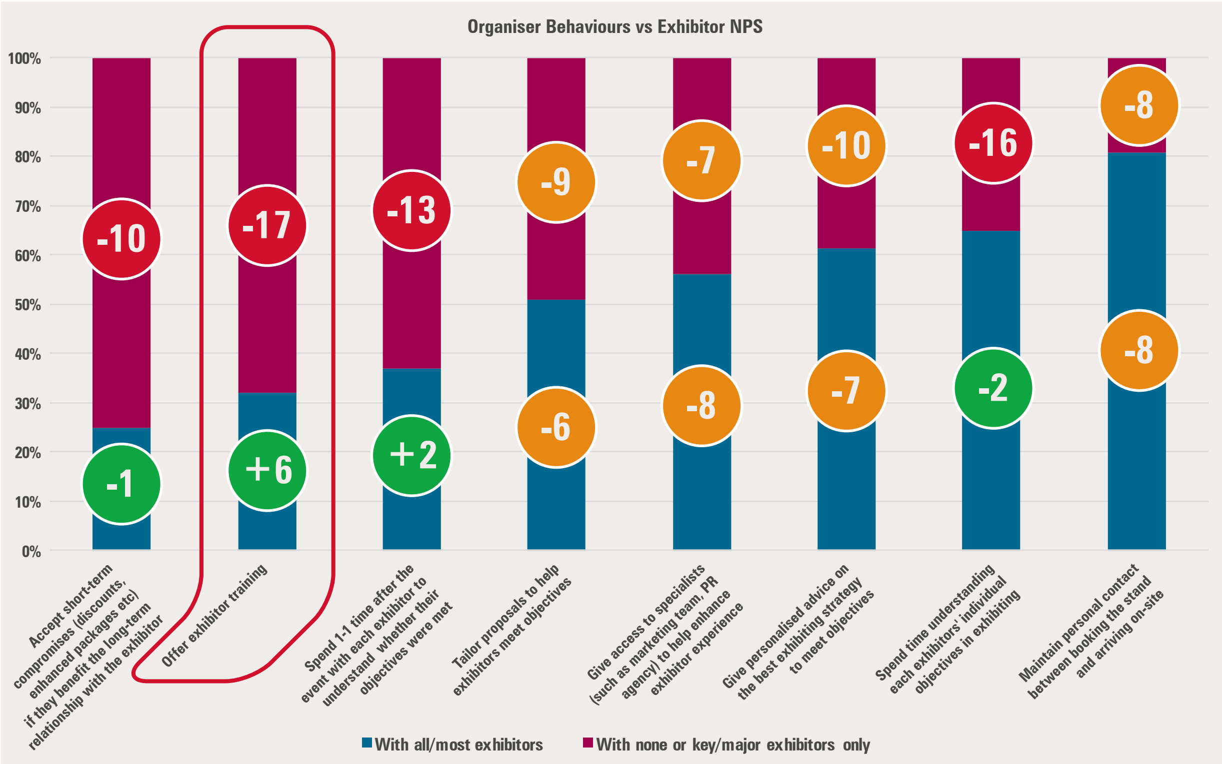
Shows with the lowest Visitor NPS

"The industry is not that fast changing so it's more about the network opportunities than bringing in new content."

Shows with the highest Visitor NPS

"By being the world's platform that ensures they are always going to get something new and fresh."

Behaviours - Which of the following does your team do to improve the exhibitor experience?



We mapped the average NPS against the shows that reported each behaviour to see which had the biggest impact on exhibitor advocacy. Offering exhibitor training to most or all exhibitors makes the clearest difference, adding an average of +23 to NPS. Long term pricing strategies and pre and post-show meetings on a 1-2-1 basis also make a big impact.

Yet, these are the behaviours undertaken by the fewest organisers, with the smallest number of their exhibitors. This suggests there is a big opportunity for improvement in exhibitor advocacy, generated by some simple changes.

SHOW LED CHANGES VS. EXHIBITION LED CHANGES

We categorised two contrasting approaches to “newness” as show led, where the innovations were typically changes to the look and feel of the event, and exhibition led, where the changes reflected innovations in the sector.

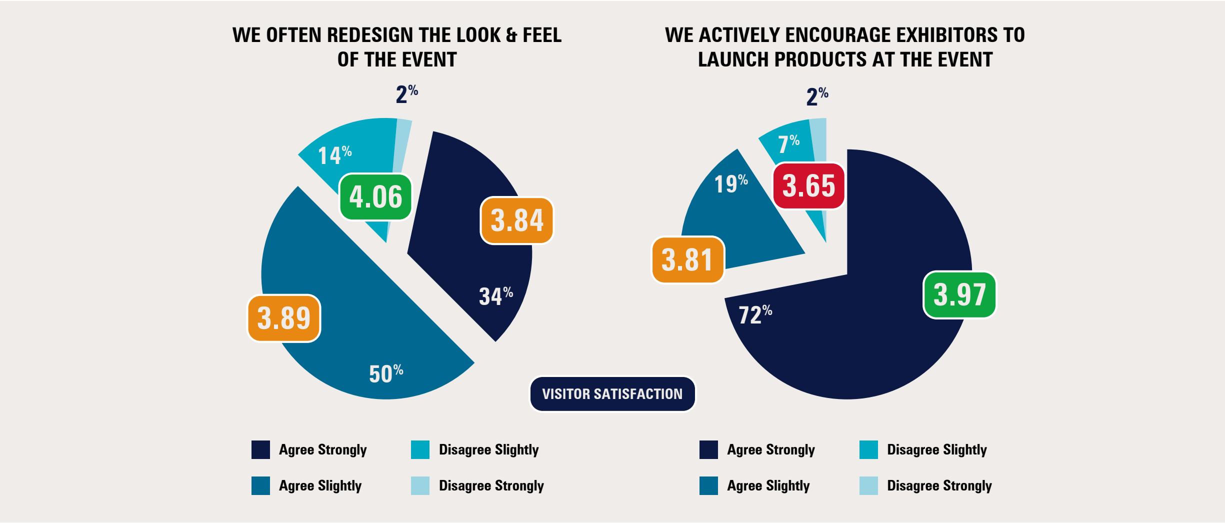
These approaches were compared with the overall satisfaction levels of visitors.

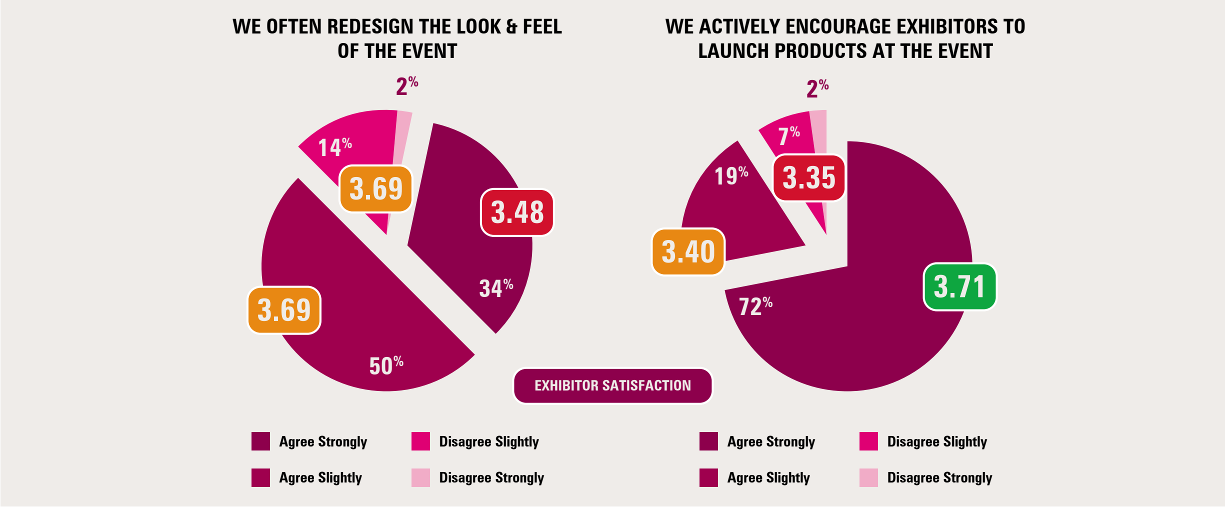
We can see that shows that remain consistent in their offering tend to show a higher NPS than those where the customers are experiencing many organiser-led changes. This leads to the suggestion that the underlying poorer NPS scoring is not mainly based on elements like branding, added content, or other editorial decisions taken by the organiser. Instead, the need for re-invention seen here is more likely driven by other factors, which are also driving lower NPS.

But when event directors report actively encouraging exhibitors to use the event to launch new products, visitor satisfaction jumps from 3.65 to 3.97.

This strategy also impacts positively on the exhibitor experience, with shows that actively encourage launches seeing a jump in both exhibitor satisfaction and advocacy.

“Newness” - To What Extent Do You Agree With The Following Statements?





CONCLUSION

The exhibitor experience is perhaps the single biggest challenge and opportunity facing the exhibitions industry globally.

As more and more businesses begin to see customer experience as the key factor on which they will compete, expectations from our exhibitors can only continue to rise. It seems unlikely that as an industry, exhibitions can continue to thrive with largely negative exhibitor Net Promoter Scores.

As we have now seen a clear link between advocacy and growth metrics, focus should turn to NPS as one of the core success measures for both exhibitions and the teams behind them.

Shows that have found themselves protected by their scale or location may become vulnerable to disruption as new players enter the space. Both new show launches and alternative marketing channels could present challenges for shows who have a high proportion of "Hostage" exhibitors; previously loyal customers who are ready to embrace an alternative to existing events which do not satisfy their needs.

This indicates good news for organisers llooking to launch new events into contested sectors as it suggests, with the right focus on customer experience by the organizer team, even well-established shows can be challenged.

We can also see the critical role "newness" plays; well beyond the visitor experience. Exhibitors who can access training and support to better understand visitor objectives and showcase their newest and most innovative products are strongly placed to have successful events.

Exhibitors and organisers share the responsibility for delivering a successful exhibition and where they work collaboratively, the effects can be very powerful. Simply investing in increasing visitor numbers may not be the most effective strategy; organisers need to address the way in which their exhibitors attract business to their stands and understanding visitor objectives is key to this.

Successful show teams can counter poor exhibitor performance. Organisers who entrench "newness" in their business and can engage their exhibitors in developing strategies that position them effectively in front of visitors, will create a better experience for both their customer groups.

A first class customer experience and increased advocacy will help organisers of all sizes to deliver sustainable growth, reduce price sensitivity and resist future disruption.

ABOUT THE AUTHORS

Explori is the official research partner of UFI.

Explori provides scalable research solutions for exhibition organisers worldwide. With a global client base including ITE, Clarion Events, Reed Exhibitions, UBM, Comexposium, Informa, dmg events, Easyfairs and Messe Frankfurt and many others regularly contributing to their global benchmarks, Explori now holds the biggest data-set of exhibition performance data in the world.

Explori's self-service research platform is designed to support organisers in gathering meaningful customer experience insight across multiple territories and languages. Over 2,000 events worldwide now work with Explori including trade shows, consumer shows and conferences.

As part of their partnership with UFI, Explori produces annual reports giving insight into the customer experience of visitors and exhibitors across the industry. Previous reports can be found at www.ufi.org/research

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