UFI & Explori Global Visitor Insights

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WELCOME
Kai Hattendorf

Dear industry colleagues,

The success of our industry depends on many factors, but the two most important customer groups exhibition organisers all around the world have to focus on are exhibitors and exhibition visitors.

Surprisingly, so far there has been very limited global insight into what visitors expect from exhibitions, and data based guidance on what organisers can and must do in different regional exhibition markets around the world to ensure their visitors are served well – or, better yet, to turn them into advocates: "word of mouth" promoters. In our age of digital social networks, where "advice from friends and colleagues" has become one of the decisive factors in decision making, this is constantly gaining in importance.

In line with this, UFI has teamed up with our research partner, Explori, to focus the spotlight on the mind of the visitor. I am pleased to share this research, which consolidates data from 920 visitor surveys taken from exhibitions all around the world.

Based on the solid data set, we have been able to work out differences in visitor behaviour for global regions, allowing you to compare the visitor insights from your home market with those from other markets. These comparisons show marked differences among the results, and we hope that this kind of research will help you and our industry.

This research 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, as we're eager to take similar research further. You can reach us at research@ufi.org.

I wish you an enjoyable and fruitful read.

Yours sincerely,

Kai Hattendorf
UFI Managing Director / CEO

INTRODUCTION

This report is the first of its kind to aggregate data on visitor attitudes from every major exhibition market in the world. It explores the perceptions trade show visitors have of the events they attend and their likely behaviours towards future events.

The authors have found marked differences between regions in visitor satisfaction levels, with the Americas scoring 3.95 out of 5 for satisfaction whilst Asia / Pacific (APAC) scores less well at 3.69. Europe and Middle East / Africa (MEA) score 3.9 and 3.8 out of 5 respectively.

However events in the relatively less-developed regions experience a “return bonus” effect, where events benefit from higher visitor loyalty than could be predicted by their ability to satisfy their visitors. The report explores this effect in relation to the “Hostages and Apostles” behaviour model and identifies a risk of disruption in developing markets as new launches provide increasing choice for visitors.

An analysis of visitor objectives across all regions identifies the desire to see “something new” as the single most important driver for visitor satisfaction, ahead of education and networking. This report positions innovation from both the exhibition floor and the session content as a key area of focus for organisers.

Finally the report finds that whilst levels of advocacy do vary between region and sector, there are examples of events in every sector delivering very high levels of visitor satisfaction and engendering exceptional levels of advocacy in the markets they serve.

HOW THIS REPORT HAS BEEN CREATED

This report has been created from the aggregated, anonymised data from 920 visitor surveys conducted via the Explori platform. Surveys were conducted in 30 countries and 14 languages, with tradeshows ranging in size from less than 500 to 100,000+ visitors. Data is included from both regional-independents, trade associations and large multi-national organisers. The majority of organisers included are “for profit”.

The report focusses on key questions that measure the visitors’ experience of the event they attended and their likely behaviours towards future events.

KEY QUESTIONS

- How satisfied are they?
- How likely are they to return to the event in future?
- How likely are they to recommend the event in future?
- How important is the event to them?

920
SHOWS

A REGIONAL OVERVIEW

Visitor Summary

Americas

Events in the Americas are performing well in the eyes of their visitors, satisfaction and advocacy are high. Despite being a mature market with a wide choice of events and alternative channels individual events are still seen as important. However, potentially driven by this breadth of choice, loyalty is lower and visitors show less commitment to any individual event.

Asia / Pacific

Events in the APAC region are currently the least successful at satisfying their visitors and this is reflected in notably low levels of advocacy. More visitors are recommending against the events they attend to their peers. However, lack of choice in this developing market results in a very high likelihood of return amongst existing visitors.

Europe

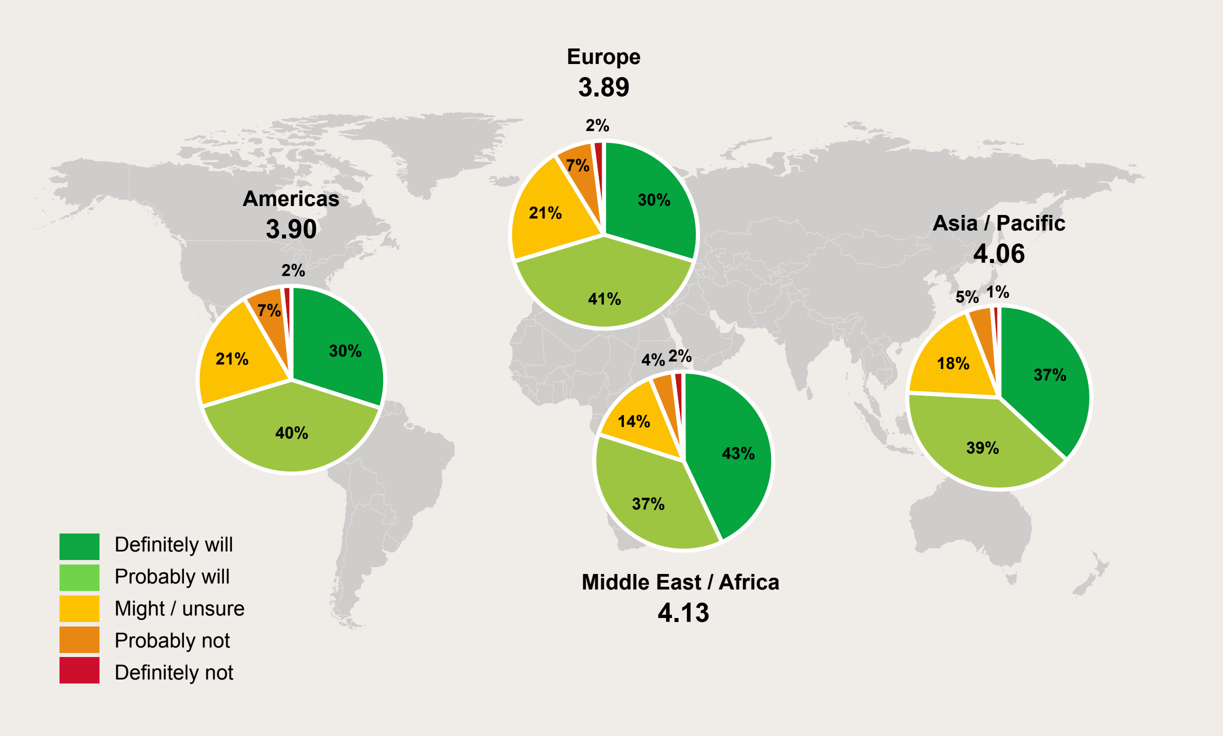
Events in Europe are reasonably successful at satisfying their visitors, but in this mature market both loyalty and perceived importance of each event is relatively low. Visitors benefit from a wide choice of events across most markets and a full range of alternative channels. European events also benefit much less from "word of mouth marketing" driven by their visitors recommending the event to their peers. On balance there are equal numbers of visitors recommending for and against the events they attend.

Middle East / Africa

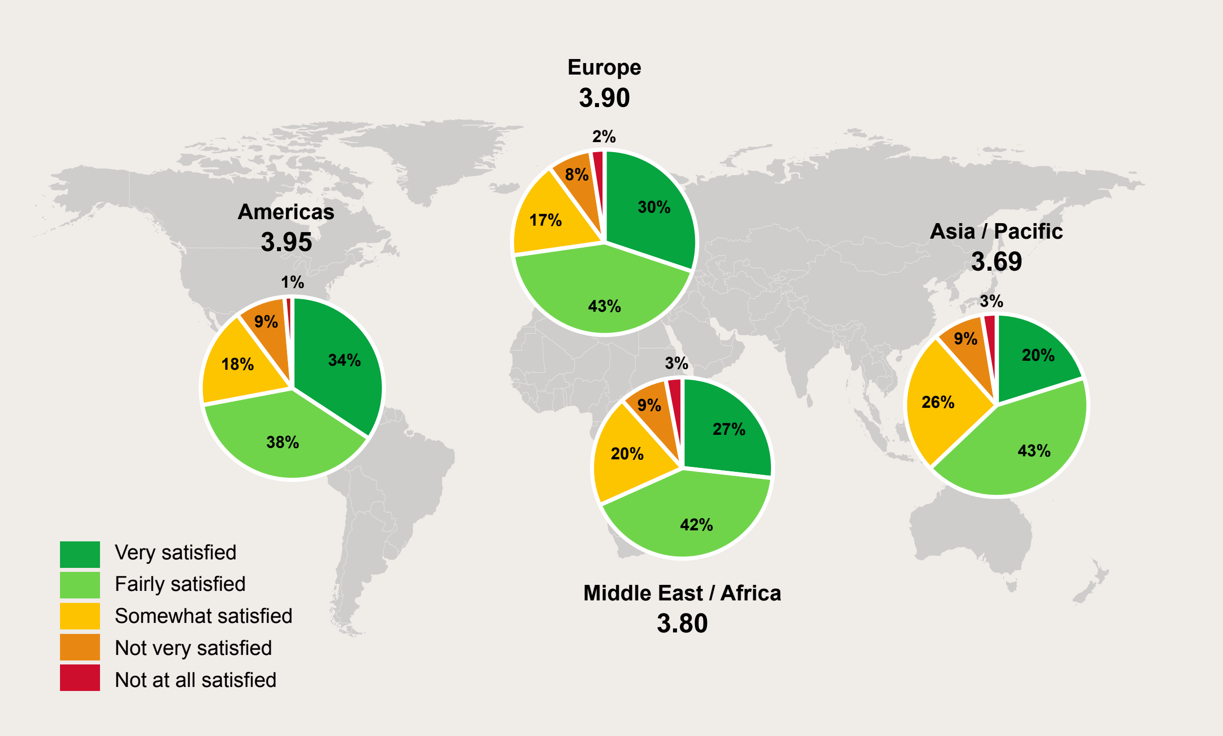
Events in MEA are moderately successful in creating visitor satisfaction, but benefit from much higher levels of loyalty than other markets.

Individual events are perceived as very important to the visitor, possibly driven by lack of choice in this developing region. Levels of advocacy are on par with Europe.

Likelihood of Return: Visitors from APAC / MEA regions have the highest likelihood of return



Visitor Satisfaction by region



We can see that visitors to events in MEA and APAC regions have the highest loyalty (measured by their likelihood of return) despite recording lower levels of satisfaction amongst their visitors - below the average for the European and Americas regions.

That is not to suggest satisfaction is not a driver of loyalty - the scatter plot below shows that the relationship between satisfaction and loyalty is similarly strong across all regions. Events in APAC and MEA however experience a “return bonus” - recording higher loyalty across all levels of satisfaction generated.

It is likely that a lack of alternatives (whether real or perceived) in these markets leads to visitors returning to events that do not fully meet their needs - whereas compared to the more developed markets a visitor has more choice in terms of competing events or alternative information channels.

Where competition is low, each event is likely to be perceived as more important to the visitor than an event of equivalent quality that operates in a more contested market.

In a less competitive market an event may continue to be successful without delivering high levels of customer satisfaction, however they will be vulnerable to new competitors entering the market.

Overall Satisfaction vs Likelihood of Return: Events in APAC and MEA experience a “return bonus”

Importance of Event vs Likelihood of Return: Importance of event has a stronger influence over future attendance than satisfaction

With high advocacy and loyalty, the events market in MEA is currently very buoyant. But organisers could be facing tougher times in the near future. As new events launch and existing events mature, competition for attention and business will increase. Visitors who are currently loyal will have new events to choose from and may view existing events as less important; loyalty and satisfaction will decrease.

We typically see in developed markets that the greater number of events an individual supports, the less likely they are to be satisfied. Possibly because they have more to compare against and higher expectations.

Visitor satisfaction in MEA and APAC is already at lower levels than in Europe and the Americas, so as choice increases it can be anticipated that loyalty and advocacy will decrease to levels seen in Europe, if not lower. This will require organisers to put more effort and investment into visitor marketing.

There are significant opportunities for organisers who can truly understand the drivers of satisfaction and loyalty amongst their visitors and invest in designing events that effectively deliver on their visitors' objectives.

Detractor

"The show has lost its mojo, the major players were missing and there were no new products."

Promoter

"Amazing atmosphere - lots to learn and lots of collaboration."

Originally developed by Bain and Satmetrix, Net Promoter Score (NPS) is now the most widely used measure of advocacy across many industries.

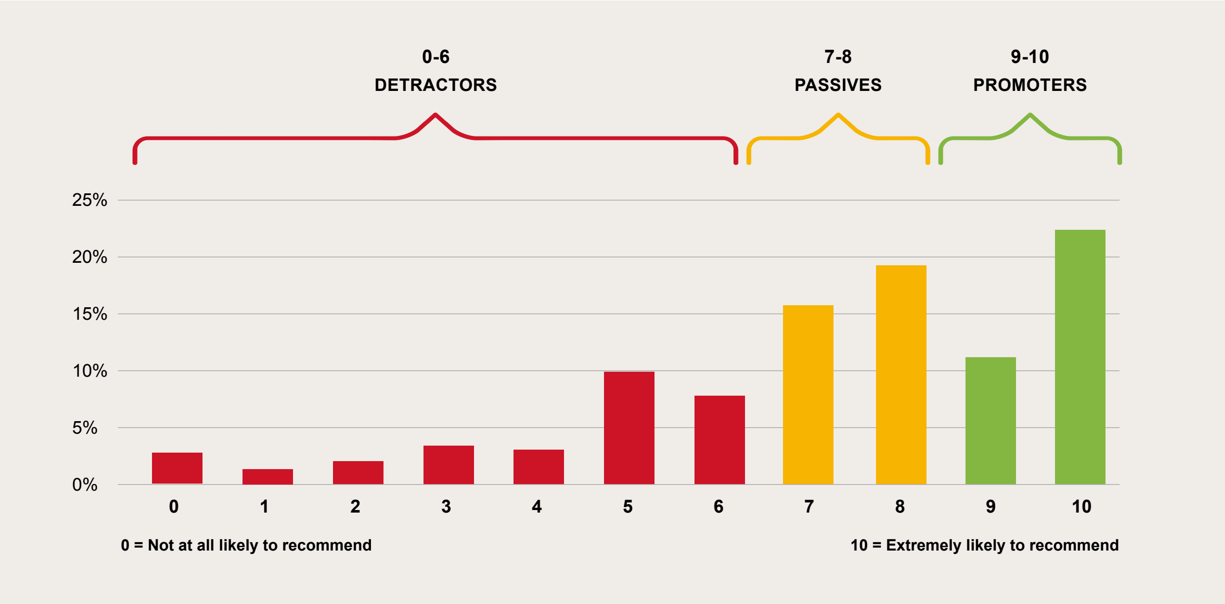
NPS is a simple yet powerful metric, used to gauge the advocacy of an organisation's customers, whether these are buyers, service users or delegates and exhibitors at your events. The question reads as follows:

How likely are you to recommend (name of event) to a friend or colleague? Please rate on a scale from 0 - 10, where 0 = not at all likely and 10 = extremely likely.

Survey responses are then broken into 3 categories, depending on the score they give:

- The promoters, those who answer 9 or 10. These visitors are highly likely to recommend your show to others and actively promote your show.
- The passives, those who answer a 7 or 8. These visitors are indifferent to your show, they aren't likely to actively promote your show, but also aren't likely to say anything negative about it either.
- The detractors, those who answer 0 - 6. These visitors are likely to speak negatively about your show.

Example of categories for Net Promoter Score



Detractor

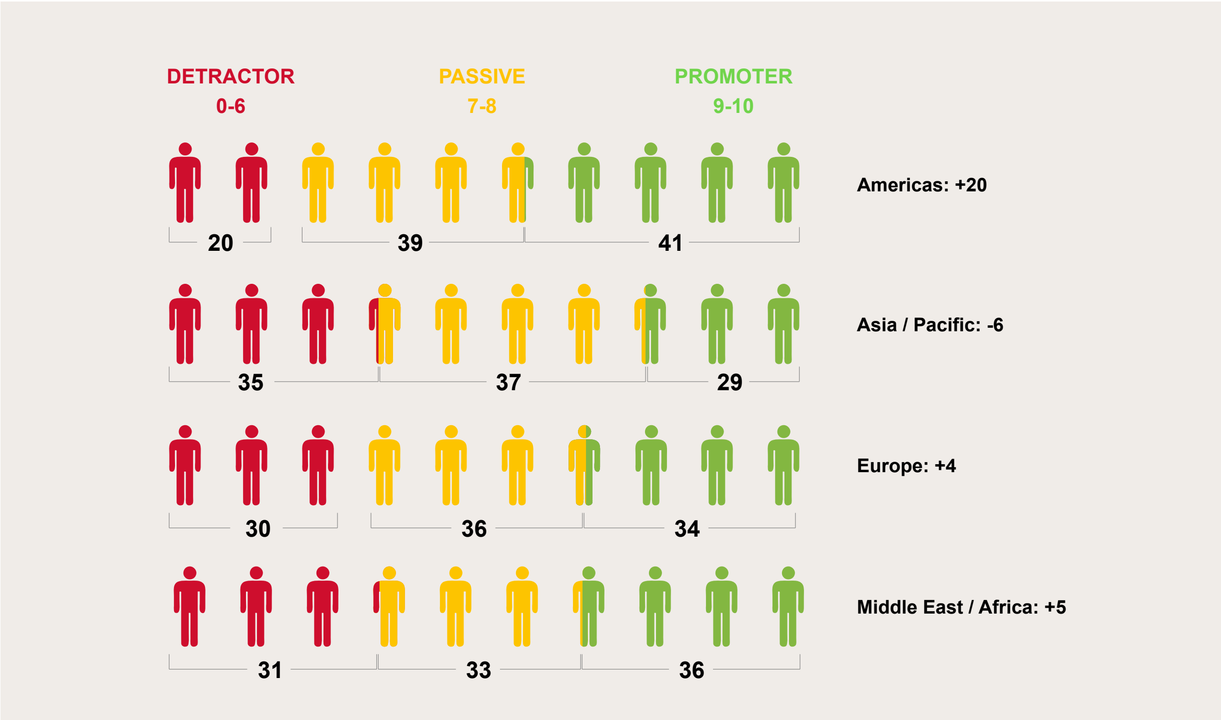
"Declining attendance needs to be reversed to make the show worthwhile."

Promoter

"I feel we are finally starting to discuss the real issues facing our market."

IF YOUR VISITORS WERE 100 PEOPLE – WHAT WOULD THEY SAY?

Net Promoter Score by region



Despite experiencing higher loyalty than developed markets, events in MEA and APAC do not benefit from high levels of "word of mouth" marketing. This is indicative of visitors attending events because they do not perceive there to be an attractive alternative rather than because their objectives are met.

These events will typically need more marketing investment to grow their visitor numbers than events that can leverage the goodwill of their existing visitors. Again this presents a significant opportunity for events who can engender advocacy to grow more quickly and cost effectively than similar events in the same market.

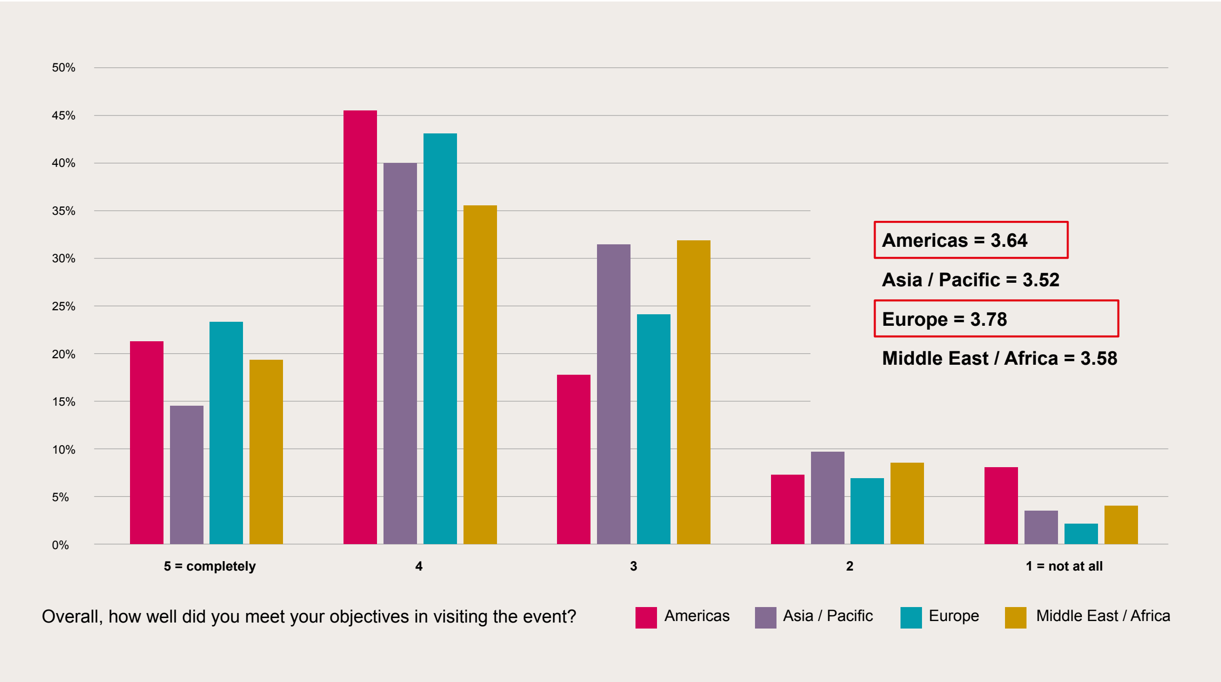
Detractor

"Found the show really uninspiring and lacking vibe and energy this year."

Promoter

"A great opportunity to meet all the major players in one place - a networking Mecca!."

Objectives Met: Globally the established markets (Europe & Americas) are most successful in meeting overall visitor objective



Typically visitors are more successful at achieving the objectives they can plan in advance such as attending conference content or meeting with specific exhibitors. However the research indicates that the exhibitions industry in all markets is less successful in delivering the “discovery” aspect that many visitors require.

A cluster of objectives can be seen around innovation or discovering something new with visitors citing objectives such as “to see new products”, “to meet new suppliers”, “to identify new trends”, all ranking with high importance amongst visitors. Events in all markets are less successful at enabling their visitors to meet these type of objectives.

Whilst many organisers have put their focus on delivering quality content and networking opportunities, in the eyes of the visitor, range, quality and innovativeness of exhibitors are more important. This is particularly strong in developing markets where the desire to see new products and services is an objective for 69% of visitors, compared with 37% who cite networking and 26% who cite the conference programme as a reason for attending.

There appears to be significant opportunity for events who can consistently deliver “newness” across their offering both through content and on the exhibition floor.

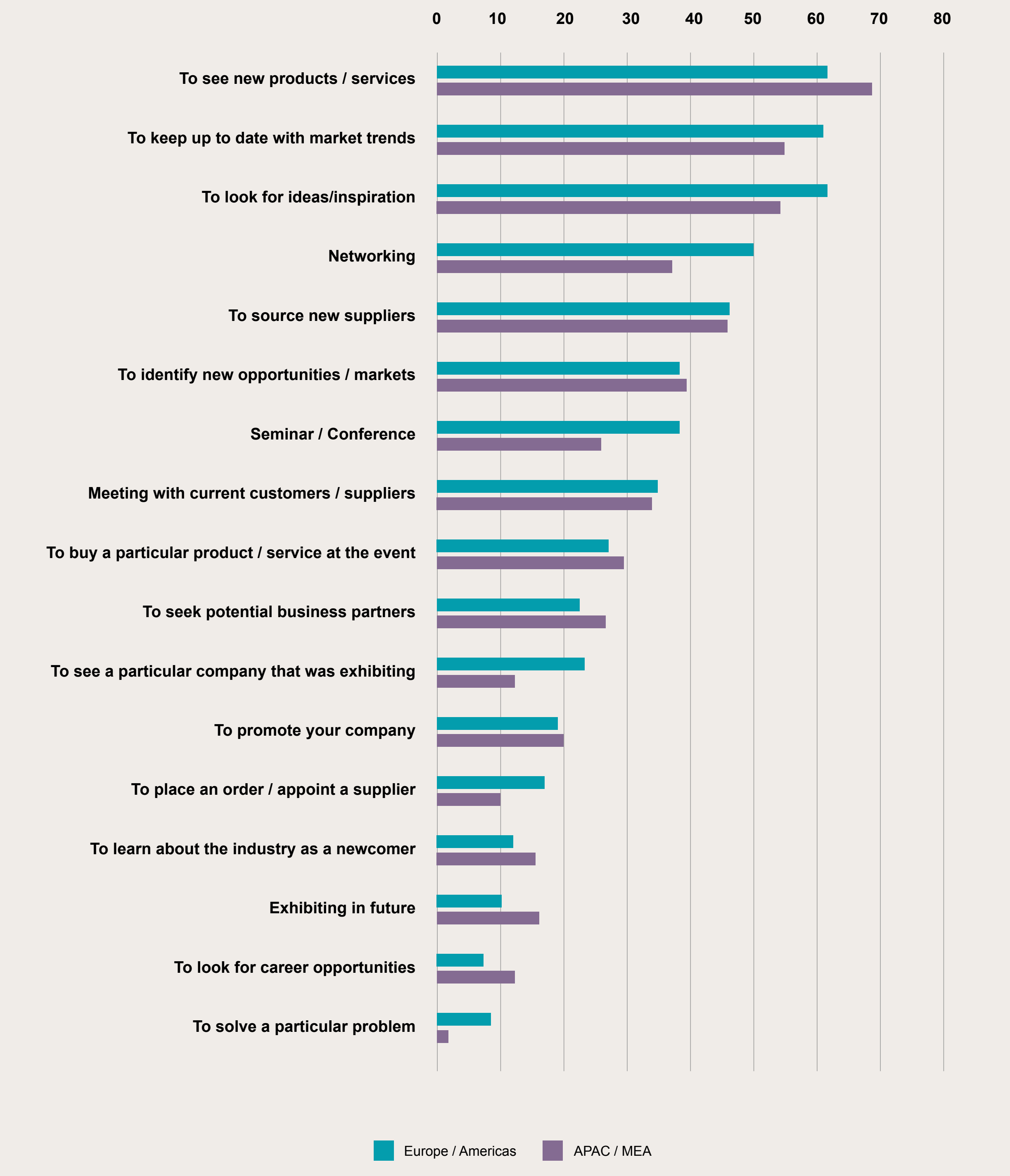
Detractor

“Not anything new or innovative - lots of the same suppliers with the same products.”

Promoter

“Gave us lots of ideas and possibilities!”

Visitor Objectives



MEET YOUR HOSTAGES AND APOSTLES

The relationship between visitor satisfaction and loyalty is key to the profitability and momentum of an exhibition.

In the chart below, visitors are plotted on a matrix based on their scores for satisfaction and loyalty (measured by likelihood of return). They are then allocated a “segment” based on which quadrant of the matrix they fall into. This segment can be used to infer their likely future behaviour in relation to the event in question.

Apostles = High satisfaction and high loyalty. Apostles are likely to return to the event with less persuasion and to encourage others to attend.

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

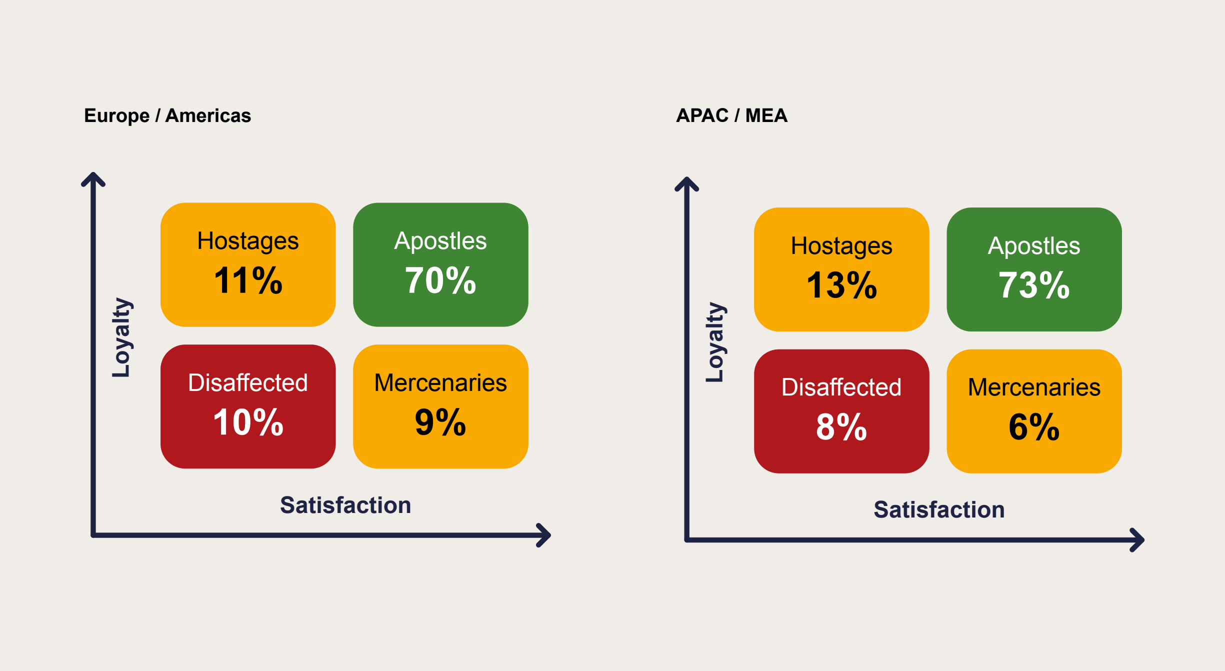
Mercenaries = High satisfaction and low loyalty. Mercenaries are satisfied with the event but will not commit to returning in future, often because they see the event as low importance.

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

Understanding where visitors fall on the matrix can help organisers understand the customer environment they will face in the next event cycle. This intelligence can form a key aspect of budget setting.

There is a marked difference in how likely the different visitor segment are to recommend you event. On average Apostles have a Net Promoter Score of 40, whilst Disaffecteds will score significantly lower, right down at -90.

Regional visitors plotted on the Loyalty vs Satisfaction matrix



WHAT DRIVES SATISFACTION AND DISSATISFACTION?

An analysis of the verbatim responses from satisfied and dissatisfied visitors reveals marked differences between their requirements of the event.

When asked what could be improved about an event, satisfied visitors mainly report "hygiene factors" such as price of parking or ease of finding their way around the event. Comments typically suggest a commitment to returning and a desire for their experience to be more "pleasant".

However visitors who report they are dissatisfied with an event cite much more fundamental concerns, often that they perceive the event as not being relevant to them, a lack of variety and innovation and a perception that the event is declining in quality when compared to previous years.

Turning round a dissatisfied visitor is rarely a quick fix. Comments highlight the need for organisers to make far-reaching changes to their event to have any impact on the satisfaction of these visitors.

Lack of newness in the content, the format and the exhibition floor is a strong driver of dissatisfaction as it makes it harder for visitors to achieve important objectives relating to sourcing new solutions and keeping ahead of sector trends. This lack of newness drives visitors into the "hostage" quadrant in markets where there are few choices for professionals wishing to attend events.

Typically satisfaction declines with each additional year an individual visits an event, unless there is continuous innovation. This positions newness as a critical area of focus for any events that rely on repeat visits.

Dissatisfied visitors suggest very different improvements to satisfied visitors

Dissatisfied people say:	Rank	Satisfied people say:	Rank
Not relevant enough	1	Too few exhibitors	1
Worse than previous years	2	Improve layout	2
Too small range of exhibitors	3	The event is too busy	3
There is nothing new at the exhibition	4	The event is too small	4
Certain sectors are under-represented	5	Certain sectors are under-represented	5
Not satisfied with the quality of exhibitors	6	There is nothing new at the exhibition	6
The event is too small	7	Noise in sessions	7
There isn't enough content at the event	8	Improve venue	8
Conference / seminar content isn't high enough	9	Improve signage	9
The event is too busy	10	Improve catering	10

Satisfied visitor comments

"This is an excellent event with all major suppliers attending."

"I saw products I never knew about - all my questions were answered."

"Exhibition is the core of networking and interaction with the market representatives."

"Good display of new and emerging technologies."

"It was very helpful and insightful. I learnt interesting techniques."

"We always find new products."

Dissatisfied visitor comments

"There were simply not enough content to bring home and justify spending three days."

"Not as applicable compared to what was publicised."

"All the product 'that were innovative' were old and a lot of the exhibitors had the same products."

"Not enough variety of stands, too much repetition."

"It's smaller, the quality is not great and the types of companies exhibiting are all very similar."

"I thought this year was the worst one I have been to - a shortage of good exhibits."

ARE THERE "GOOD" AND "BAD" SECTORS?

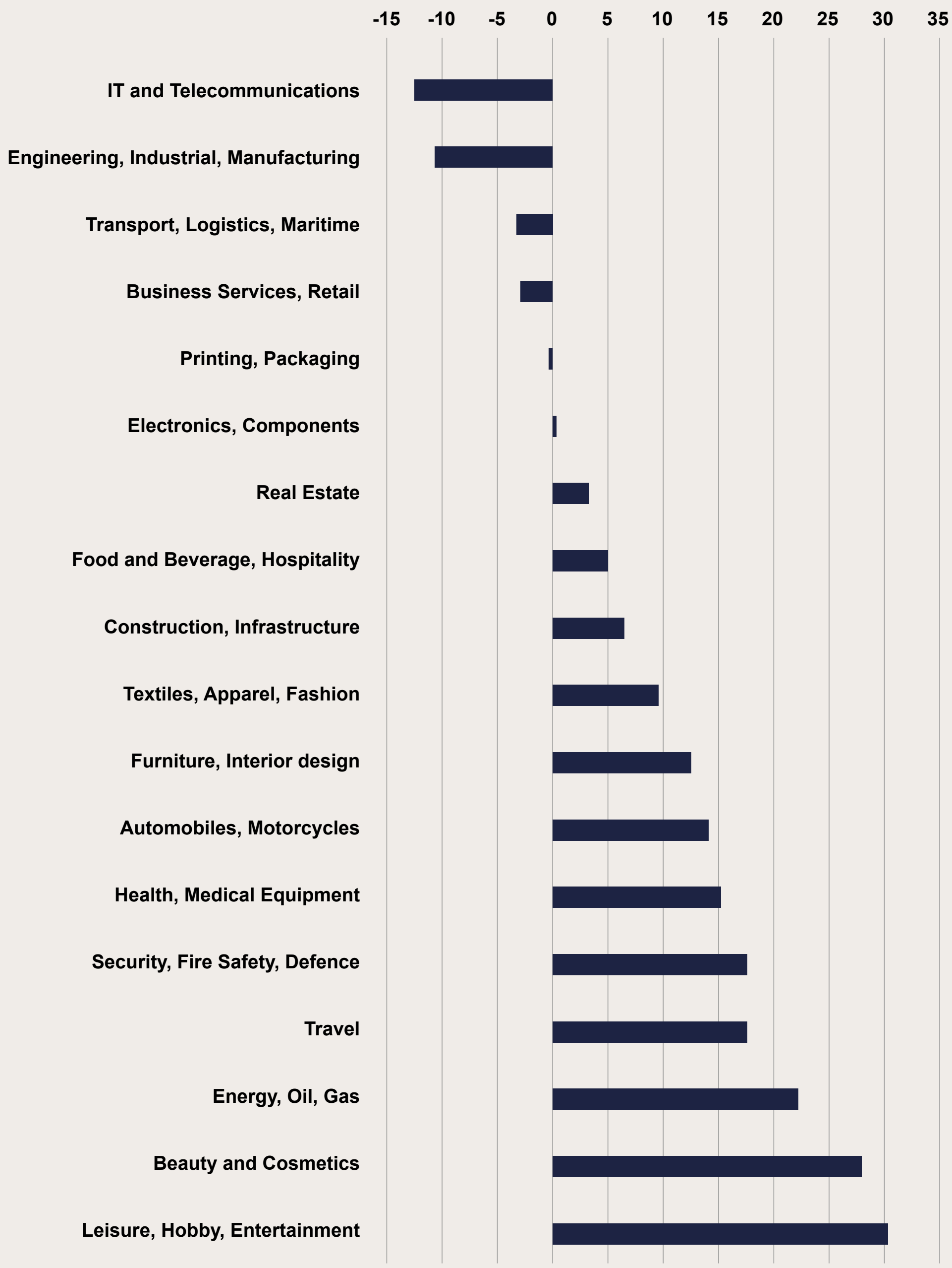
Whilst we have previously discussed the impact of the competitive environment within geographical regions, we can also see that perceived competition within market sectors also impacts visitor behaviour.

The following charts highlight the extent to which customer advocacy, satisfaction and loyalty vary between sectors. It is important to understand the competitive context of each individual event when evaluating performance - especially events which compete for visitors from an international audience who can attend events anywhere in the world.

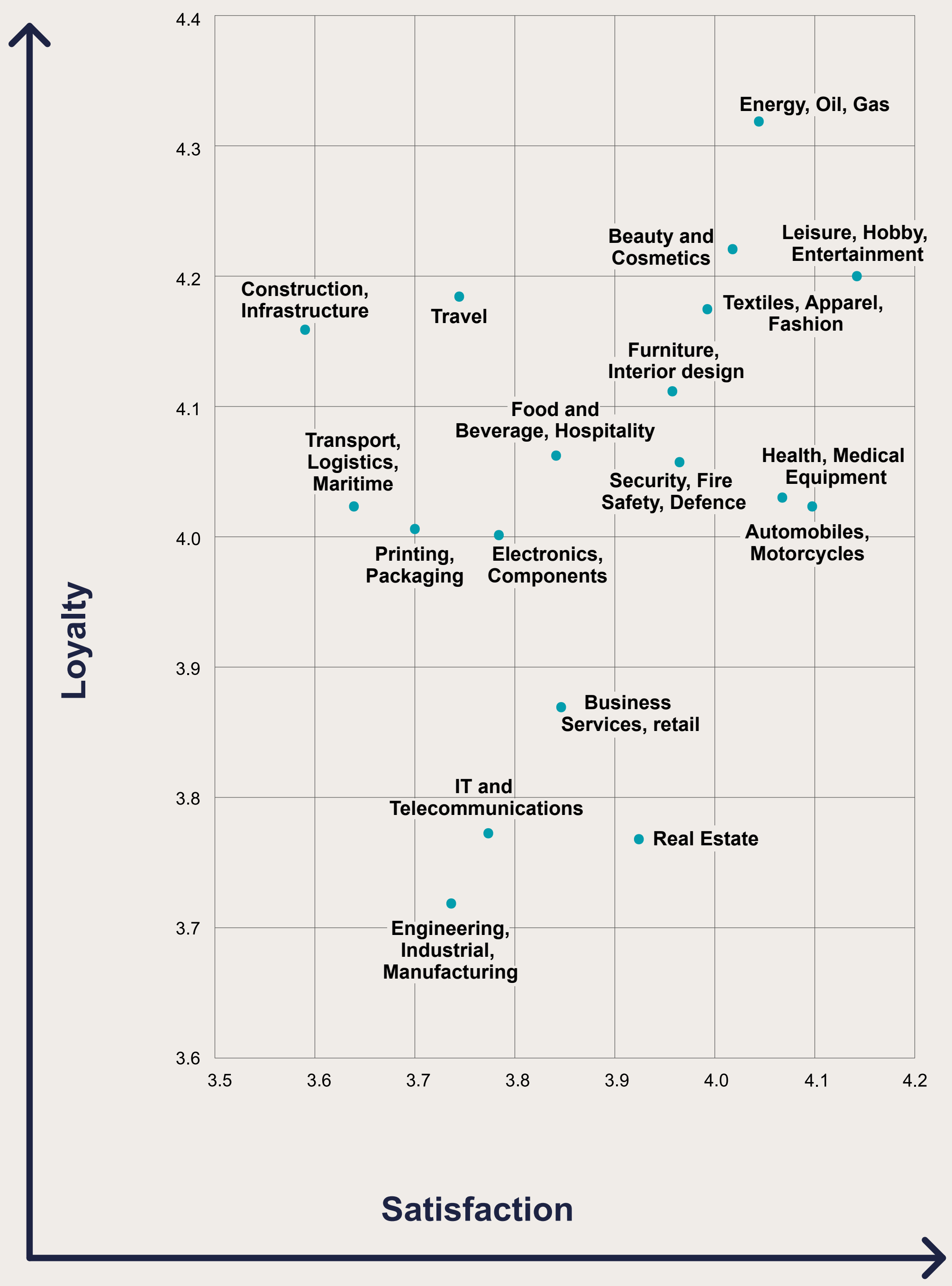
By plotting the main UFI industry segments on the Loyalty vs Satisfaction matrix, we can see that there is an increased risk of hostages in sectors where there are fewer competing events, for example, where there are relatively low numbers of high spending buyers or barriers to entry are high for new events. Only "Real Estate" and "Medical Equipment" sectors have more "mercenaries" than "hostages" which indicates increased competition in these sectors from other events or channels. Higher career transience amongst visitors in this sector may also be a contributing factor.

When sectors are ranked by their NPS we can see that this does not map exactly with reported loyalty and satisfaction, suggesting that there are "cultural" differences between each sector that can also impact how likely a visitor is to recommend to their colleagues.

Net Promoter Score by Sector

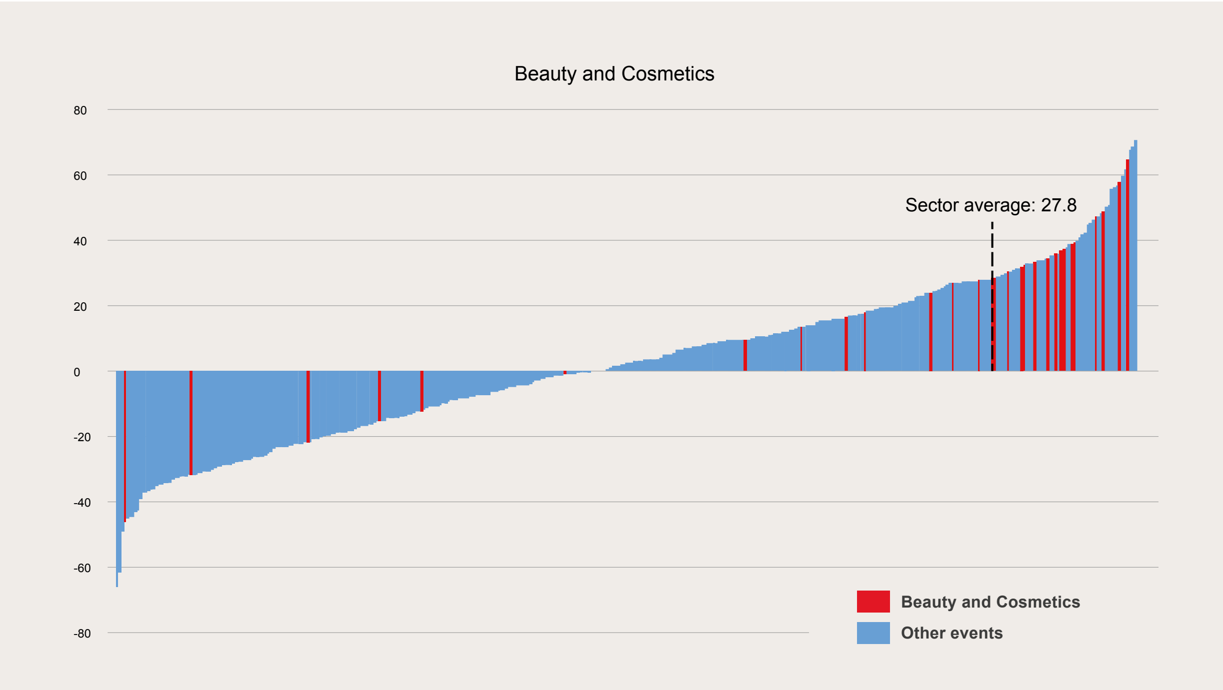


Overall Satisfaction & Likelihood of Return by Sector



OR JUST GOOD AND BAD SHOWS?

Net Promoter Score - Sector Spread



As can be seen in the preceding charts, when we examine selected sectors in more detail, (here “IT and Telecommunications” and “Beauty and Cosmetics” are used as examples) we can see that although average NPS varies, most sectors show a wide spread of results between shows. In each sector there are some events engendering very high levels of advocacy, whilst others experience virtually no advocacy at all, with the majority of their visitors actively recommending against their events.

This suggests that there is no such thing as a “tough crowd” and that there is the potential for well executed events to generate “word of mouth” marketing in any sector. In crowded sectors, creating satisfied visitors who will actively promote an event to their peers will be a key competitive edge.

IN CONCLUSION

This analysis of visitor attitudes demonstrates that creating satisfaction depends not only on the quality, innovation and relevance of an event to its audience, but that each event does not operate in isolation.

With an increasingly globalised and connected audience, the competitive environment in which each show operates, both in terms of its geographical location and its market sector are critical components in determining and understanding visitor attitudes.

We can see that events in mostly developing markets have yet to feel the full force of the competitive environment experienced by developed regions. Organisers in less developed markets could see the results generated in Europe and the Americas as a predictor of change ahead.

Across the globe, only a minority of events are effectively delivering the innovation that visitors crave, both through their content, format and importantly the exhibition floor. There is significant opportunity for organisers who can develop propositions and pricing models that attract the most innovative companies in their markets and collaborate with them to meet the needs of their audience.

Where visitors are dissatisfied, organisers must commit to reinventing their products in fundamental ways to ensure they stay fresh and relevant for their target audiences. Cosmetic changes such as faster Wi-Fi or higher quality food have limited impact on visitor attitudes when compared to the relevance of the content and the variety and innovation to be seen on the exhibition floor.

And whilst there are events in every region and every sector that are delivering outstanding experiences for their visitors, equally there is a cohort of events that is currently being flattered by the market in which they operate.

If satisfaction is not addressed, these events will be vulnerable to disruption from competitive launches, or their visitors choosing alternative channels to meet their needs.

About Explori

Explori is the official research partner of UFI.

Launched in London in 2012, Explori has rapidly grown to provide scalable research solutions to major exhibition organisers worldwide. With a global client base including the likes of ITE, Clarion Events, Reed Exhibitions, UBM, Informa, dmg, Easyfairs, Centaur, SEMI, 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.

To date over 2 million survey responses have been conducted on the Explori platform in 30 countries and 14 languages.

Explori's self-service research platform is designed to support major organisers gather meaningful customer insight across multiple languages and territories. Over 1,600 events worldwide work with Explori including trade shows (58%) consumer shows (20%) and conferences (22%).

These are the percentages at the date of publication and subject to ongoing change

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