2020

The Global Association of the Exhibition Industry

Industry Partners Benchmark Survey

UFI Research: an overview

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Industry Partners Working Group

The UFI Industry Partners Working Group is a diverse group of motivated industry experts offering a broad range of services. All members share a common goal – to work closely with organisers and venues to help them create and sustain successful exhibitions. As the exhibition industry continues to evolve, "we offer a vital partnership, adding our valuable support across key areas and professions."

Definition: Industry Partners work closely with organisers and venues to help create and sustain successful exhibitions.

Mission and activities: the UFI Industry Partners Working Group and its members commit to facilitate the transfer of knowledge and the sharing of best practices and insights from their entire spectrum of activities, industries served and services provided. It does this by using Working Group meetings as discussion forums, conducting specific industry research studies and showcasing best practice examples through the UFI Awards scheme.

Words of welcome

Dear friends,

As Chair of the Industry Partners Working Group, I am extremely proud to provide you with our first global Industry Partners Benchmark Survey. We believe this is the first survey of it’s kind in our industry to focus on the value that organisers place on their suppliers.

The survey will be of great interest to suppliers and partners worldwide, by giving them key insights into the true nature of the relationships between organisers and the companies that support their events.

I take this opportunity to thank and congratulate Sebastian Witt (our Co-Vice-Chair), who has dedicated many hours to constructing the survey and analysing the results. A big thank you also to his jwc team for their immense contribution. They’ve all been amazing !

This “new” Working Group is here to stay. I express gratitude to each member for their support, with a very special mention for my current Vice-Chairs Jo-Anne Kelleway and Sebastien Witt, and those from the previous year, Jochen Witt and UFI’s Angela Herberholz. Thank you for your contributions!

Best wishes,

Ravinder Sethi
Chairman
Industry Partners Working Group

Industry Partners Benchmark Survey: objectives

Developed by the UFI Industry Partners Working Group, this survey aims to benchmark and assess the relationships between industry partners/suppliers and exhibition organisers/venues, as well as identifying areas for improvement with regard to collaboration.

The results demonstrate that industry partners are regarded as an essential and valuable component of our industry. Overall satisfaction levels with regard to service delivery are relatively high. The results indicate that some of the less-utilised services may have a stronger impact on the outcome of an event than those more commonly relied upon. The results also show that the duration of cooperation between industry partners and their customers has a strong positive correlation to satisfaction levels.

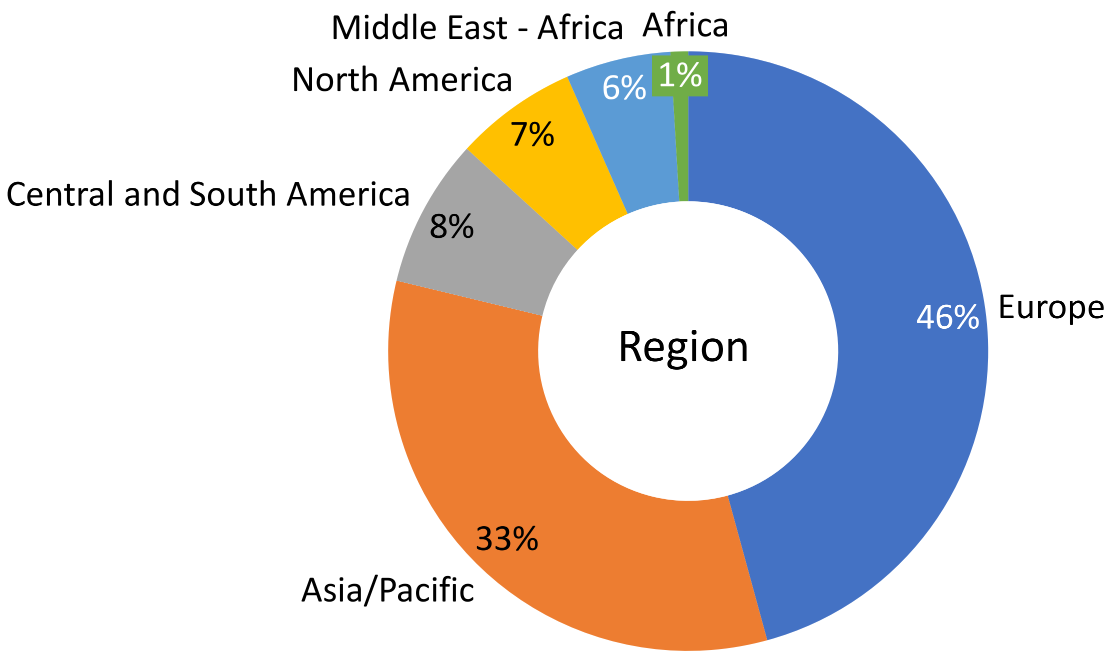
Despite the overall positive feedback, the results also indicate a demand for more innovation from industry partners and that an increase in data sharing between industry partners and their customers could bring additional value.

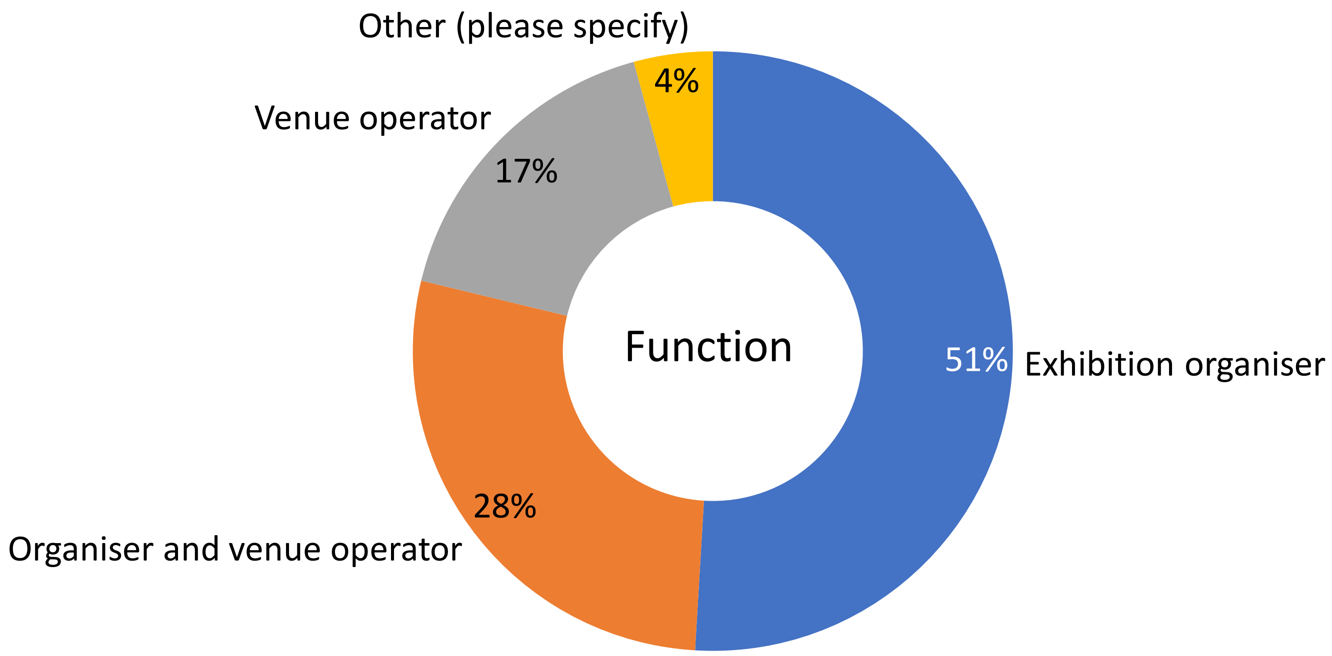
Descriptive statistics

Survey participation indicators

Total number of survey participants: 212

86% UFI members





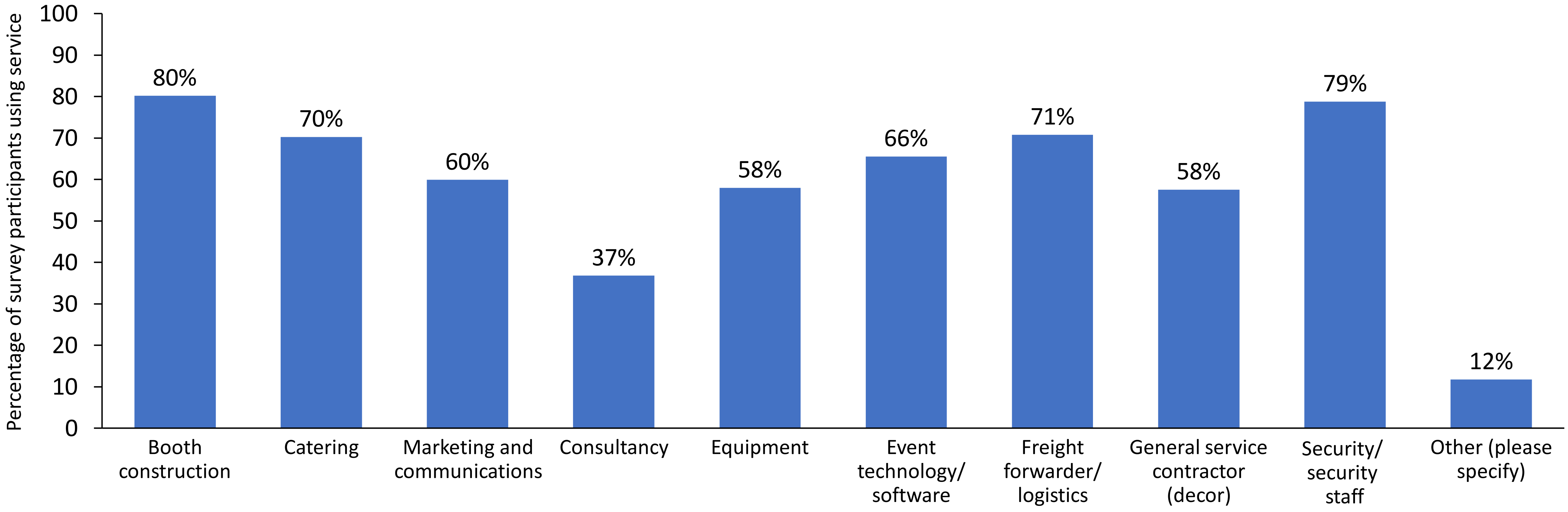
Descriptive statistics

- The Industry Partners Benchmark Survey was run from January-March 2020.
- A total of 7,988 invitations were sent.
- Target groups: organisers, venue operators, and organisers and venue operators.
- A total of 212 individuals participated, of which 86% are UFI members.
- The majority of respondents (79%) are from Europe and Asia/Pacific.
- Due to the limited number of survey respondents, a geographical analysis of results was only possible for Europe and Asia/Pacific.

***Question 1**: Which of the following services does your company use?*

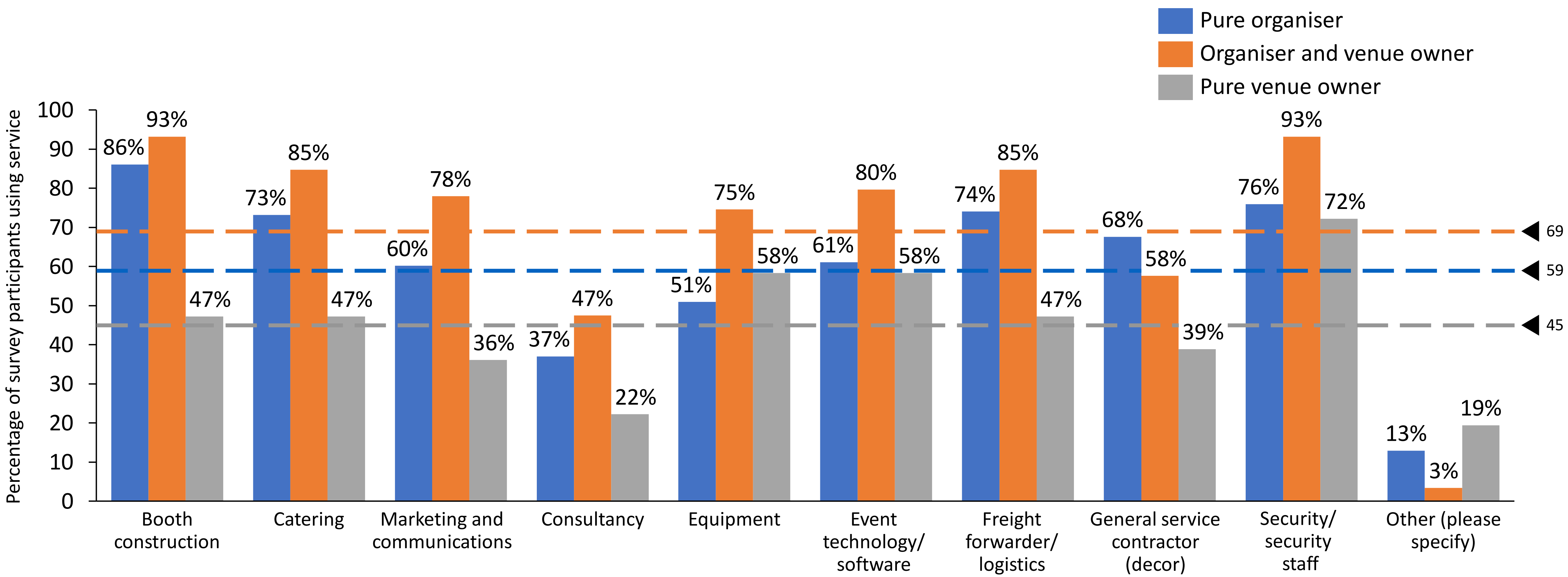
Booth construction is the most relied-upon service

Percentage of all survey participants using services

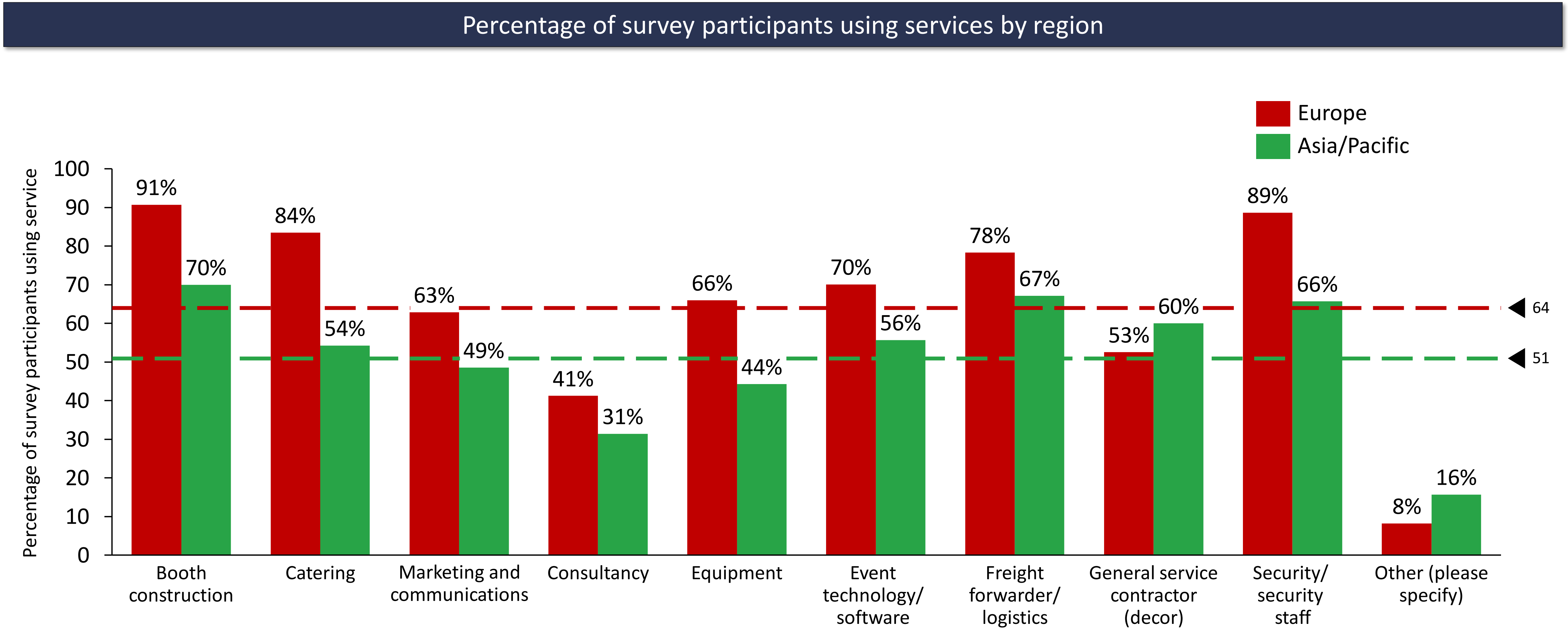


Organisers with their own venues use service providers the most

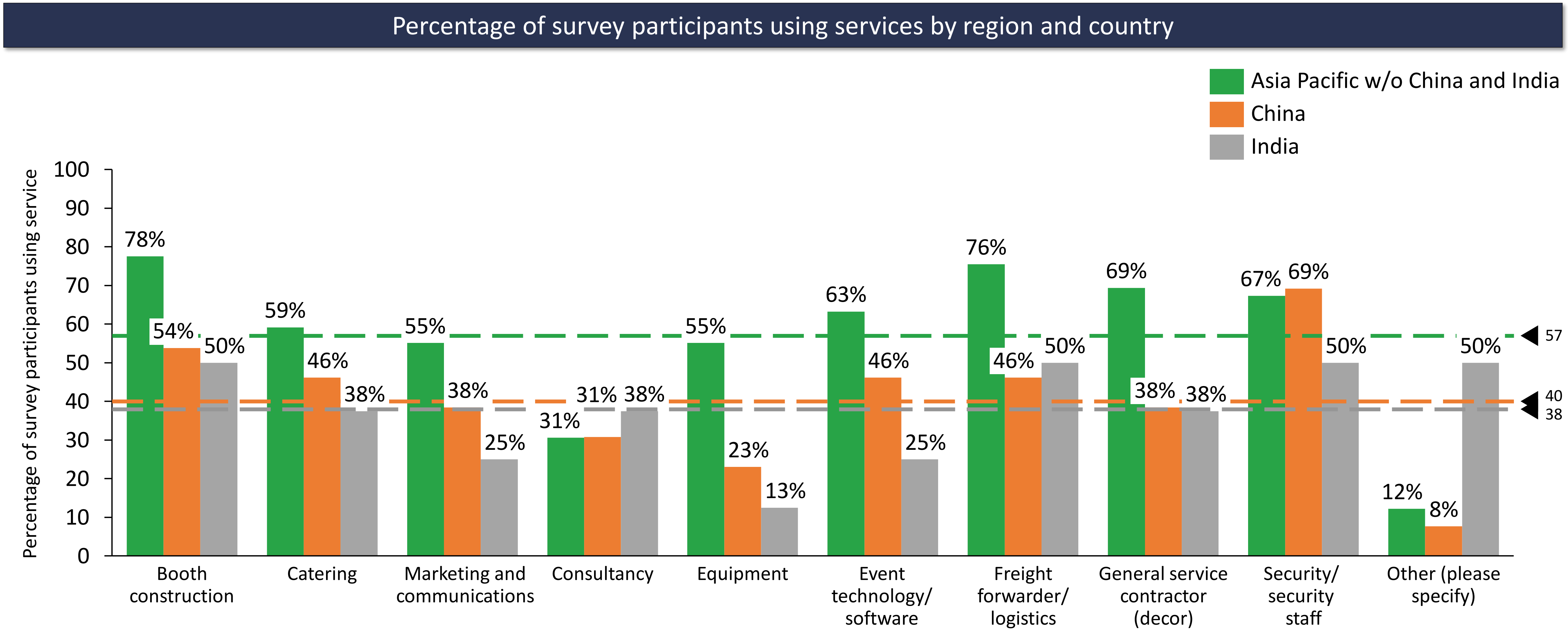
Percentage of survey participants using services by target group



European companies use service providers more than companies in Asia/Pacific



India and China drive down overall use of services in Asia/Pacific



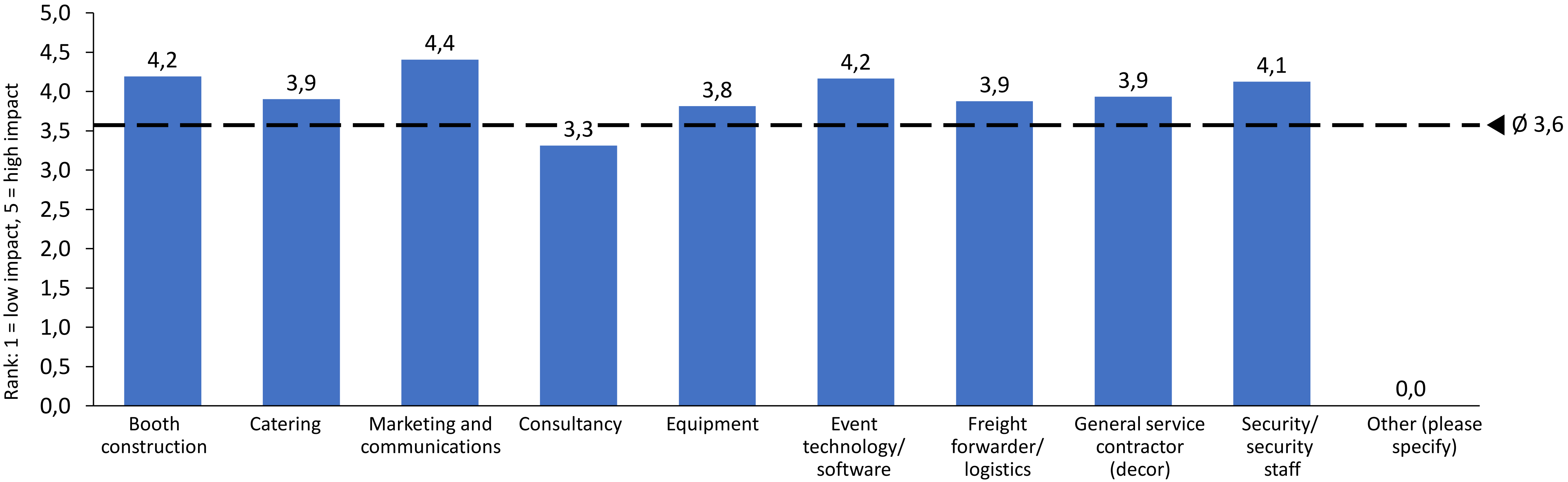
Use of services: key takeaways

- Booth construction is the most relied-upon service, followed closely by staff and security.
- The reason for the heavy reliance on staff and security is because these services are usually outsourced, with few organisations having staff in-house.
- Consultancy services are amongst the least-used services.
- Many of the most-used services can be considered mandatory services needed to run an event, while services such as consultancy are used on a more voluntary basis.
- Pure venue owners rely the least on service providers.
- Europe relies most heavily on service providers, while Asia/Pacific relies on them much less. This trend is driven by China and India, where an average of just 38%-40% of companies use service providers.

***Question 2**: Rate the impact that the service of your industry partner has on overall event success (1= low impact, 5= high impact)*

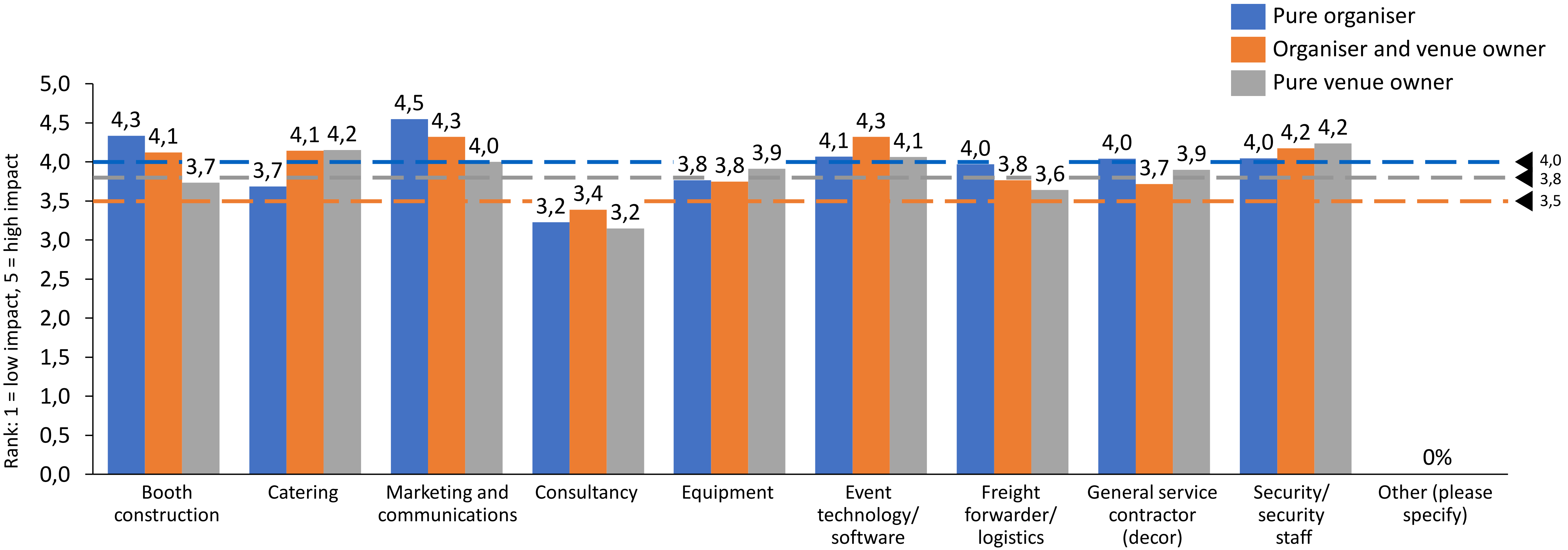
While booth construction is the most-used service, marketing and communications are perceived to contribute the most to event success

Perceived impact of service on event success (1 = low, 5 = high) amongst all participants



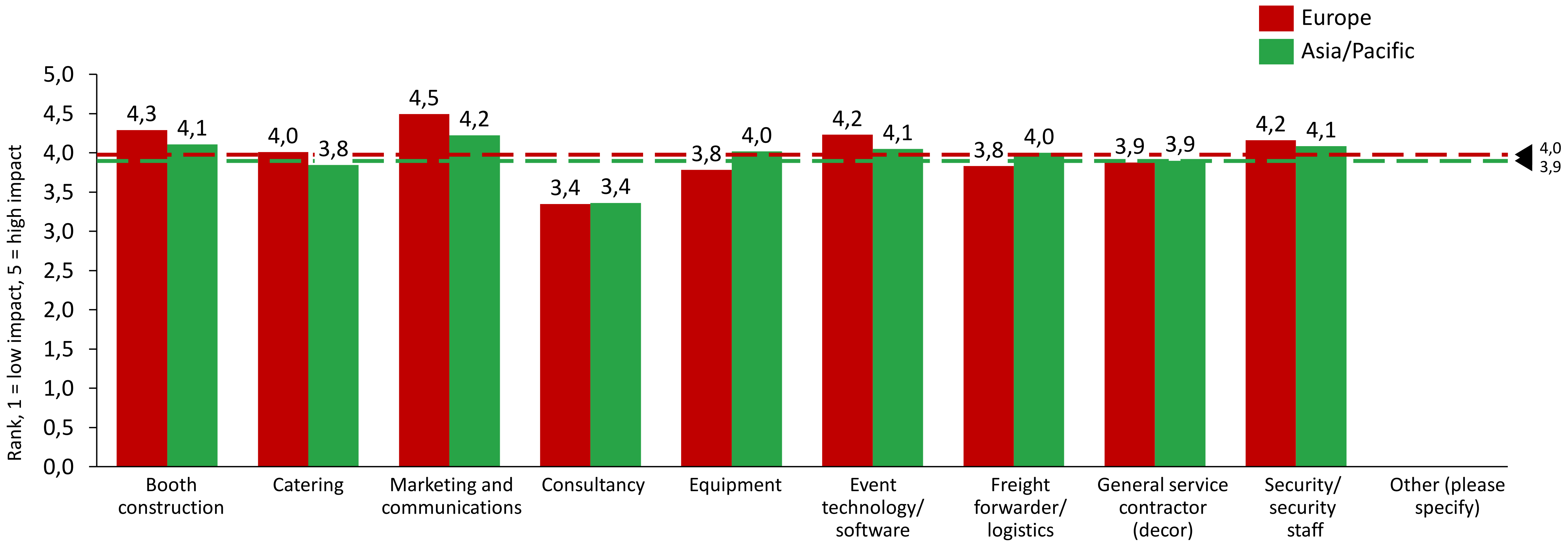
Venue owners do not perceive those services as valuable, which typically are of high relevance for the event (e.g. communication and marketing, booth construction)

Perceived impact of service on event success (1 = low, 5 = high) by target group



There are no notable differences in the perceived impact of services between Europe and Asia/Pacific

Perceived impact of service on event success (1 = low, 5 = high) by region



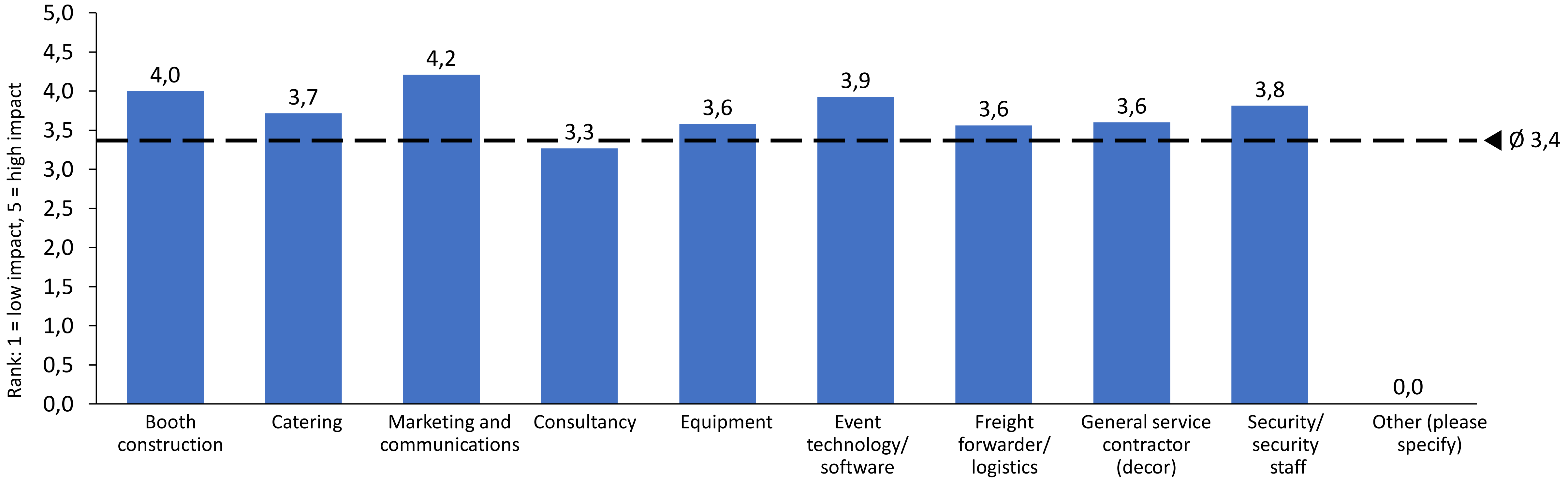
Impact of services on event success: key takeaways

- Although booth construction is relied upon most frequently, it is not considered to be the most relevant factor in terms of overall event success.
- Marketing and communications are seen as the most significant lever for event success. The fact it is possible to track the success of marketing efforts more effectively than other services may go some way to explaining this. These services also directly contribute to securing event participation.
- Consultancy services are perceived to have the lowest impact on event success, suggesting the overall quality of these services within the industry may not be sufficient, and the quality of service providers may be too inconsistent.
- The perceived impact of services on event success are relatively homogeneous, suggesting that a successful event requires a wide array of services.
- Although service use varies greatly between target groups and regions, perceived impact is regarded similarly between these groups.

***Question 3**: Rate the impact that the services of your industry partner have on the overall business. (1= low impact, 5= high impact)*

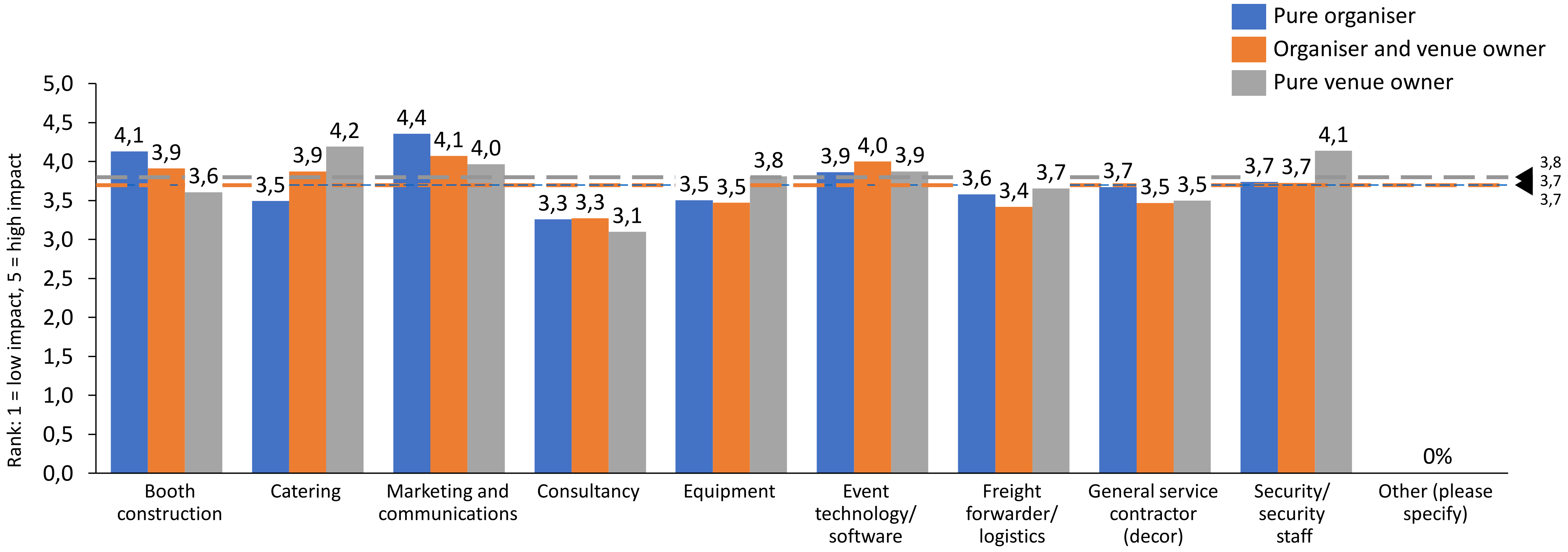
The perceived impact of services on overall business success is similar to the perceived impact on event success

Perceived impact of services on overall business success (1 = low, 5 = high) amongst all participants



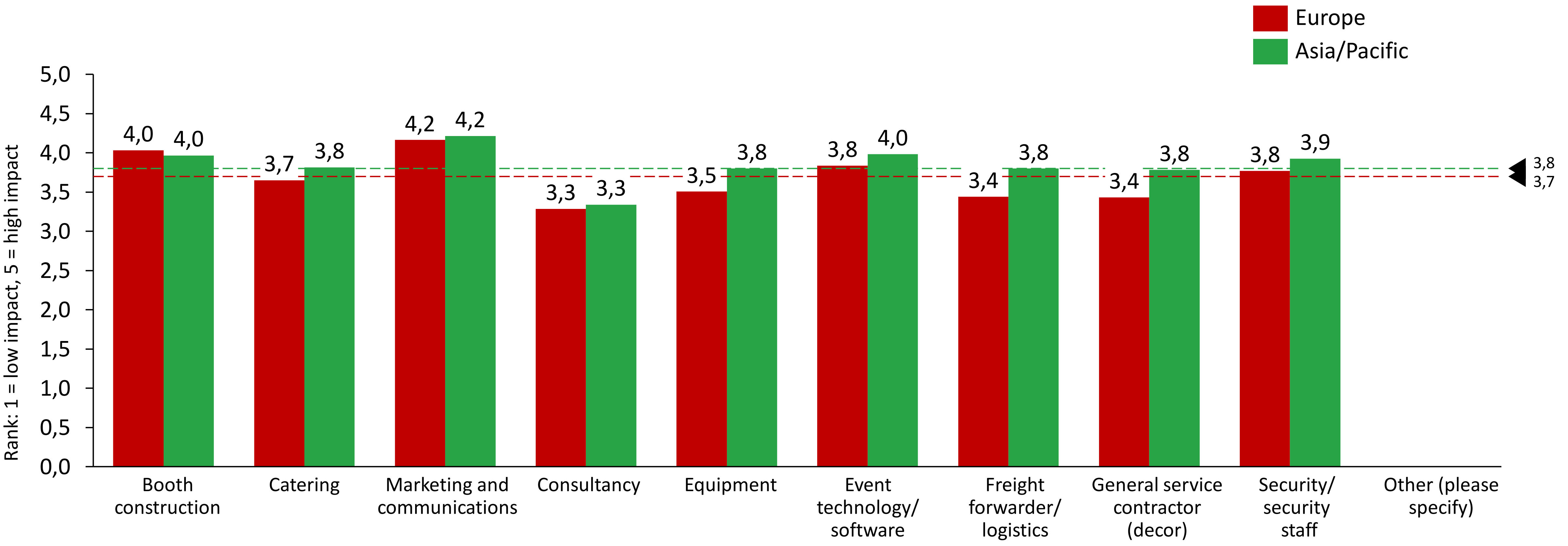
Consultancy services are perceived to have the lowest impact on overall business success

Perceived impact of services on overall business success (1 = low, 5 = high) by target group



The perceived impact of services on overall business success is similar across Europe and Asia/Pacific

Perceived impact of services on overall business success (1 = low, 5 = high) by region



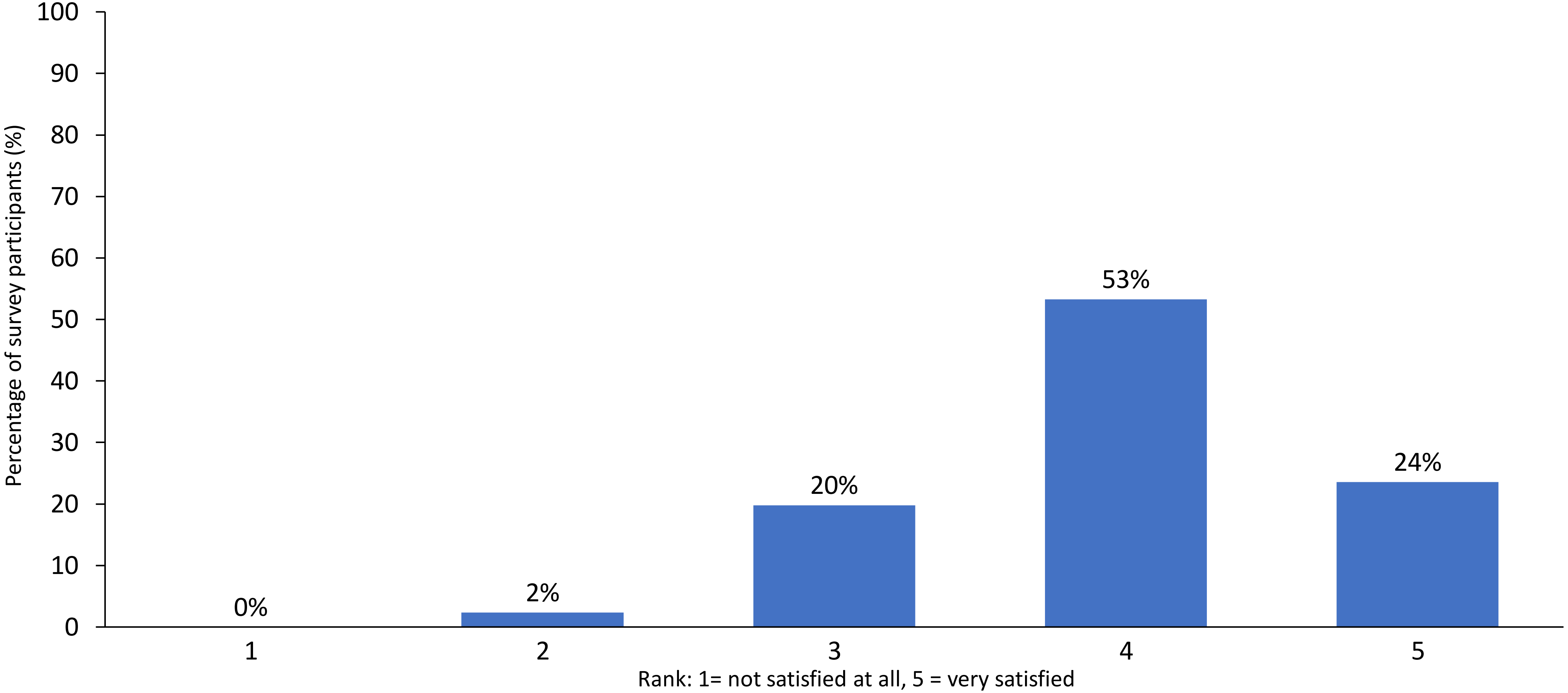
Impact of services on business success: key takeaways

- The impact of service providers on overall business success is marginally lower than their impact on event success.
- Like their impact on event success, their impact on overall business success is relatively homogeneous.
- Consultancy services are seen as the least significant in terms of overall business success.
- These effects hold true across the different target groups and geographic regions.

Question 4: *How satisfied are you with your relationship with your most important industry partner (that which is most relevant to the success of your event)? (1= not satisfied at all, 5 = very satisfied)*

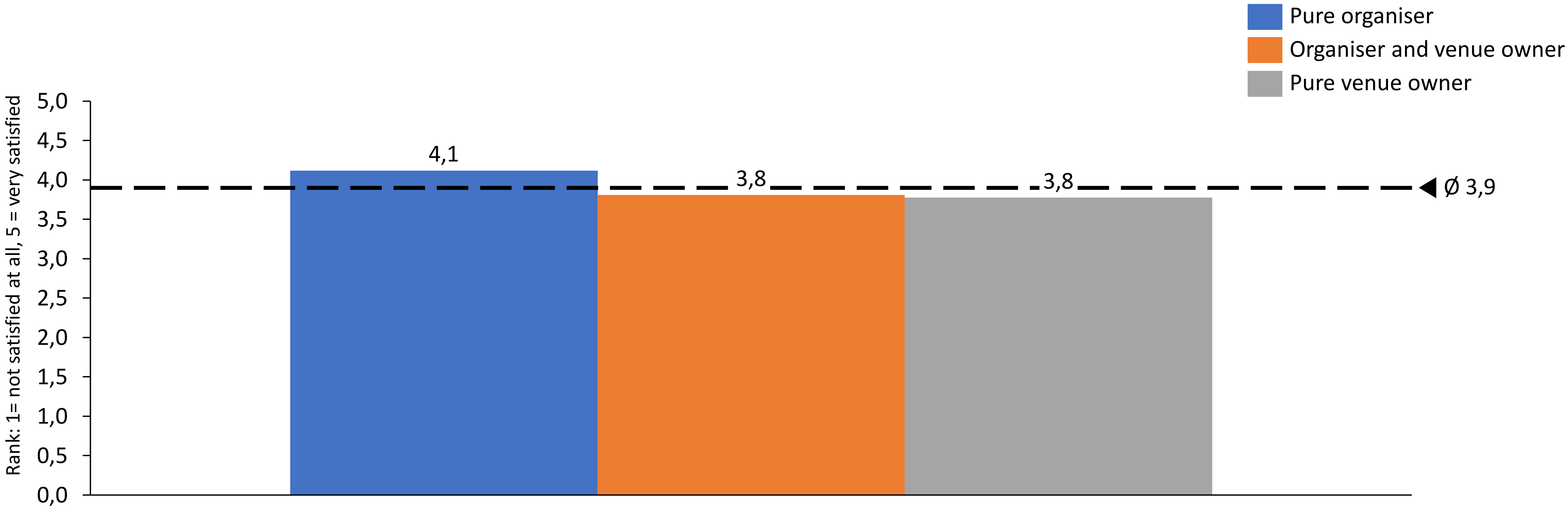
Close to 80% of participants are satisfied with their most important service provider

Satisfaction with most important service provider (1= not satisfied at all, 5 = very satisfied) amongst all survey participants



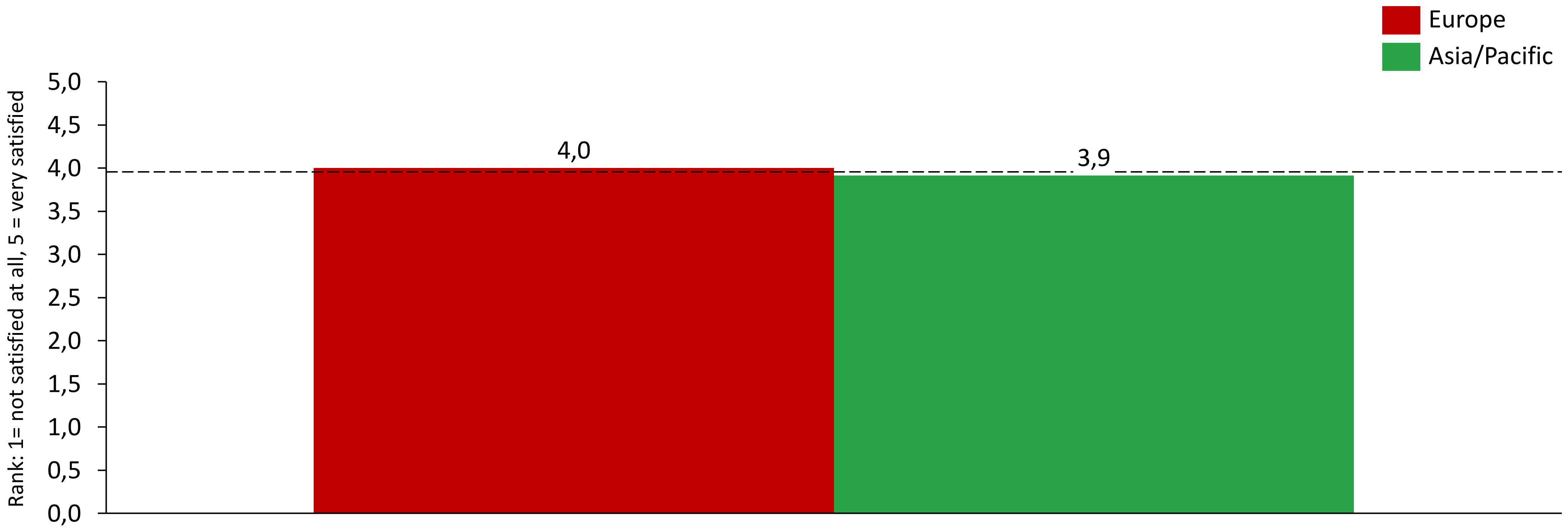
Pure organisers are marginally more satisfied with their most important service provider than the other target groups

Satisfaction with most important service provider (1= not satisfied at all, 5 = very satisfied) by target group



Satisfaction with their most important service provider is similar amongst participants in Europe and Asia/Pacific

Satisfaction with most important service provider (1= not satisfied at all, 5 = very satisfied) by region



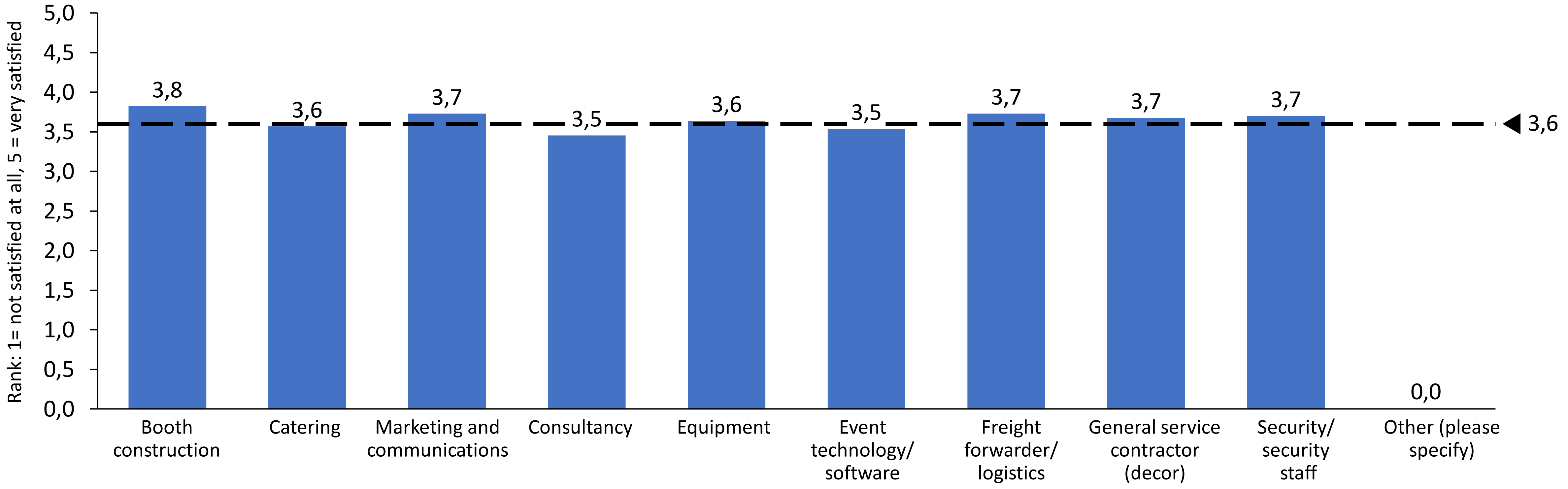
Satisfaction with most important service provider: key takeaways

- The overall satisfaction rate with the most important service provider is extremely positive, with 80% of participants giving a rating of either 4 or 5.
- Nearly 25% of all participants gave their most important service provider the highest possible rating of "very satisfied".
- None of the participants gave a "not satisfied at all" rating, and just 2% gave a rating of 2.
- There are no significant differences between target groups and regions.

Question 5: *How satisfied are you with your relationship to your other industry partners? (1= not satisfied at all, 5 = very satisfied)*

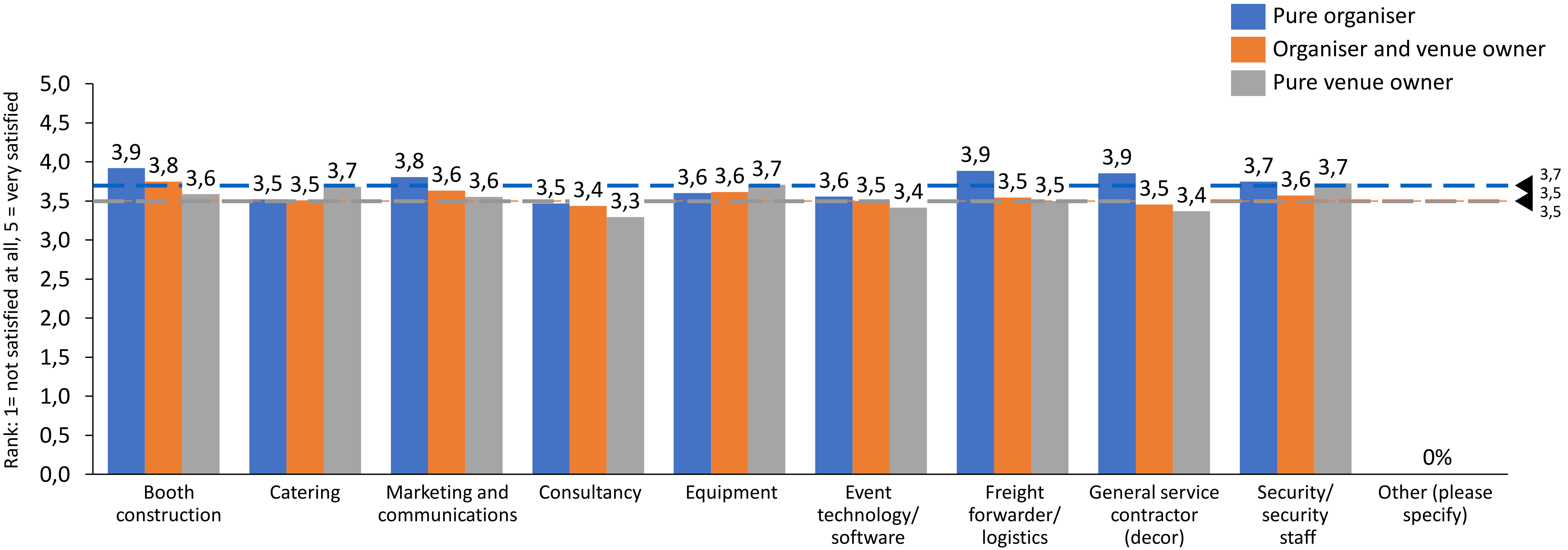
Satisfaction with other service providers is slightly lower than with the most important service provider, but still fairly positive

Satisfaction with other service providers (1= not satisfied at all, 5 = very satisfied) amongst all participants



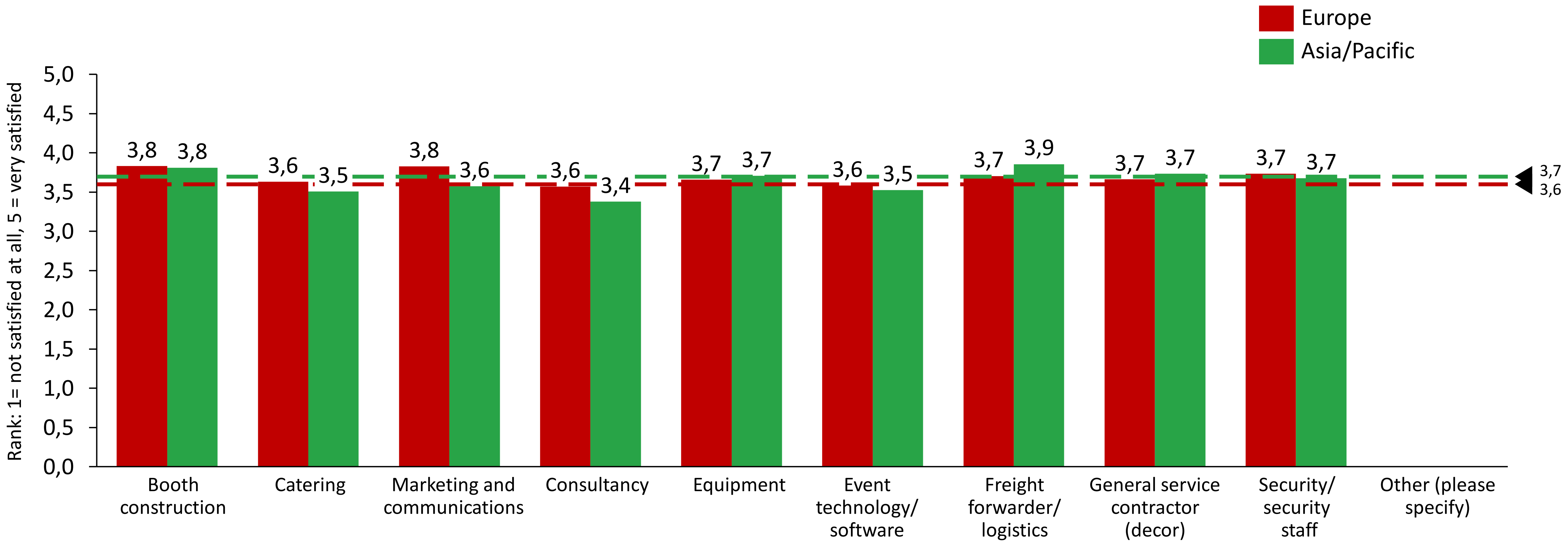
Pure organisers are marginally more satisfied with their other service providers than the other target groups

Satisfaction with other service providers (1= not satisfied at all, 5 = very satisfied) by target group



Satisfaction with other service providers is similar across Europe and Asia/Pacific

Satisfaction with other service providers (1= not satisfied at all, 5 = very satisfied) by region



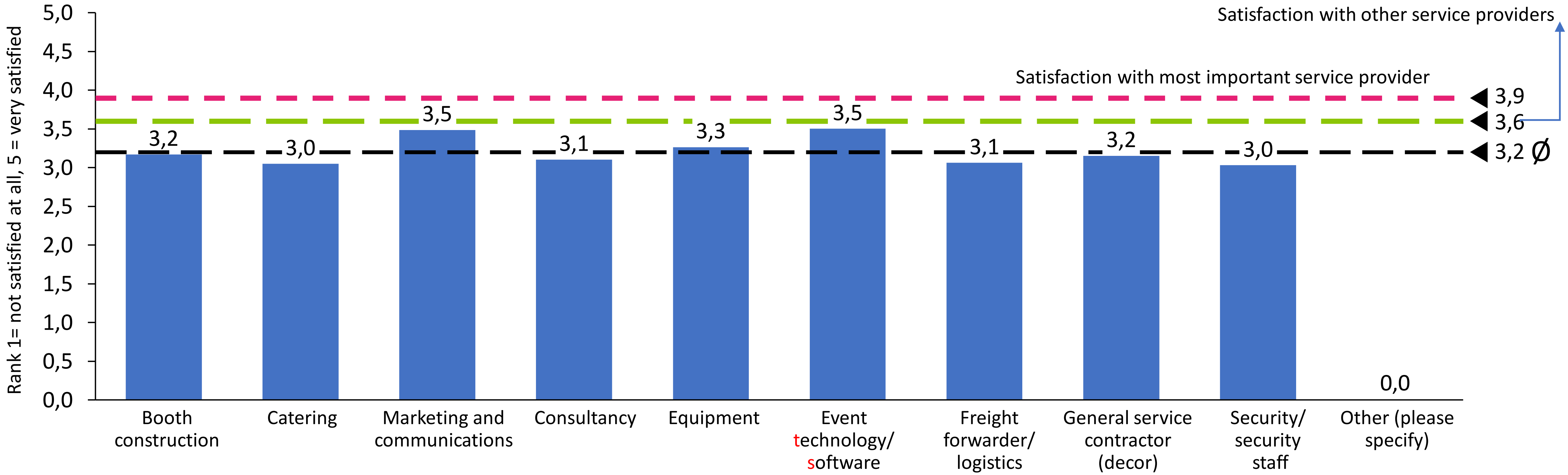
Satisfaction with other service providers: key takeaways

- Overall satisfaction with other service providers is relatively high and spread extremely evenly between different service categories.
- There are no significant differences between target groups or geographic regions.

Question 6: *Please rate how satisfied you are with the innovation provided by your industry partner? (1 = Not at all satisfied, 5= Very satisfied)*

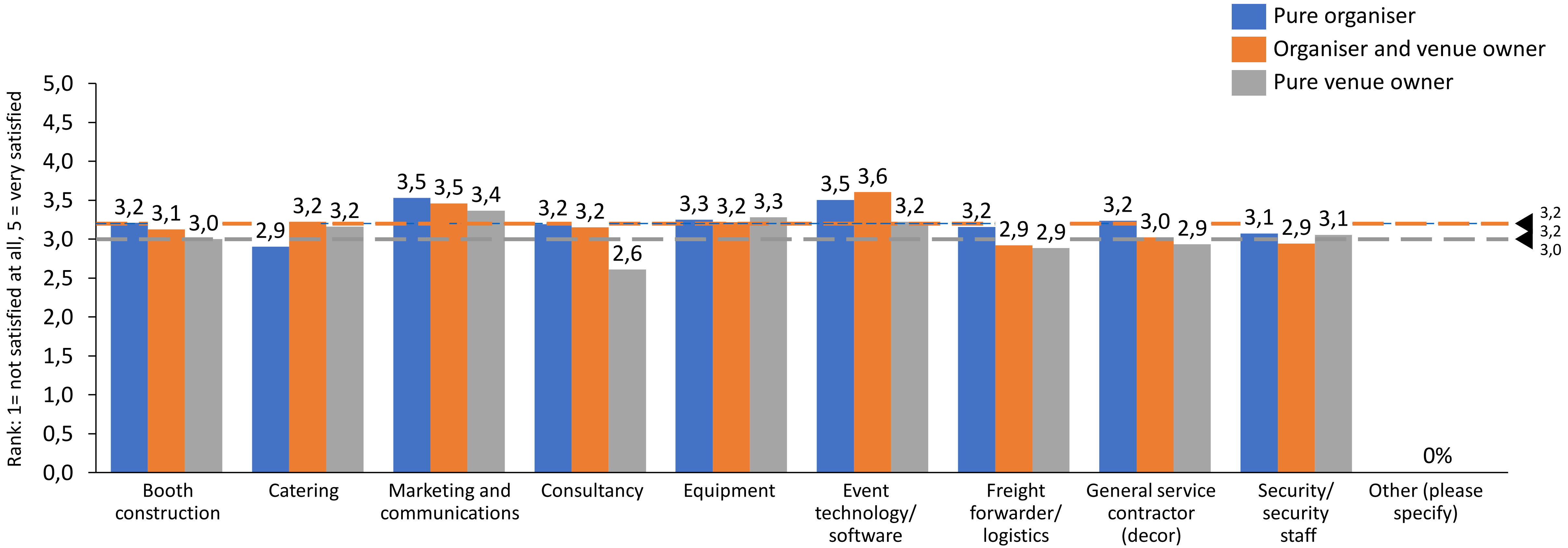
While participants are generally satisfied with the level of innovation from their service providers, it is lower than overall satisfaction

Satisfaction with innovation from service providers (1= not satisfied at all, 5 = very satisfied) amongst all participants



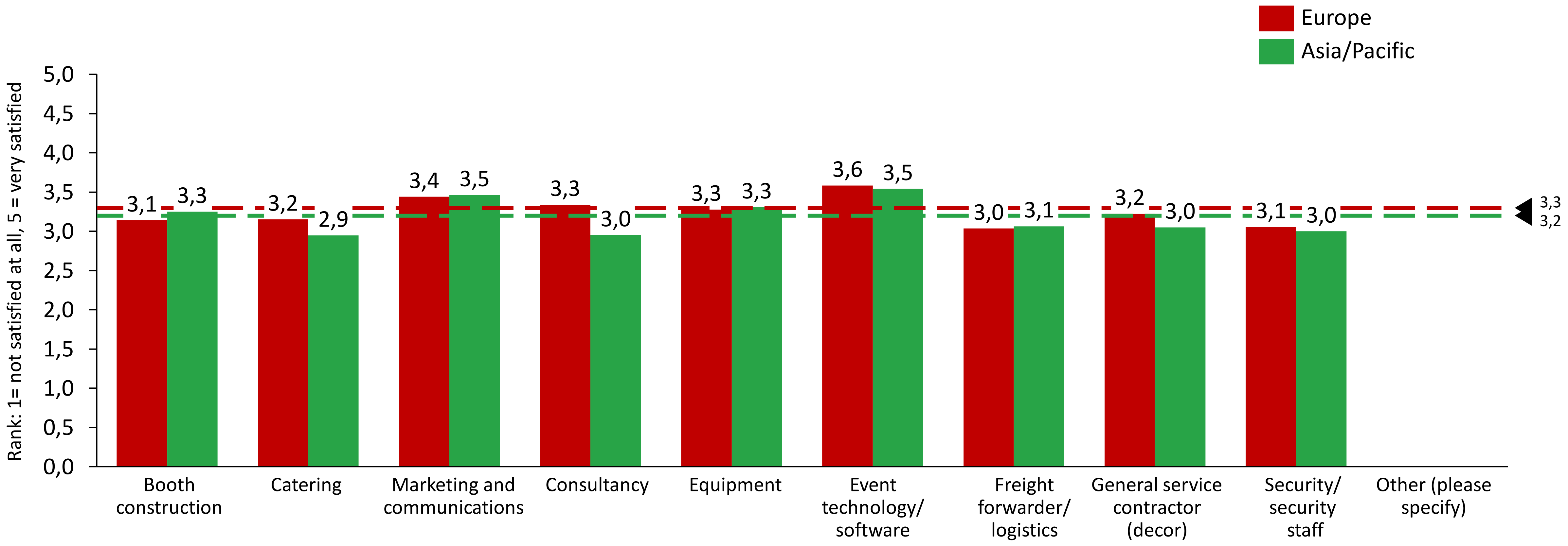
Satisfaction with innovation from service providers is relatively even between target groups

Satisfaction with innovation from service providers (1= not satisfied at all, 5 = very satisfied) by target group



Satisfaction levels regarding innovation from service providers are similar across Europe and Asia/Pacific

Satisfaction with innovation from service providers (1= not satisfied at all, 5 = very satisfied) by region



Innovation: key takeaways

- Overall satisfaction amongst participants with regard to innovation from service providers is lower than their overall satisfaction with their most important service provider and other service providers.
- This suggests there is demand for more innovation from service providers.
- Marketing and communications service providers are perceived to be the most innovative.
- There are no significant differences between target groups or geographic regions.

Question 7: *In which segment do you see the biggest investment to enhance the quality of your event within the next 12-18 months?*

Event technology is the key area of investment for enhancing the quality of events

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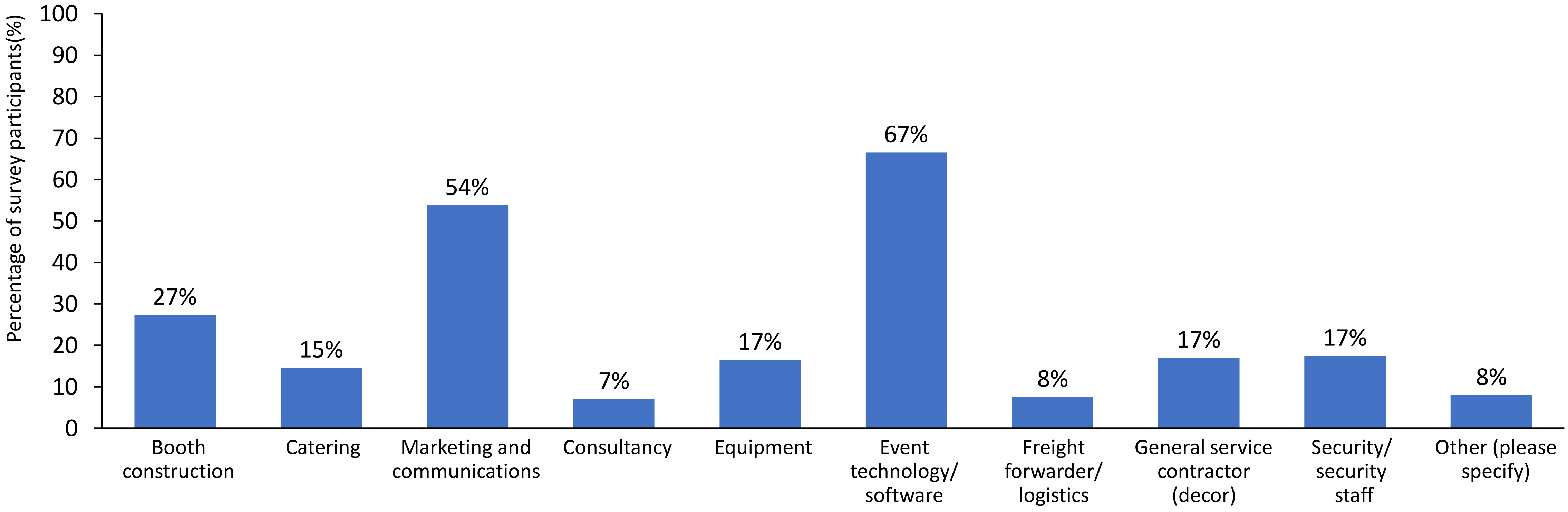
Key segments for investment amongst all participants



Pure venue owners and pure organisers place most importance on event technology when it comes to enhancing the quality of events

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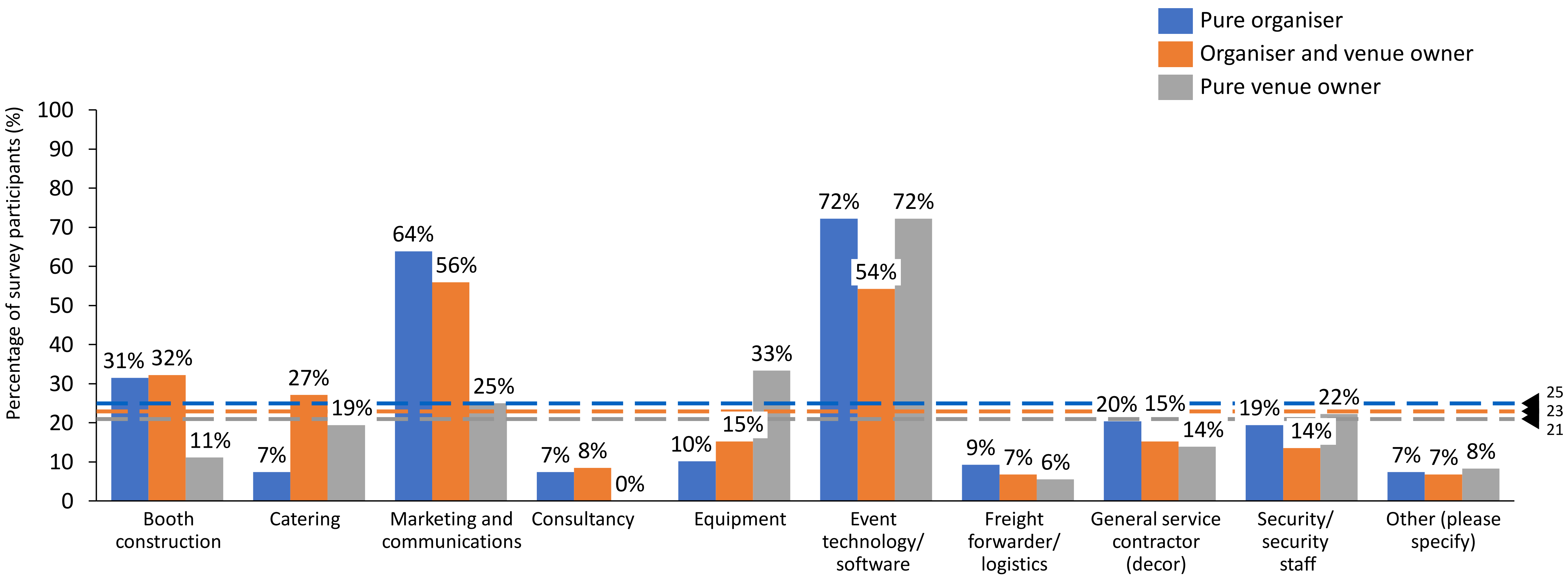
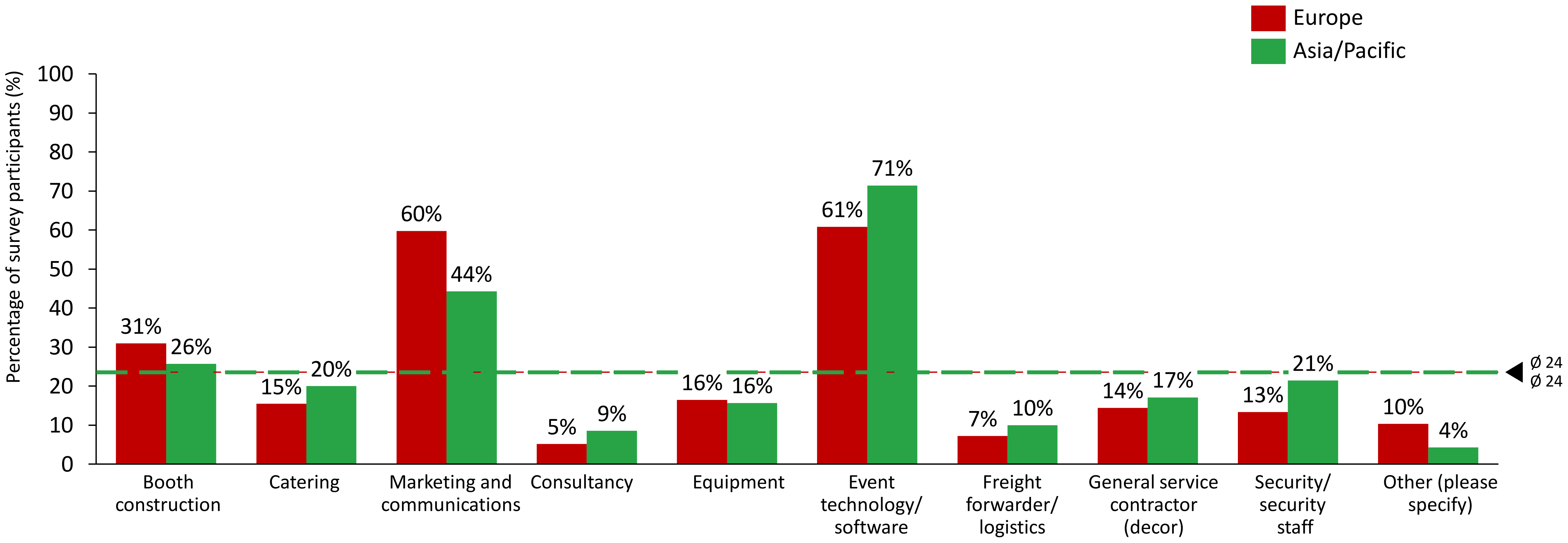
Key segments for investment by target group



Asia/Pacific has a bigger focus on event technology than Europe, which has a bigger focus on marketing and communications

Key segments for investment by region



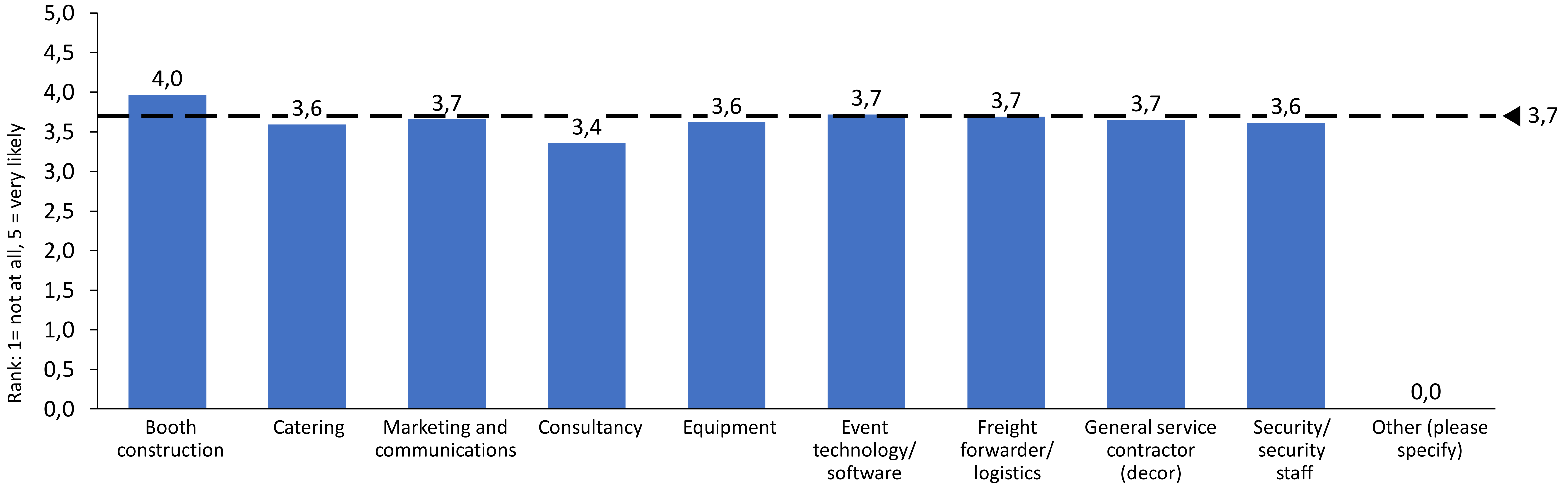
Future investments: key takeaways

- The key areas of investment for the future development of events are perceived to be marketing and communications, and event technology and software. Participants believe other service areas will have only a marginal impact on the future development of events.
- Consultancy services are perceived to have only a marginal impact on the future development of events.
- Survey participants in Asia/Pacific place a larger emphasis on event technology and software than their European counterparts. Meanwhile, marketing and communications is perceived to play a more significant role in Europe than in Asia/Pacific.

Question 8: *On a scale of 1-5, how likely are you to recommend your most important industry partner (that which is most relevant to the success of your event)?*
(1=not at all, 5= very likely)

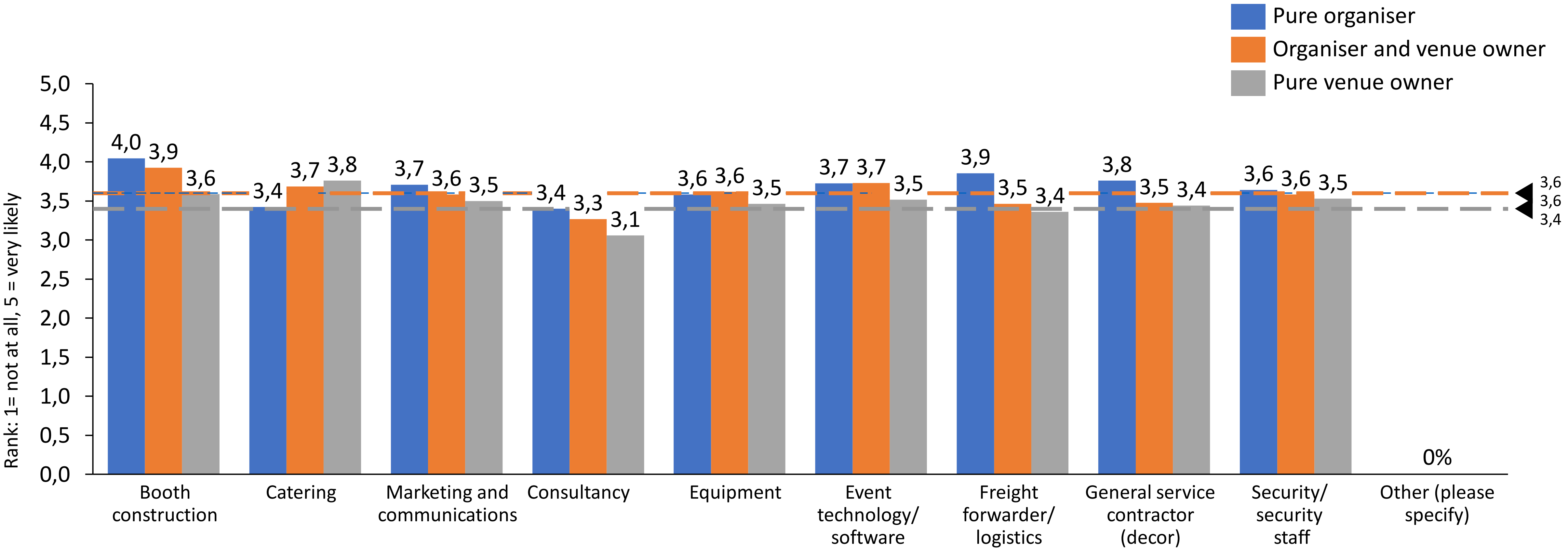
Companies providing booth construction services are most likely to get recommended

Likelihood of recommending most important service provider (1 = not at all, 5 = very likely) amongst all participants



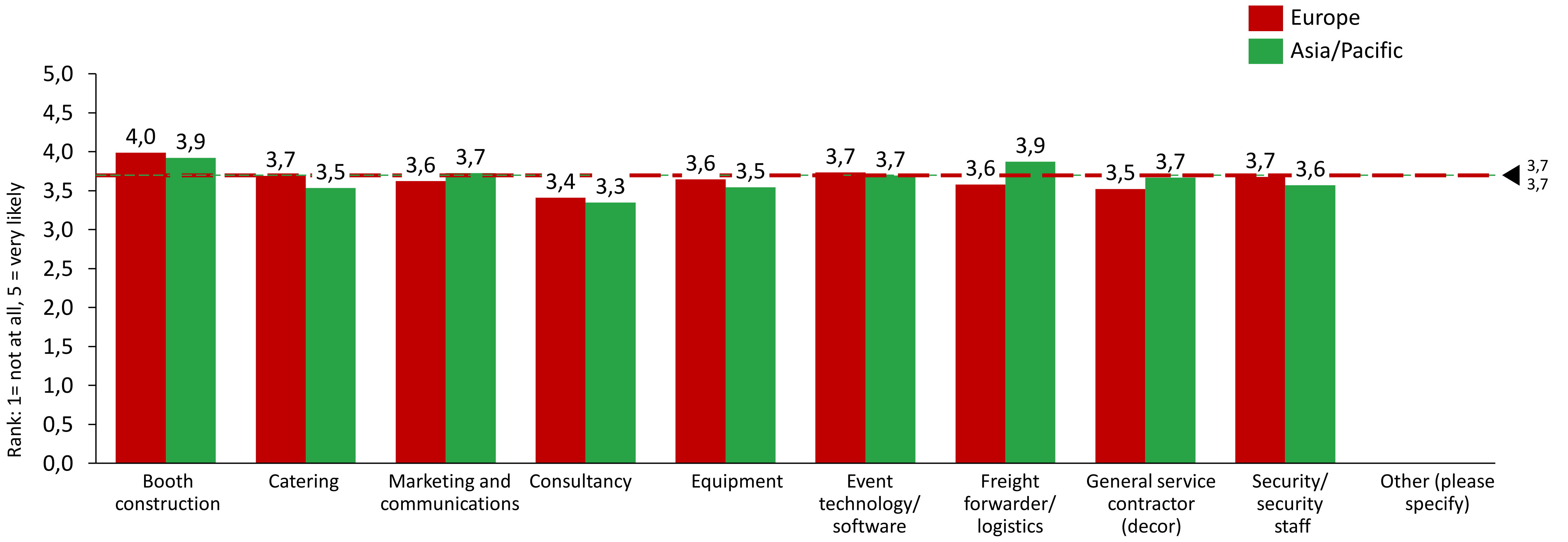
Pure venue owners are least likely to recommend their most important service provider

Likelihood of recommending most important service provider (1 = not at all, 5 = very likely) by target group



The likelihood of recommending their most important service provider is similar for participants in Europe and Asia/Pacific

Likelihood of recommending most important service provider (1 = not at all, 5 = very likely) by region



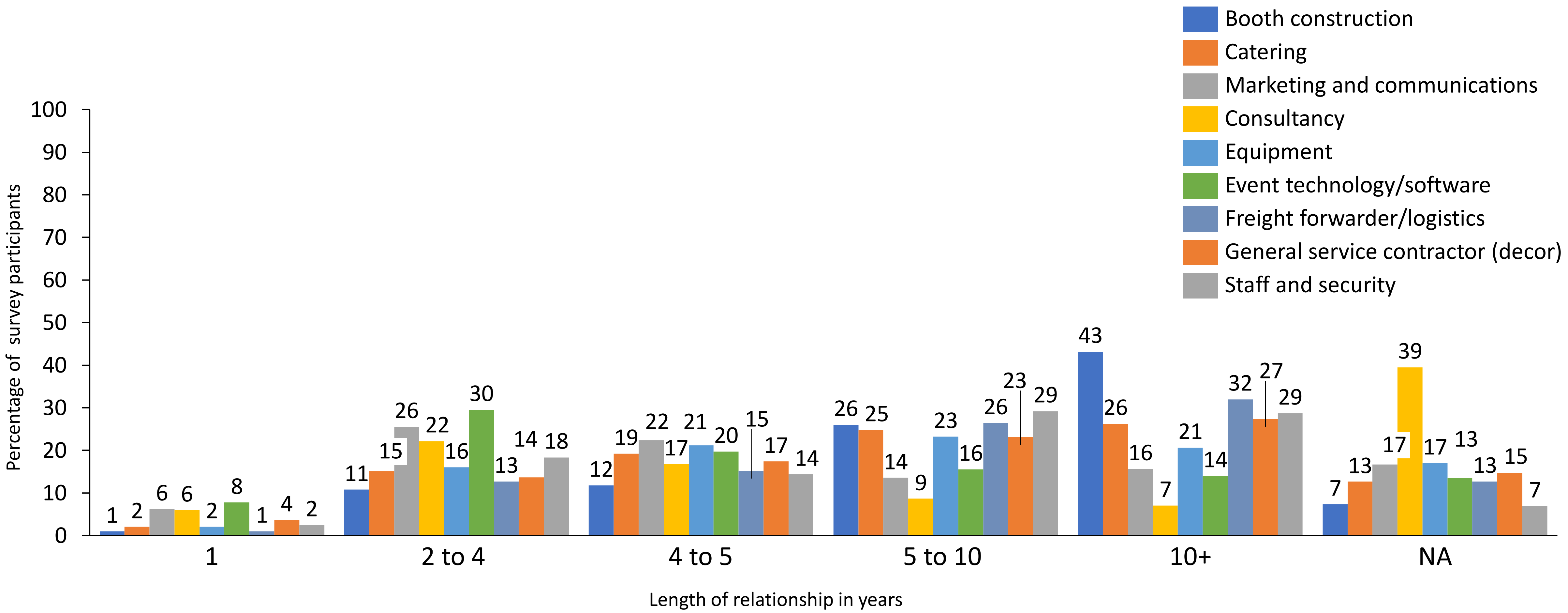
Recommending most important service providers: key takeaways

- The likelihood of survey participants to recommend their most important service provider is very high (rating of 3.7).
- This score is closely linked to their overall satisfaction with their most relevant service provider (rating of 3.9).
- Companies that provide booth construction services are most likely to be recommended .
- Once again, consultancy service providers are not as likely to get recommended as others – again seeming to indicate the inconsistent levels of quality amongst different consultancy companies.
- There are no significant differences between target groups and geographic regions.

Question 9: *How long (in years) have you worked with your most important industry partner?*

Companies providing booth construction services enjoy high loyalty from their clients

Length of business relationship with most important service provider



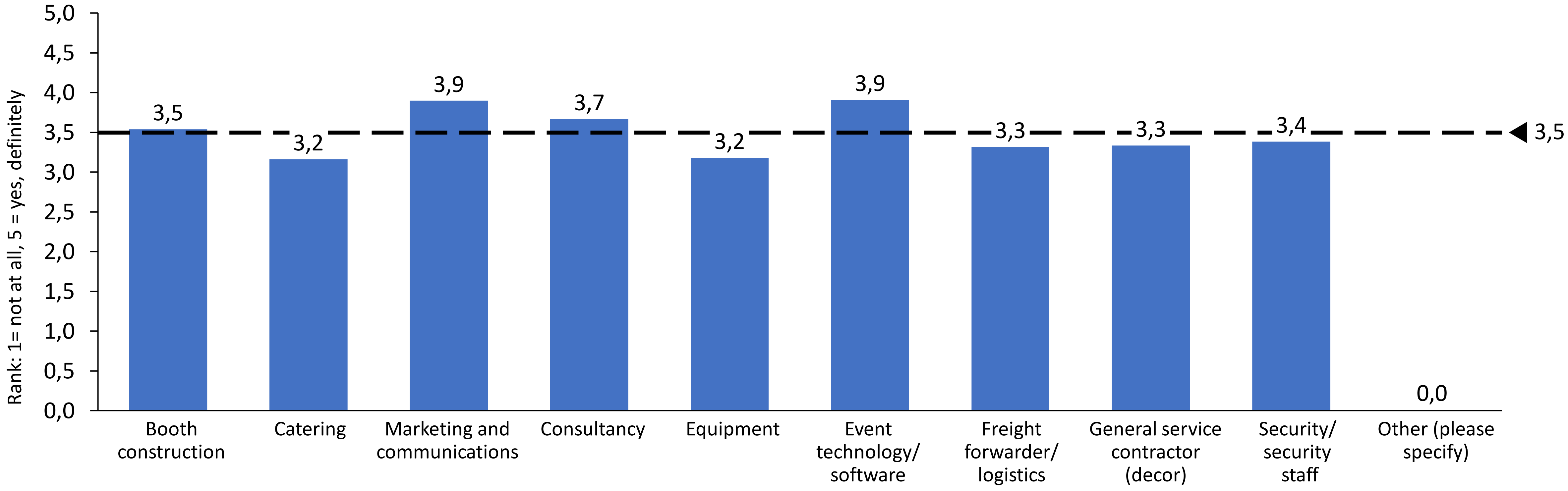
Length of collaboration: key takeaways

- There is a clear relationship between the length of collaboration and the value attributed to these collaborations.
- Booth construction service providers enjoy the longest relationships with their clients.
- Despite being a major factor for success, the length of collaboration between marketing and communications service providers and their clients is relatively short, which suggests that clients are prone to switching service providers more frequently.

Question 10: *Do you believe you would receive a better service if you shared more data/information with your industry partners (i.e., business information, customer data, operational insights, etc.)?(1= not at all, 5= yes, definitely)*

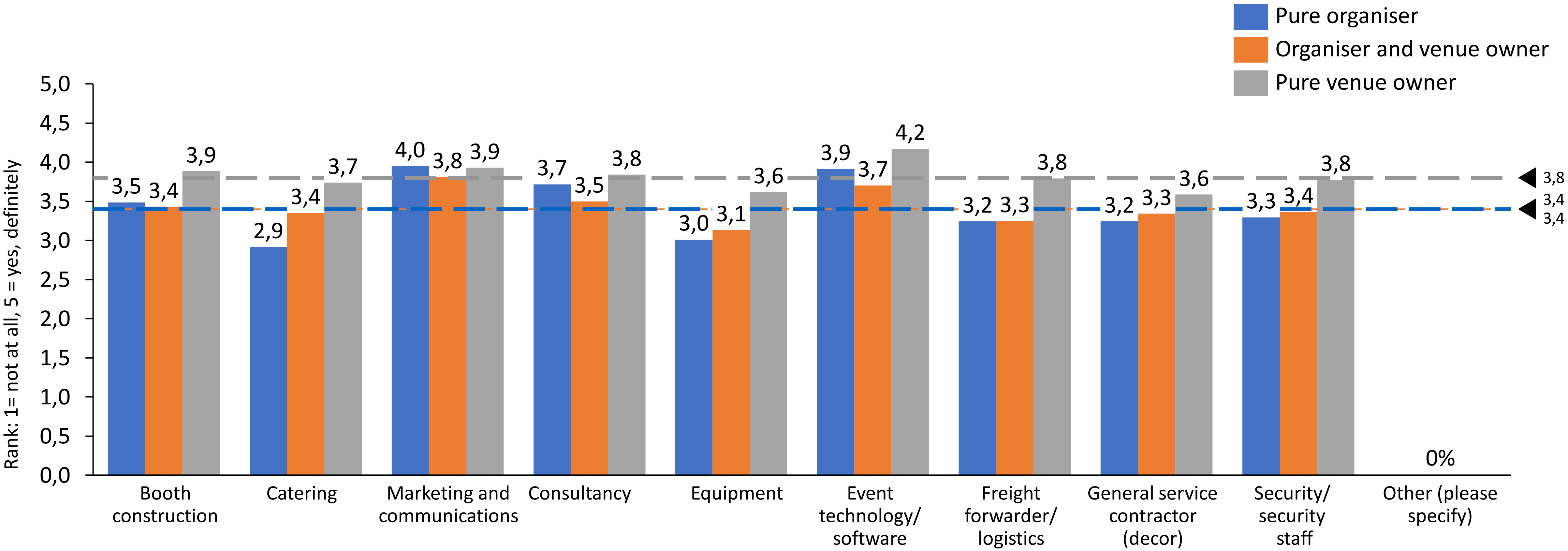
The quality of services in the areas of event technology and marketing, in particular, would improve with an increase in the data transferred between client and contractor

Perceived positive effect of information sharing with service providers (1 = not at all, 5 = yes, definitely)



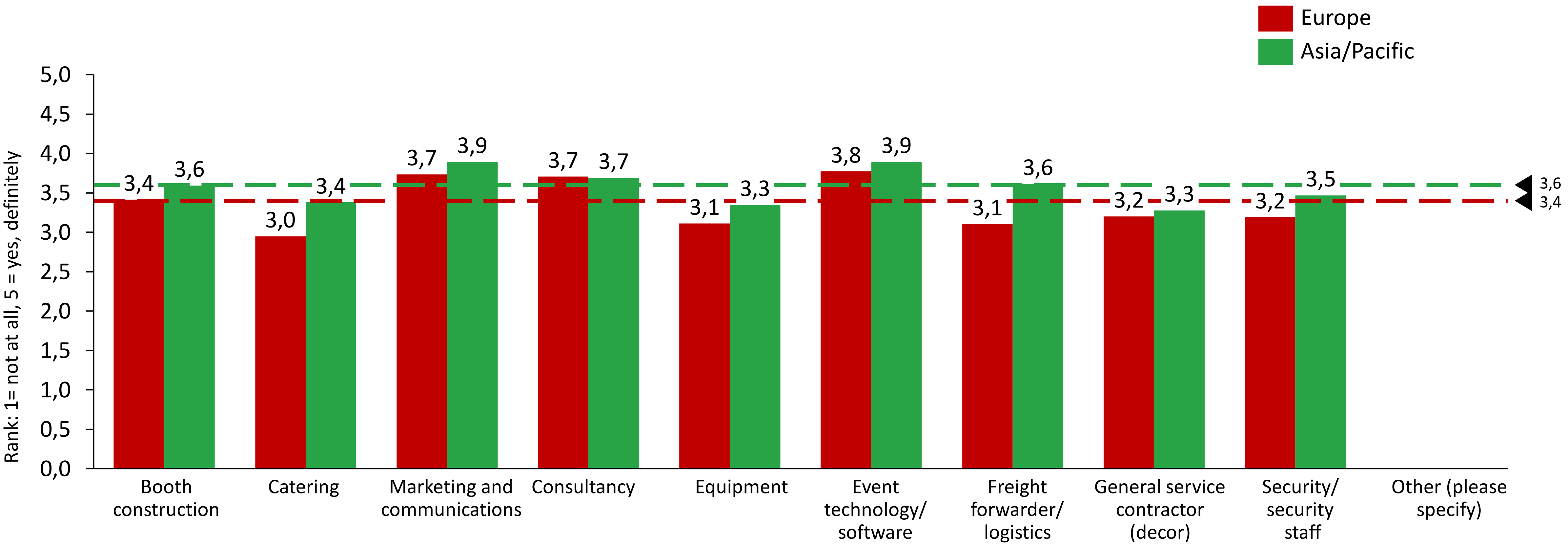
Pure venue owners believe they would benefit most from an increase in the data transferred between them and their contractors

Perceived positive effect of information sharing with service providers (1 = not at all, 5 = yes, definitely) by target group



The value of data sharing is perceived to be marginally higher in Asia/Pacifict han in Europe

Perceived positive effect of information sharing with service providers (1 = not at all, 5 = yes, definitely) by region



Data sharing: key takeaways

- There is a clear belief that increasing the amount of information shared service providers and organiser and venue operators can be beneficial.
- This holds true especially for organisations that provide marketing and communications services and those who provide event technology services.
- Pure venue owners believe most strongly that information sharing can improve event success.
- There are no significant differences between geographic regions.

Summary and final remarks

- Service providers remain an integral and essential part of the exhibition and trade fair industry.
- Satisfaction with service providers within the industry is relatively high, whilst the length of collaboration between clients and customers has a big impact on overall satisfaction levels.
- There is a strong demand for more innovation from service providers and increased information sharing between companies and service providers.

Next steps

The Industry Partners Working Group is dedicated to running the Industry Partners Benchmark Survey on an regular basis.

Questions related to this survey can be addressed to Angela Herberholz, UFI Programme Manager, at angela@ufi.org

This research is available online at www.ufi.org/research