2nd Industry Partners

BENCHMARK

SURVEY

BY JWC FOR ufi The Global Association of the Exhibition Industry

UFI Research: An Overview

Global Reports

Analysing the global exhibition industry with global comparisons.

Global Barometer – Bi-annual report on industry developments.

World Map of Venues – Report on trends in venue space and project developments globally.

Economic Impact Study – Report on the value of exhibitions globally and regionally.

United Nations Sustainable Development Goals – Report on the economic, social & environmental impacts of a number of exhibition industry projects.

Status of Sustainability – Report on the status of sustainability in the exhibition industry, including results from surveys conducted by UFI research partner Explori.

Regional Reports

Regular market overviews on UFI's chapter regions.

Euro Fair Statistics – Annual list of certified data for Europe by country.

The Trade Fair Industry in Asia – Annual analysis of market developments for Asia/Pacific by country.

The Exhibition Industry in MEA –Overview of the exhibition market in the MEA region.

The Exhibition Industry in Latin America – The first comprehensive overview by UFI of the exhibition industry Latin America.

Topical Reports

Focused reports on challenges and developments within the exhibition industry.

COVID Related Research – Data, reports, and standards covering the exhibitions industry.

Global Visitor and Exhibitor Insights – Data driven research reports on visitor feedback and exhibitor expectations.

Best Practices Compendiums –Case studies of successful industry developments.

Special Industry Topics – A wide ranging selection of bespoke reports into specific industry topics.

UFI Research Patron: Freeman

Freeman is the world's leading brand experience company. They help their clients design, plan, and deliver immersive experiences for their most important audiences. Through comprehensive solutions including strategy, creative, logistics, digital solutions, and event technology, Freeman helps increase engagement and drive business results. What makes them different is their collaborative culture, intuitive knowledge, global perspective, and personalized approach.

ufi The Global Association of the Exhibition Industry

UFI Research is available at www.ufi.org/research

UFI 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 and 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 present the second edition of our global Industry Partners Benchmark Survey. This builds on the first edition of the survey released in January 2021, which was the first survey of it's kind in our industry to focus on the value organisers and venues 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 Sebastian Witt of jwc (our Co-Vice-Chair), who has dedicated many hours to analyzing and preparing the results.

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 Sebastian Witt and UFI's Angela Herberholz. Thank you for your valuable contributions!

Best wishes,

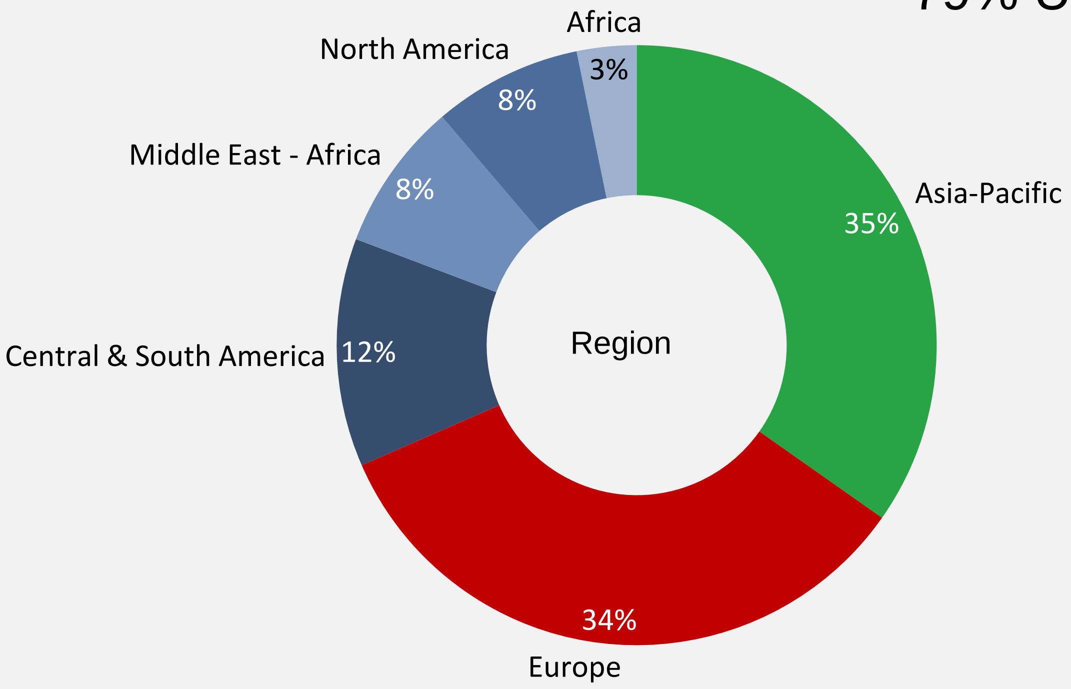
Ravinder Sethi
Chairman
Industry Partners Working Group

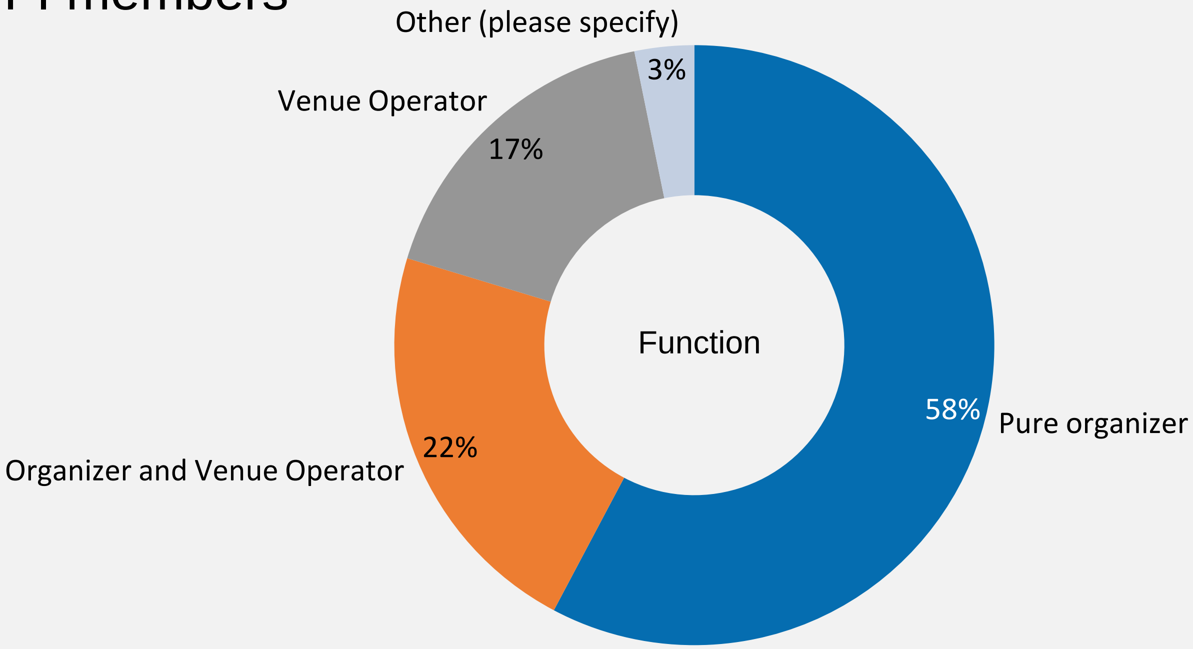
Descriptive statistics

Survey participation indicators

Total number of survey participants: 187

79% UFI members





Descriptive statistics

Survey participation indicators

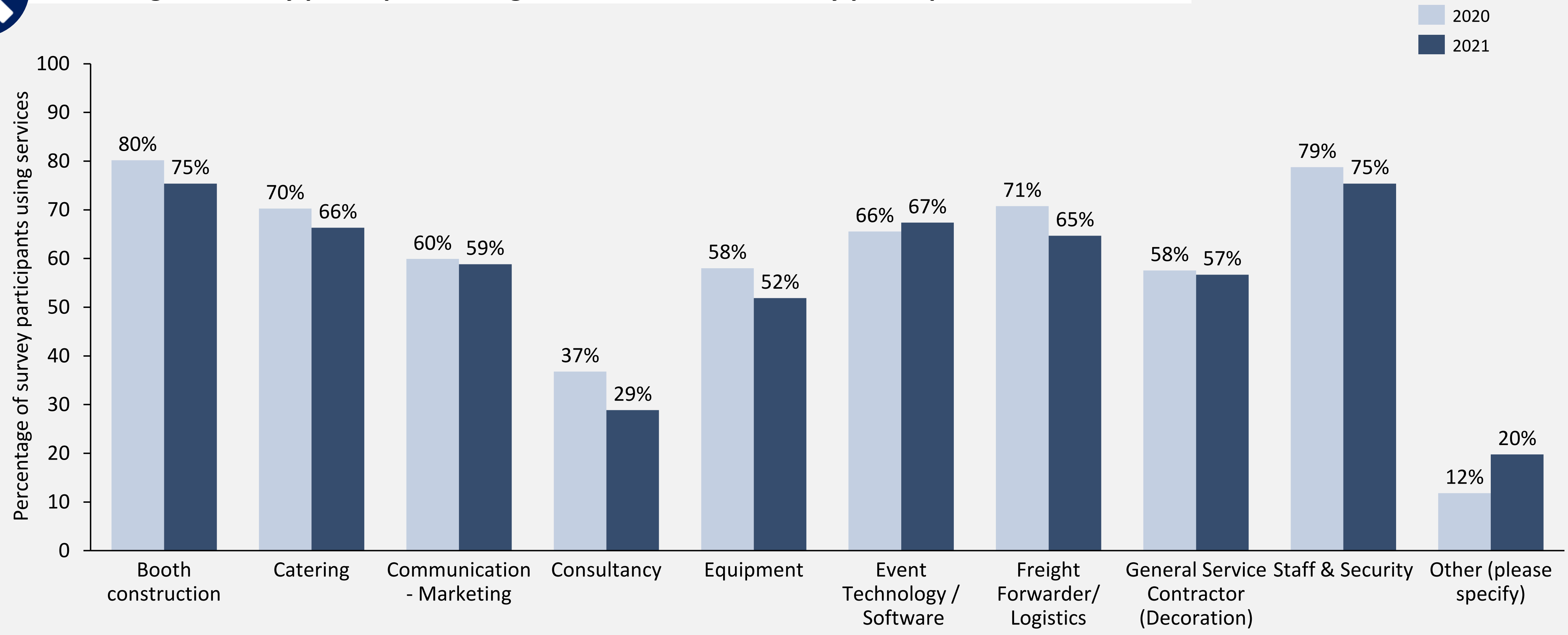
- The Industry Partners Benchmark Survey was run at the beginning of 2021
- Target groups: pure organisers, organisers and venue operators, and venue operators
- A total of 187 individuals participated in the survey, of which 79% are UFI members
- The majority of respondents are from Europe and the Asia-Pacific region (69%)
- Due to the limited number of survey respondents, a geographical analysis of the results was only possible for Europe and the Asia-Pacific region

Question 1

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

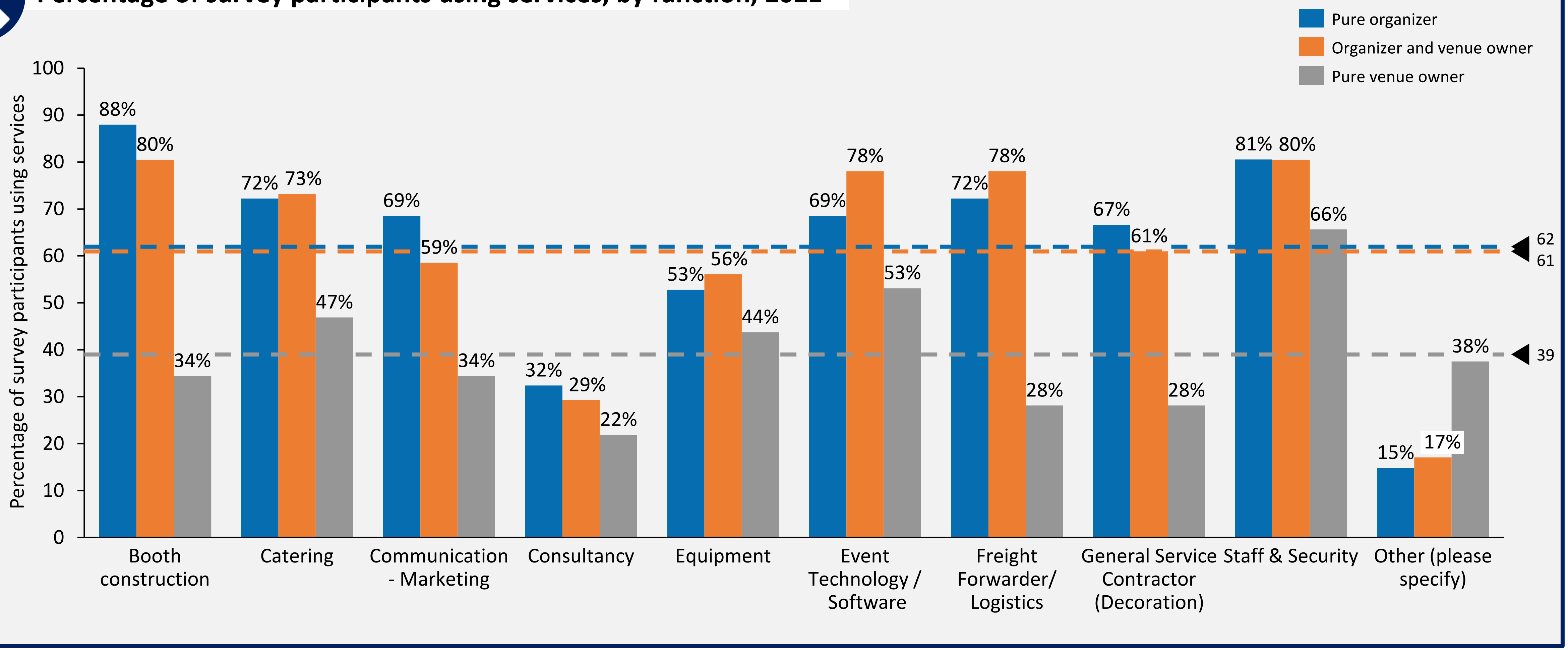
The demand for services of physical events has dropped

Percentage of survey participants using services, across all survey participants, 2020 – 2021



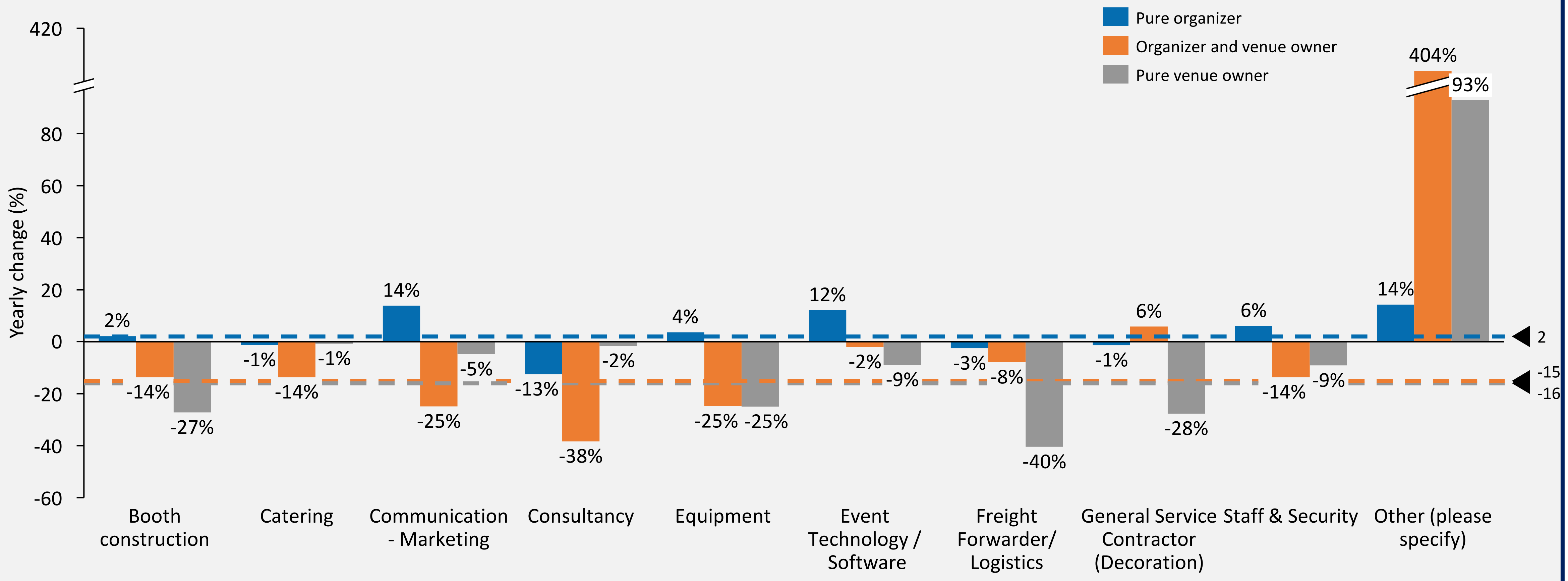
Pure venue owners have the lowest demand for services

Percentage of survey participants using services, by function, 2021

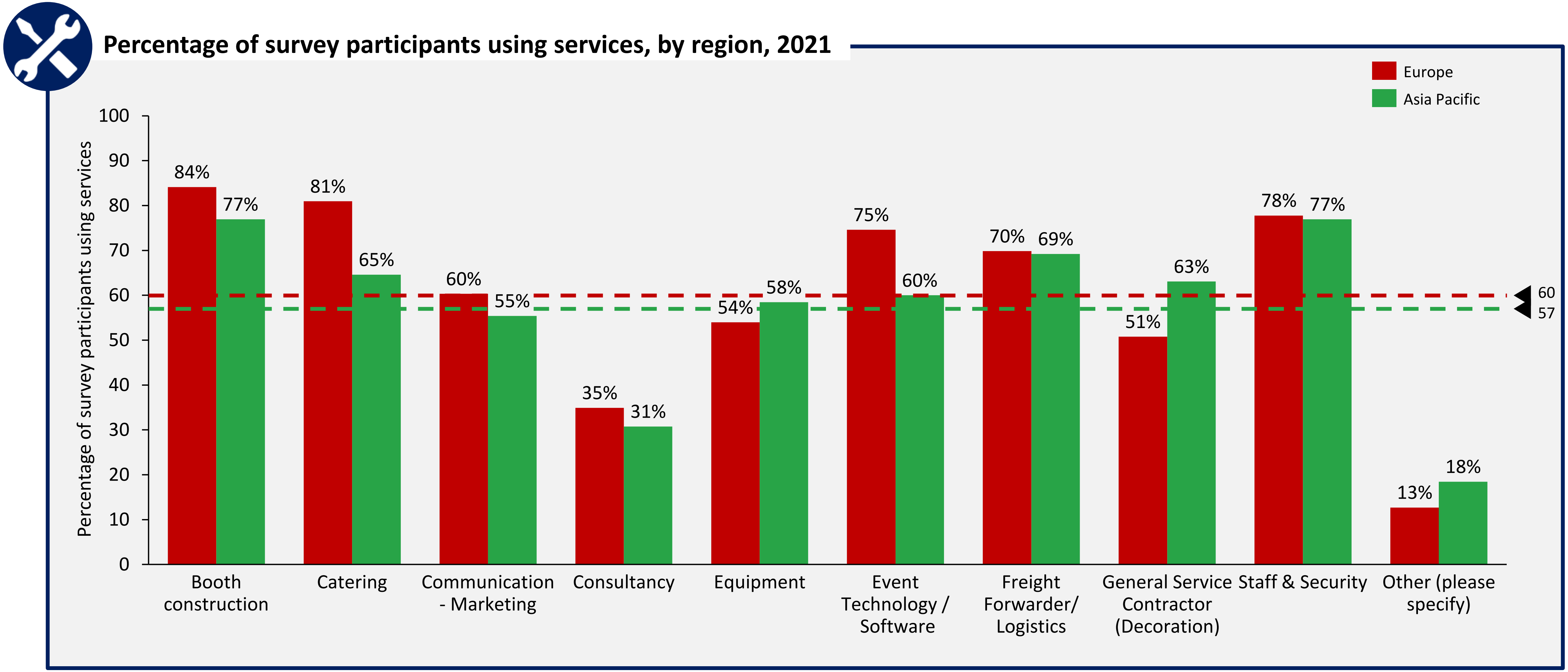


The global demand for services is stable from the perspective of pure organizers but has dropped within the remaining target groups

Percentage of survey participants using services, by function, yearly change (%) 2020 - 2021

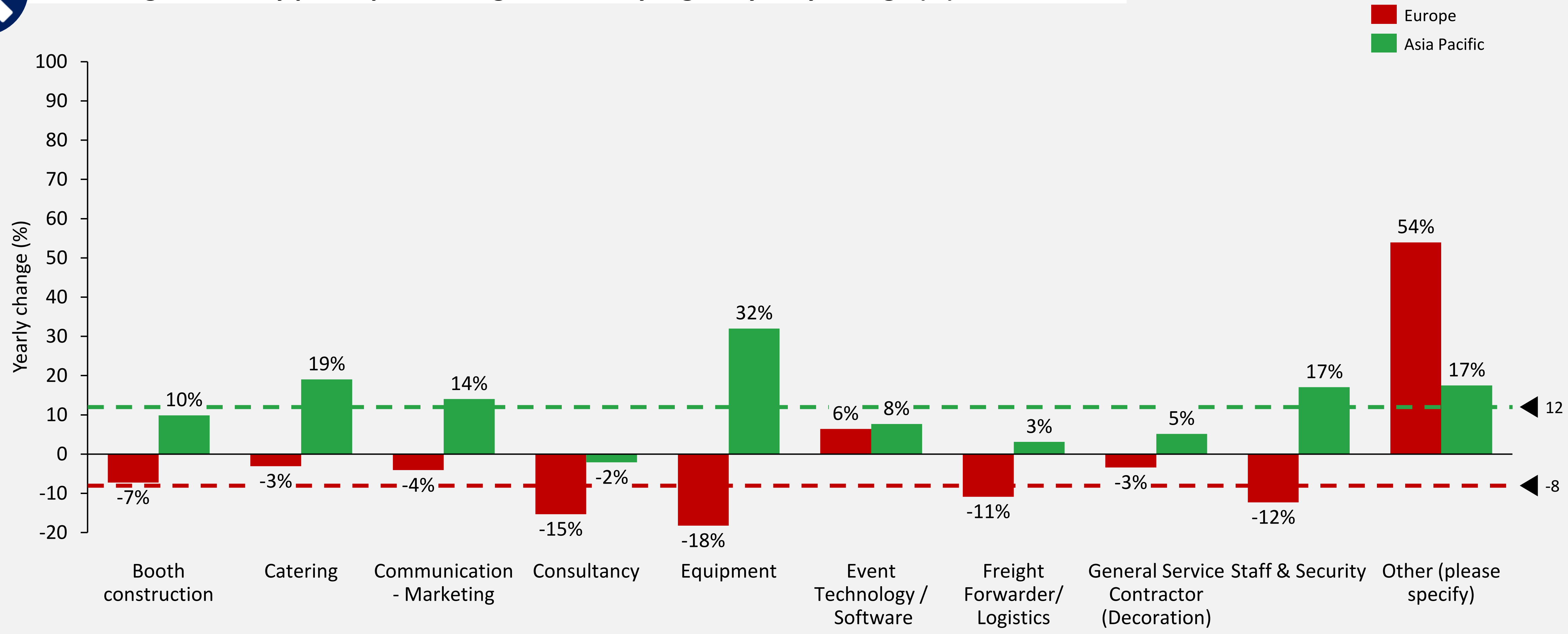


The regional demand for services is converging



The Asian Pacific region is experiencing a growing demand for services, whilst the demand in Europe is declining

Percentage of survey participants using services, by region, yearly change (%) 2020 - 2021



Question 1 – Key takeaways

- Booth construction remains the most relied upon service, alongside staff and security, which is probably relied upon so heavily due to it usually being outsourced (few organisations have in-house staff)
- Consultancy services are amongst the least utilised services, experiencing a further steady decline in demand
- Demand for services that can be considered mandatory for running events have also experienced a steady decline in demand
- Pure venue owners rely least heavily on services
- Countries in Europe and Asia-Pacific currently rely to a similar degree on services, yet Europe is seeing a decrease in demand whilst Asia-Pacific is seeing an increase

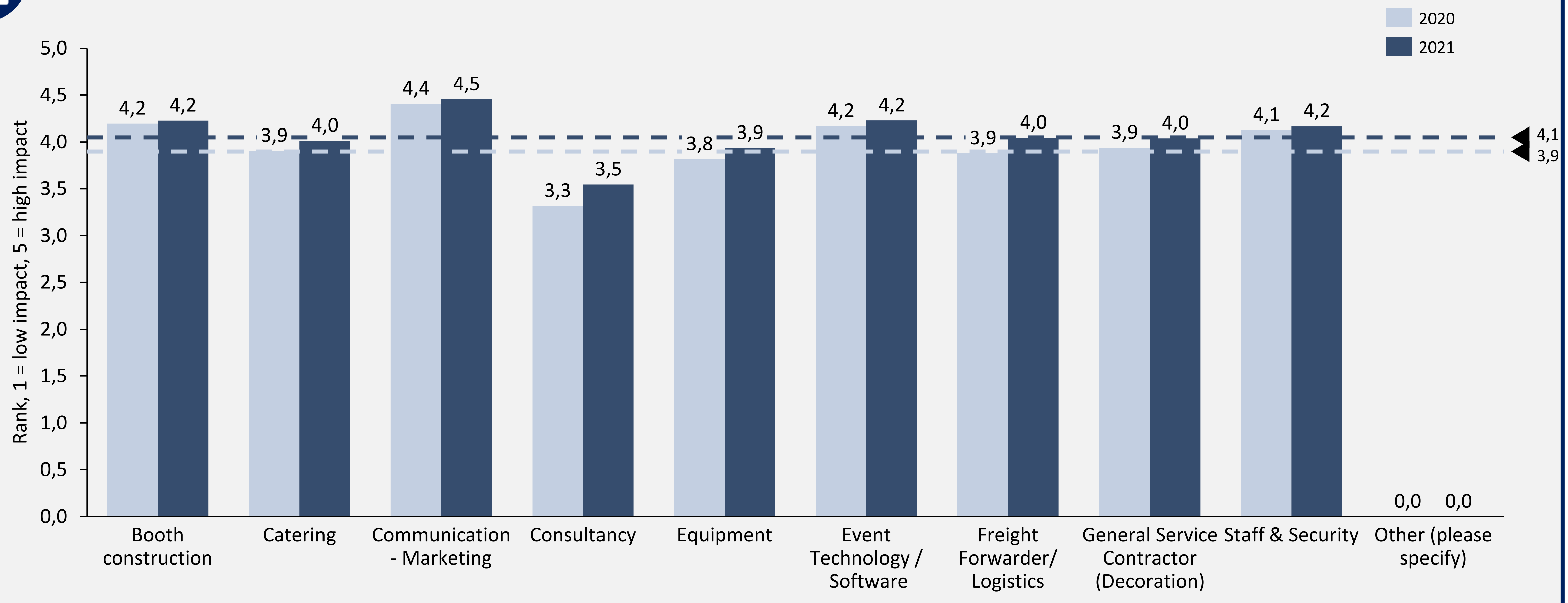
Question 2

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

The impact of services on the success of events has marginally increased

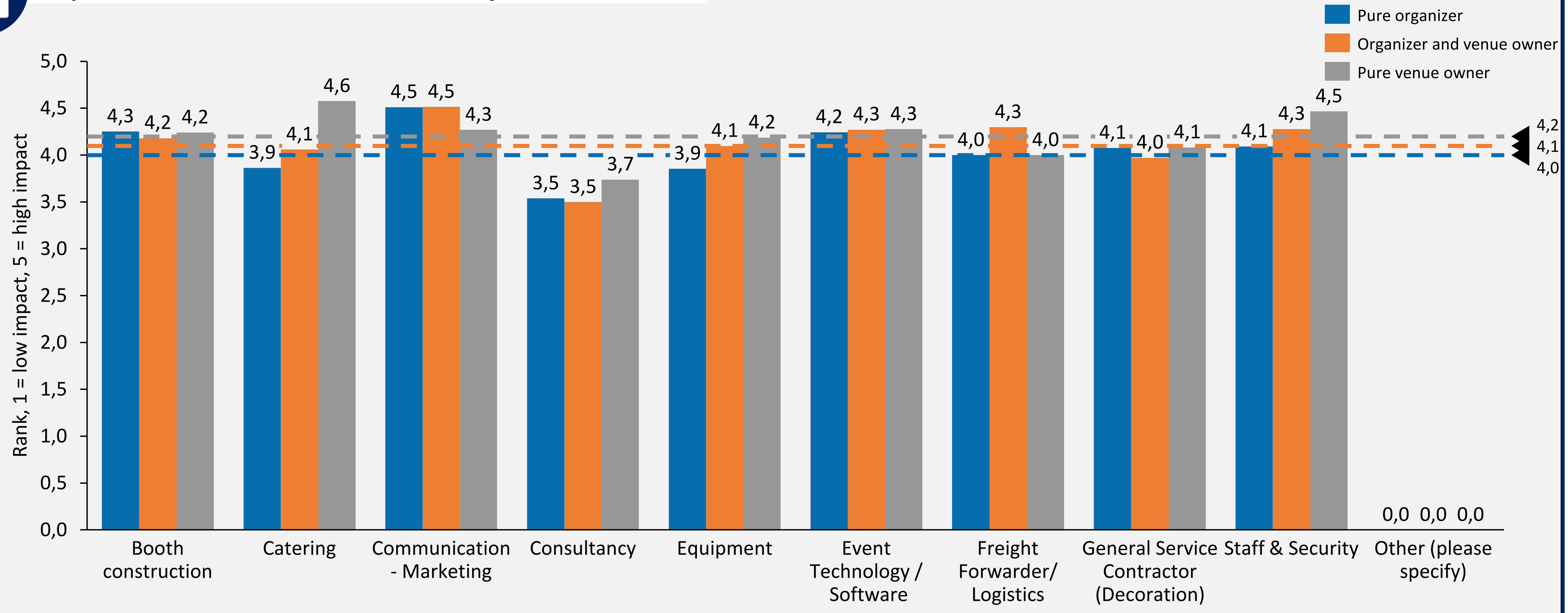
The Global Association of the Exhibition Industry

Impact of services on event success, across all survey participants, 2020 – 2021



Consultants have the lowest impact on the success of events

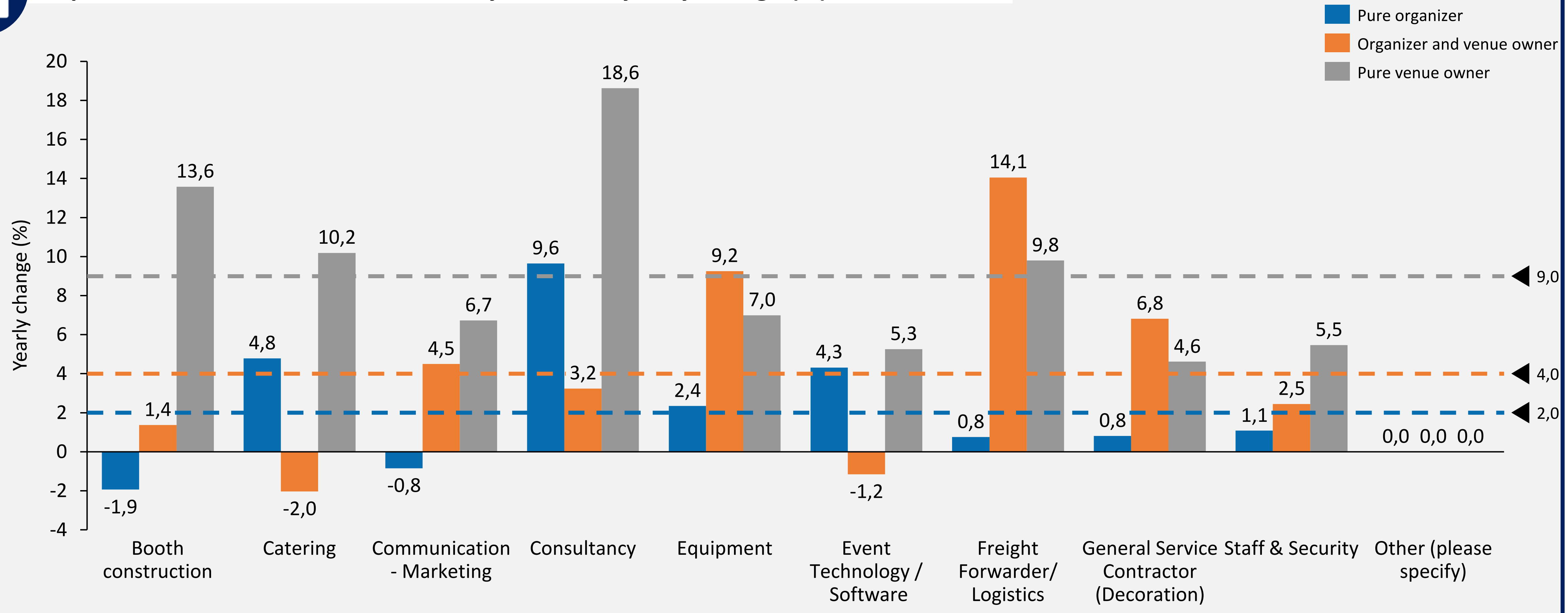
Impact of services on event success, by function, 2021



Pure venue owners note the largest increase in the perceived value of service providers

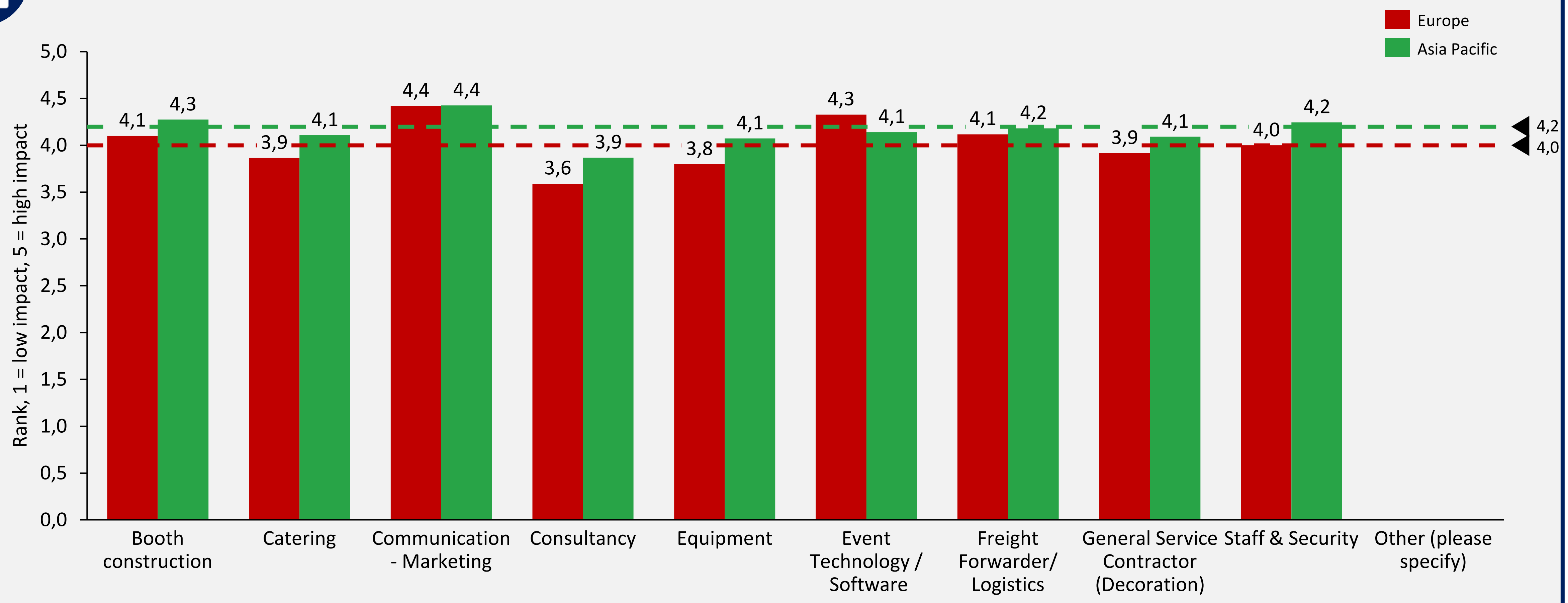
The Global Association of the Exhibition Industry

Impact of services on event success, by function, yearly change (%) 2020 – 2021



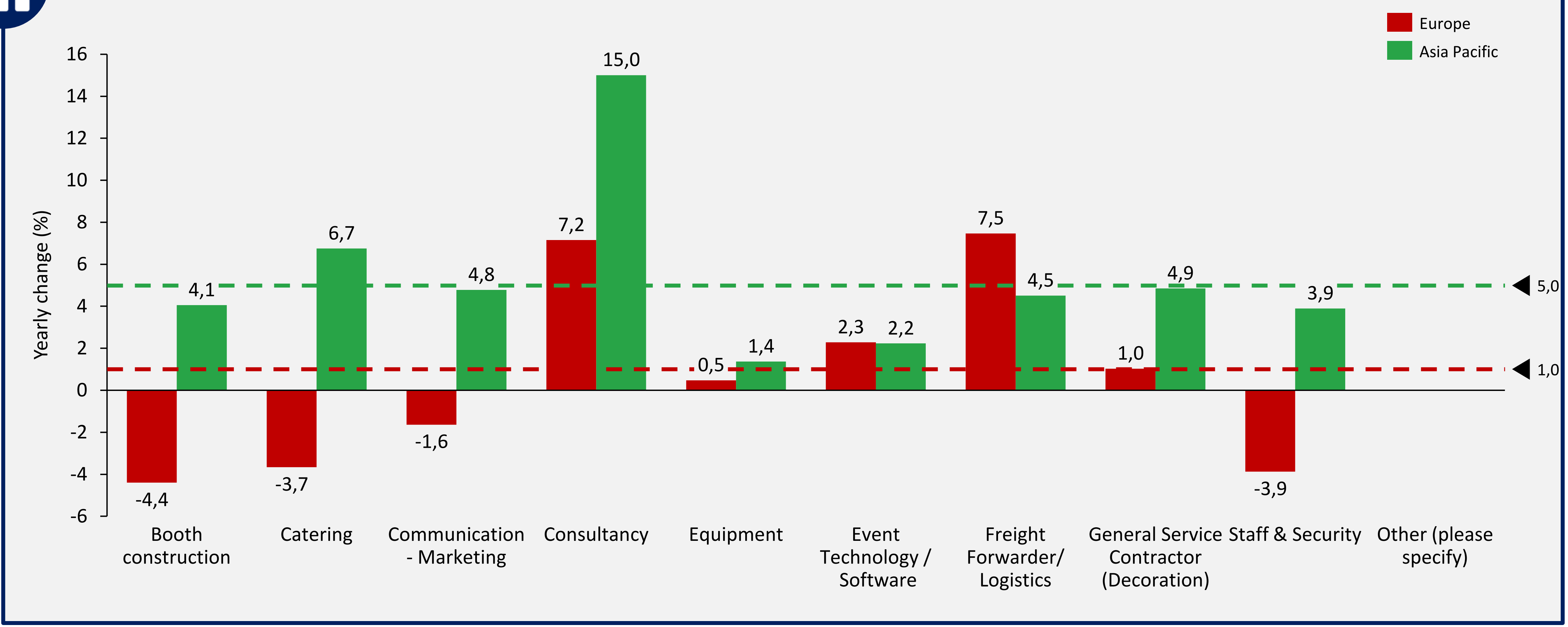
The perceived value of services for the success of events is fairly similar between regions

Impact of services on event success, by region, 2021



The growth in the perceived value of services is driven by Asian Pacific markets

Impact of services on event success, by region, yearly change (%) 2020 - 2021



Question 2 – Key takeaways

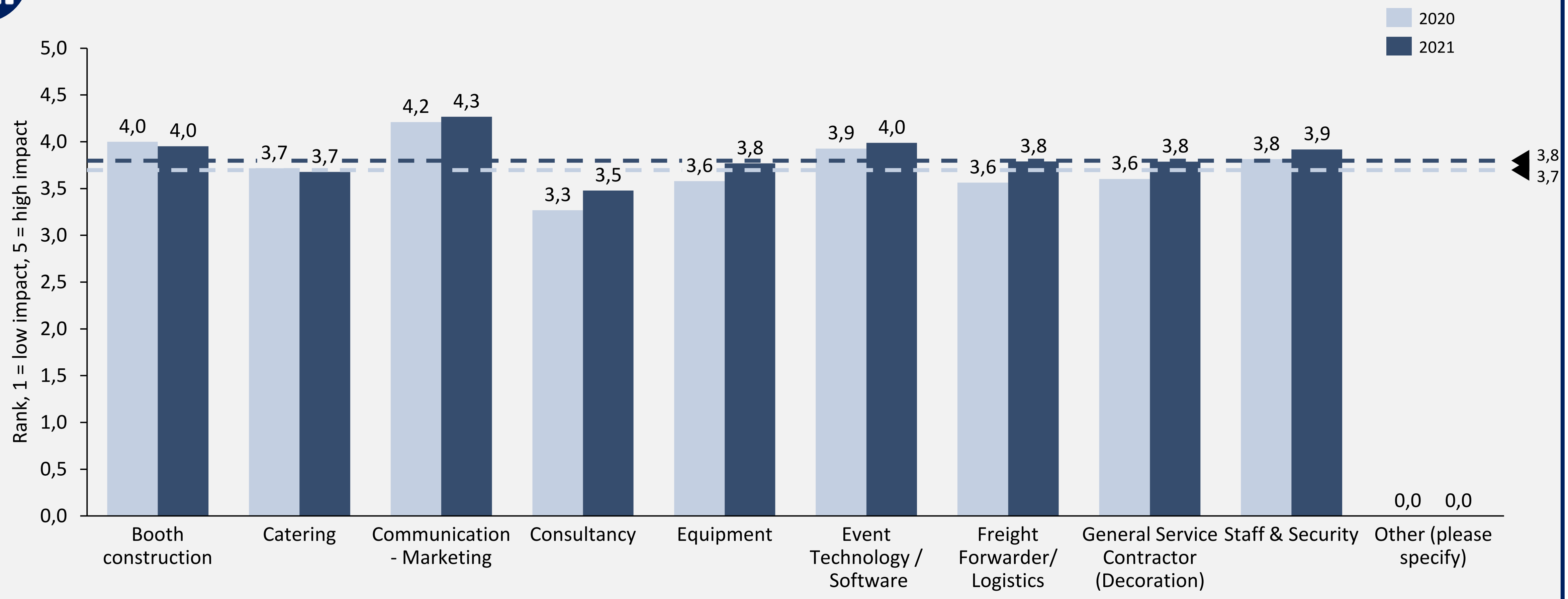
- In general, there has been a small increase in the perceived value of services on the success of events
- Although booth construction is relied upon most frequently, it is not considered the most relevant factor for overall event success
- Communication and marketing is still regarded as the most important element for event success, which could be linked to the ability to track the success of marketing activities more effectively than other services. These services are also the biggest contributors to ensuring event participation
- Consultants are perceived to have the lowest impact on event success, suggesting that the overall quality of consultancy services, and those providing these services, within the industry may be too inconsistent. Still, there is a significant increase in the perceived value of consultants amongst pure venue owners, especially in countries in the Asia-Pacific region
- The perceived impact of services on event success is relatively homogeneous, suggesting that a successful event requires a wide array of services
- Although the use of services varies greatly between industry functions and geographic regions, the perceived impact is regarded similarly between these groups

Question 3

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

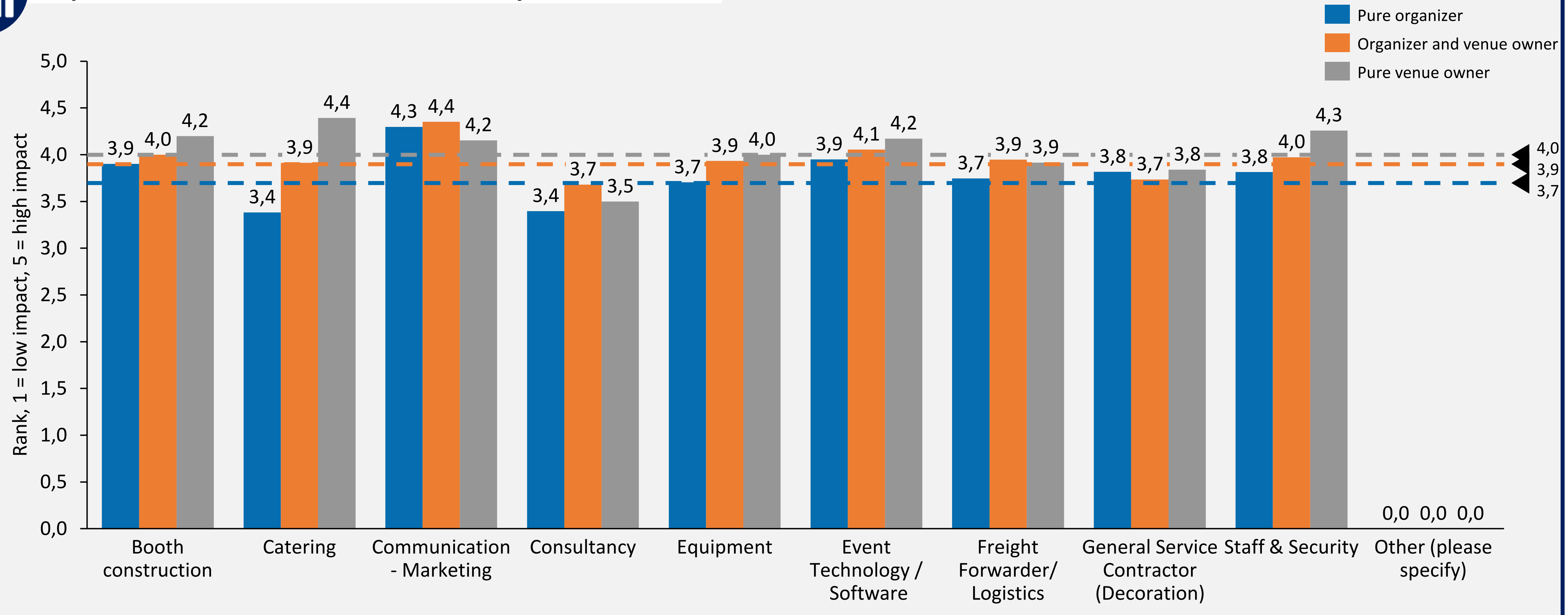
The impact on services on the overall business remains relatively constant

Impact of services on overall business, across all survey participants, 2020 – 2021



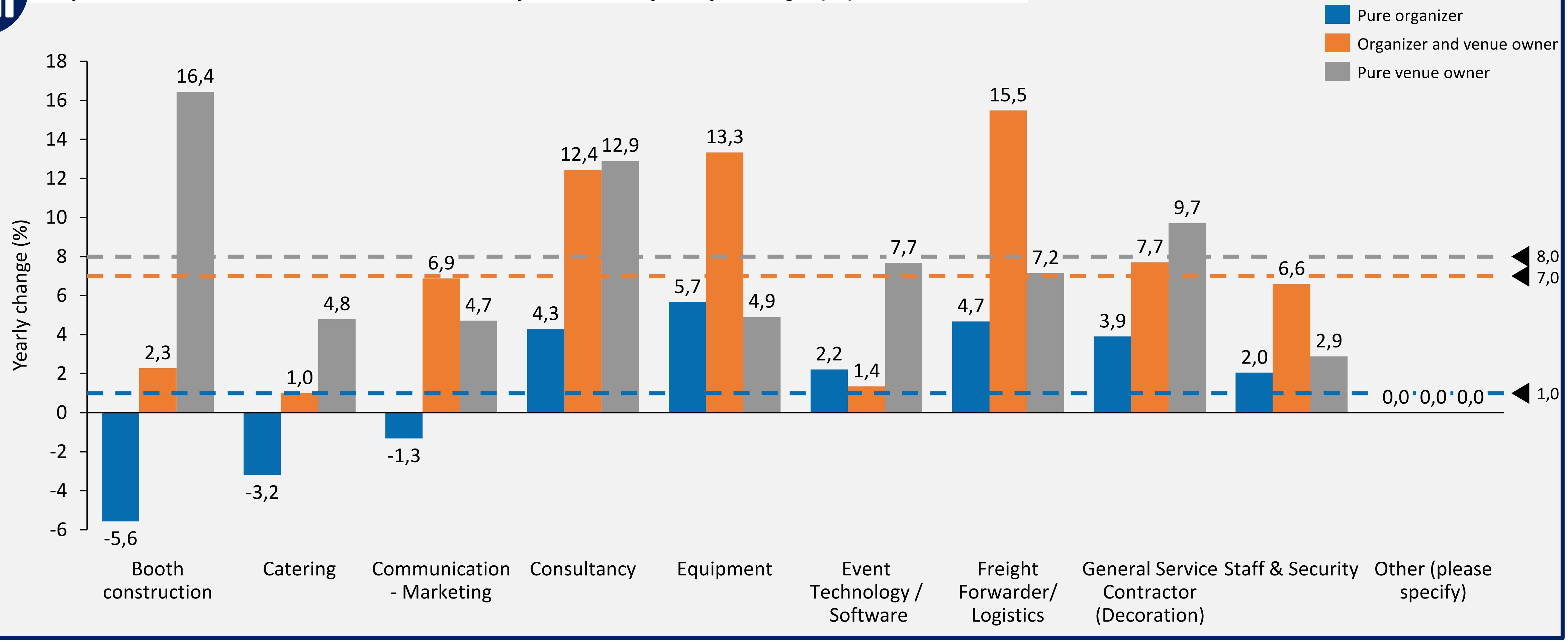
Pure organizers note the lowest perceived impact of service providers on the overall business

Impact of services on overall business, by function, 2021



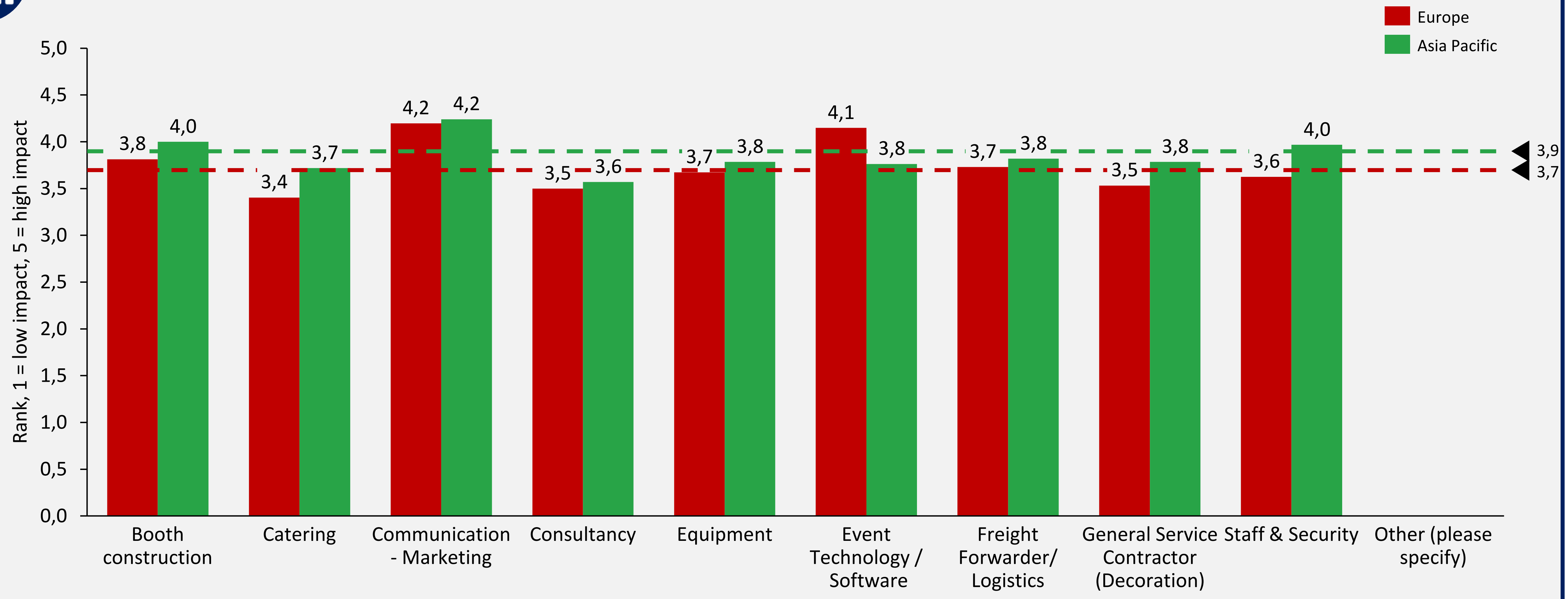
Venue owners (both pure and organizing venue owners) perceive the most value from service providers for the overall business

Impact of services on overall business, by function, yearly change (%) 2020 – 2021



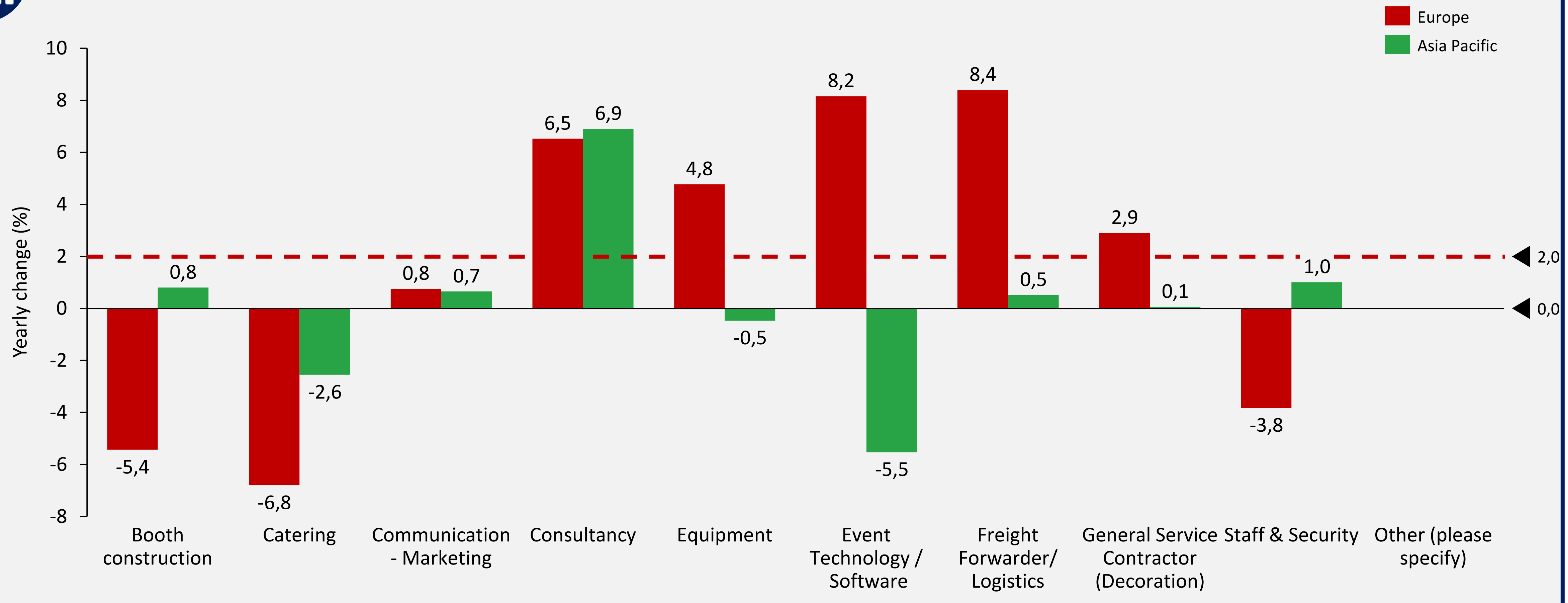
Services for physical events have lost importance

Impact of services on overall business, by region, 2021



The perceived impact of services on the overall business is rising in Europe and is stagnant in Asian Pacific markets

Impact of services on overall business, by region, yearly change (%) 2020 - 2021



Question 3 – Key takeaways

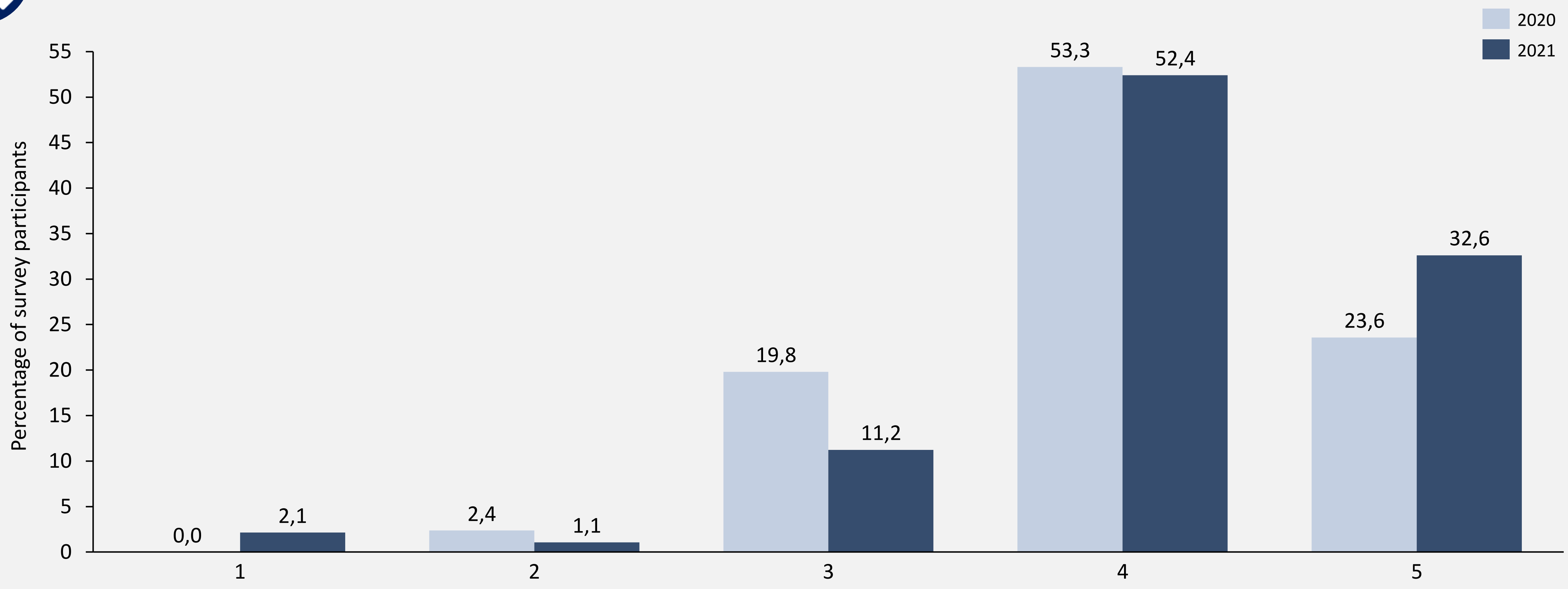
- The perceived importance of service providers to overall business success is marginally lower than their importance to event success, but this has marginally increased over the last year
- As with their impact on event success, the perceived impact of services on overall business success is relatively homogeneous
- Consultancy services are still regarded as the least significant element to overall business success, yet they have experienced a considerable increase over the last year
- This perceived importance holds true across different industry functions and geographic regions

Question 4

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

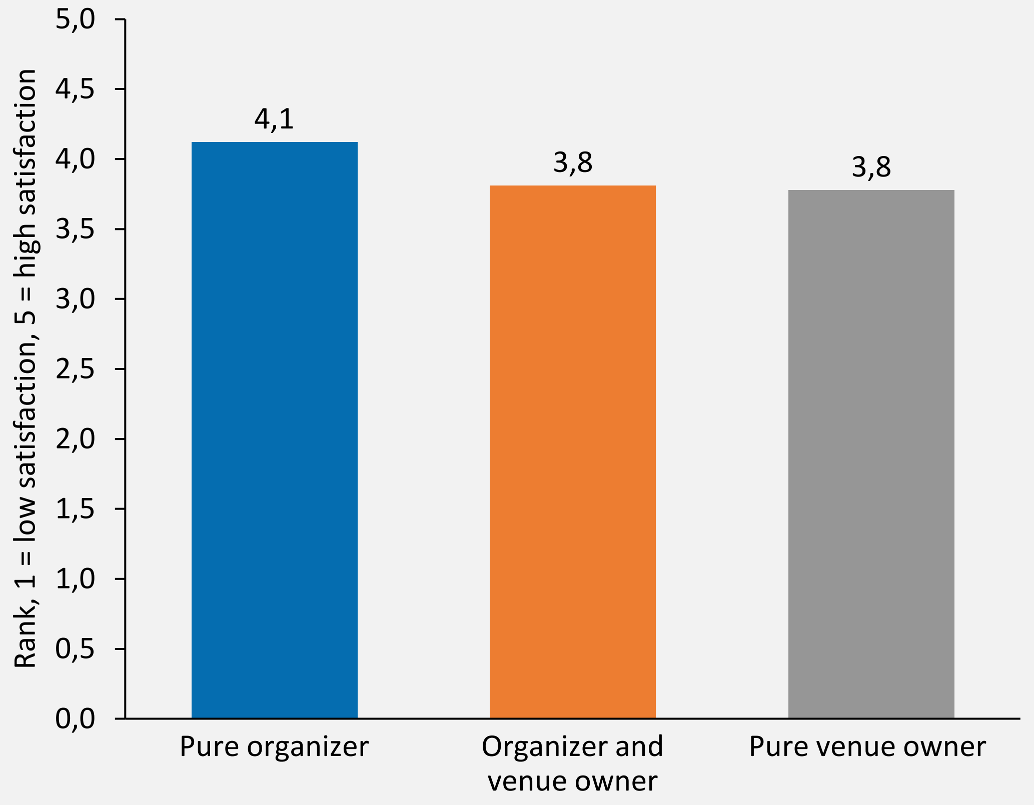
On average, the satisfaction with top service providers has increased

Satisfaction with top service provider, across all survey participants, 2020 – 2021

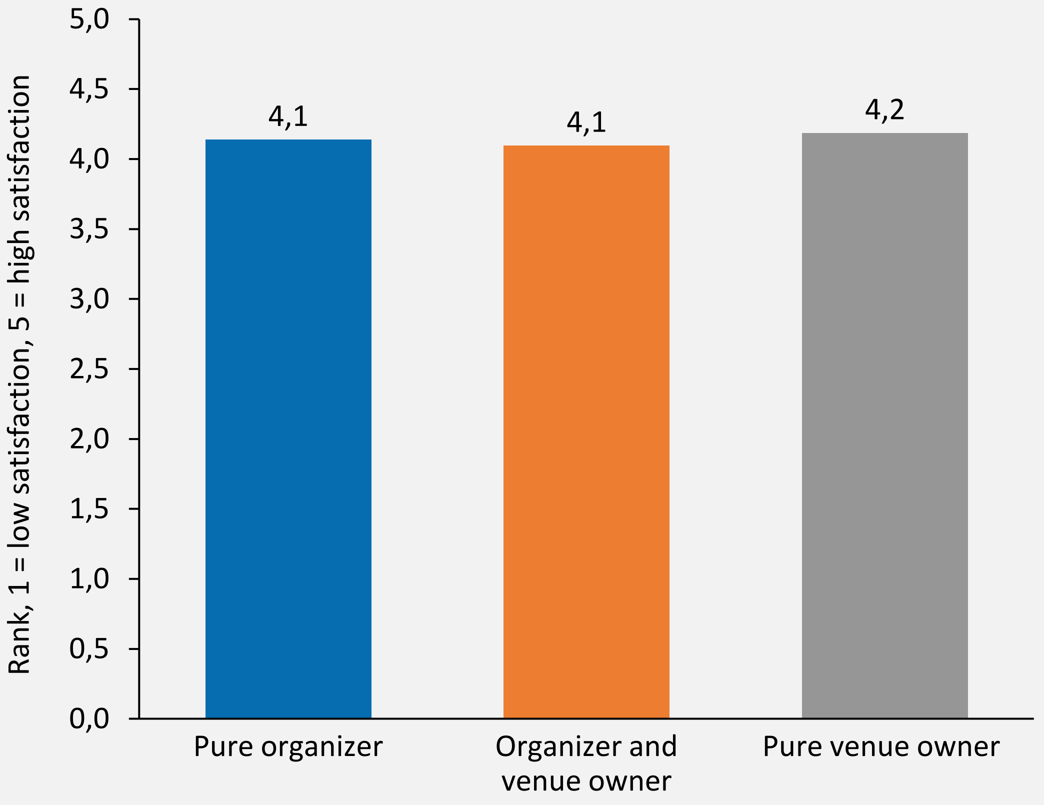


The satisfaction with top service providers has increased most on the behalf of pure venue owners

Satisfaction with top service provider, by function, 2021



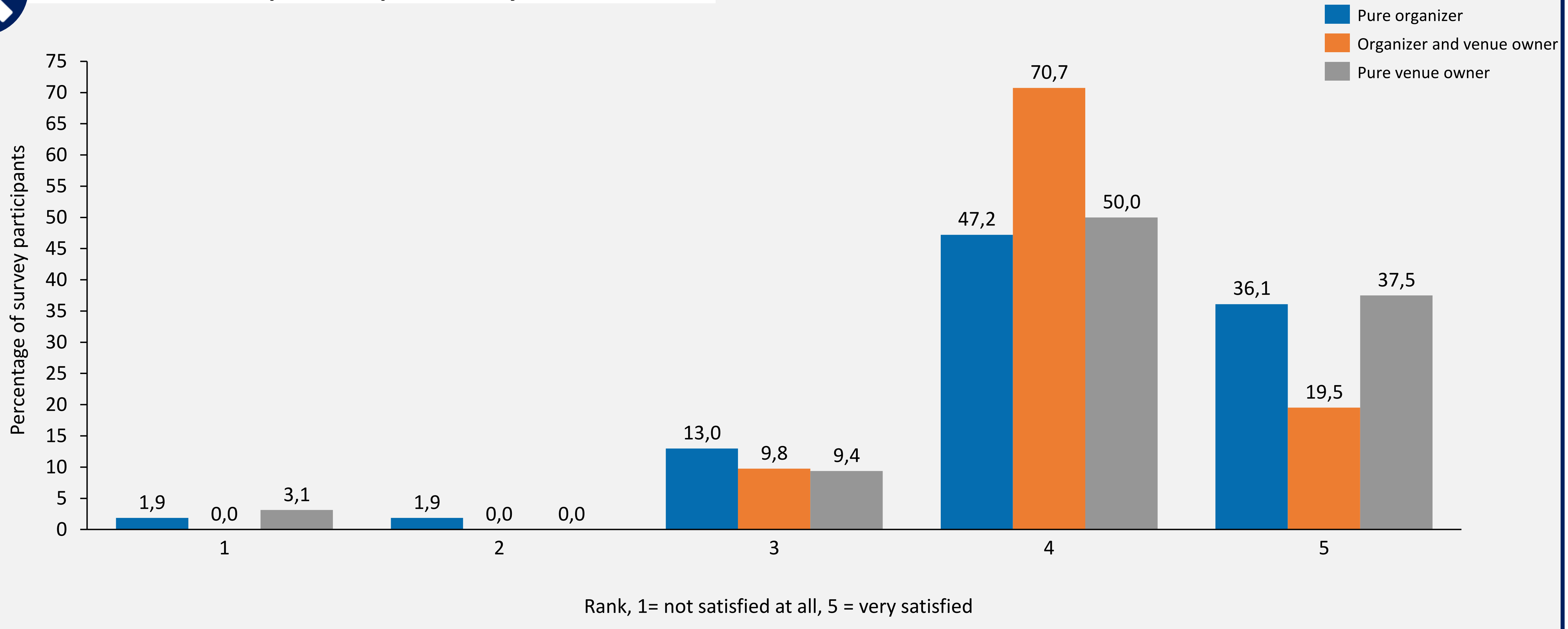
Satisfaction with top service provider, by function, 2022



Pure organizers have the most survey respondents which are unsatisfied with their top service provider

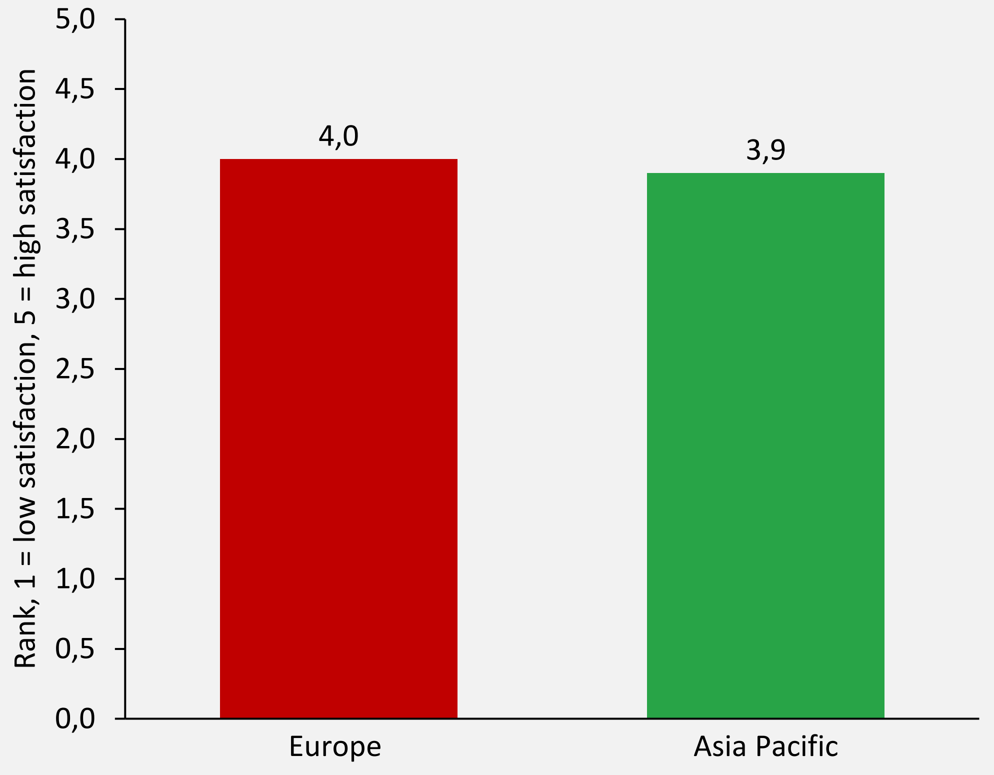
The Global Association of the Exhibition Industry

Satisfaction with top service provider, by function, 2021

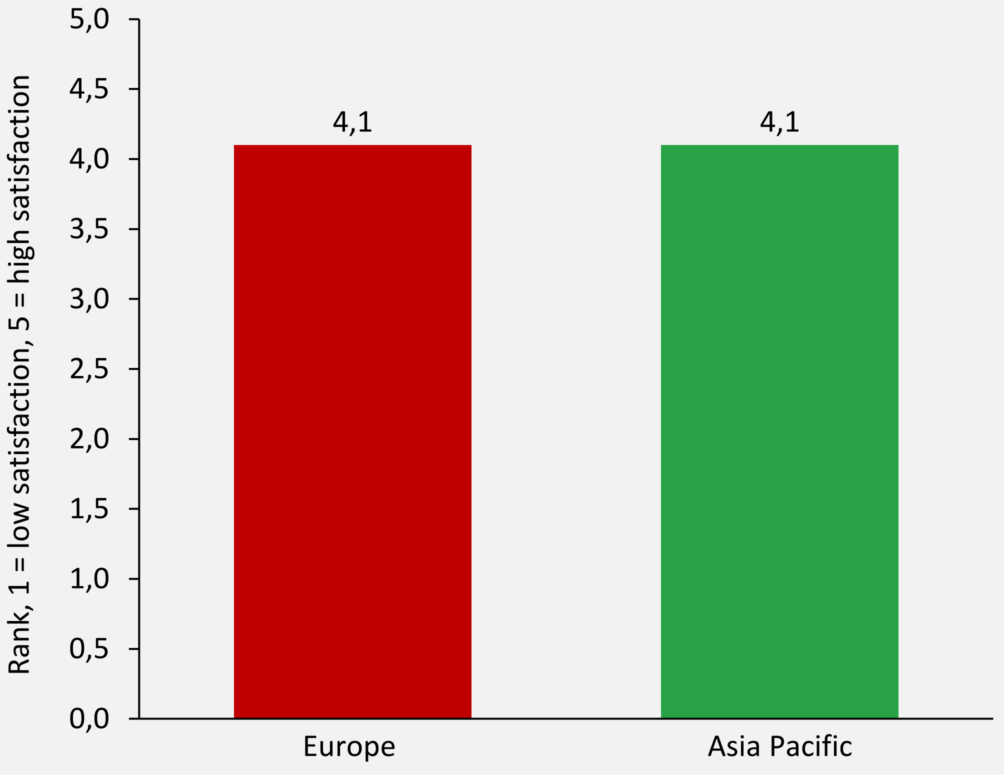


Satisfaction levels with top service providers are converging between regions

Satisfaction with top service provider, by region, 2021



Satisfaction with top service provider, by region, 2022



Question 4 – Key takeaways

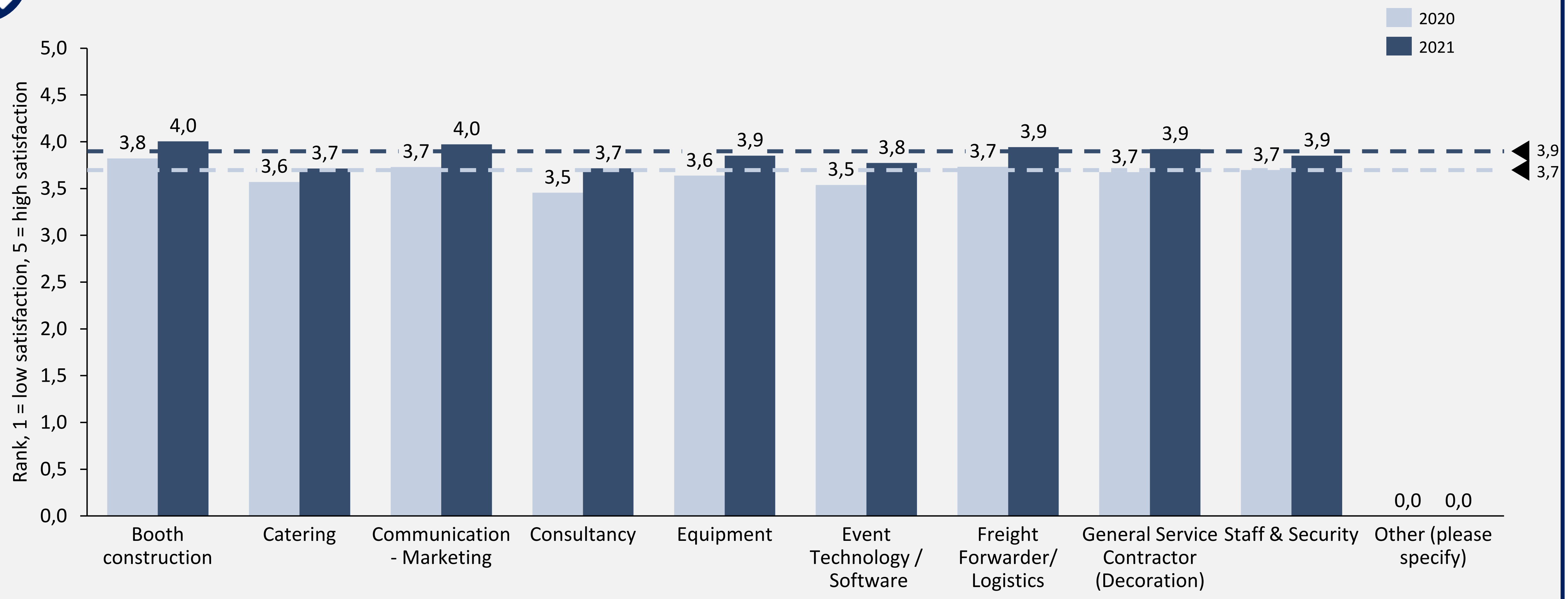
- Overall satisfaction rate with the most relevant service provider is very positive at 85%, with a score of between four and five (a 5% point increase on the previous year)
- Approximately 32% of all survey respondents evaluate their most relevant service provider at the highest rating (a 7% point increase on the previous year)
- Still, there is an increase in the number of respondents who are completely unsatisfied with their top service provider (now at 2.1%, compared to 0% the previous year)
- Venue owners that organise their own events are, on average, slightly less satisfied with their top service provider than other target groups

Question 5

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

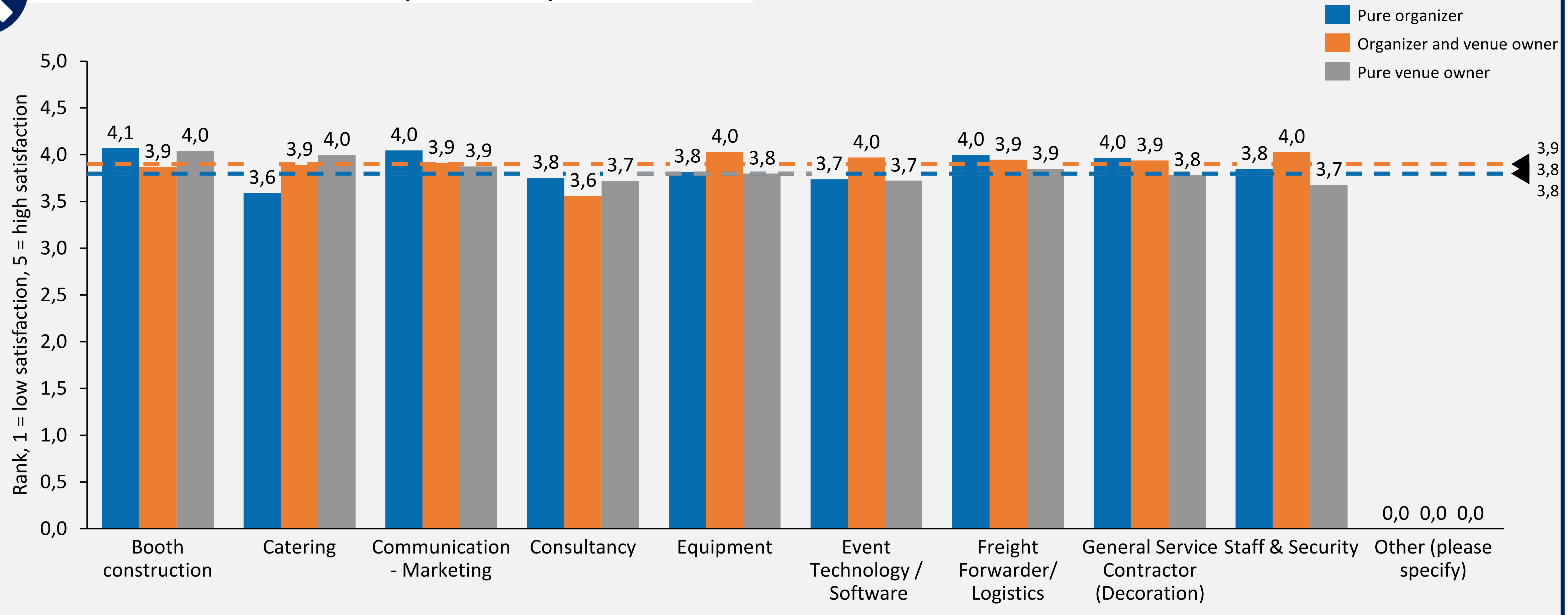
Satisfaction levels with other service providers are also increasing

Satisfaction with other service providers, across all survey participants, 2020 – 2021



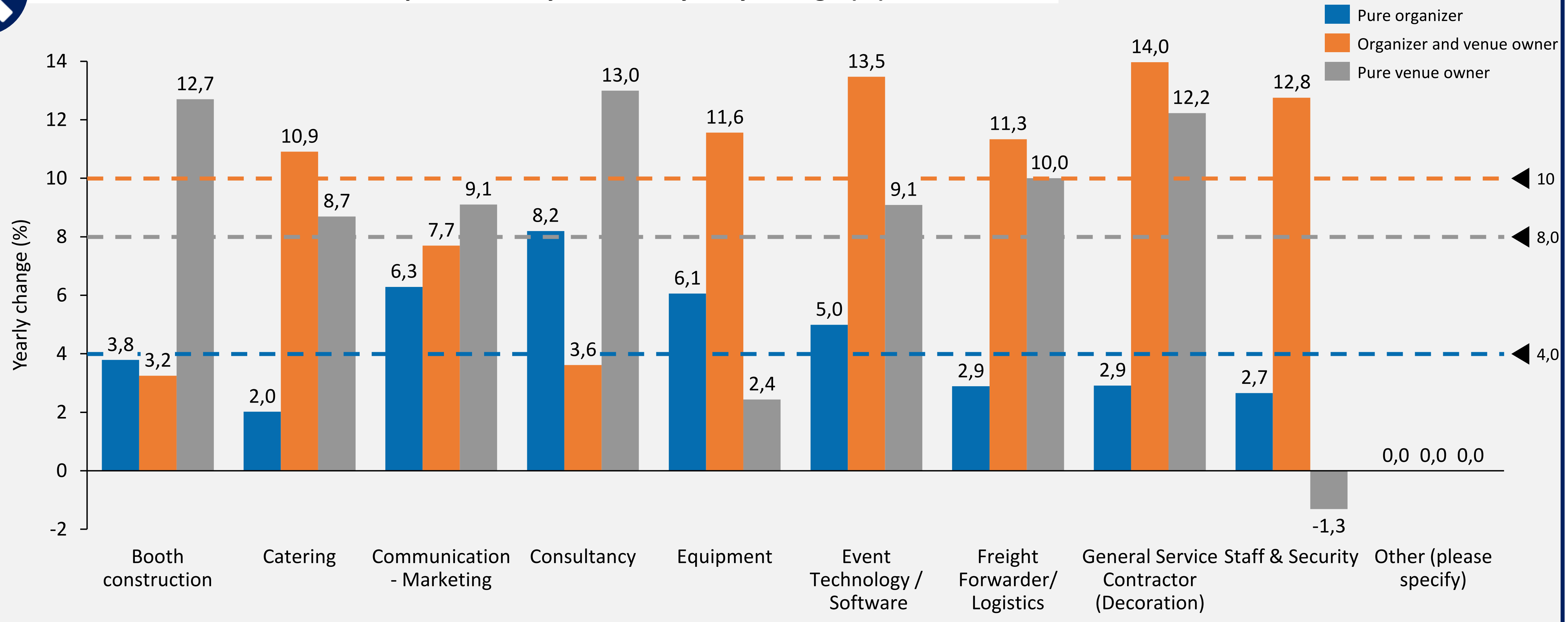
Satisfaction levels with other service providers are fairly constant between the survey groups and also the services themselves

Satisfaction with other service providers, by function, 2021



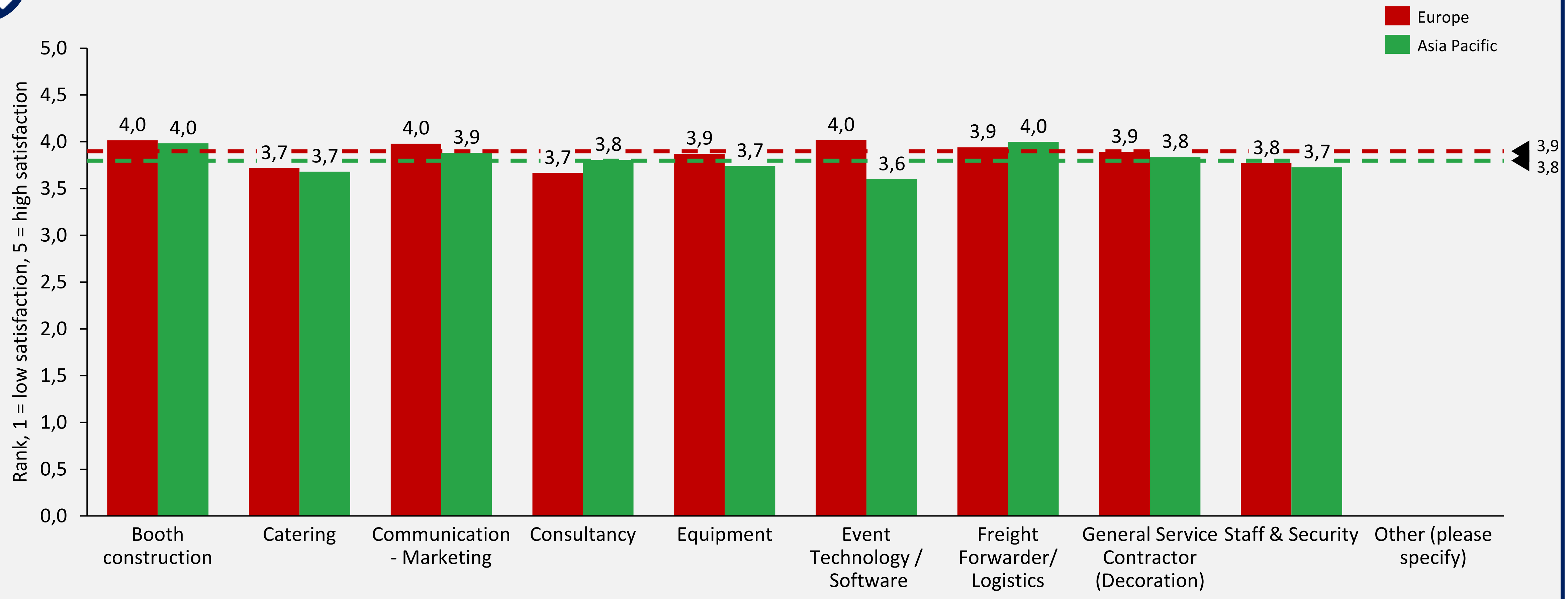
Satisfaction levels with other service providers has increased most within the organizing and venue owning survey group

Satisfaction with other service providers, by function, yearly change (%) 2020 – 2021



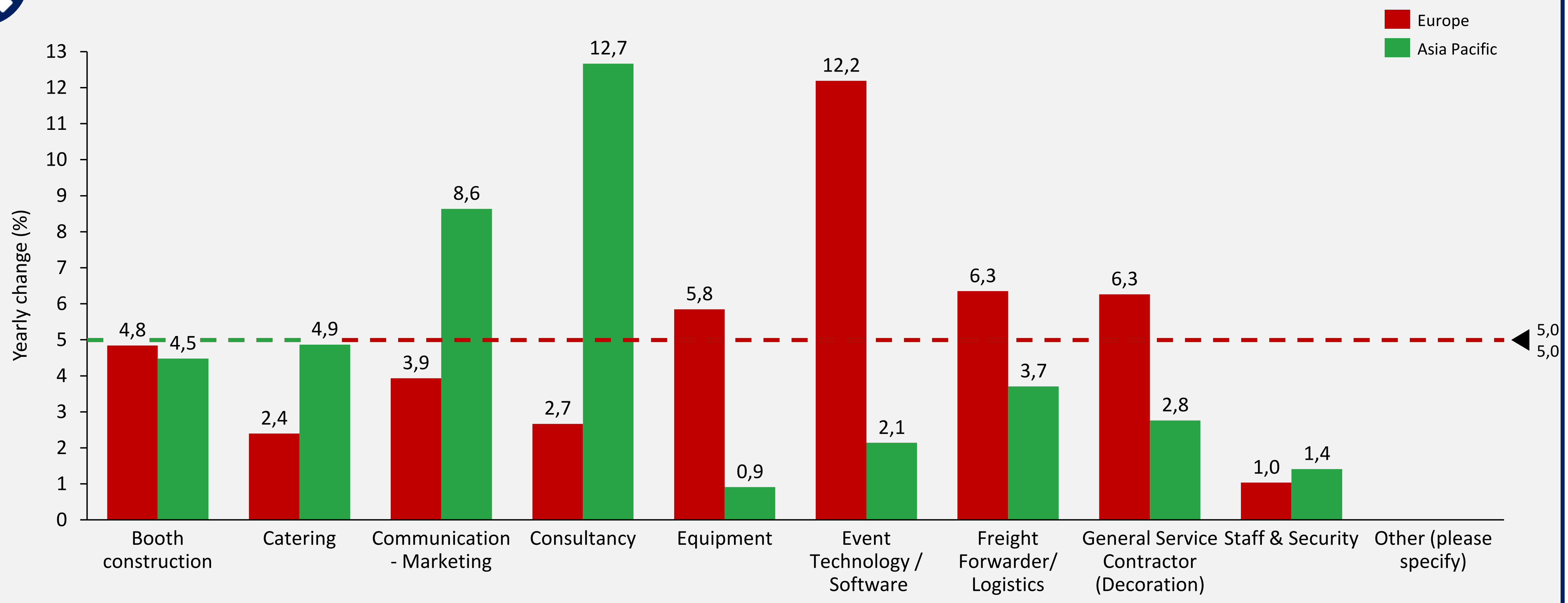
Satisfaction levels with other service providers are fairly identical between regions

Satisfaction with other service providers, by region, 2021



Both regions experience a similar overall increase in satisfaction levels, the services for which satisfaction has risen the most vary significantly

Satisfaction with other service providers, by region, yearly change (%) 2020 - 2021



Question 5 – Key takeaways

- Overall relationship satisfaction with other service providers remains relatively high, and there is an even spread across the different service categories
- There are no significant differences between industry functions
- In Europe, the biggest increase in relationship satisfaction has been driven by event technology service providers, whilst in the Asia-Pacific region, this increase has been driven by consultants

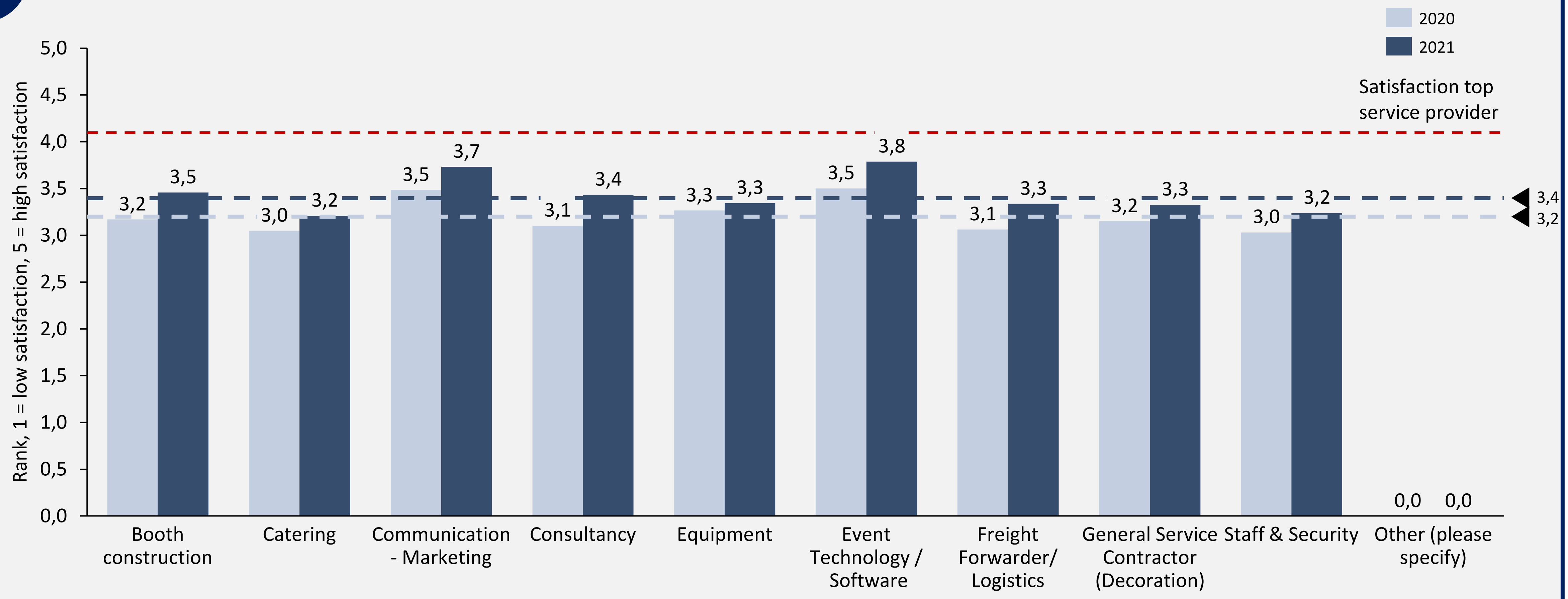
Question 6

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

Satisfaction w.r.t. innovation from service providers has increased slightly, however still falls far behind overall satisfaction levels

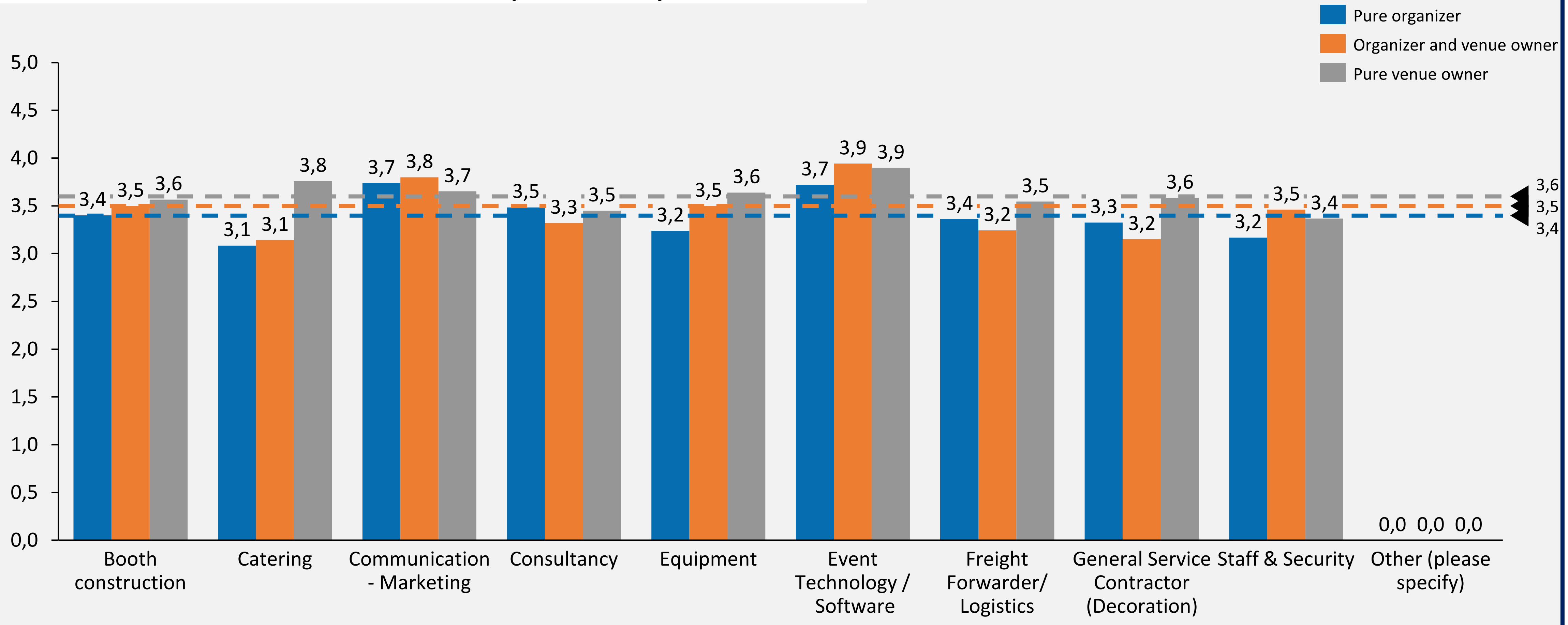
The Global Association of the Exhibition Industry

Satisfaction with innovation from service providers, across all survey participants, 2020 – 2021



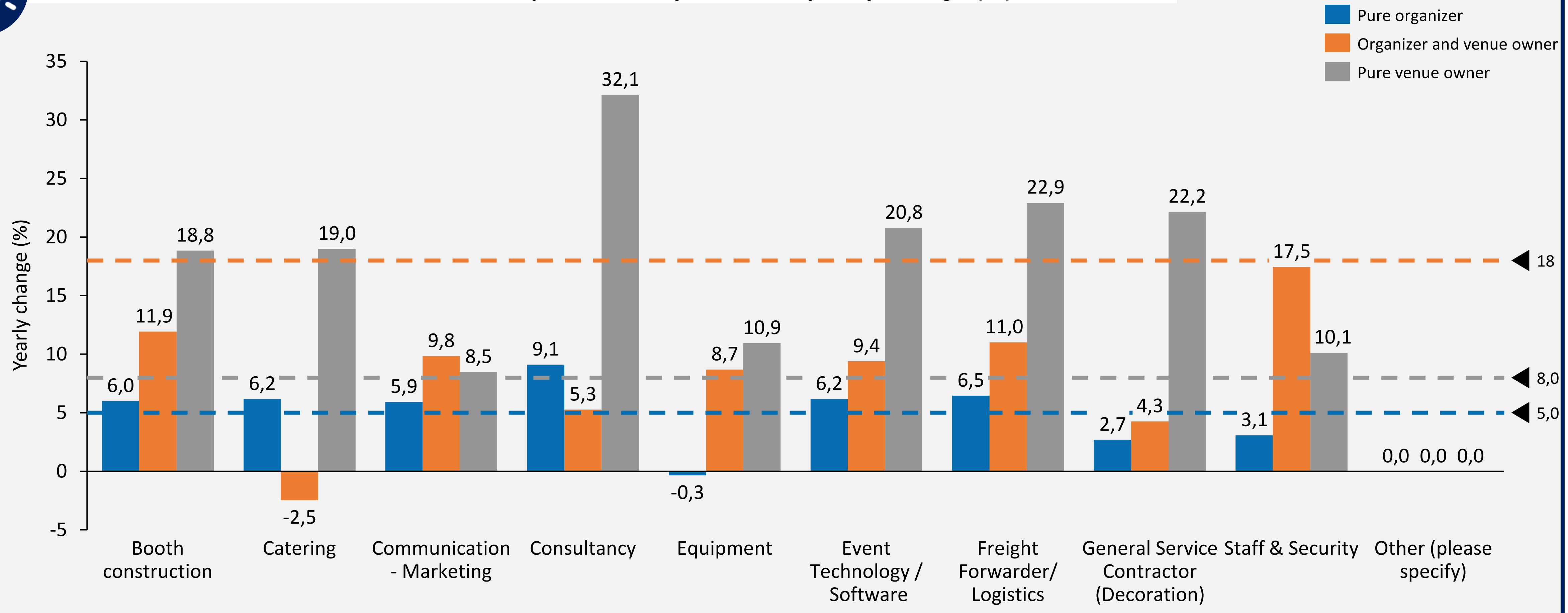
Satisfaction levels with regards to innovation are similar between different target groups

Satisfaction with innovation from service providers, by function, 2021



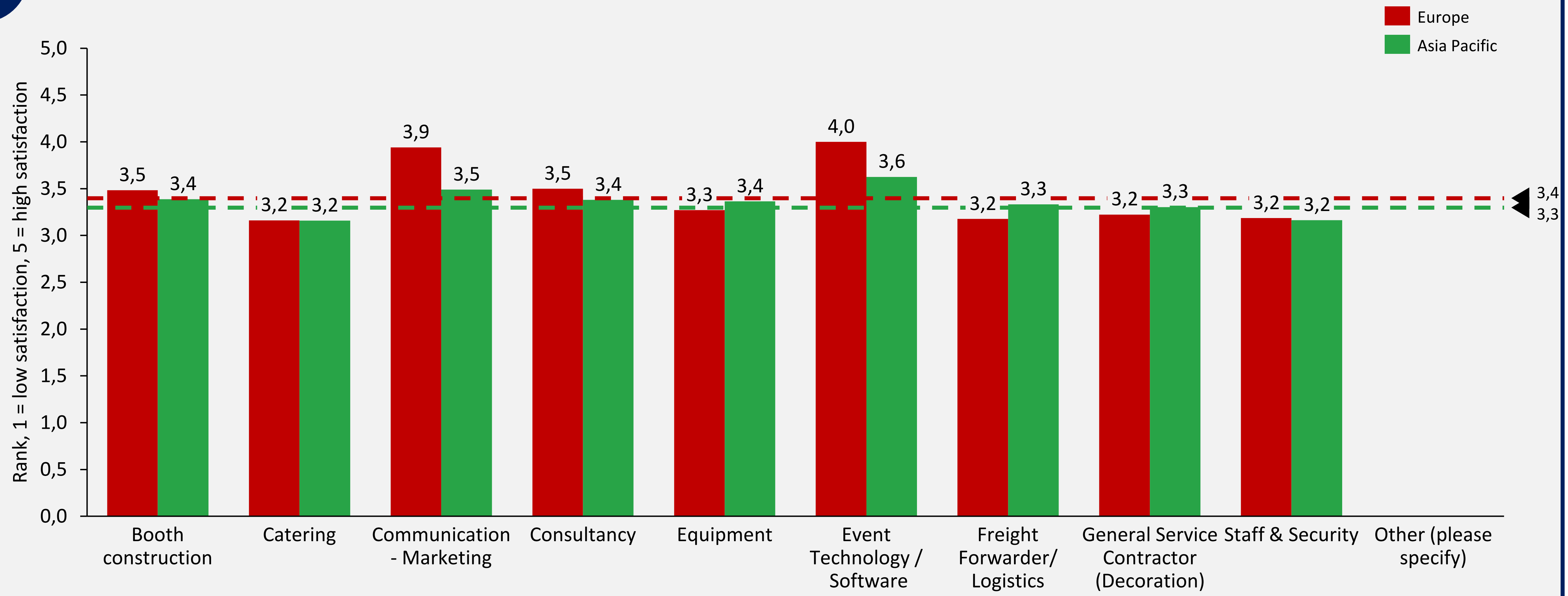
Especially pure venue owners display a significant increase in satisfaction w.r.t. innovation from consultants

Satisfaction with innovation from service providers, by function, yearly change (%) 2020 – 2021



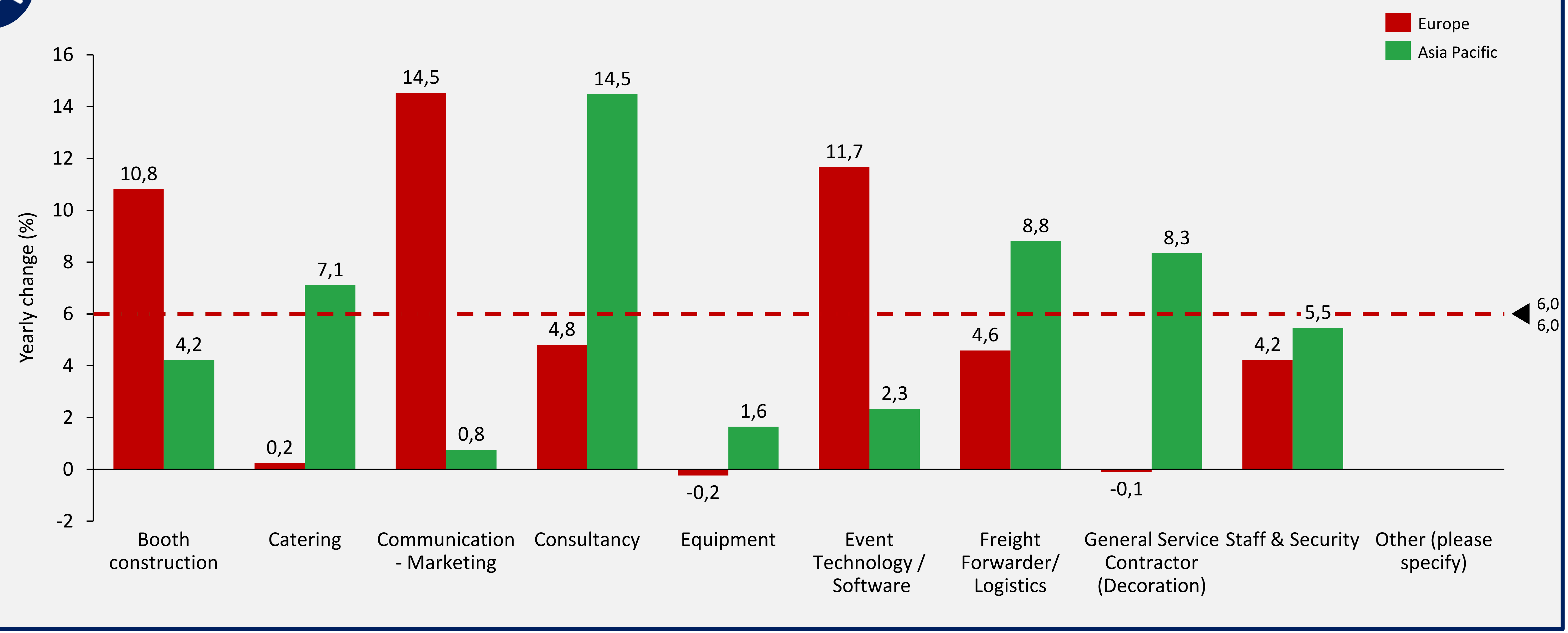
Satisfaction levels with regards to innovation are fairly identical between regions

Satisfaction with innovation from service providers, by region, 2021



Both regions display similar increases in satisfaction levels with regards to innovation

Satisfaction with innovation from service providers, by region, yearly change (%) 2020 - 2021



Question 6 – Key takeaways

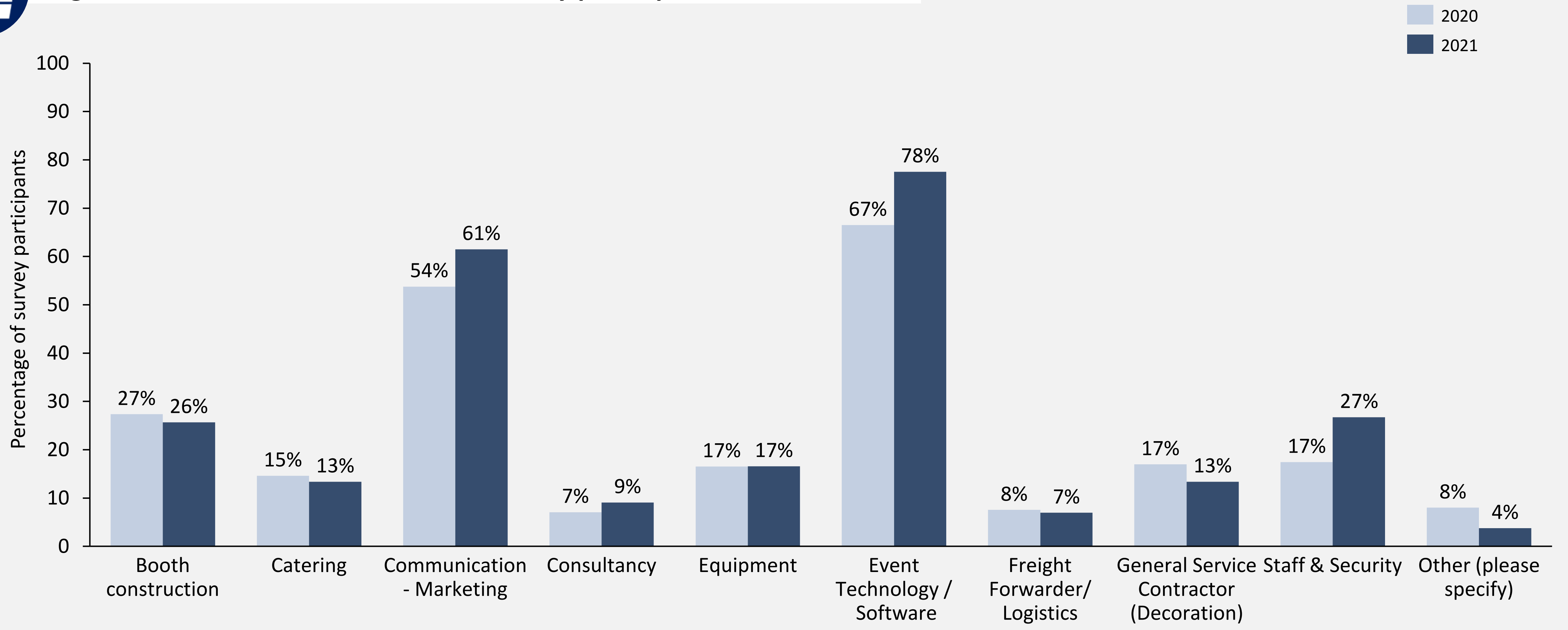
- Overall satisfaction with regard to innovation from service providers remains lower than overall satisfaction with top service provider and other service providers, yet continues to increase
- This suggests that there is high demand for more innovation from service providers
- Communication and marketing service providers are perceived to be the most innovative
- Consultants are perceived to be more innovative than before, especially amongst pure venue owners
- Differences between industry functions and geographic regions are marginal

Question 7

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

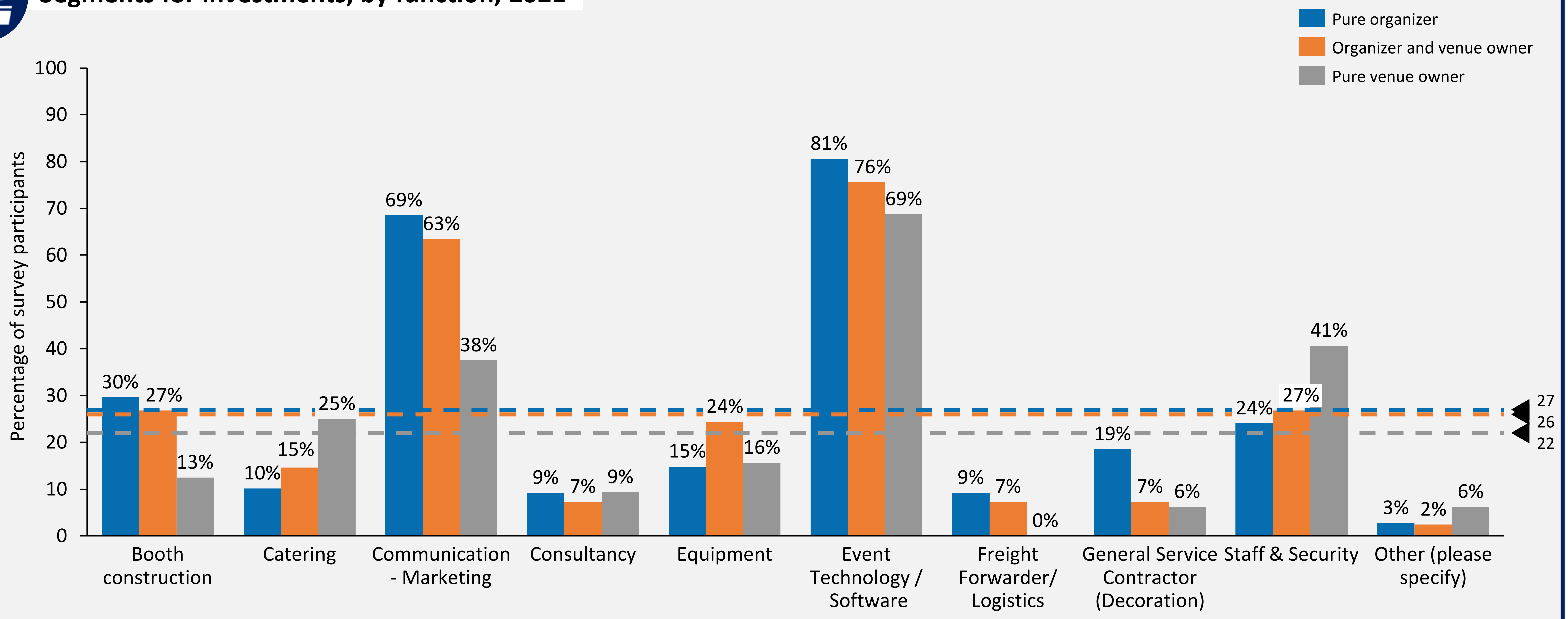
Event technology remains the largest area for future investments

Segments for investments, across all survey participants, 2020 – 2021



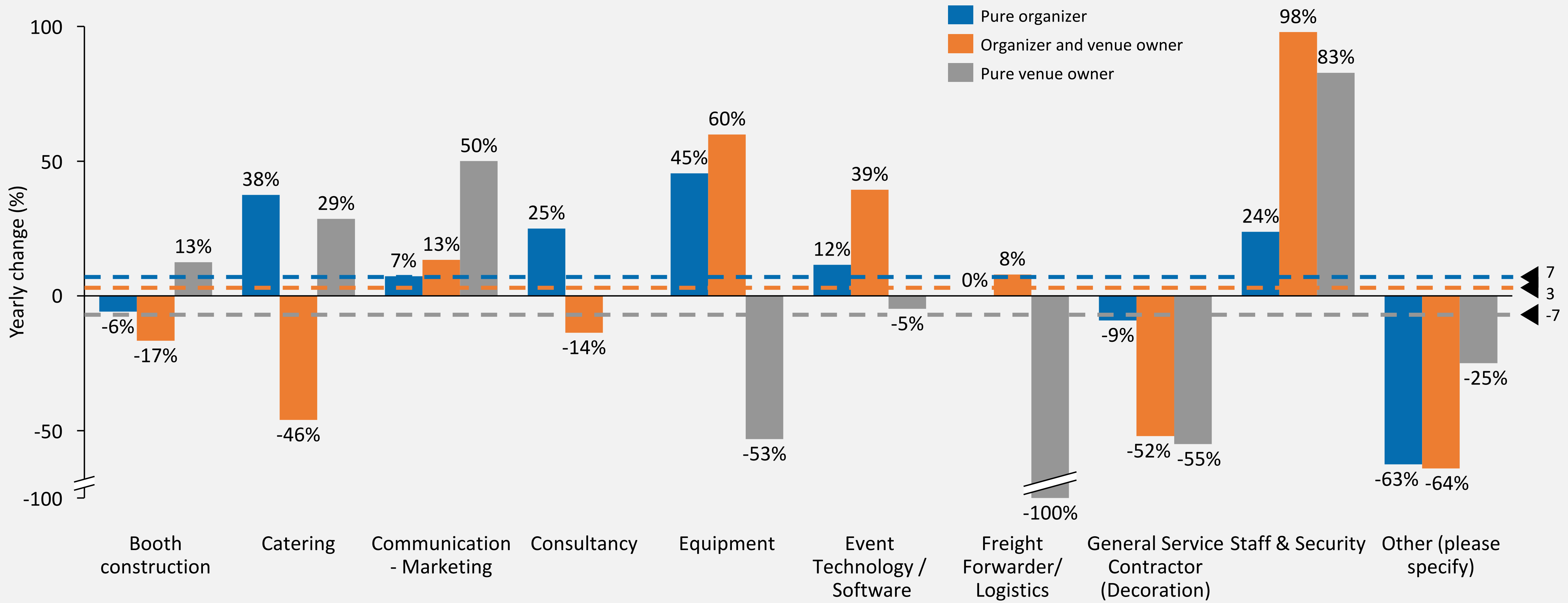
Across all target groups event technology remains the field with the most potential for investments

Segments for investments, by function, 2021



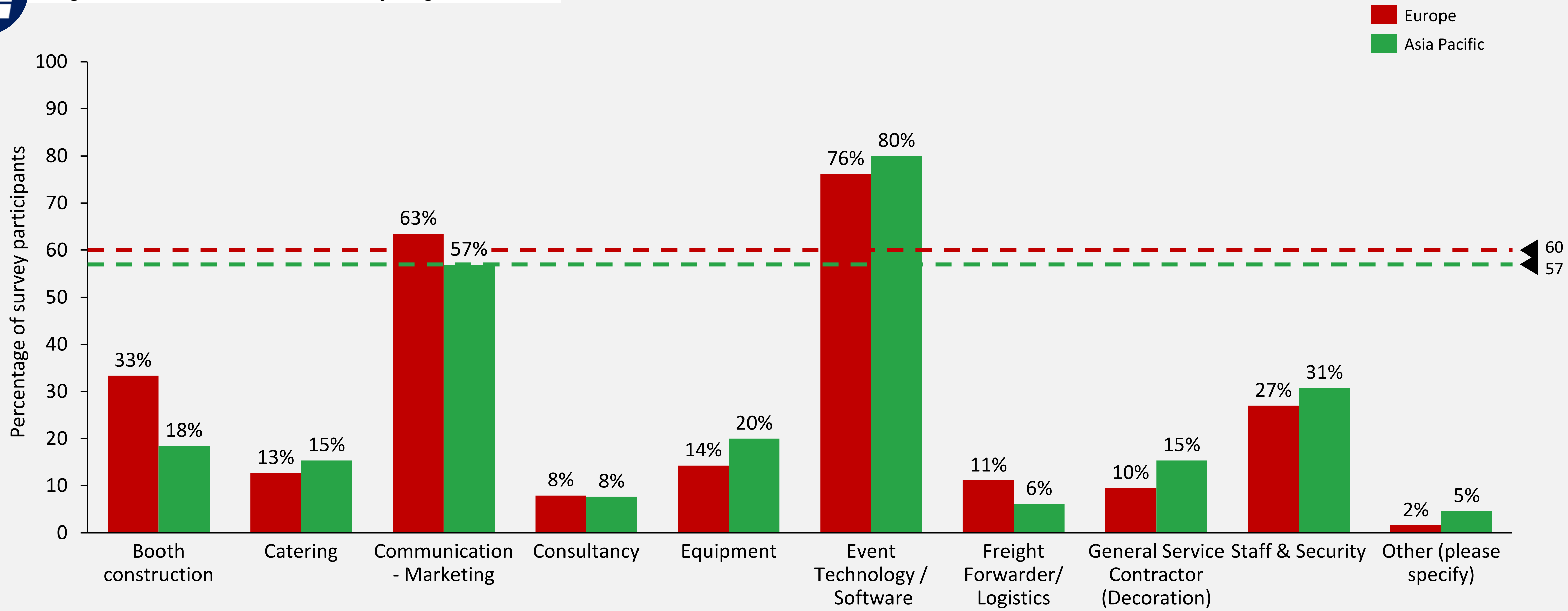
Pure venue owners, however, display a small decrease in the potential for investments in event technology services

Segments for investments, by function, yearly change (%) 2020 - 2021



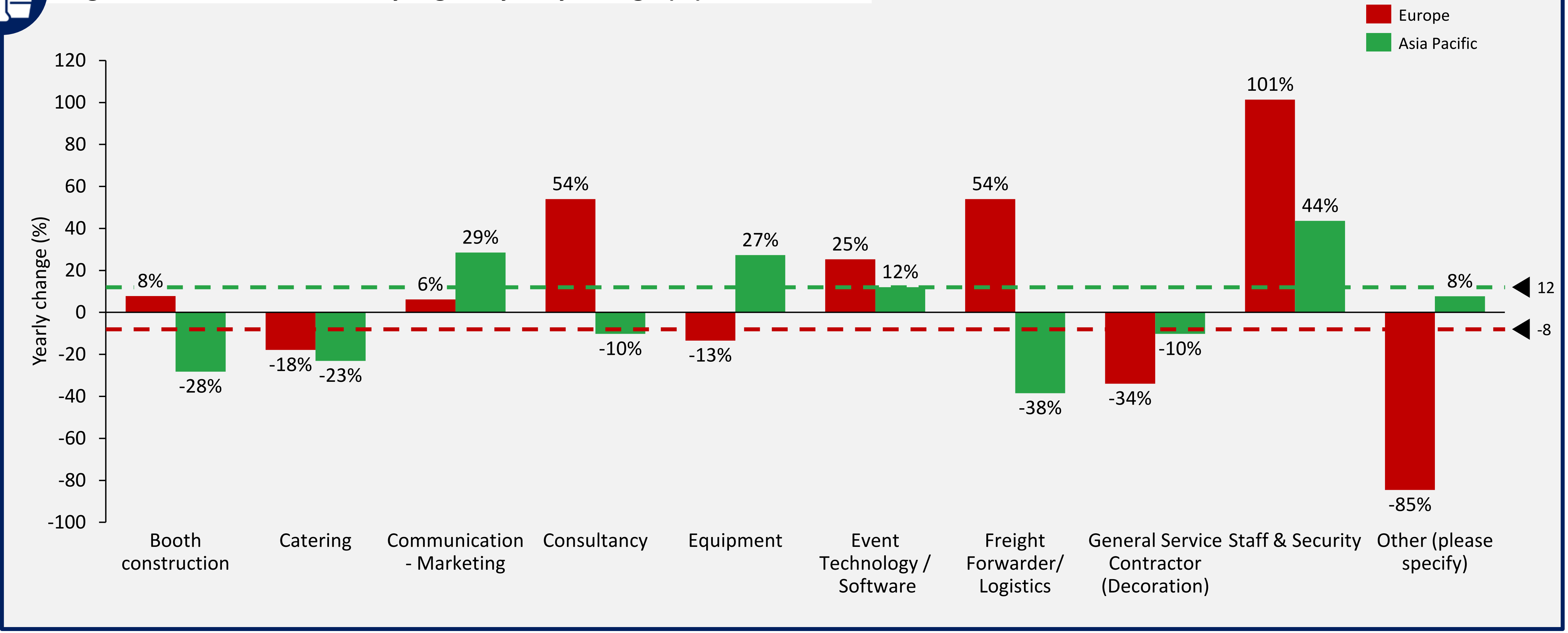
The potentials for investments into services are similar between regions

Segments for investments, by region, 2021



European countries display a decrease in potential for investments, whilst Asian Pacific countries display an increased potential

Segments for investments, by region, yearly change (%) 2020 - 2021



Question 7 – Key takeaways

- Service areas that are perceived to have the biggest impact in terms of future event development are marketing and communications, and event technology and software, with the value attributed to these areas increasing over the year; other service areas are seen as having minimal impact in terms of future event development
- Consultants are perceived to have a marginal impact on the future development of events
- Respondents in the Asia-Pacific place a larger emphasis on event technology and software than their counterparts in Europe, who place a greater emphasis on marketing and communications

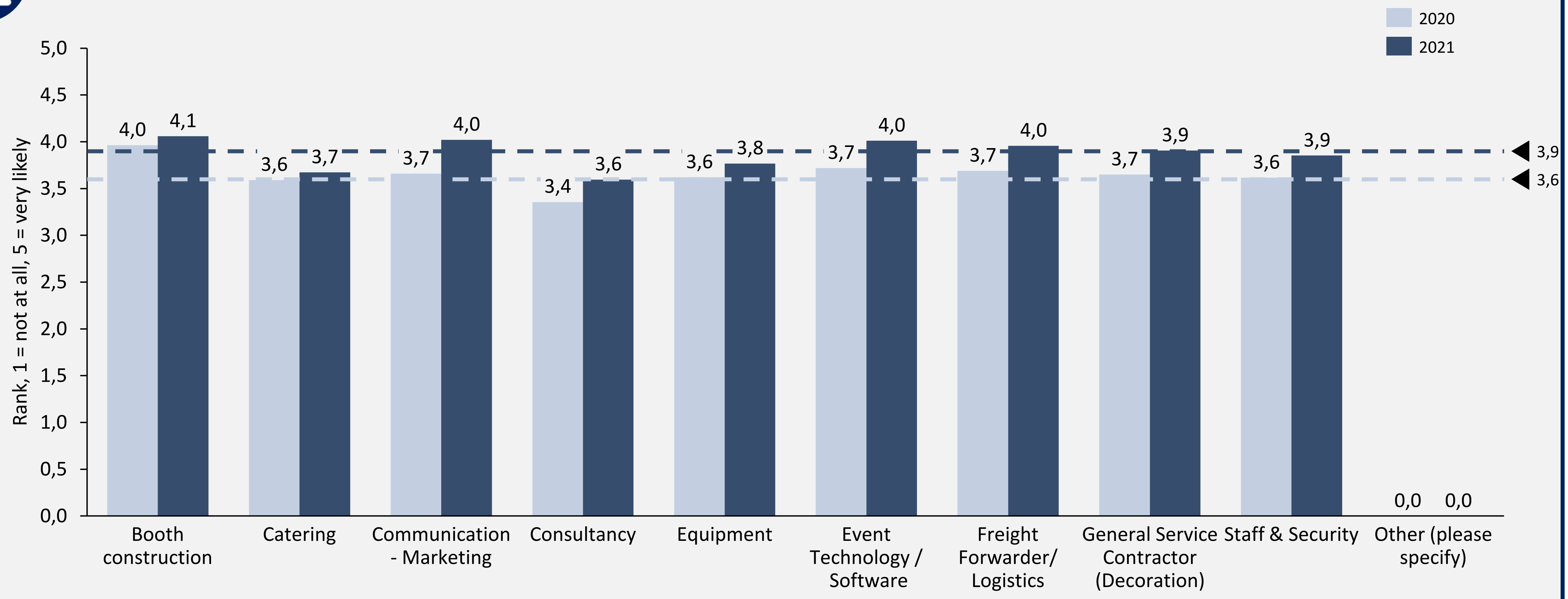
Question 8

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

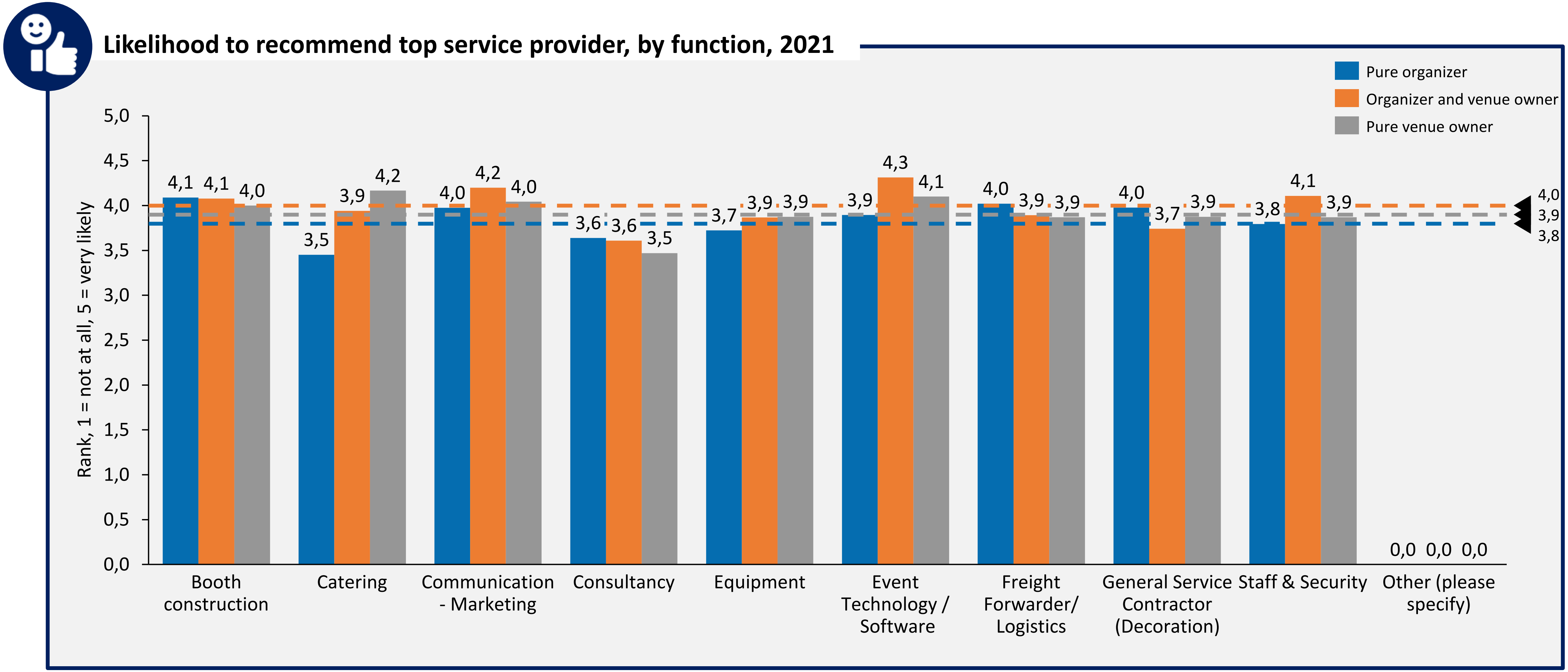
The likelihood to recommend the top service providers has increased over the last year

The Global Association of the Exhibition Industry

Likelihood to recommend top service provider, across all survey participants, 2020 – 2021

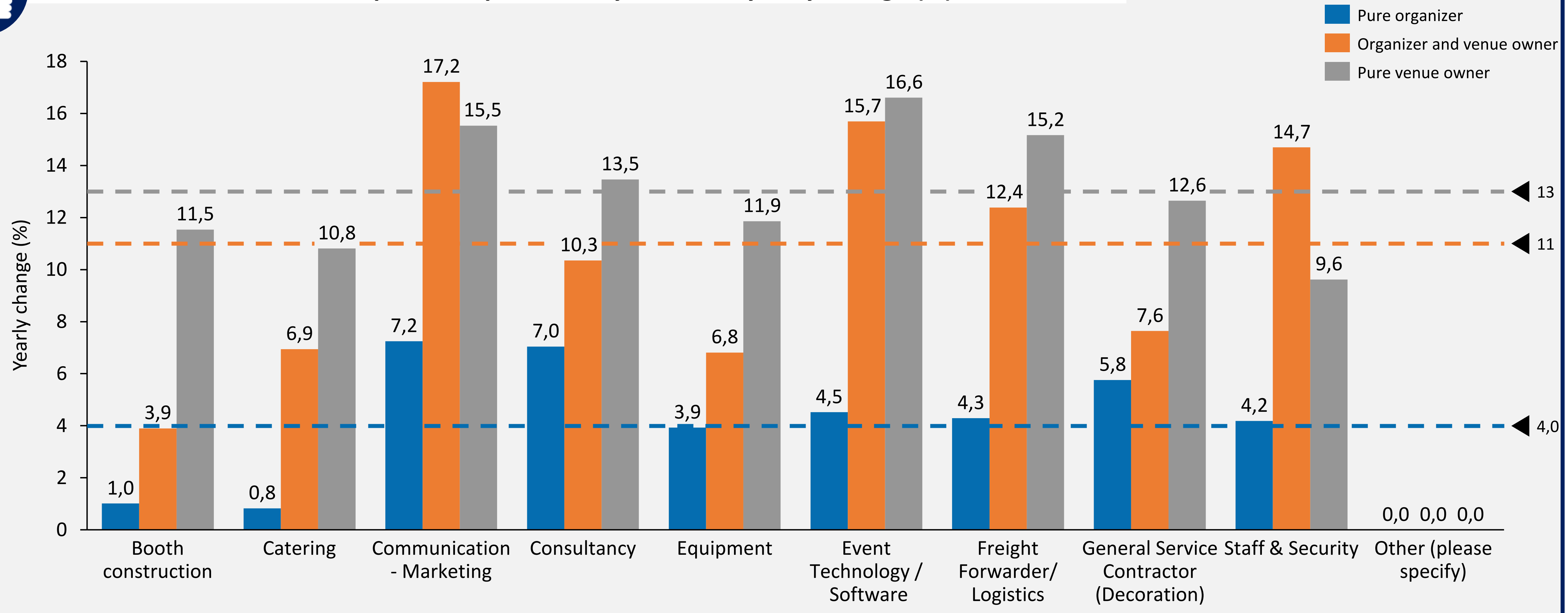


The likelihood to recommend the top service provider is similar between function groups



All target groups display an increase in the likelihood to recommend the top service provider

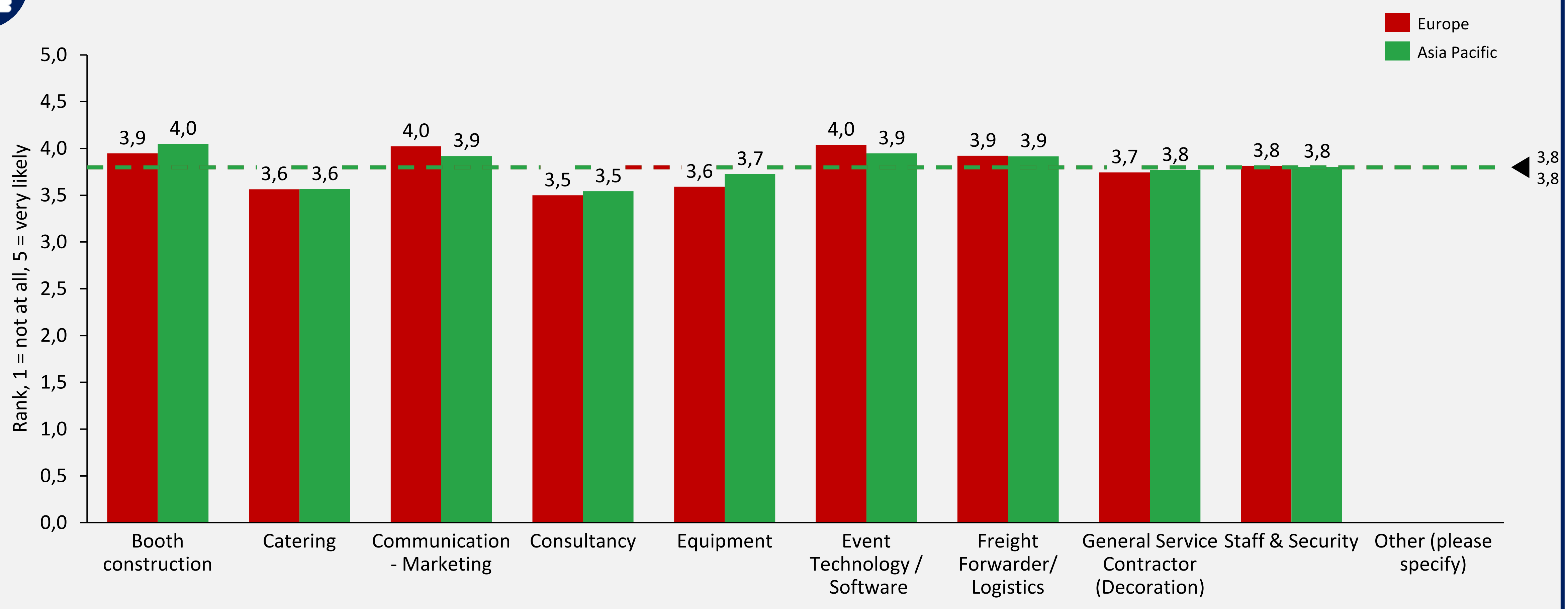
Likelihood to recommend top service provider, by function, yearly change (%) 2020 – 2021



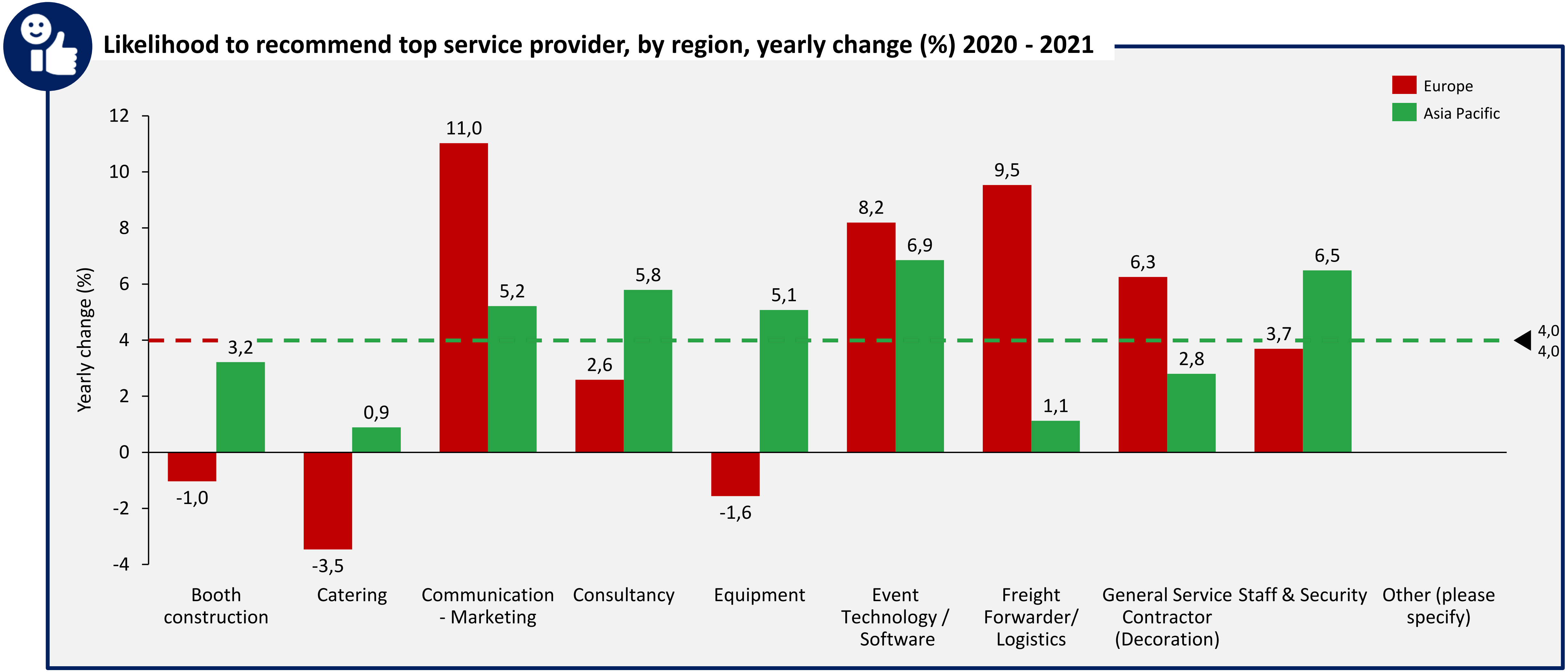
The likelihood to recommend the top service provider is identical between regions

The Global Association of the Exhibition Industry

Likelihood to recommend top service provider, by region, 2021



On average, both regions display the same increase in the likelihood to recommend top service provider



Question 8 – Key takeaways

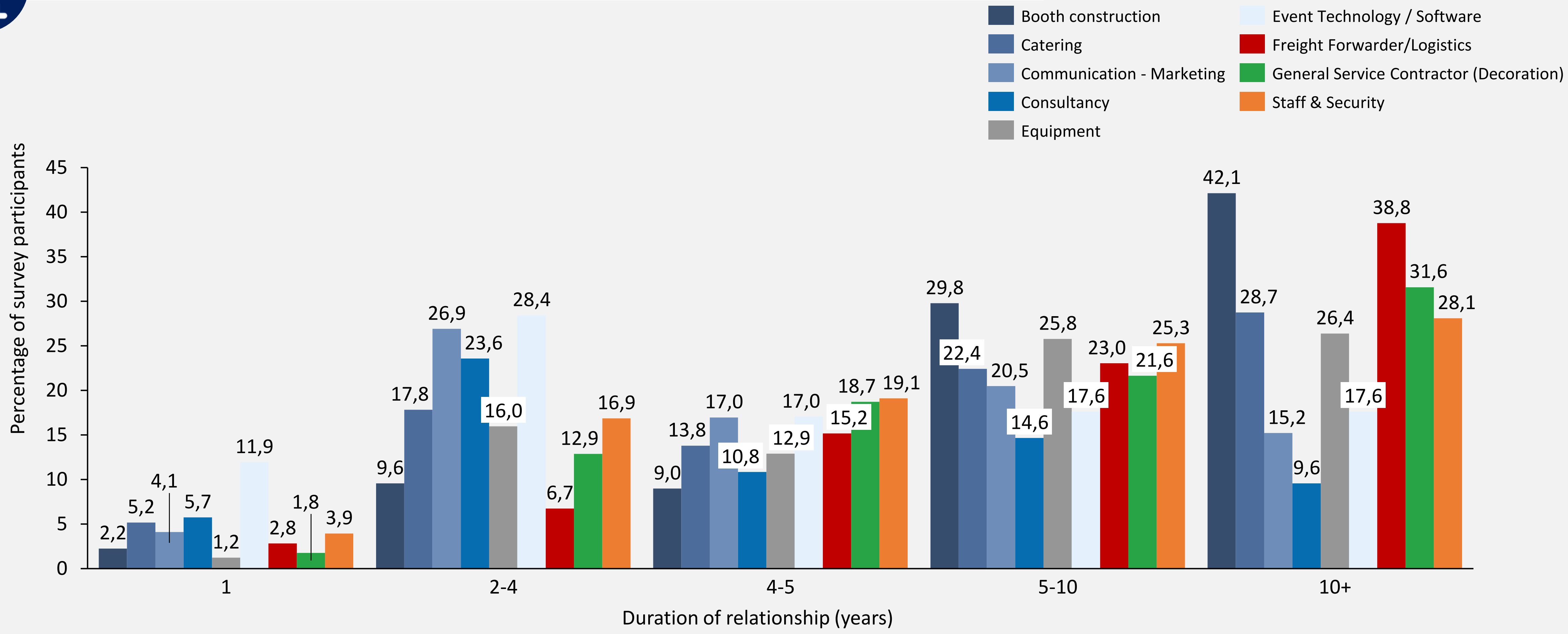
- The likelihood of survey respondents to recommend their most important service provider remains high, and this score has increased from 3.6 to 3.9
- This score is closely linked to the overall satisfaction with the most relevant service provider (which sits at 4.1)
- Companies providing booth construction services are most likely to be recommended, although other services receive similar scores
- Again, consultants are less likely to be recommended than other service providers, which could be an indication of the inconsistent quality levels across different consultancy companies
- There are no significant differences between industry functions and geographic regions

Question 9

***Question 9**: How long (years) do you work with your top industry partner, which is most relevant to the success of your event?*

Companies providing booth construction services enjoy high loyalty from their clients

Duration of relationship to top service provider, across all survey participants, 2021



Question 9 – Key takeaways

- There remains a clear relationship between the duration of cooperation and the value attributed to these cooperations
- Booth construction service providers enjoy the longest cooperation with their clients, followed closely by freight forwarding and logistics
- Despite being a major factor for success, the duration of cooperation between marketing and communications service providers and their clients is relatively short, suggesting that clients are prone to switching service providers more frequently

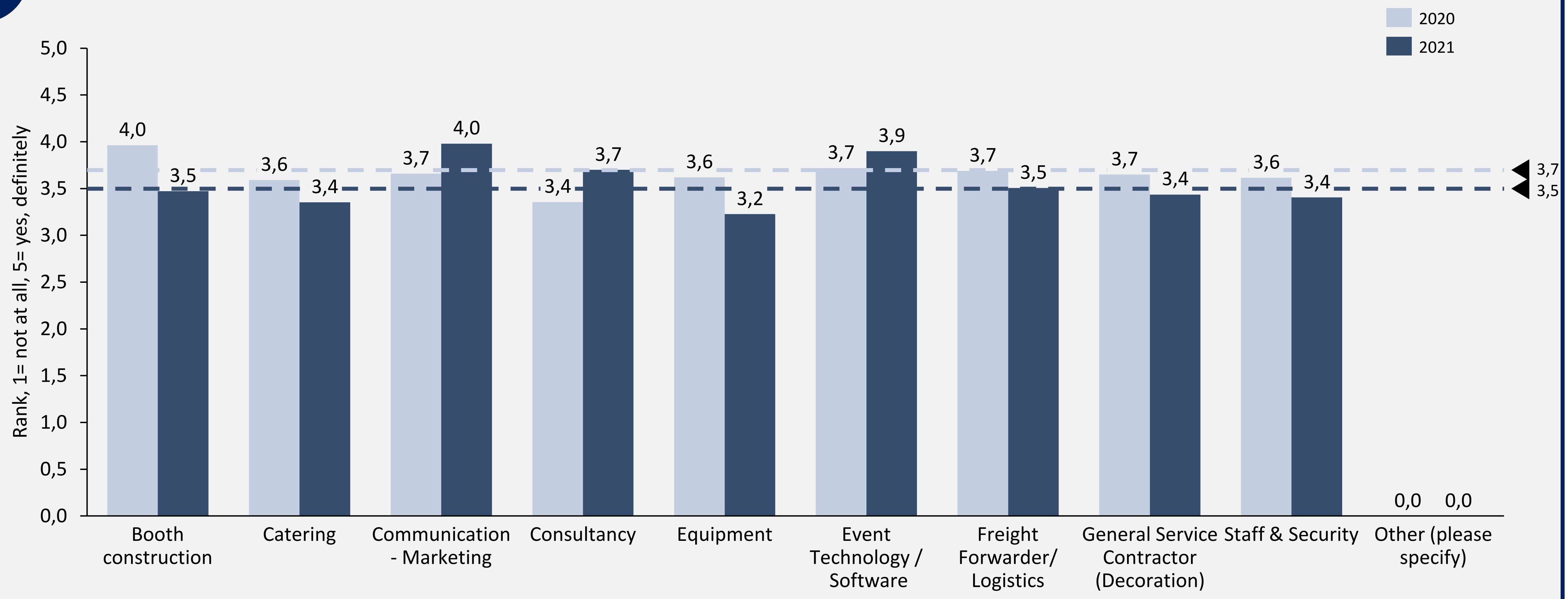
Question 10

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

The perceived benefit from an increase in information sharing has slightly dropped over the last year

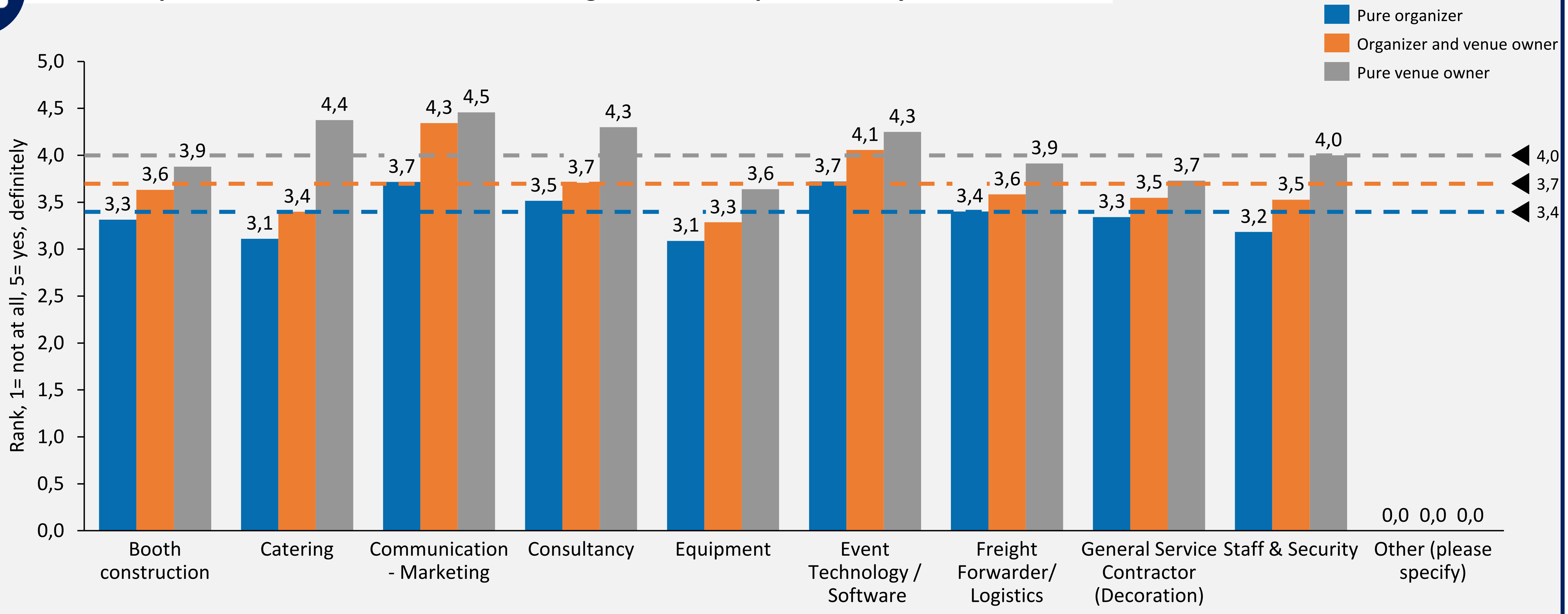
The Global Association of the Exhibition Industry

Perceived positive effect of information sharing with service providers, across all survey participants, 2020 – 2021



Pure venue owners perceive the largest benefit from an increase in information sharing

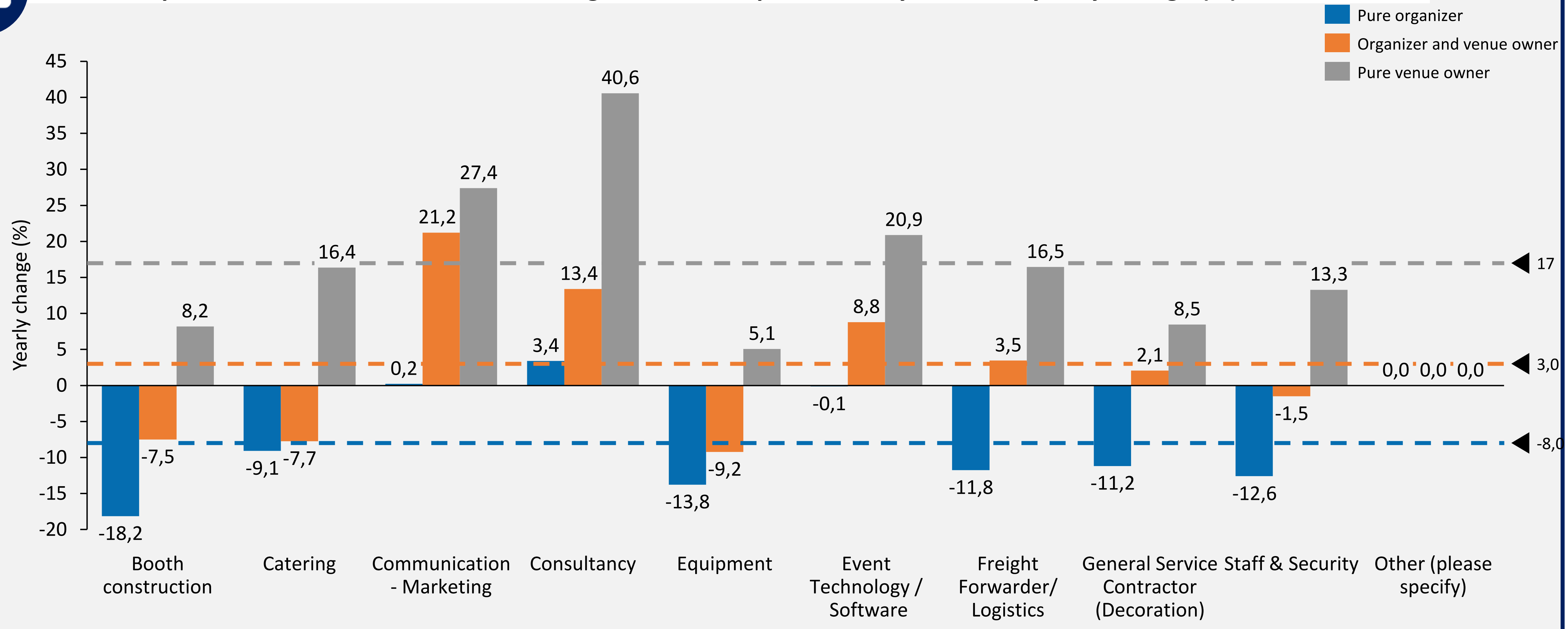
Perceived positive effect of information sharing with service providers, by function, 2021



The perceived benefit of an increase in information sharing has dropped for pure organizers

The Global Association of the Exhibition Industry

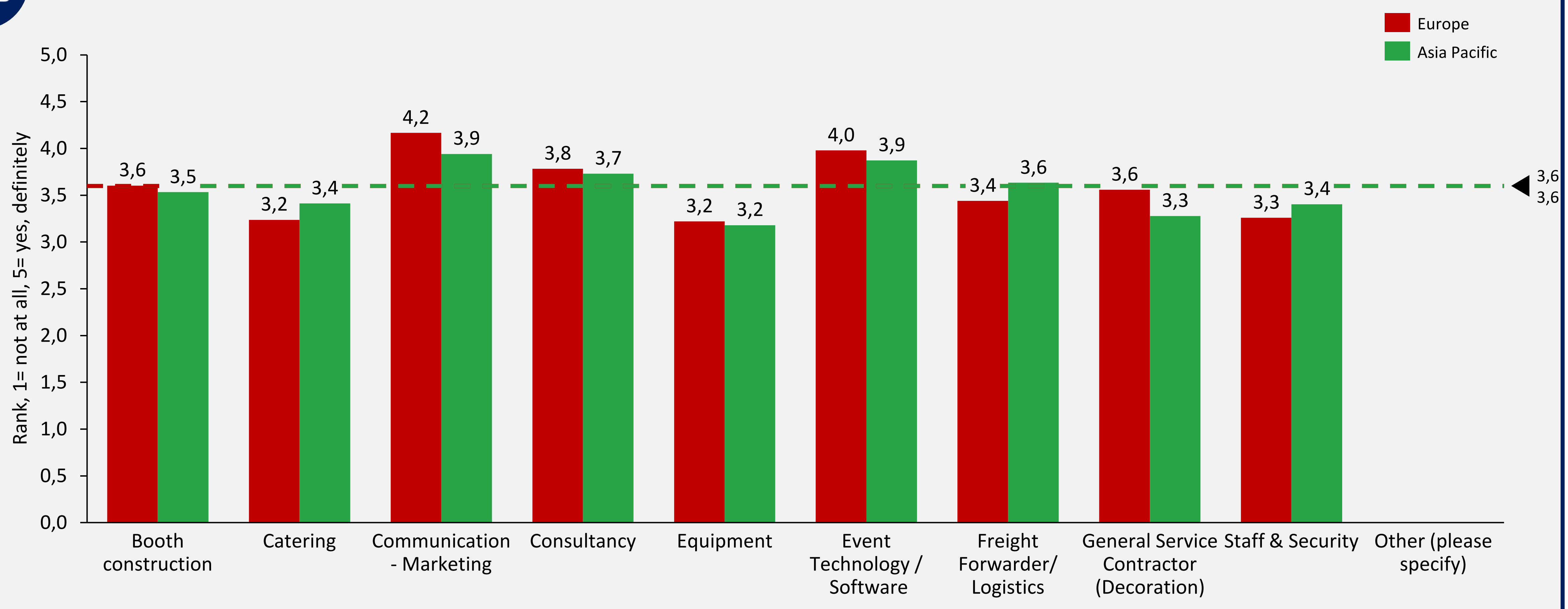
Perceived positive effect of information sharing with service providers, by function, yearly change (%) 2020 – 2021



The perceived benefits from an increase in information sharing are identical between regions

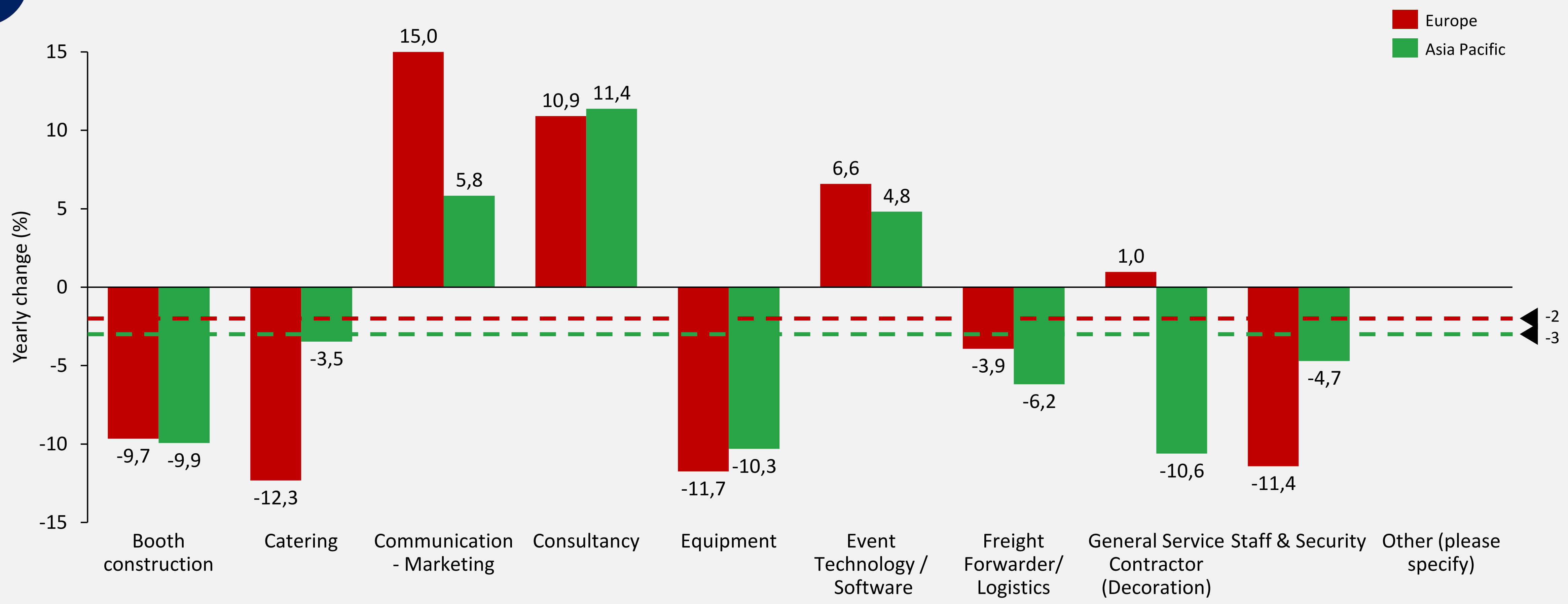
ufi The Global Association of the Exhibition Industry · jwc

Perceived positive effect of information sharing with service providers, by region, 2021



However, both regions note a drop in the significance of information sharing

Perceived positive effect of information sharing with service providers, by region, yearly change (%) 2020 - 2021



Question 10 – Key takeaways

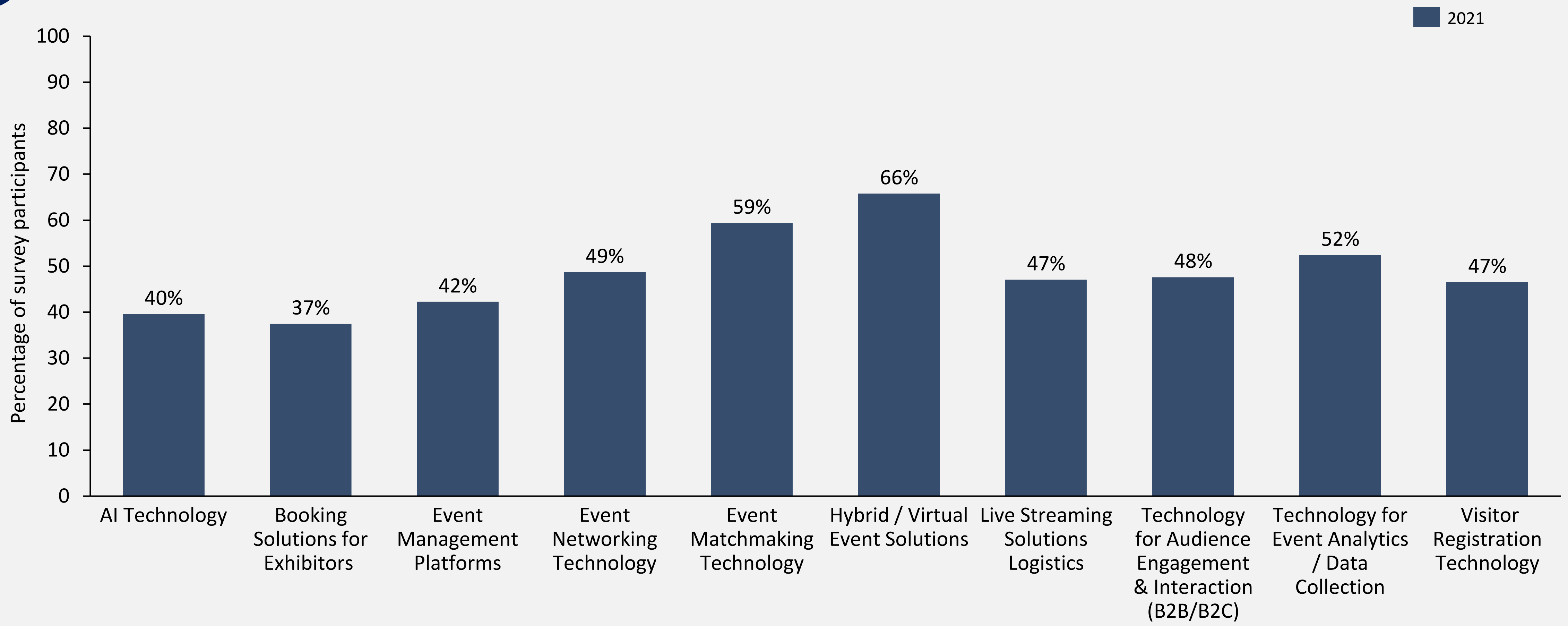
- There is still a clear notion that increasing the sharing of information between service providers and industry partners could be beneficial, although this has declined in significance over the last year
- Surprisingly, pure organisers display a strong downward trend in the importance of information sharing, which could be driven by the ongoing debate around the data ownership and usage with regard to virtual event platforms
- Pure venue owners believe most strongly that information sharing could improve event success
- There are no significant differences between geographic regions

Question 11

***Question 11**: Which digital products / solutions will be most relevant for your events in the upcoming 12-18 months (select max. 3 items)*

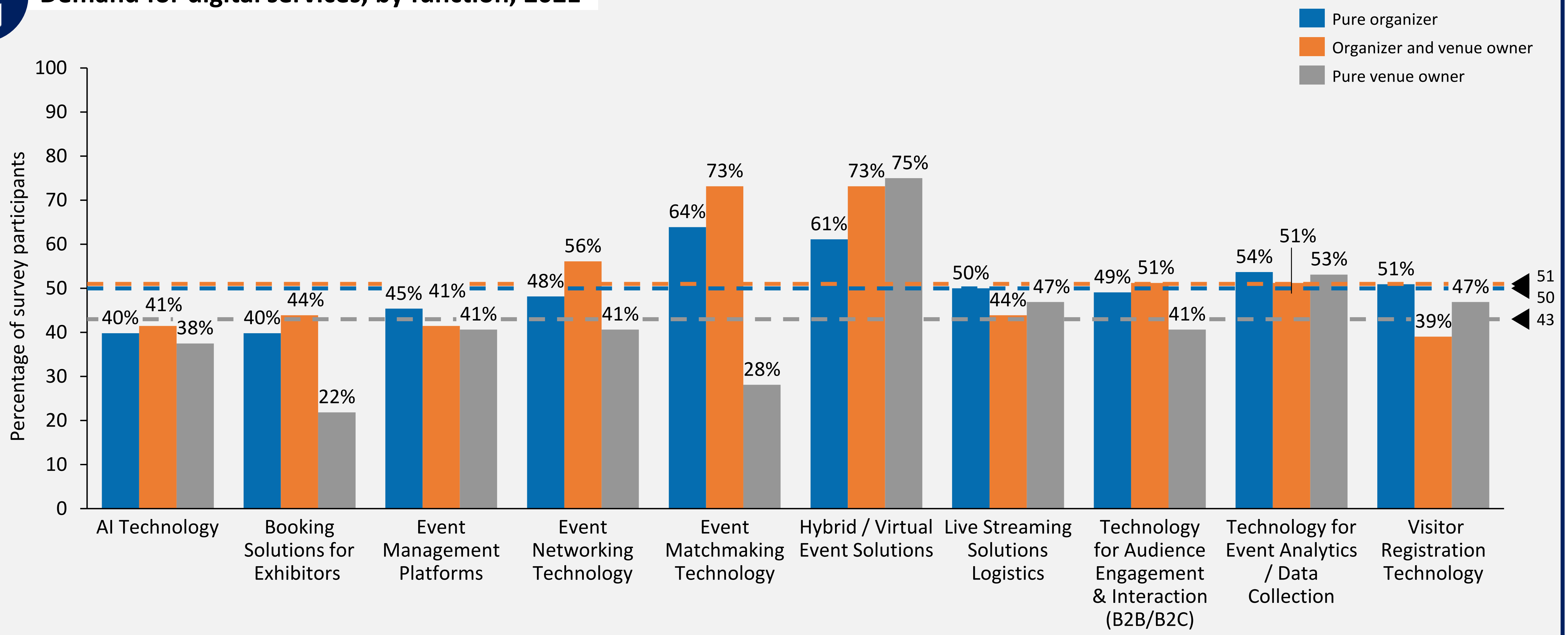
The majority of the survey participants display a demand for hybrid or virtual event solutions

Demand for digital services, across all survey participants, 2020 – 2021



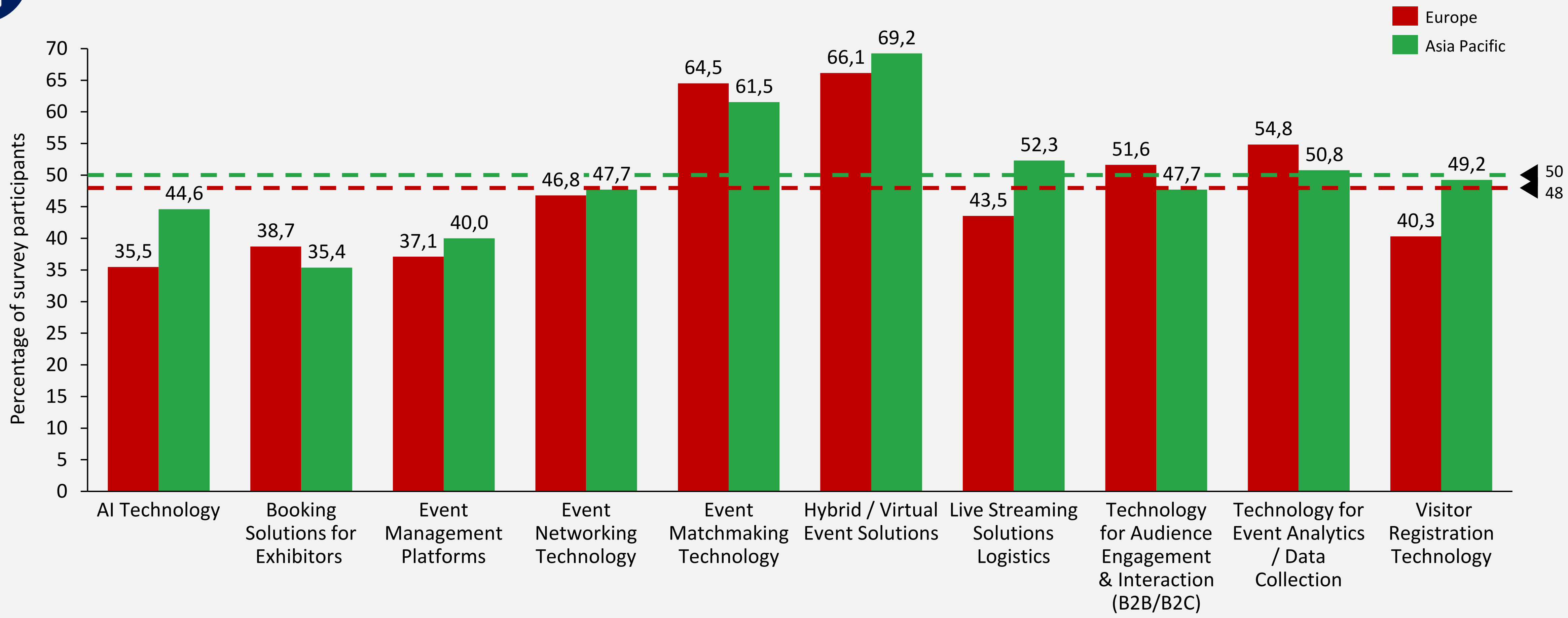
The demand for digital services is lowest on the behalf of pure venue owners

Demand for digital services, by function, 2021



Asian Pacific countries have a slightly higher demand for digital services than their European counterparts

Demand for digital services, by region, 2021



Question 11 – Key takeaways

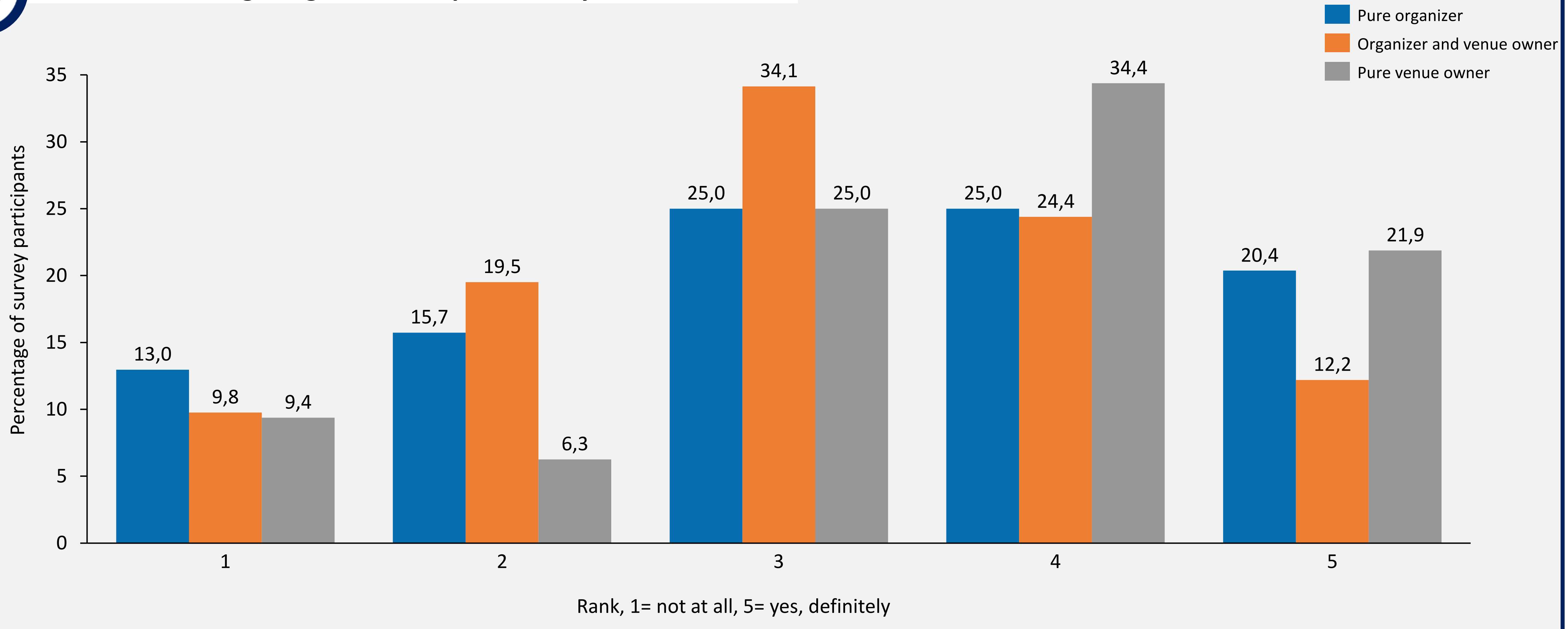
- Driven by the COVID-19 pandemic, the most in-demand digital services are virtual and hybrid events solutions, followed closely by matchmaking solutions, which could be utilised for both on-site and online events
- The demand for digital services is highest amongst those who organise events
- Countries in the Asia-Pacific have a slightly higher demand for matchmaking services than their counterparts in Europe, who have a higher demand for virtual/hybrid event solutions, most likely due to the fact that events in Europe were open sooner in Asia since the pandemic

Question 12

Question 12*: Many different service providers offer an array of digital tools. Would you prefer to rely on one service providing all digital tools you require (1= not at all, 5= yes, definitely)*

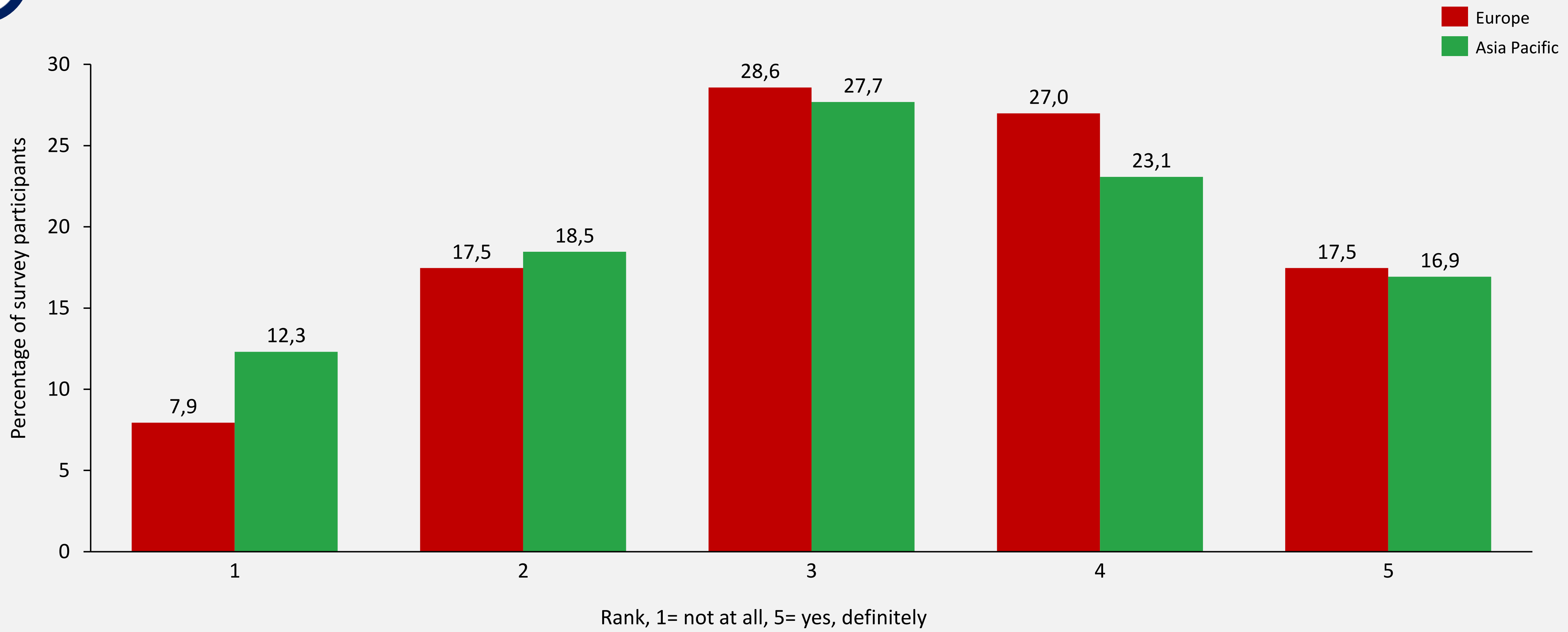
On average, the survey participants prefer a selection of different digital services providers

Demand for a single digital service provider, by function, 2021



European countries have a higher tendency to rely on one service provider, than the Asian Pacific counterparts

Demand for a single digital service provider, by region, 2021



Question 12 – Key takeaways

- On average, survey participants prefer a selection of different digital services providers
- European countries have a higher tendency to rely on one service provider, than those in the Asia-Pacific

Summary

- The demand for services that can be considered as mandatory services for running an event have experienced a steady decline in demand
- Booth construction remains the most relied upon service, alongside staff and security
- In general, there has been a small increase in the perceived value of services on event success
- The perceived impact of services on event success are relatively homogeneous, suggesting that a successful event requires a wide array of services
- Overall satisfaction rate with the most relevant service provider is very positive
- The demand for more innovation from service providers remains high, and marketing and communications service providers are perceived to be the most innovative
- Service areas that are perceived to have the biggest impact on future event development are marketing and communications, and event technology and software
- There is a clear notion that increasing the sharing of information between service providers and industry partners could be beneficial, although this trend has declined in significance over the last year
- Driven by the COVID-19 pandemic, the most in-demand digital services are virtual and hybrid event solutions, followed closely by matchmaking solutions, which could be utilised for both on-site and online events