

EXHIBITION MANAGEMENT LEADERSHIP STUDY

How SISO Members and Top Associations are Positioning
for Growth and Innovation



Special Report Developed by



2017

Table of Contents

Introduction	3
Executive Summary	4
I.) Growth Outlook and Strategies	6
II.) New Revenue Streams, Innovation and Technology	11
III.) How Attendees and Exhibitors are Changing	18
IV.) Recruiting and Retaining Talent	20
V.) Biggest Challenges and Opportunities	21
Conclusion	23
Methodology & About the Respondents	24

Introduction

The Exhibition Management Leadership Study: How SISO Members and Top Associations are Positioning for Growth and Innovation

TSNN, SISO and Access Intelligence Research & Consulting have developed this exclusive industry study to help convention and exhibition producers analyze and benchmark their growth strategies.

The report provides results from a survey of SISO members and a select group of top associations with major exhibitions. The respondents represent many of the leading associations, exhibition producers and corporate event planners in North America.

The areas covered include:

- Growth Outlook and Strategies
- New Revenue Streams, Innovation and Technology
- How Attendees and Exhibitors are Changing
- Recruiting and Retaining Talent
- Biggest Challenges and Opportunities

TSNN, SISO and Access Intelligence Research & Consulting thank all of the respondents for their invaluable contributions to this study.



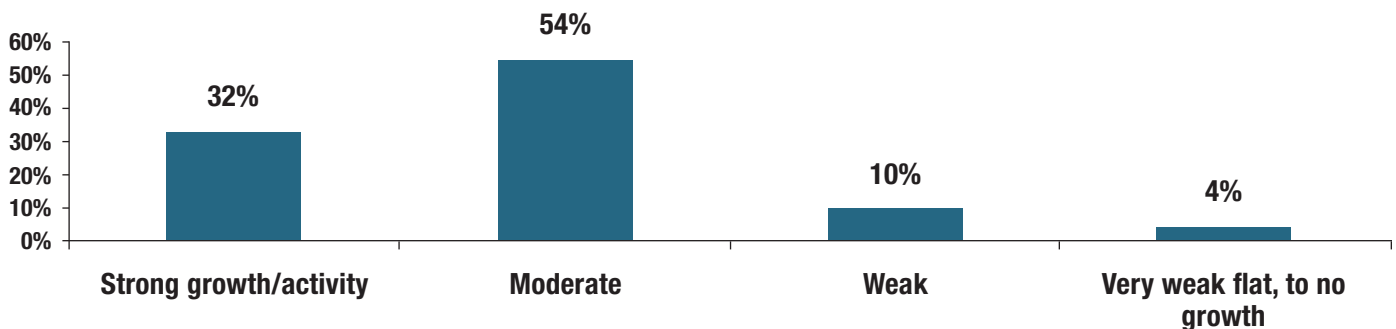
Copyright © 2017 TSNN and Access Intelligence, LLC. All Rights Reserved. No part of this publication can be copied or disseminated without the permission of TSNN Access Intelligence, LLC.

Executive Summary

Some of the key findings along with insightful quotes from event producers are provided in this summary.

Moderate to Strong Growth is Expected for the Next 12 to 18 Months

Leading exhibition producers expect to see moderate to strong growth for their events business over the next year to year and a half. Only 14% expect weak to flat or no growth over the next year to eighteen months. In short, the near-term industry outlook is good.



- **Organic growth of existing events is by far the top growth strategy** – a significant 85% of exhibition producers selected this, followed by 58% selecting partnerships and 42% indicating new hires. Exhibition producers are being somewhat cautious in terms of investment and risk taking. Most are focusing on their key events, and bolstering these events with partnerships and new hires.
- **Besides the overall health of the economy, the top risk to growth is considered to be exhibitors questioning ROI** – both of these areas were selected by 50% of respondents. It's a positive sign that no single risk or group of risk factors, besides the economy and exhibitor sentiment towards exhibitions (which is a critical issue), has been selected by more than four out of ten of the respondents.
- **More exhibition producers are adding new innovations than revenue streams** – 44% of the respondents have added a new revenue source in the past year, while two-thirds of exhibition producers added an innovation or new technology service.
- **By far, the primary way attendees are changing is they are registering closer to the event days** – 84% of respondents say they see their attendees making later decisions to attend and register. The second most common trends is attendees are getting harder to reach with marketing messaging.
- **Networking continues to grow in importance to attendees** – 61% of the respondents say their attendees are more interested in networking opportunities than a few years ago.
- **Exhibitors and sponsors want more customized sponsorship opportunities** – this is by far the primary way exhibitors and sponsors are changing, according to 84% of the respondents. Over half of the respondents also see their exhibitors asking for more demographic data on the audience, more targeted leads with additional information, and proof of ROI.
- **There's a gap between what exhibition producers feel they would benefit from in terms of data collection and analysis and their ability to gain insight from their data.** 34% of respondents say they are extremely or very effective at collecting event data, but only 14% say they are extremely or very effective at using their data.

Exhibition Producer Executive Quotes

The survey asked a number of open-ended questions. Some of the quotes include:

New Revenue Sources and Innovations

- *"Added attendee experience sponsored show floor features including immersive technology showcase, and use of beacon tag technology for attendee traffic monitoring."*
- *"Data solutions to enhance customer insight and the customer experience."*
- *"Events within the main show."*
- *"Integrated sponsorship packages with our branded media."*
- *"On-the-floor content opportunities."*

Industry Areas Where More Innovation is Needed

- *"Actual booths; the 10x10 carpet/drape model is outdated."*
- *"Allowing attendees to personalize their experience."*
- *"Attendance marketing and understanding attendee behavior."*
- *"Customized individual attendee experiences, pre-show, in-show and post-show."*
- *"On-site experience, especially the exhibit hall/floor."*
- *"We still need a way to drive good 1-to-1 matching via software or other practices."*

Major Economic or Political Issues Impacting the Industry

- *"Consolidation in some of our markets as well as major companies doing their own corporate events."*
- *"Continuing digitization of everything; all industries are being shifted to software vs. hardware base, which is less conducive to traditional exhibitions."*
- *"Event security will become a major issue."*
- *"We are an international show and attaining visas can be a serious issue."*

Biggest Challenges

- *"Exhibitor consolidation/budget cuts; rising costs of labor, show services and facility rental; increasing competition from other shows."*
- *"Predicting what the younger generation wants, and what's important to them."*
- *"Right talent and agility to morph pure exhibitions to hybrid ones involving conferences and online engagements yet keeping revenues strong."*
- *"Very mature market in the U.S. Very competitive M&A market, with very high prices."*

Biggest Opportunities

- *"Associations are focusing on their core business -- education, advocacy, membership -- and looking at outsourcing their event management."*
- *"Bundling exhibitions, conferences and digital spend rather than selling ala carte, providing predictive analytics to exhibitors/sponsors and geo-fencing attendees."*
- *"Driving retention of buyers up, and understanding buyers better."*
- *"New markets, smaller, quicker-to-market events."*
- *"Trying to capture data, and making good use of it."*