January 2024

The Global Association of the Exhibition Industry

3rd UFI-Industry Partners Benchmark Survey 2023

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.

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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 organizers 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 organizers and venues to help create and sustain successful exhibitions.

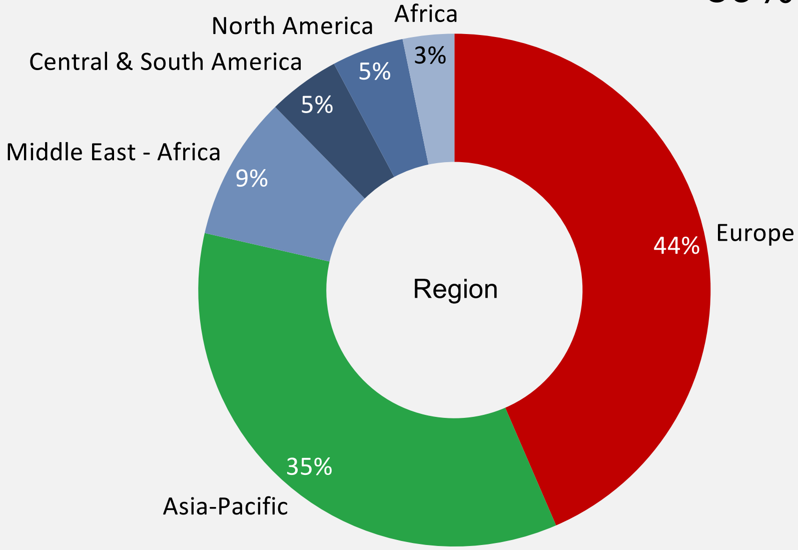
Mission and activities: the UFI Industry Partners Working Group and its members commit to facilitate the transfer of knowledge and the sharing of best practices and insights from their entire spectrum of activities, industries served and services provided. It does this by using Working Group meetings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

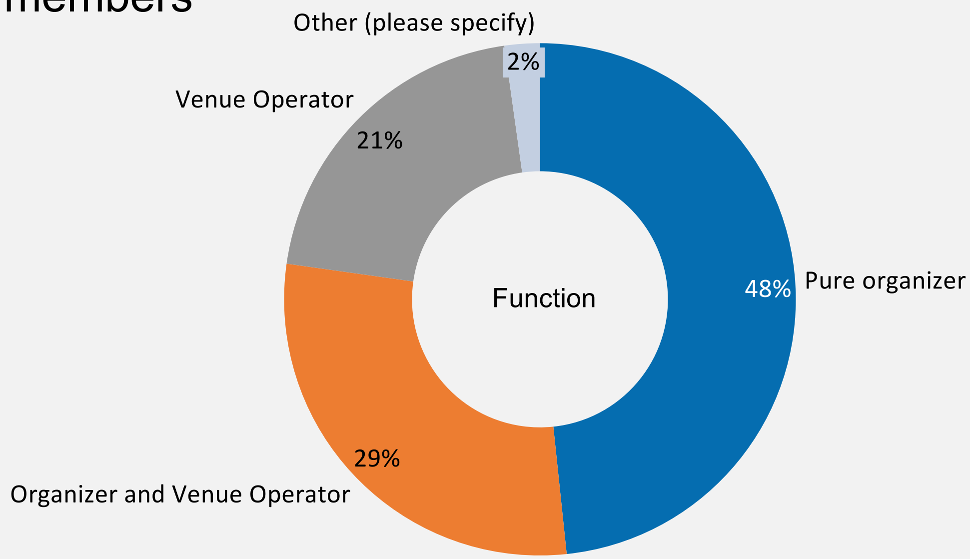
Descriptive statistics

Survey participation indicators

Total number of survey participants: 192

89% UFI members





Descriptive statistics

Survey participation indicators

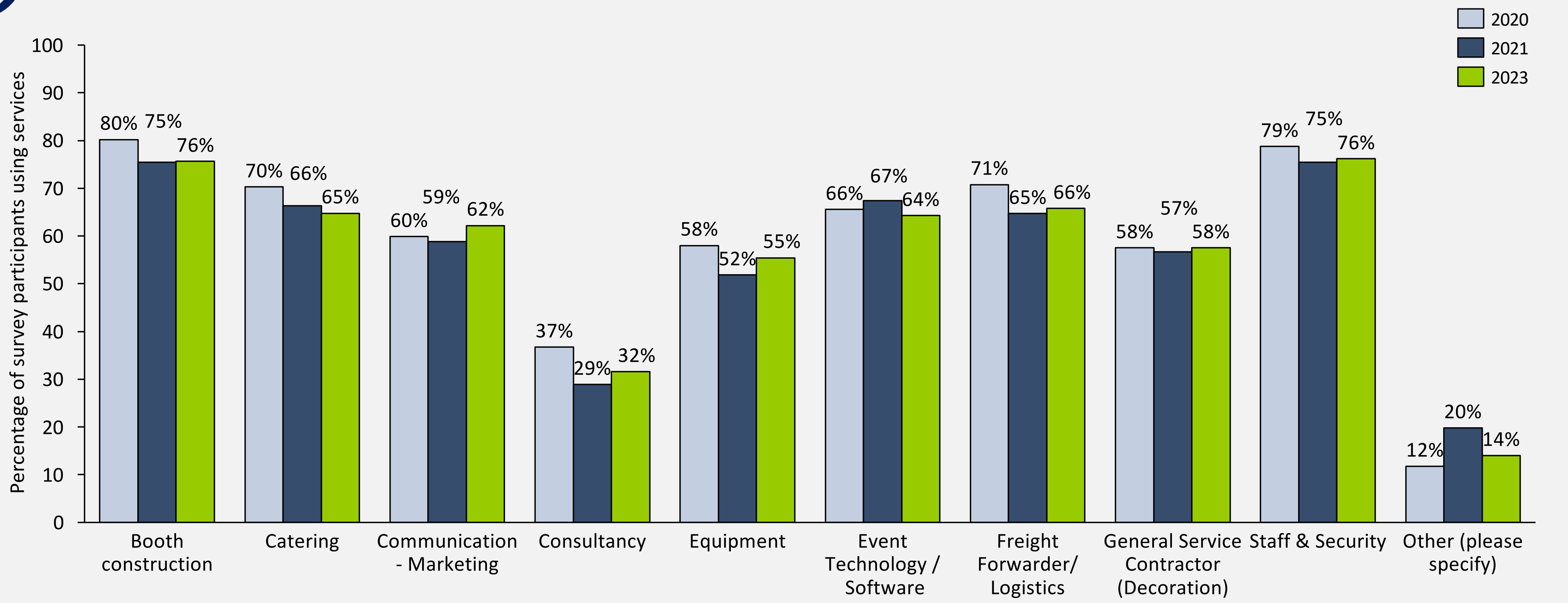
- The Industry Partners Benchmark Survey was run mid 2023
- Target groups: pure organizers, organizers and venue operators, and pure venue operators
- A total of 192 individuals participated in the survey, of which 89% are UFI members
- The majority of respondents are from Europe and the Asia-Pacific region (77%)
- 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?*

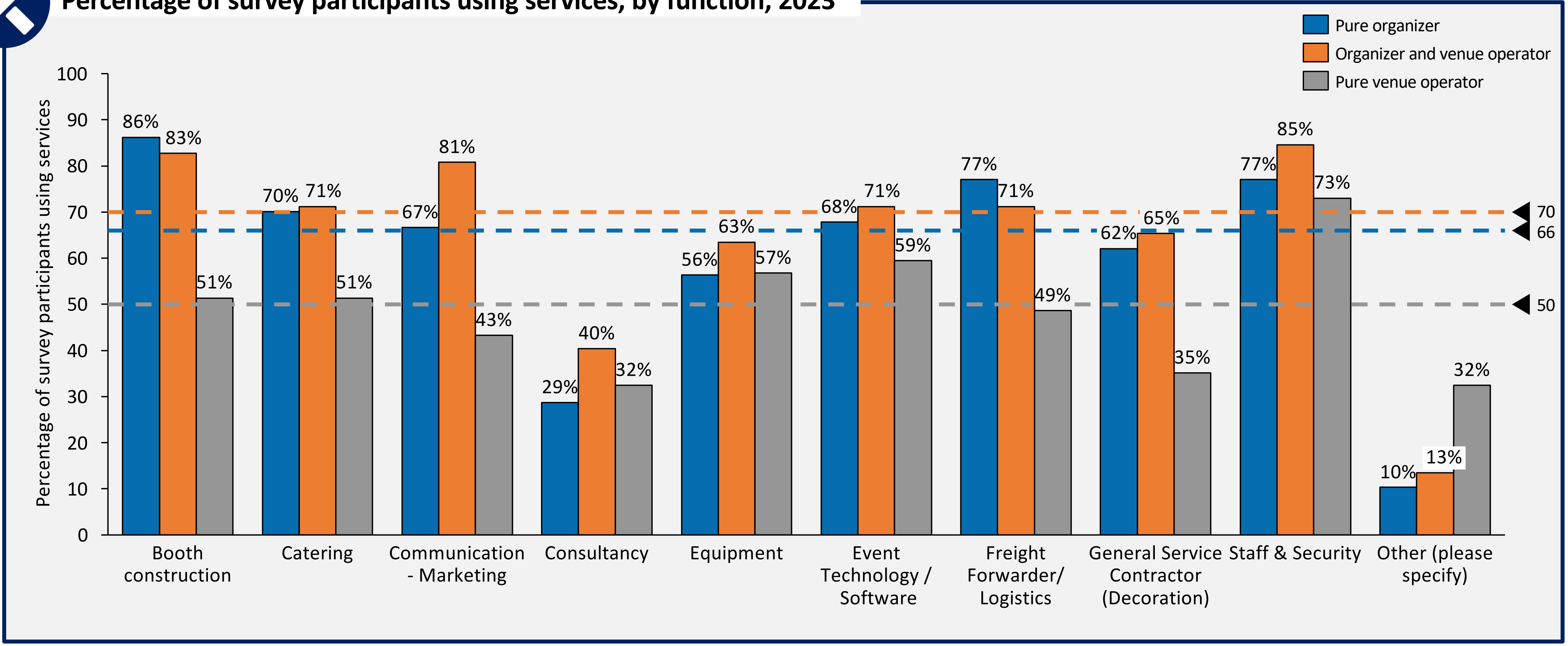
The demand for services has slightly increased since the previous survey in 2021

Percentage of survey participants using services, across all survey participants, 2020 – 2023



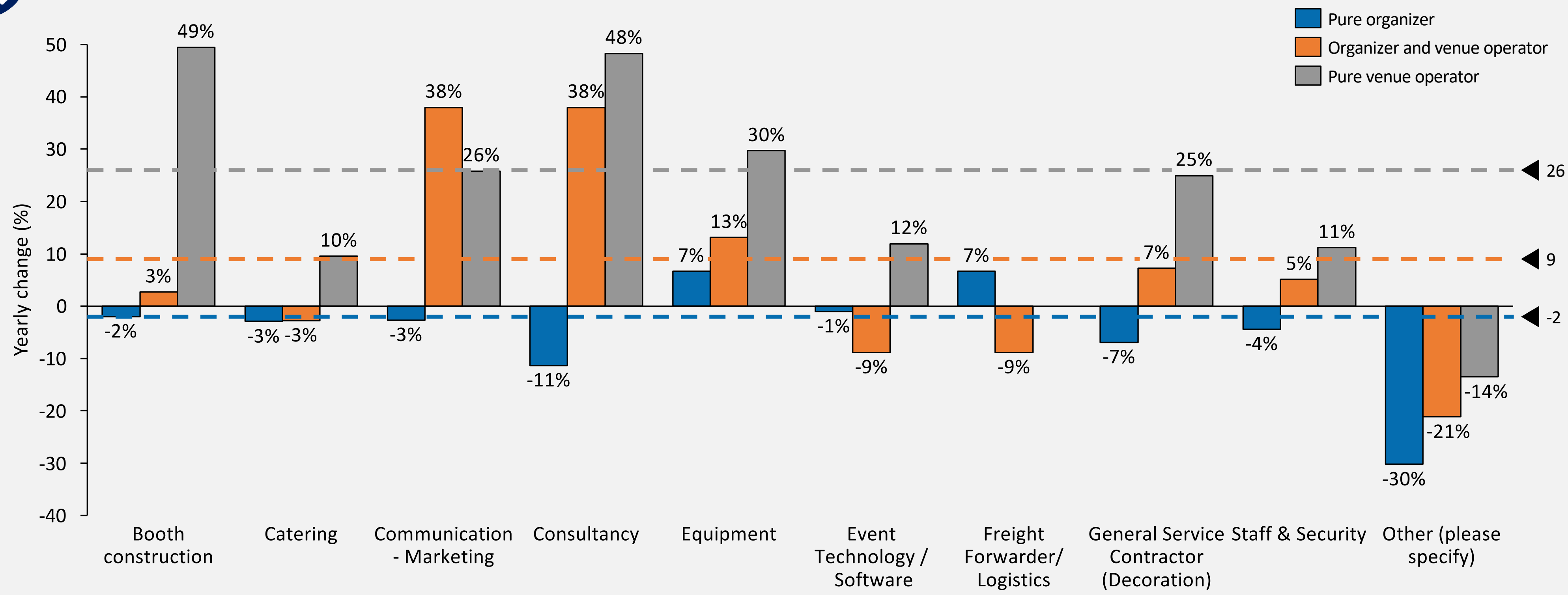
Pure venue operators have the lowest demand for services

Percentage of survey participants using services, by function, 2023



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

Percentage of survey participants using services, by function, change (%) 2021 - 2023



The regional demand for services is diverging, compared to the survey in 2021

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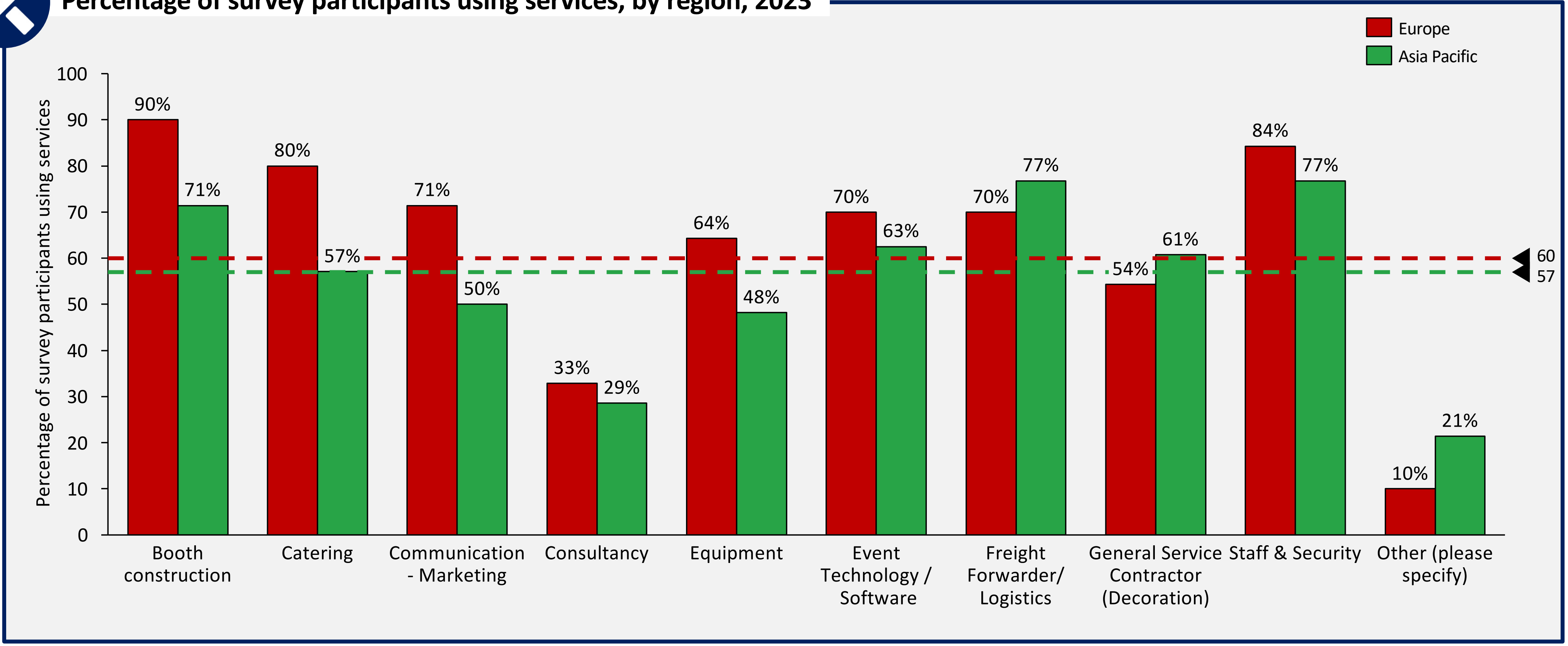
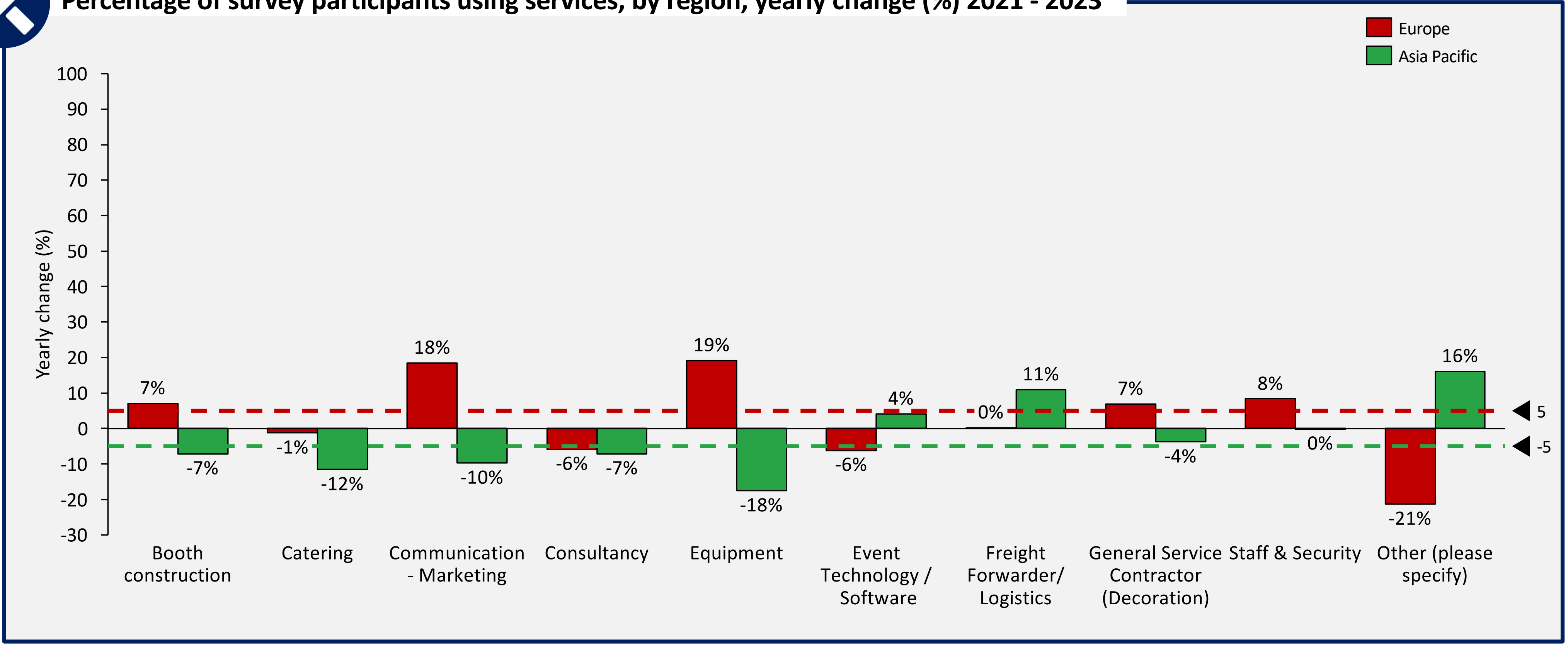
Percentage of survey participants using services, by region, 2023



Europe is experiencing a growing demand for services, whilst the demand in Asia-Pacific is declining – a turnaround from the previous survey

Percentage of survey participants using services, by region, yearly change (%) 2021 - 2023



Question 1 – Key Take-aways

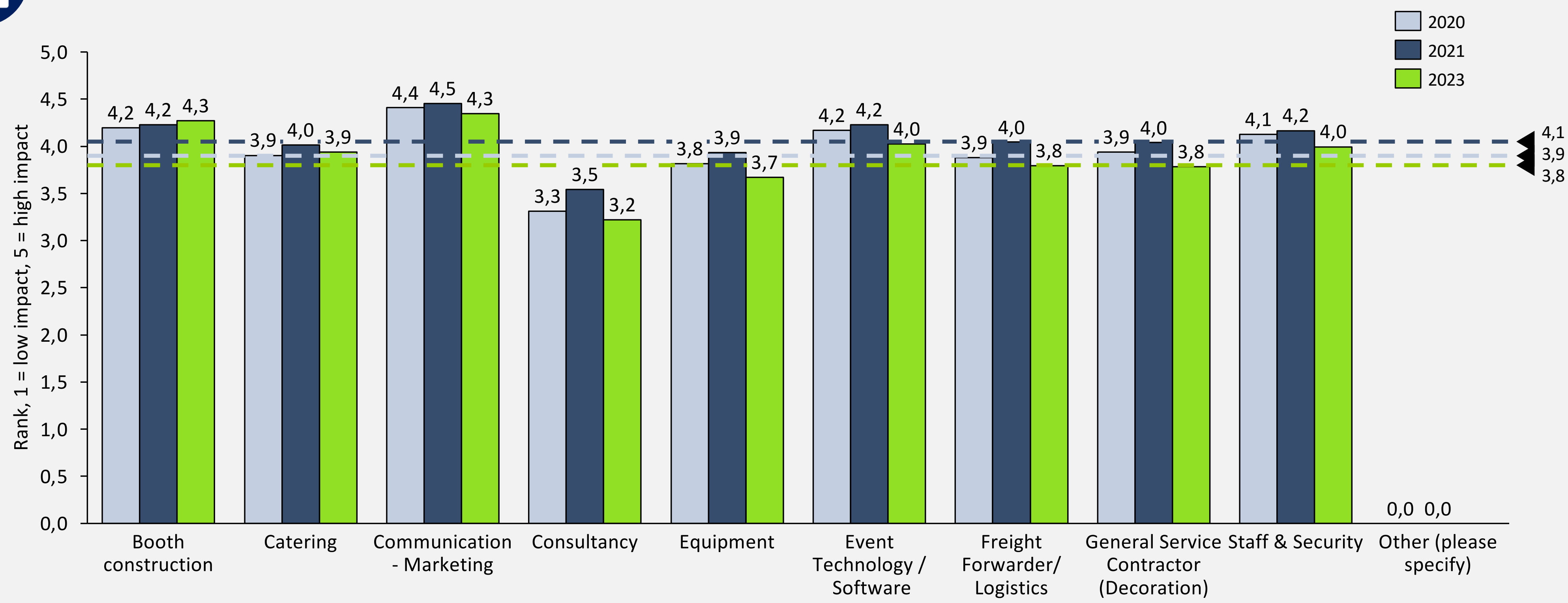
- The overall demand for services has slightly increased compared to 2021
- Booth construction, alongside staff and security, remains the most relied upon service, which is probably relied due to the fact that it usually being outsourced (few organizations have in-house booth construction services)
- Consultancy services are amongst the least utilized services
- Pure venue operators rely least heavily on services
- European countries seam to have a stronger demand for services than their Asian-Pacific counterparts

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)*

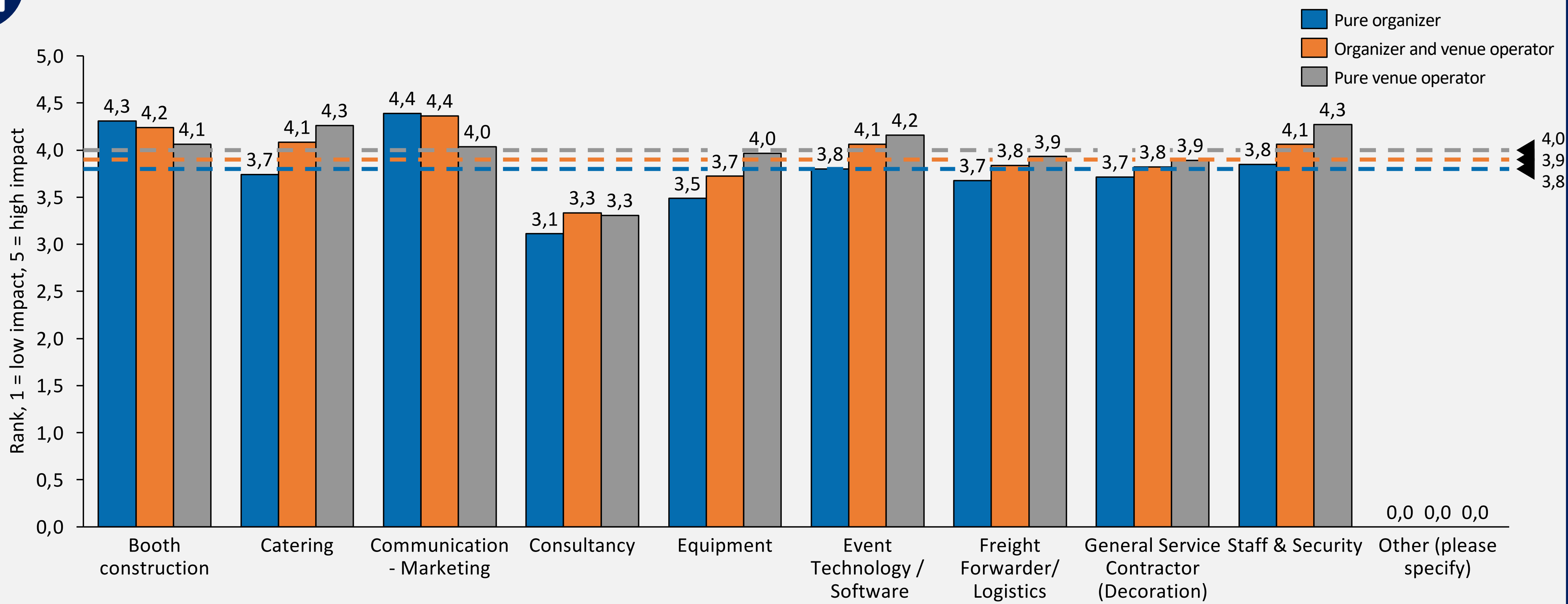
The impact of services on the success of events has decreased since the last survey in 2021

Impact of services on event success, across all survey participants, 2020 – 2023



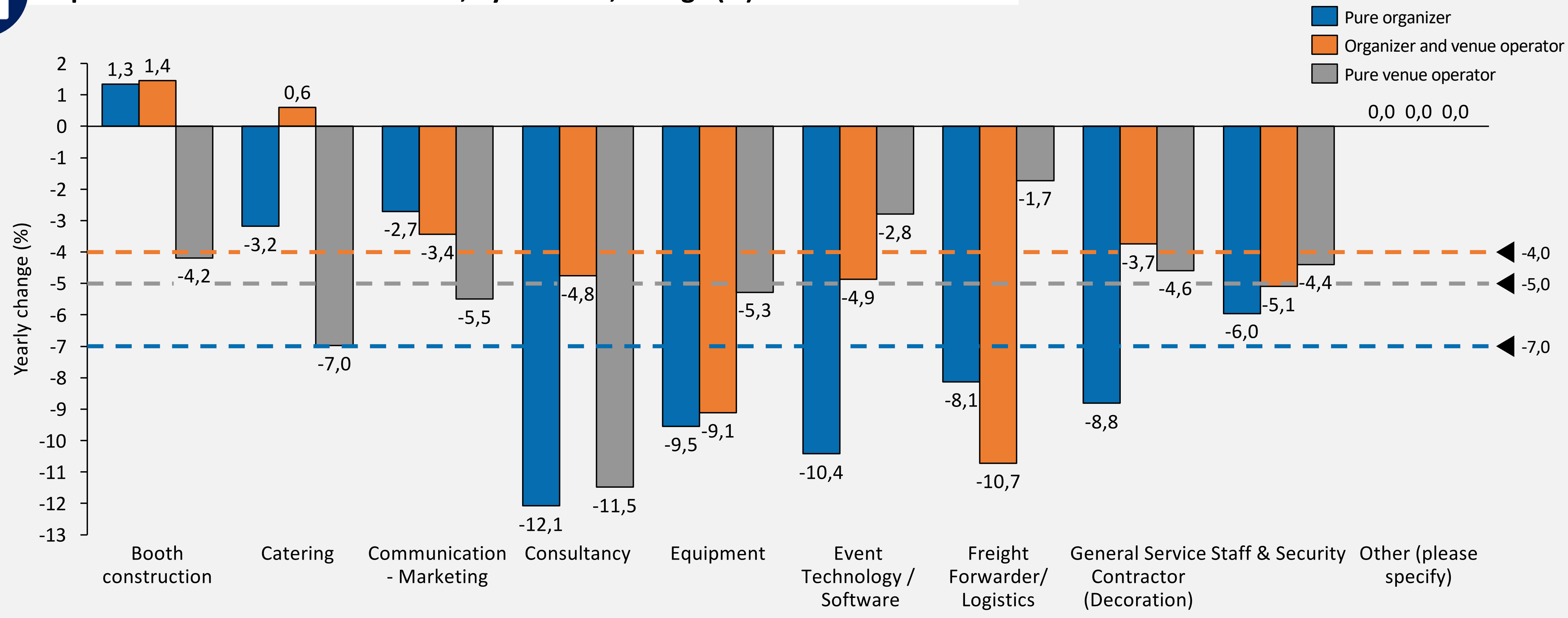
Consultants are perceived to have the lowest impact on the success of events

Impact of services on event success, by function, 2023



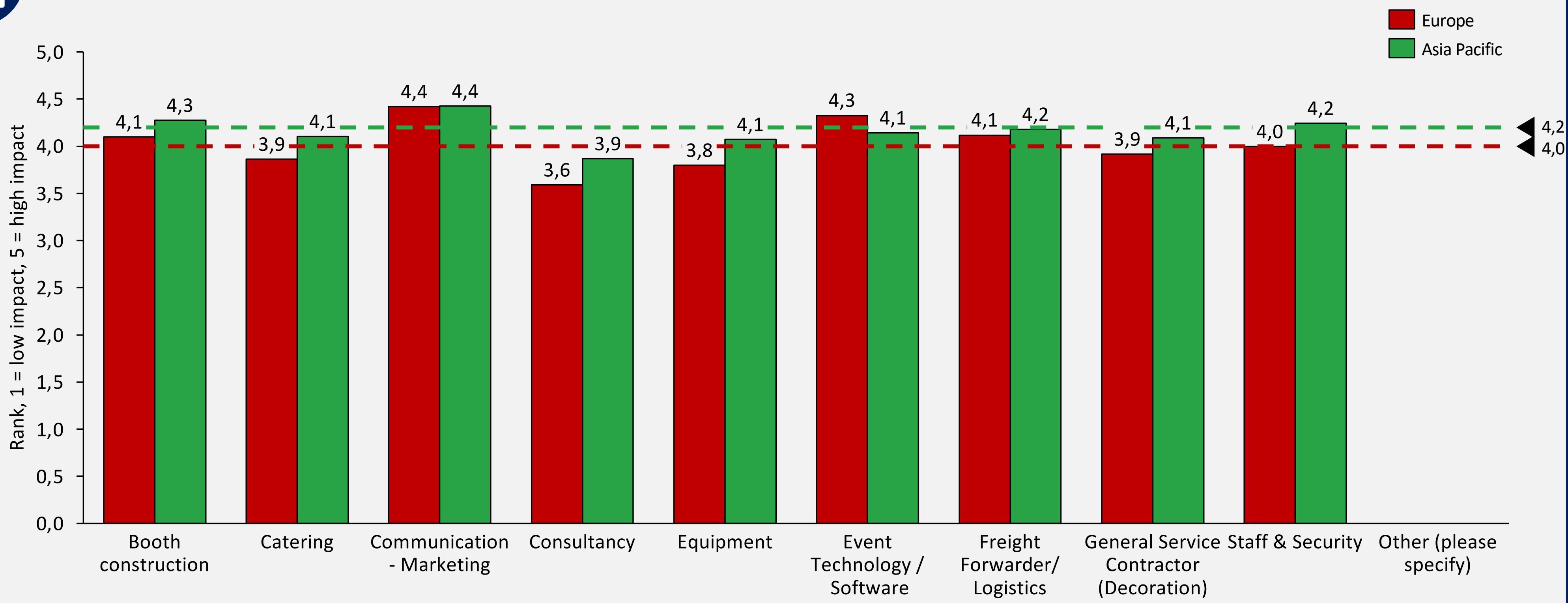
All in all, the perceived value of service providers to the success of events has dropped

Impact of services on event success, by function, change (%) 2021 – 2023



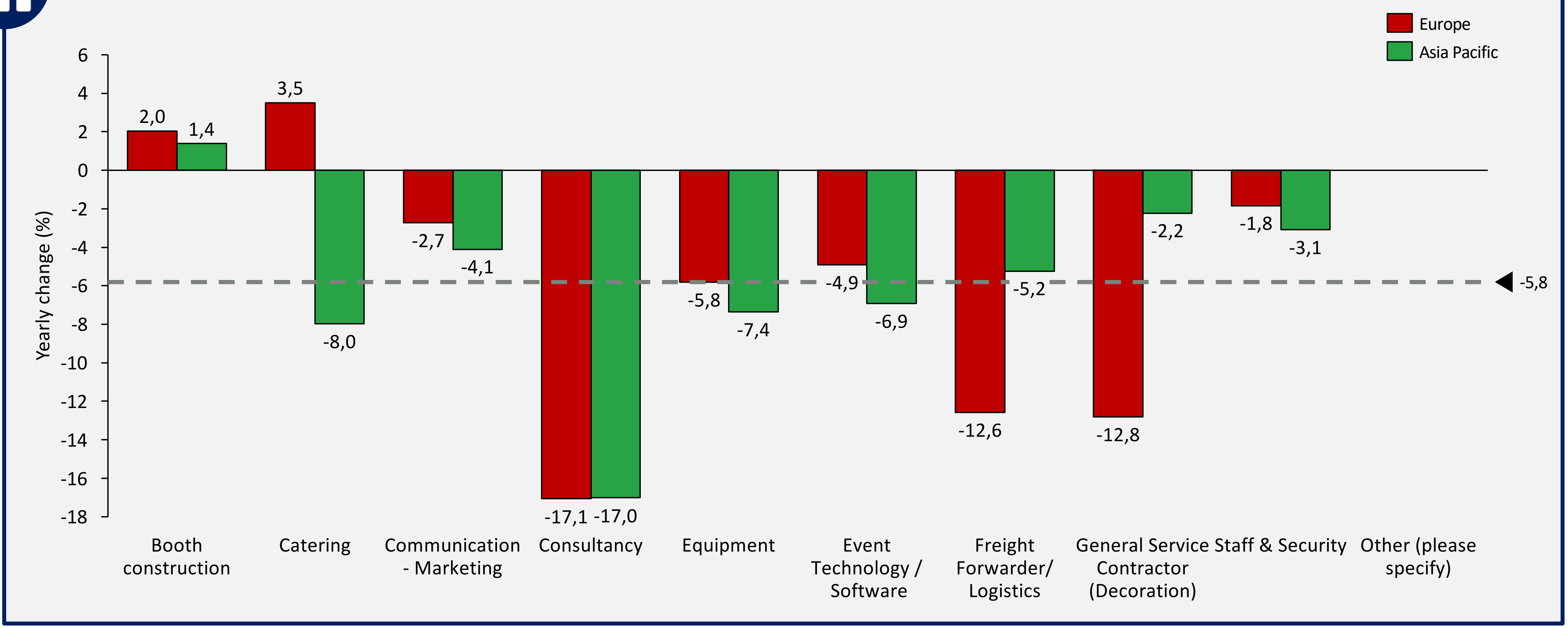
Services in Asia Pacific have a higher perceived value than in Europe, yet the demand is lower

Impact of services on event success, by region, 2023



Only catering and booth construction have witnessed a rise in the perceived impact on their service to the success of events

Impact of services on event success, by region, change (%) 2021 - 2023



Question 2 – Key Take-aways

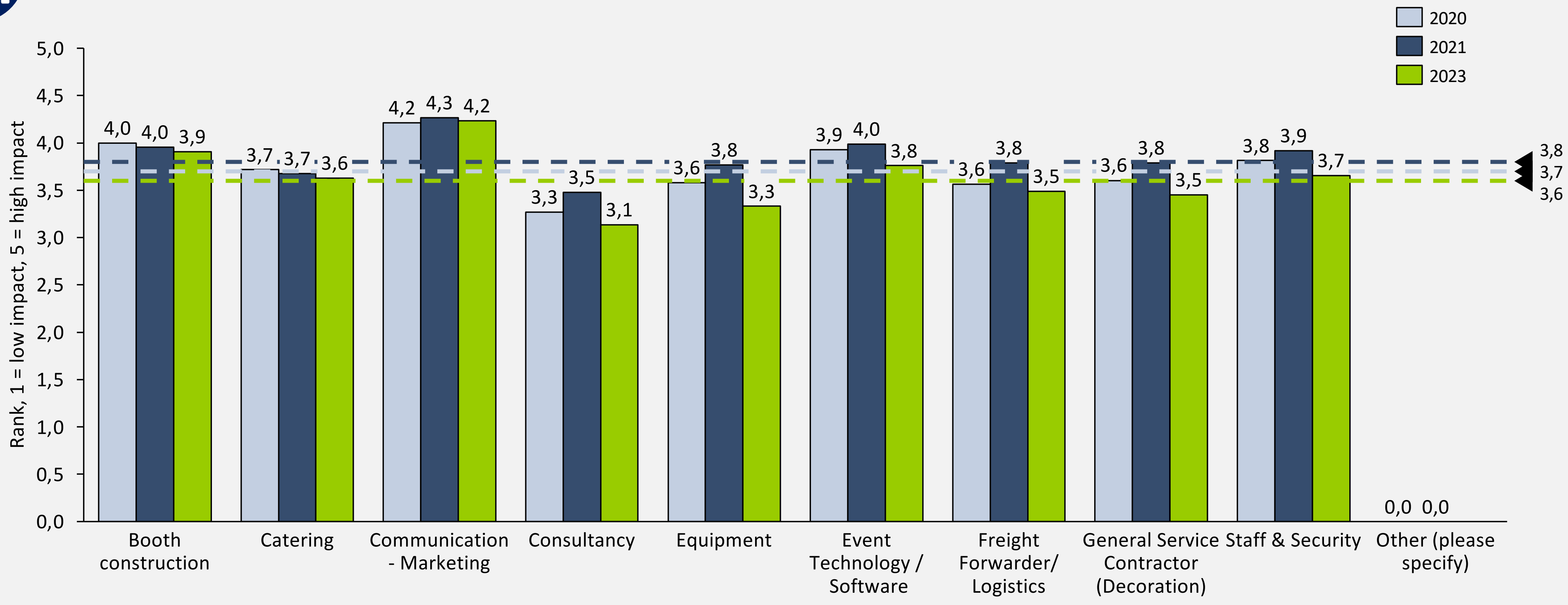
- In general, there has been a significant decrease in the perceived value of services on the success of events
- While booth construction is a commonly relied-upon element in events, it is not necessarily considered the most crucial factor for overall event success.
- Communication and marketing are still regarded as the most important elements for event success. This could be attributed to the ability to track the success of marketing activities more effectively than other services. Additionally, these services play a significant role in driving event participation, making them key contributors to overall success.
- Consultants continually are perceived to have the lowest impact on event success, indicating that the quality of consultancy services is likely inconsistent.
- 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)*

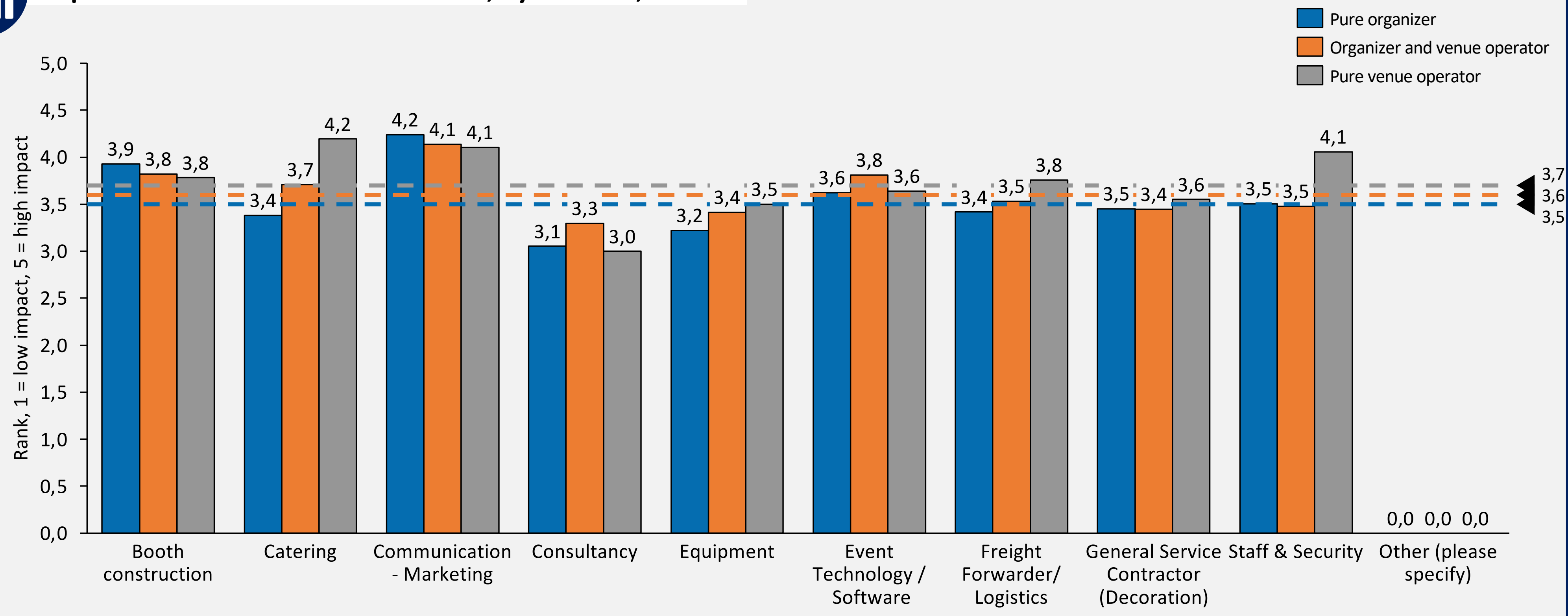
The perceived impact of services on the overall business has gradually decreased

Impact of services on overall business, across all survey participants, 2020 – 2023



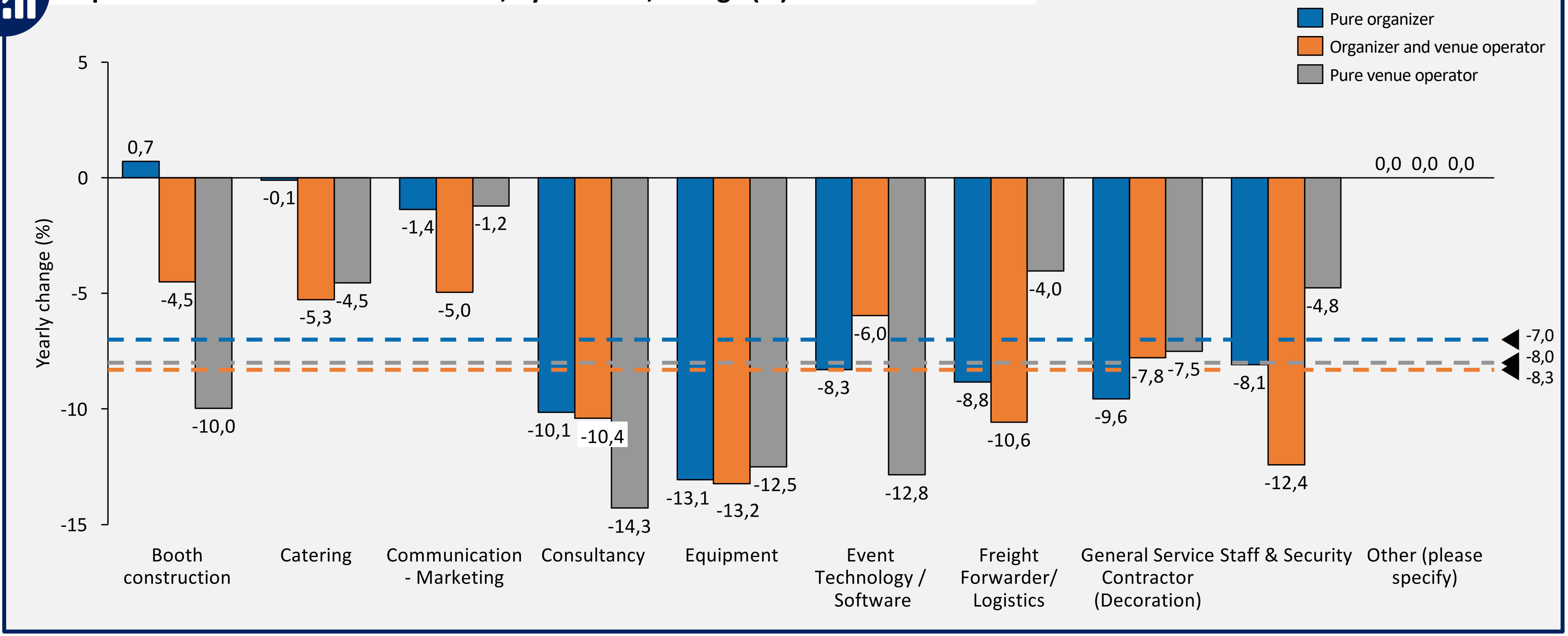
Pure organizers note the lowest perceived impact of service providers on the overall business

Impact of services on overall business, by function, 2023



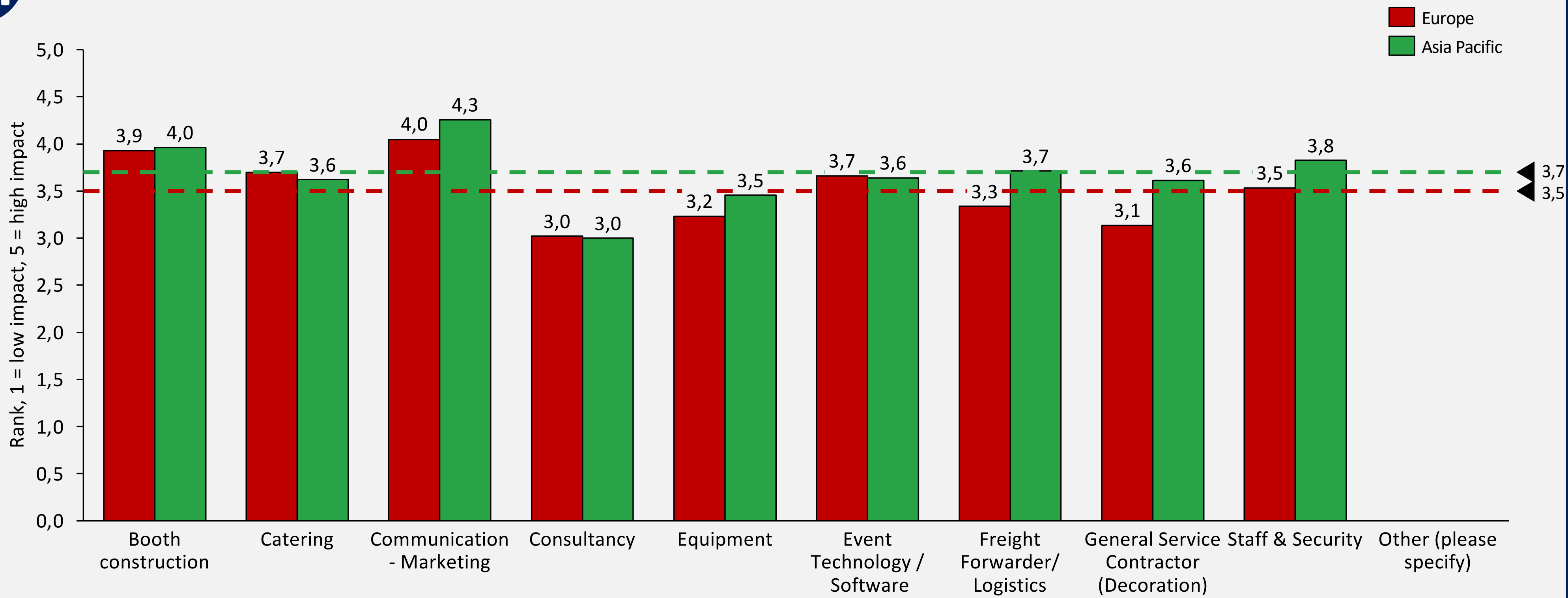
Across all services and functions, we note a considerable decrease in the perceived value add of services on the overall business

Impact of services on overall business, by function, change (%) 2021 – 2023



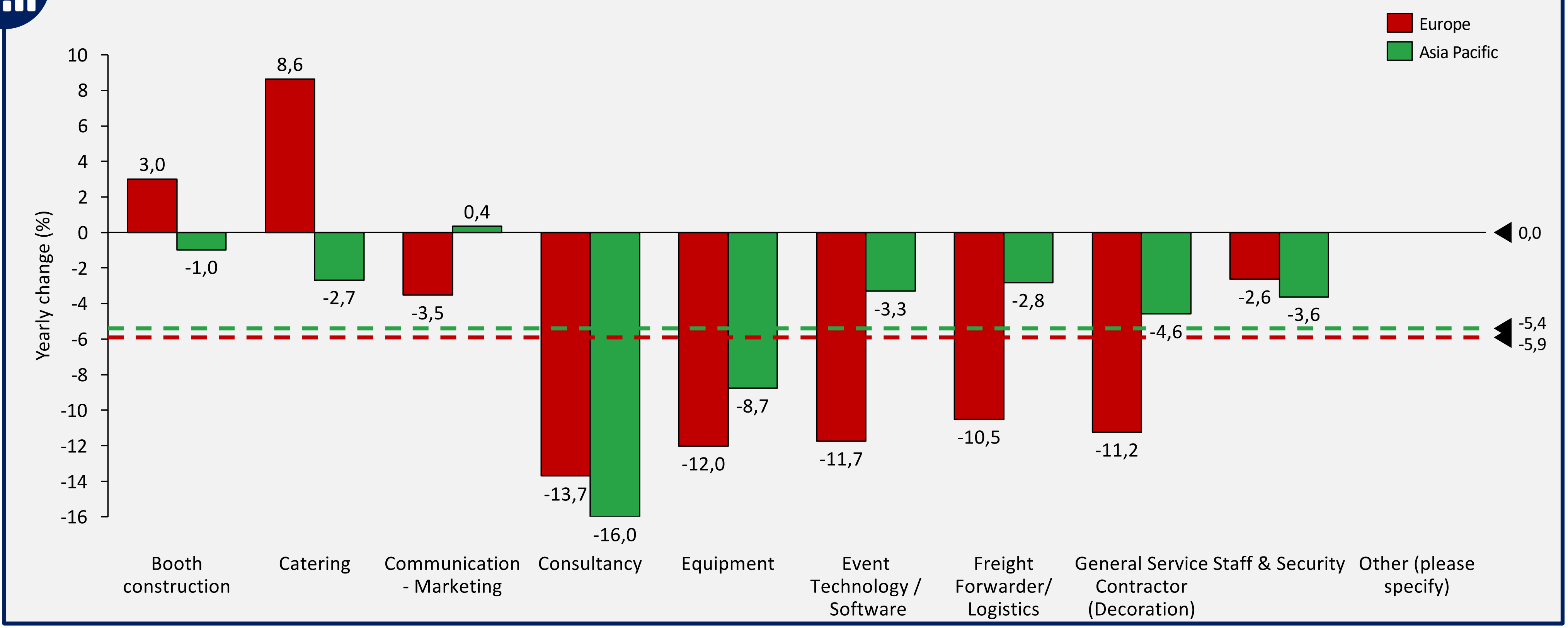
The impact of services on the overall business is slightly higher in the Asian-Pacific countries than in European countries

Impact of services on overall business, by region, 2023



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

Impact of services on overall business, by region, change (%) 2021 - 2023



Question 3 – Key Take-aways

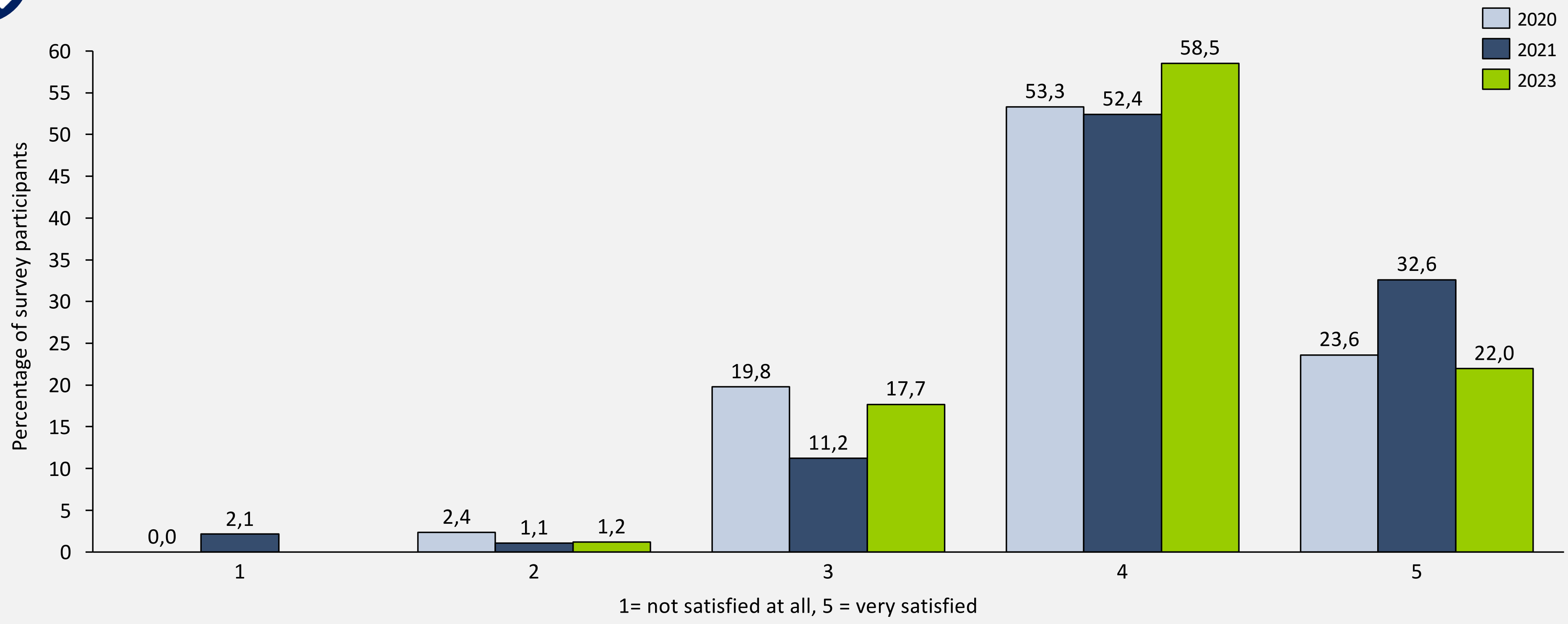
- The perceived importance of service providers to overall business success is marginally lower than their importance to event success.
- As with their impact on event success, the perceived impact of services on overall business success is relatively homogeneous
- Consultancy services are still regarded as the least significant element to overall business success and have noted a considerable decrease in value since the last survey
- The perceived value of services on the overall business performance is relatively even between 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)*

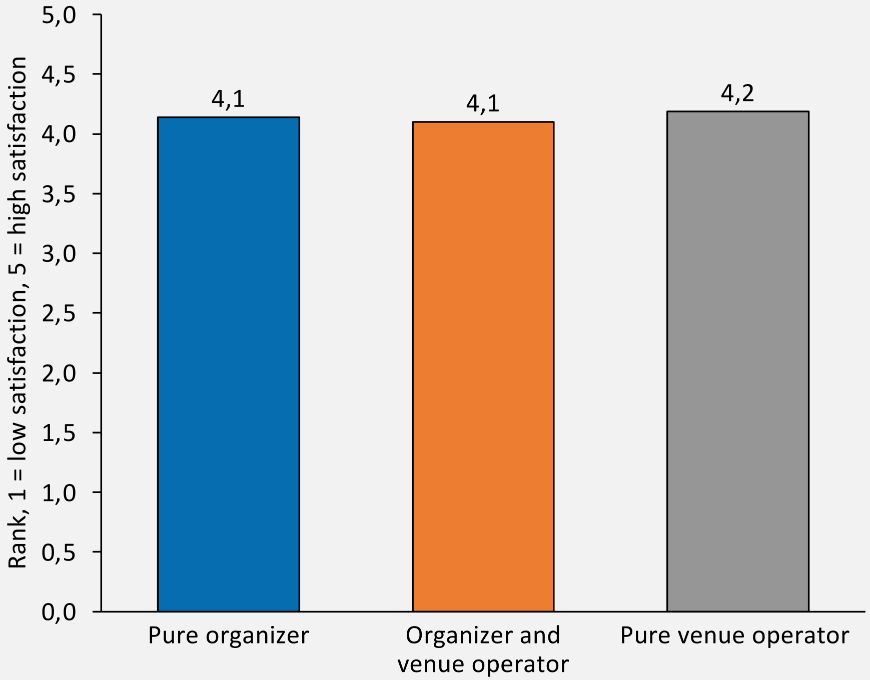
On average, the satisfaction with top service providers has slightly decreased

Satisfaction with top service provider, across all survey participants, 2020 – 2023

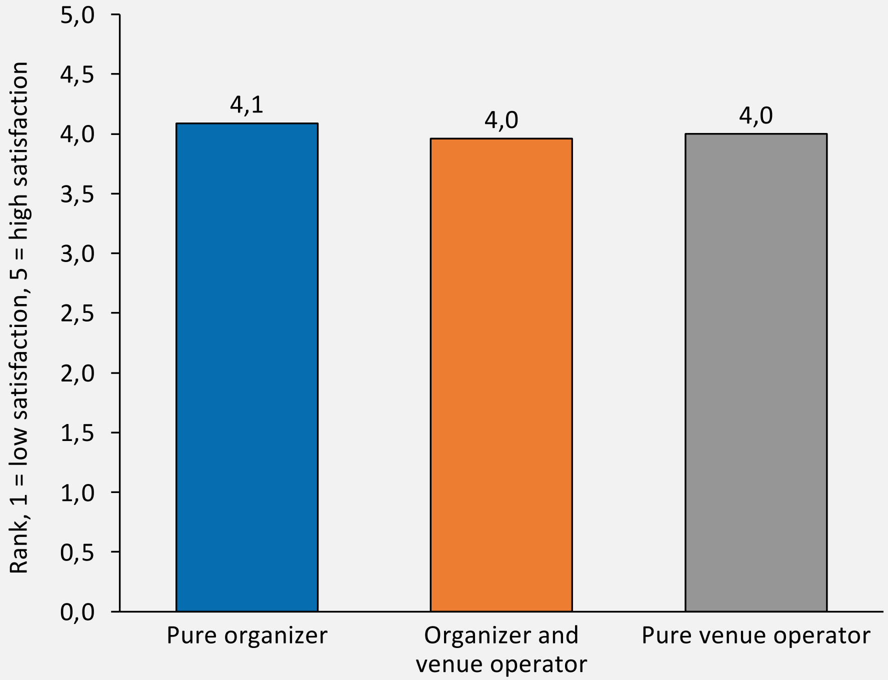


The satisfaction with top service providers has decreased most on the behalf of pure venue operators

Satisfaction with top service provider, by function, 2021

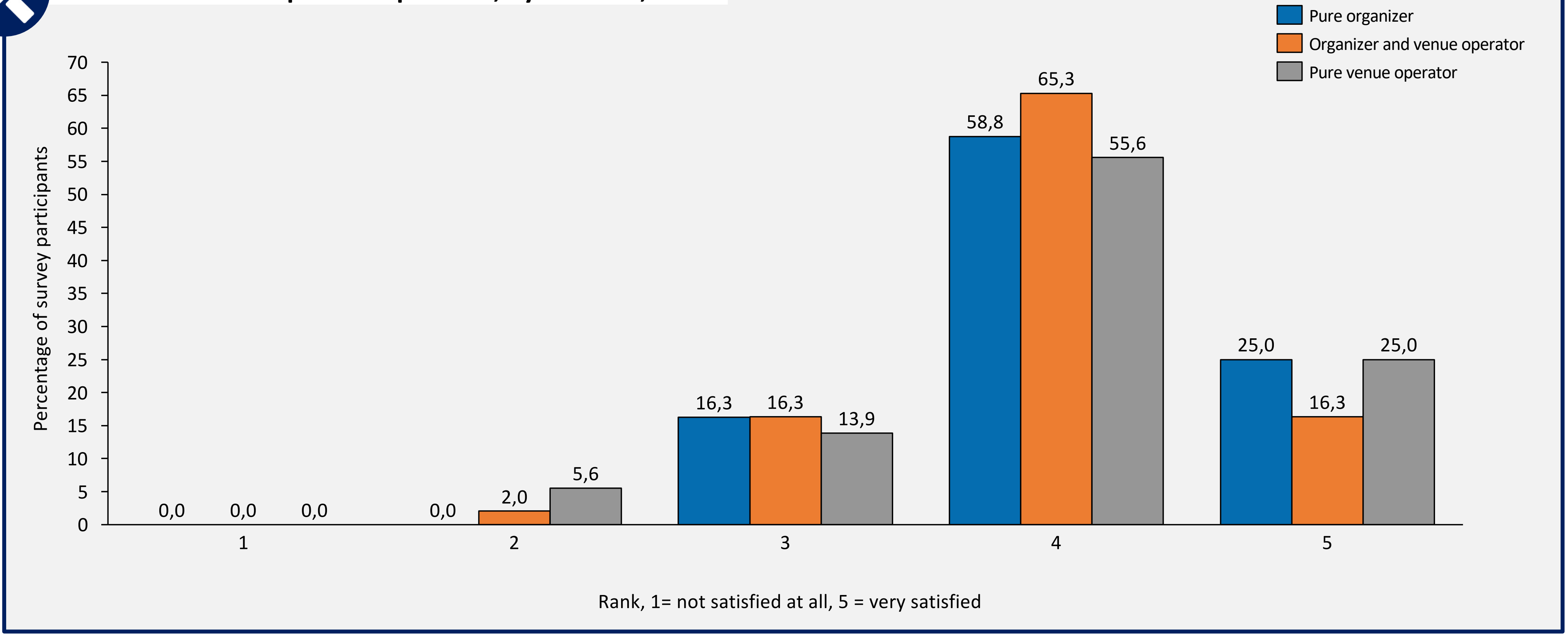


Satisfaction with top service provider, by function, 2023

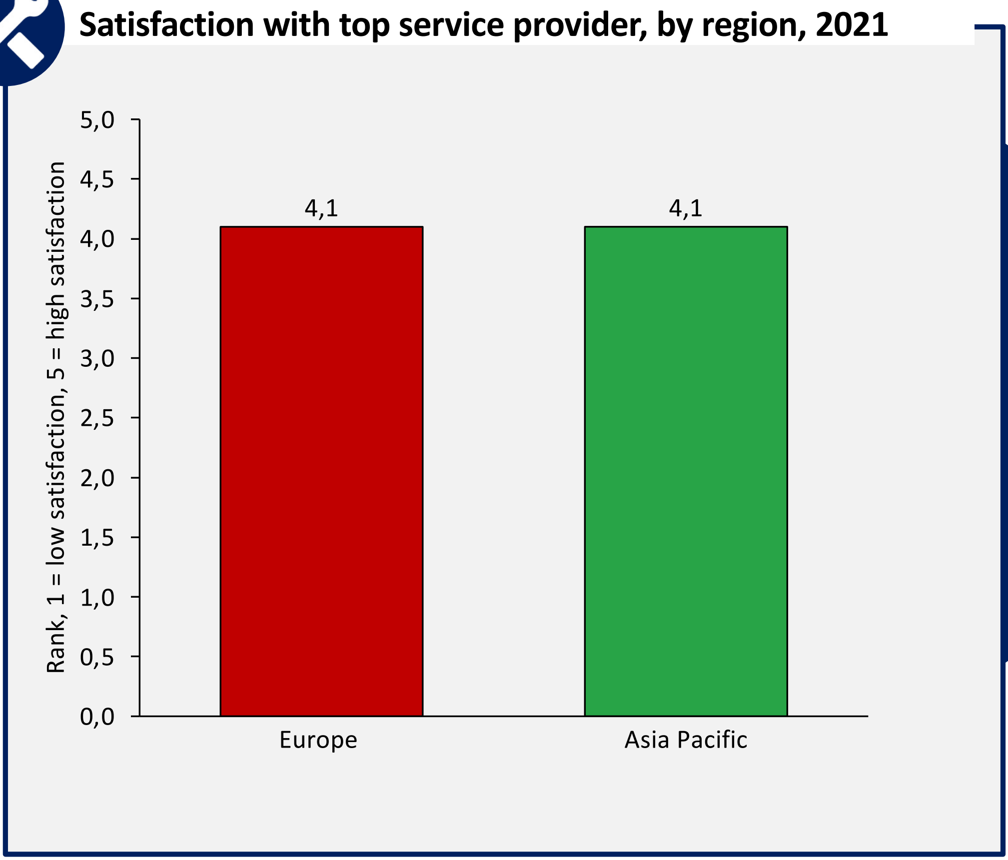


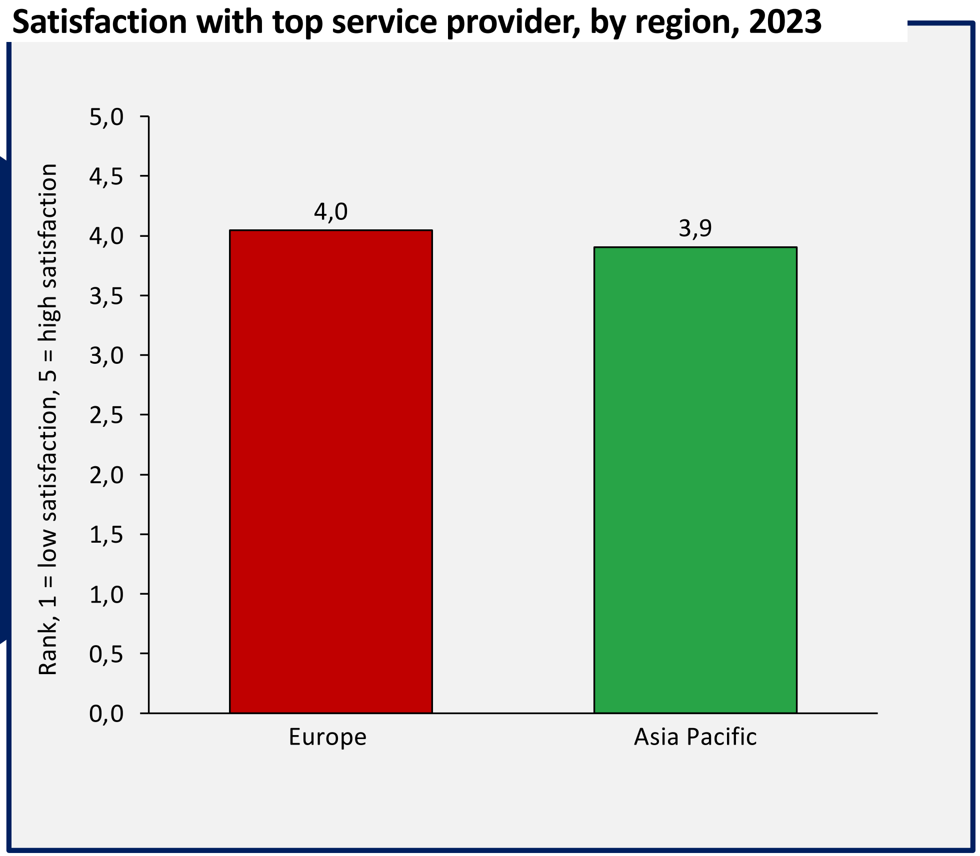
Pure venue operators have the most survey respondents which are unsatisfied with their top service provider

Satisfaction with top service provider, by function, 2023



Satisfaction levels with top service providers are similar between regions





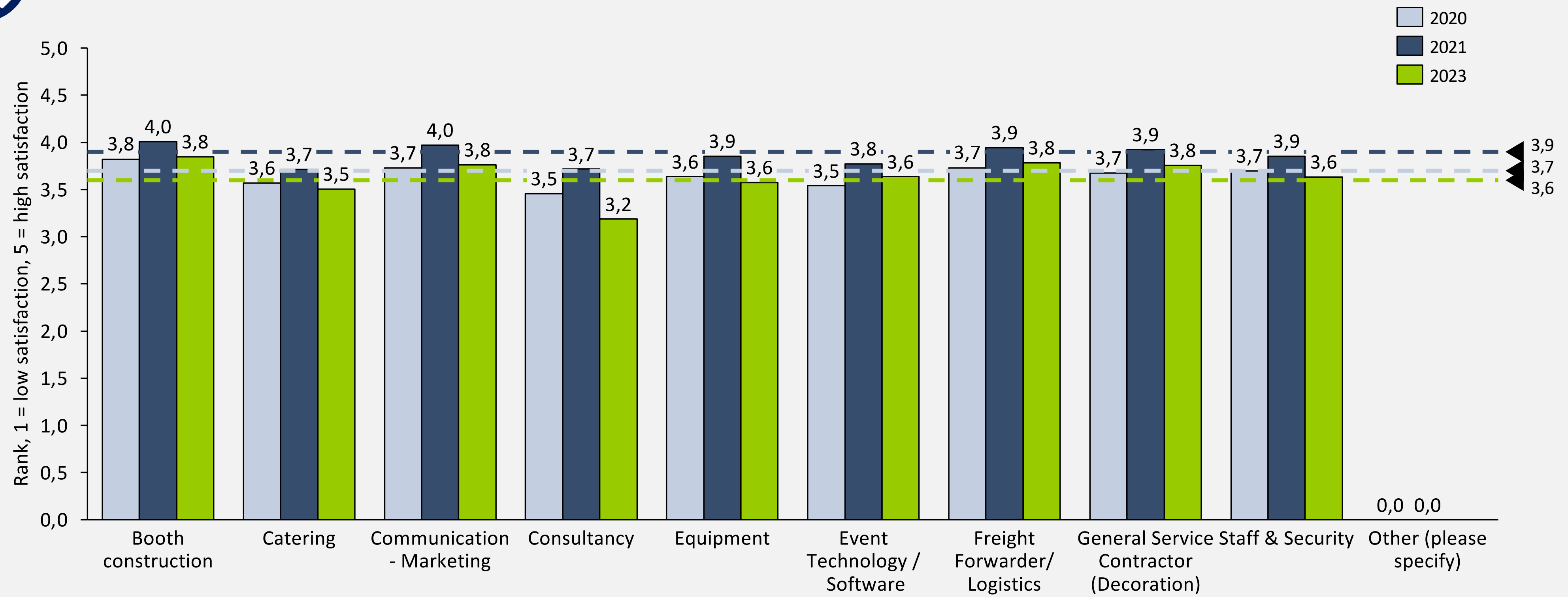
Question 4 – Key Take-aways

- Overall satisfaction rate with the most relevant service providers remains positive with a score between four and five on a scale of 1-5 (notably still a 15%-point decrease from the previous survey)
- Approximately 22% of all survey respondents evaluate their most relevant service provider at the highest rating (a 10%-point decrease from the previous survey)
- A positive trend is that there are no respondents who are completely unsatisfied with their top service provider
- There are no major differences between regions or stakeholder groups

***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 decreasing

Satisfaction with other service providers, across all survey participants, 2020 – 2023



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

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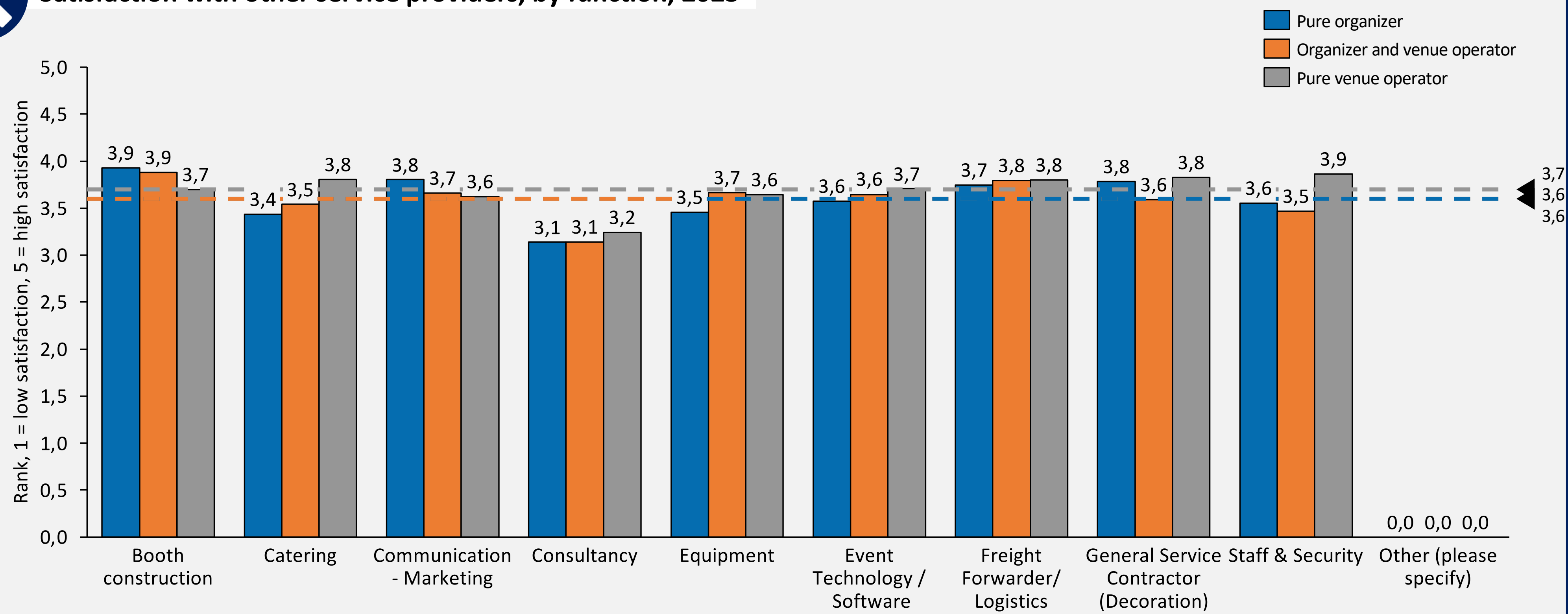
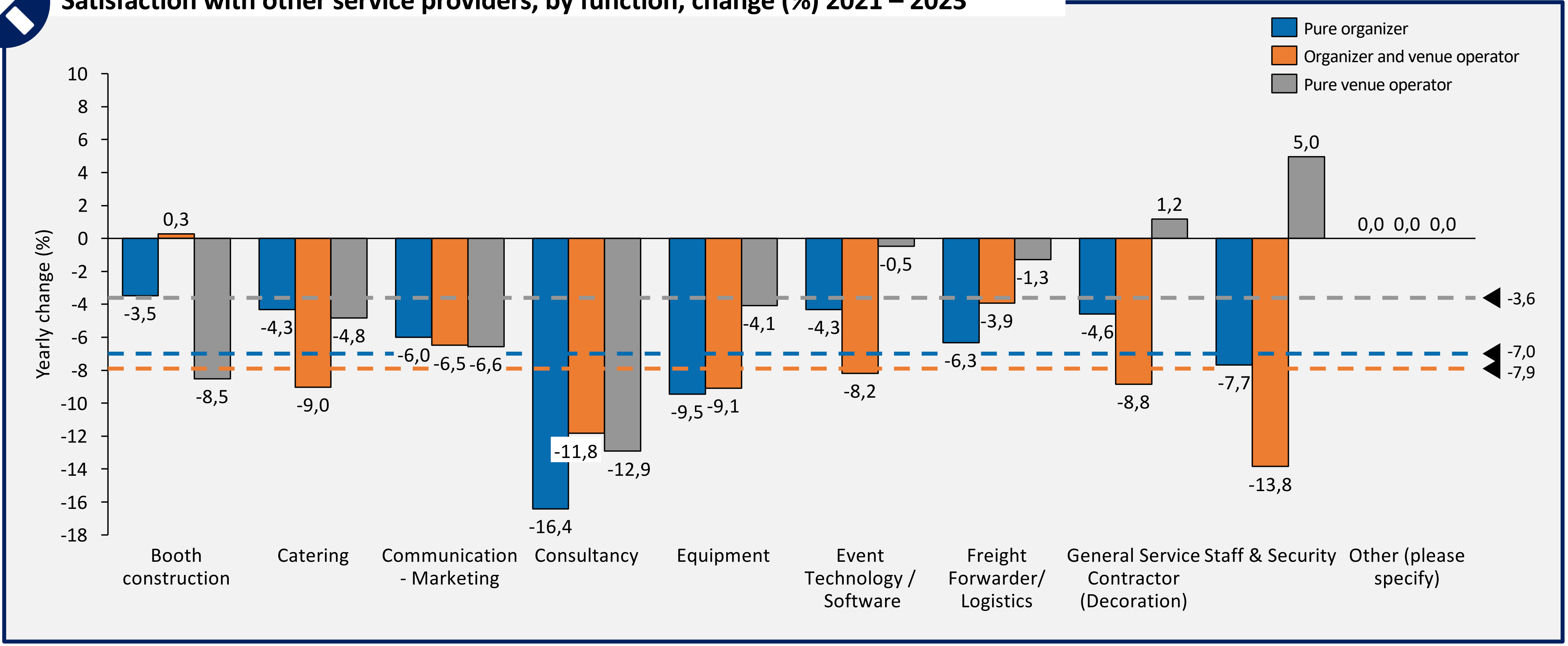
Satisfaction with other service providers, by function, 2023



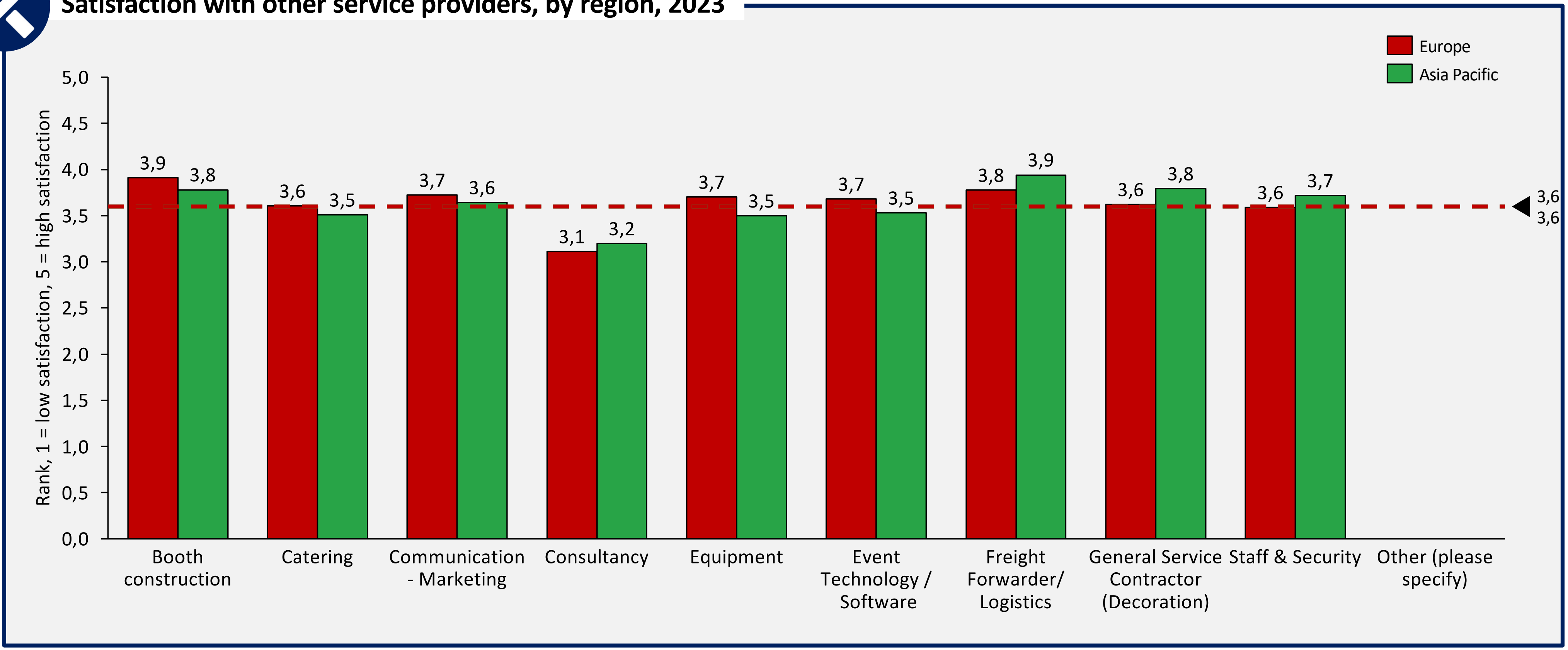
Satisfaction levels with other service providers has decreased across different stakeholder groups and service categories

Satisfaction with other service providers, by function, change (%) 2021 – 2023

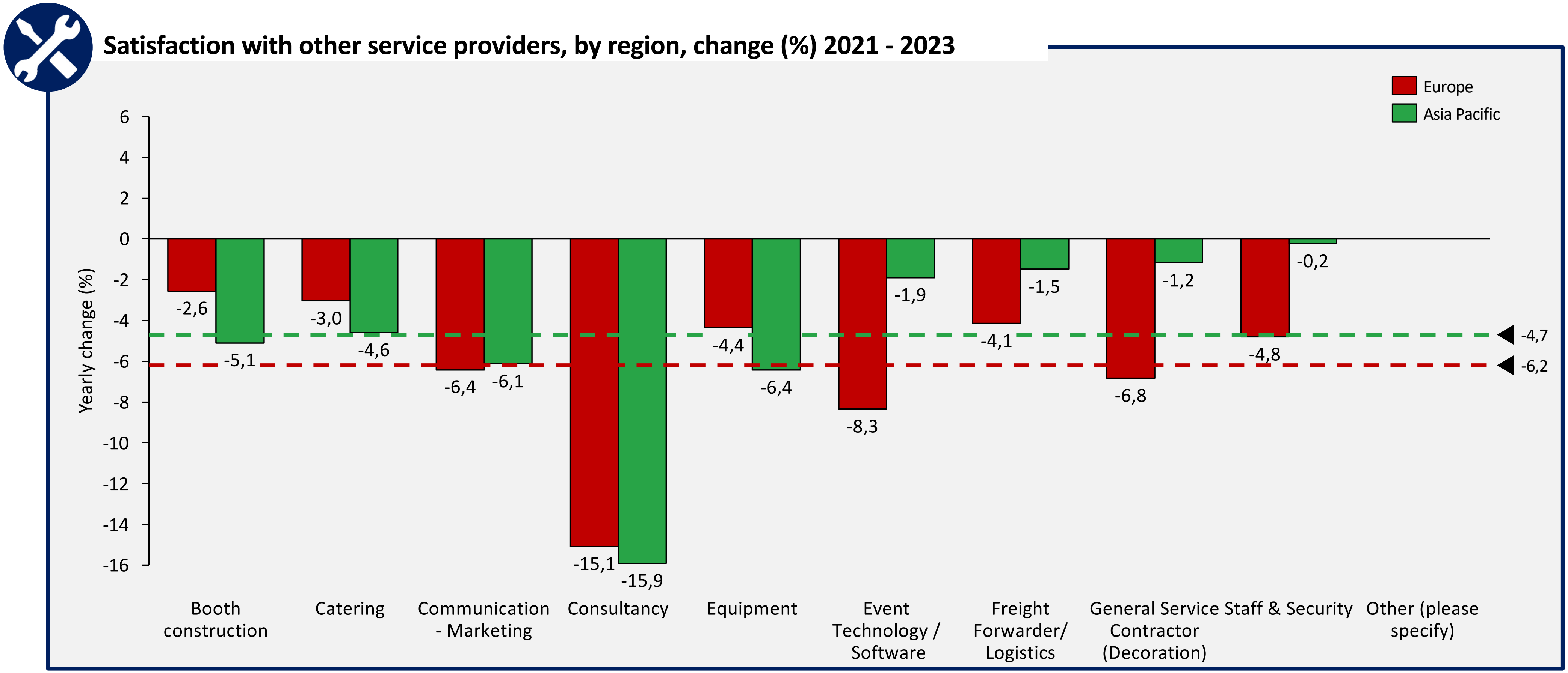


Satisfaction levels with other service providers are identical between regions

Satisfaction with other service providers, by region, 2023



Both regions experience a similar overall decrease in satisfaction levels



Question 5 – Key Take-aways

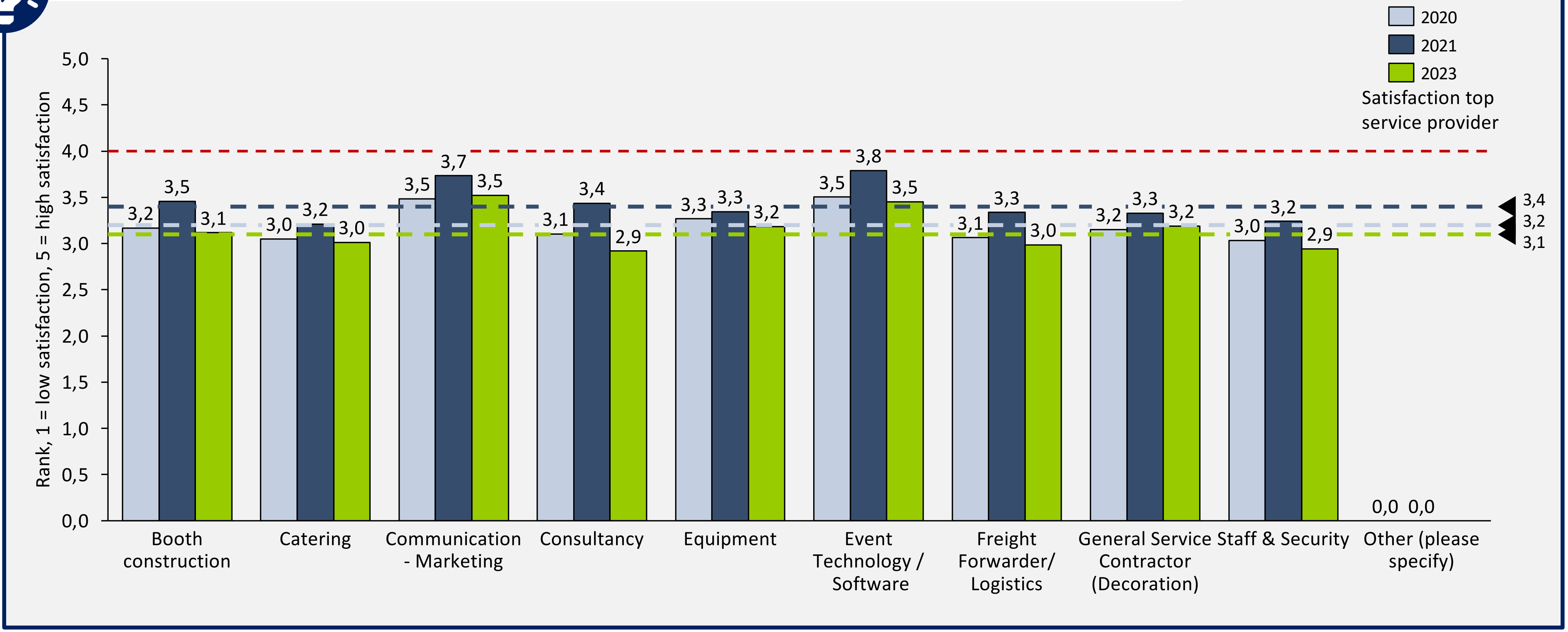
- Overall relationship satisfaction with other service providers has decreased since the previous survey
- There are no significant differences between industry functions
- The strongest decrease in relationship satisfaction occurred in Europe

Question 6

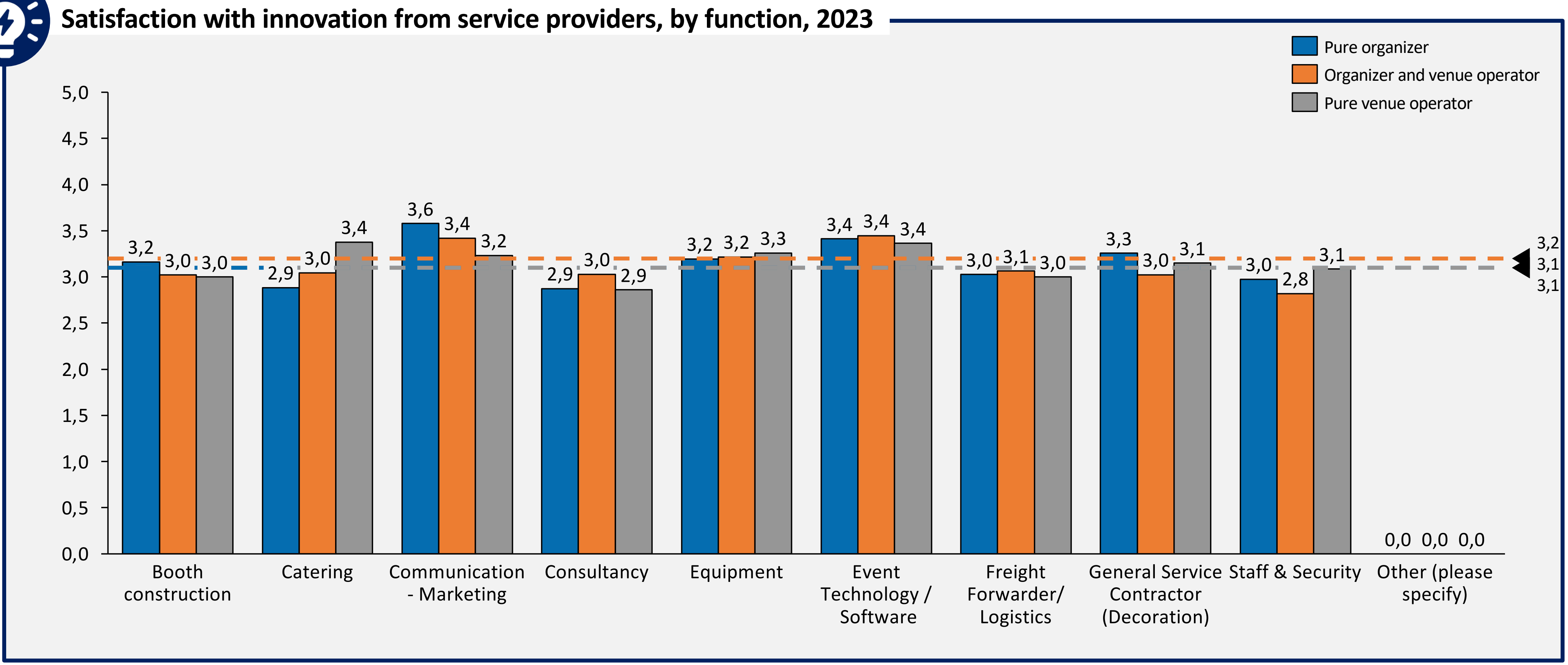
***Question 6**: Please rate how satisfied you are with the innovation provided by your industry partner? (1 = Not at all satisfied, 5= Very satisfied)*

Satisfaction w.r.t. innovation from service providers has decreased slightly and still falls behind overall satisfaction levels

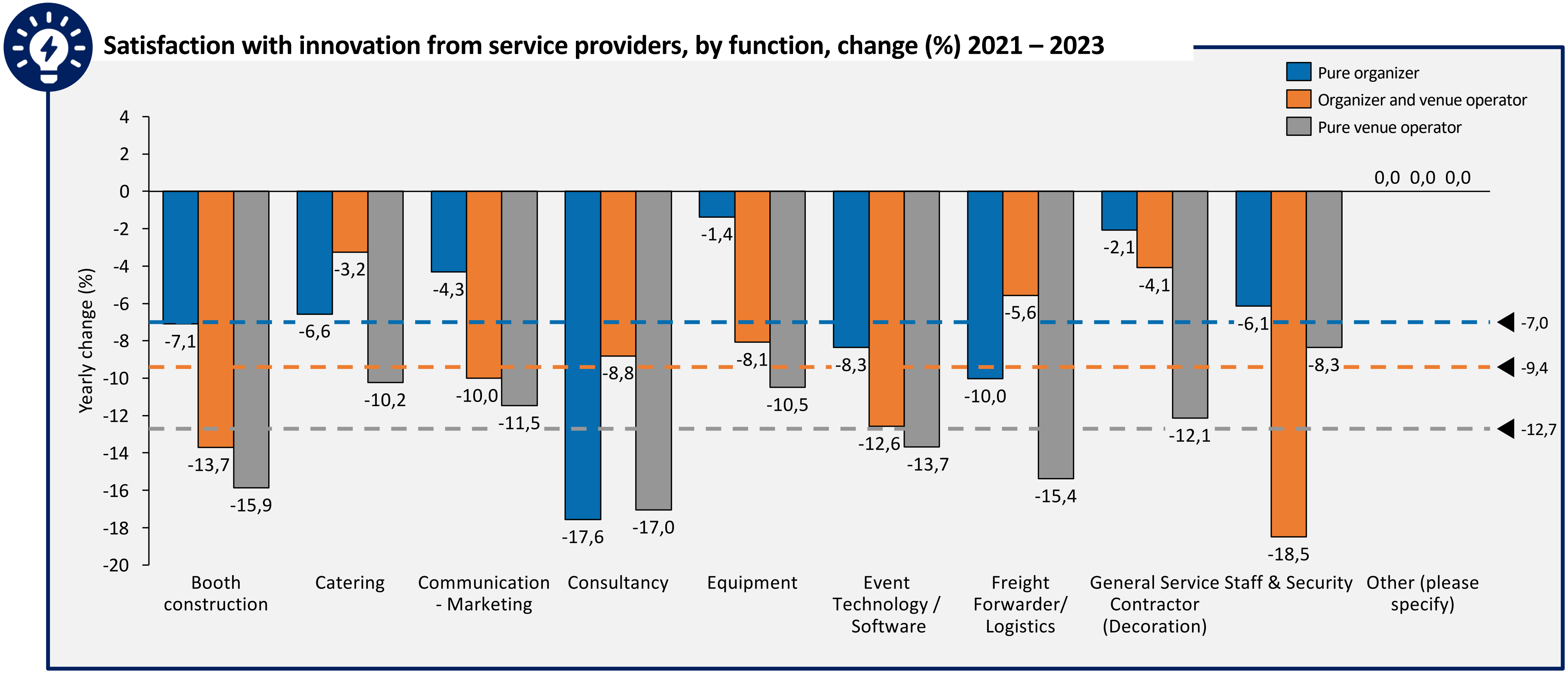
Satisfaction with innovation from service providers, across all survey participants, 2020 – 2023



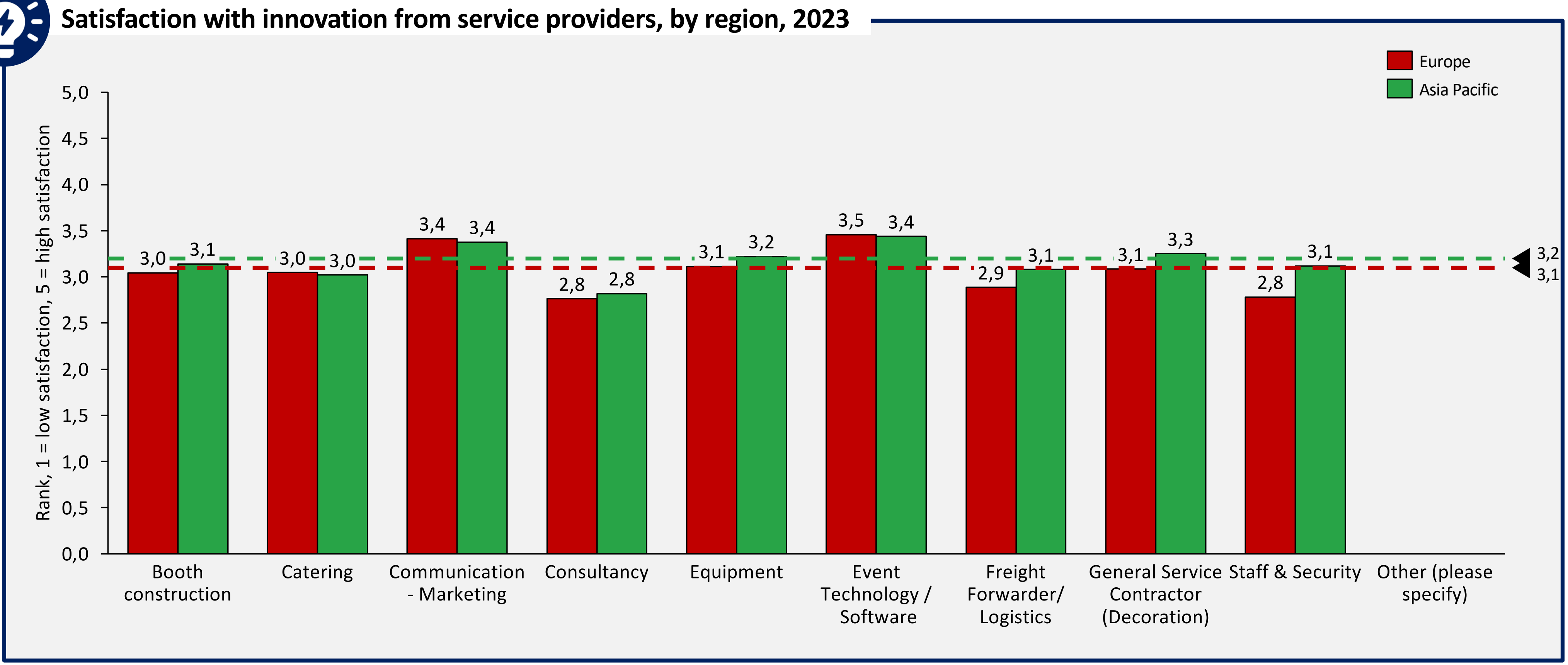
Satisfaction levels with regards to innovation are similar between different target groups



All stakeholders display a significant decrease in satisfaction w.r.t. innovation from all service providers

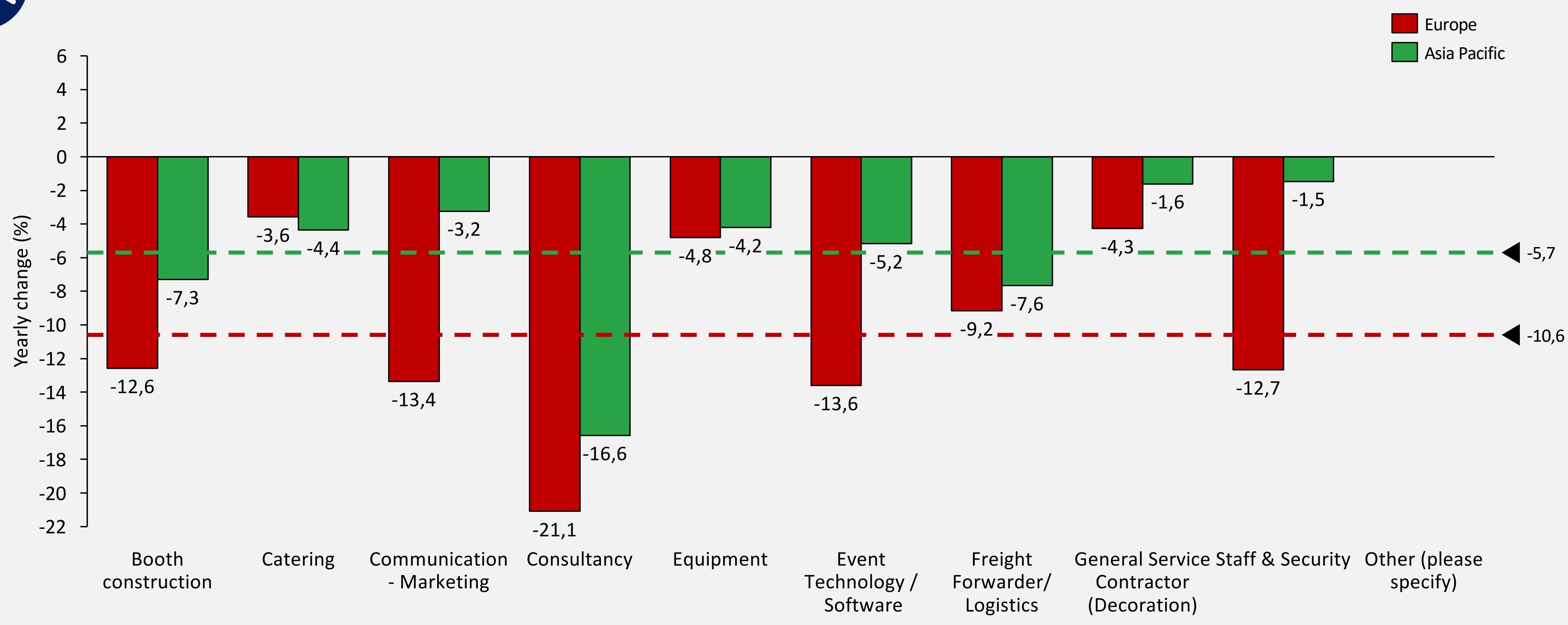


Satisfaction levels with regards to innovation are fairly identical between regions



Satisfaction levels w.r.t. innovation are down 11% in Europe and are down almost 6% in Asia-Pacific

Satisfaction with innovation from service providers, by region, change (%) 2021 - 2023



Question 6 – Key Take-aways

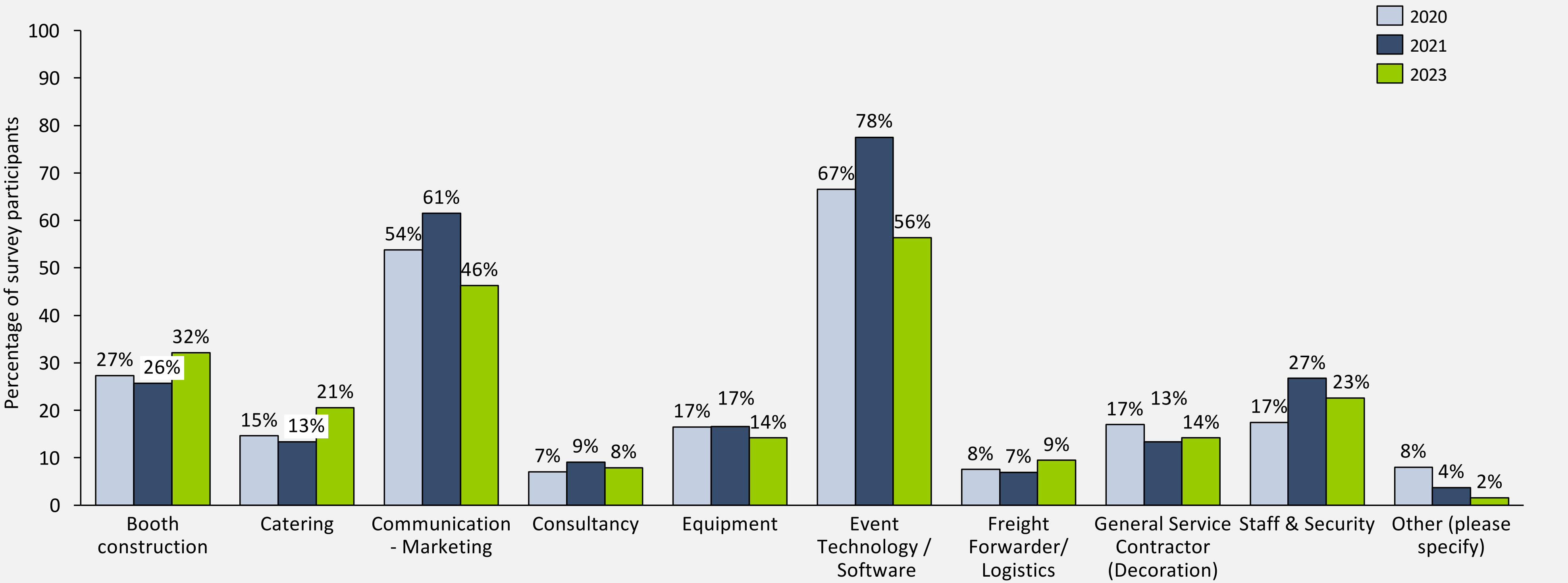
- Overall satisfaction with regard to innovation from service providers remains lower than overall satisfaction with top service provider and other service providers
- Satisfaction with regard to innovation from service providers has seen a considerable decrease since the last survey
- This suggests that service providers are doing too little to innovate
- Communication and marketing service providers are perceived to be the most innovative, especially from the pure organizer section
- 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?*

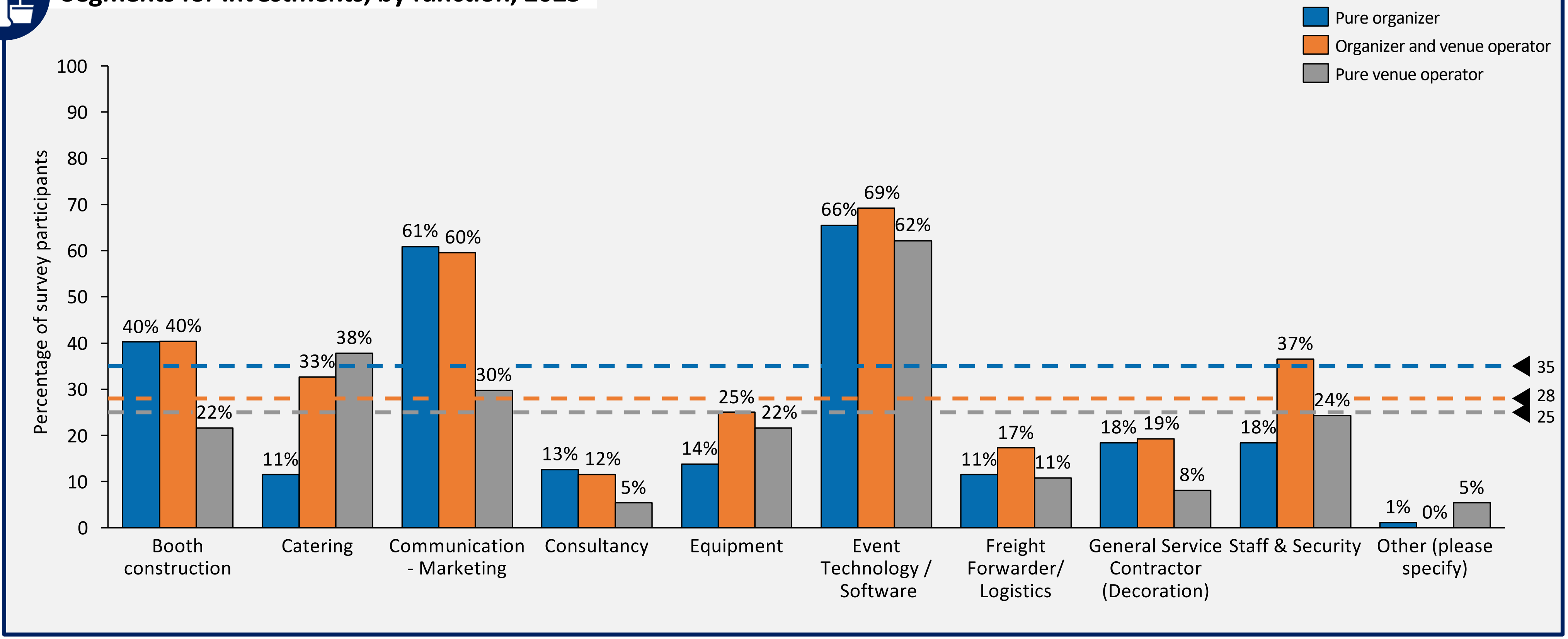
The importance of investments into event technology has dropped significantly since the last survey

Segments for investments, across all survey participants, 2020 – 2023



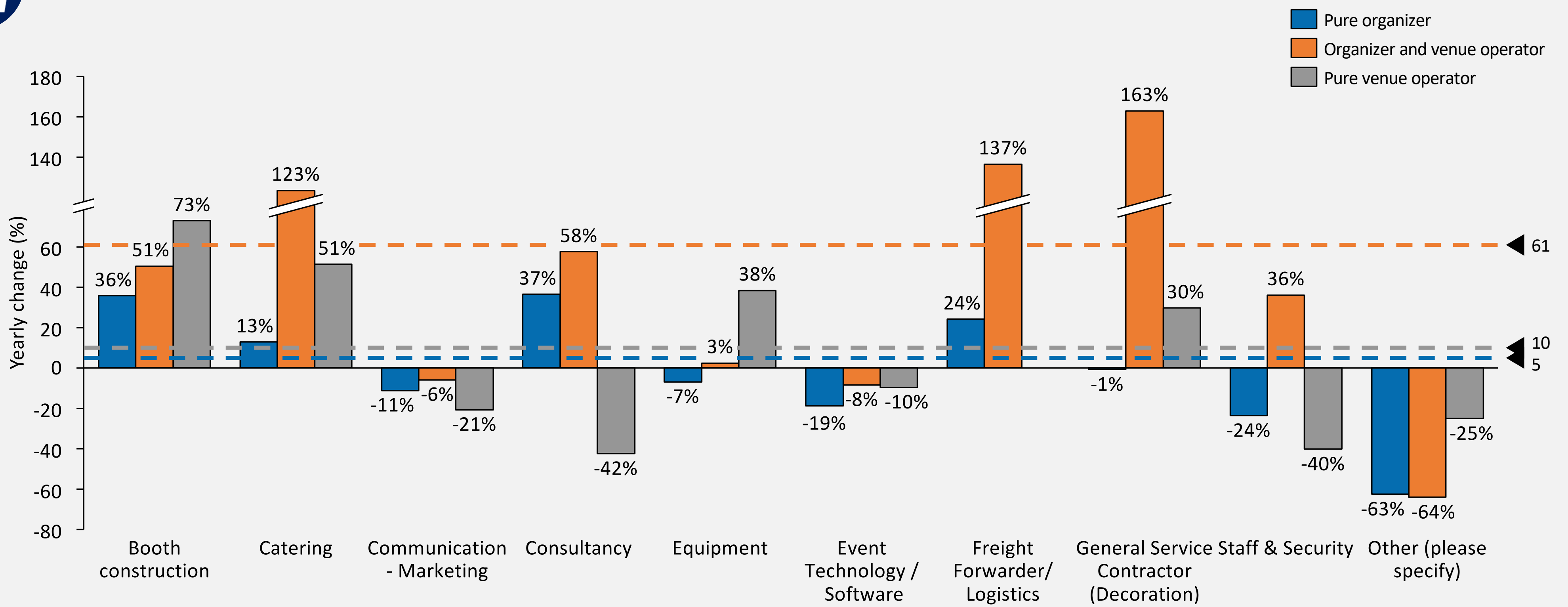
Yet, across all target groups event technology remains the field with the highest potential for investments

Segments for investments, by function, 2023



All survey groups, however, display a decrease in the potential for investments in event technology services

Segments for investments, by function, change (%) 2021 - 2023



The potentials for investments into services are similar between regions

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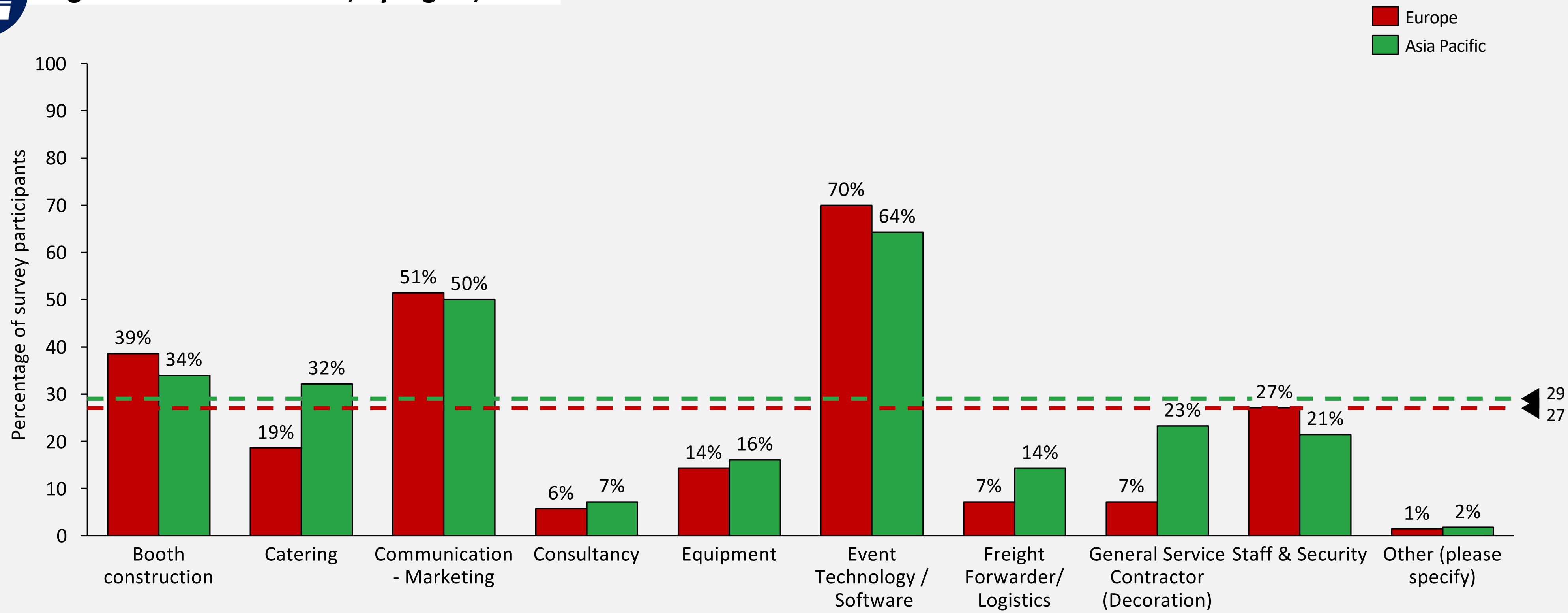
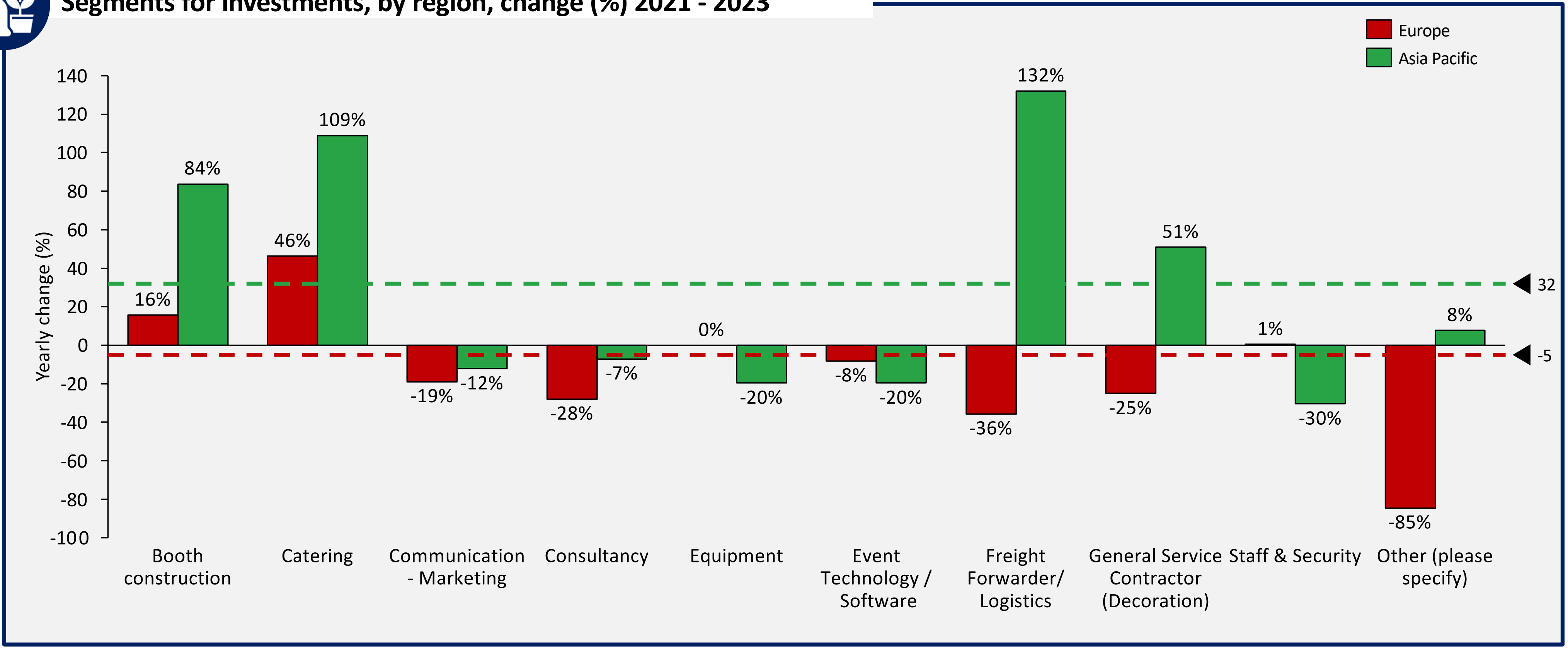
Segments for investments, by region, 2023



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

Segments for investments, by region, change (%) 2021 - 2023



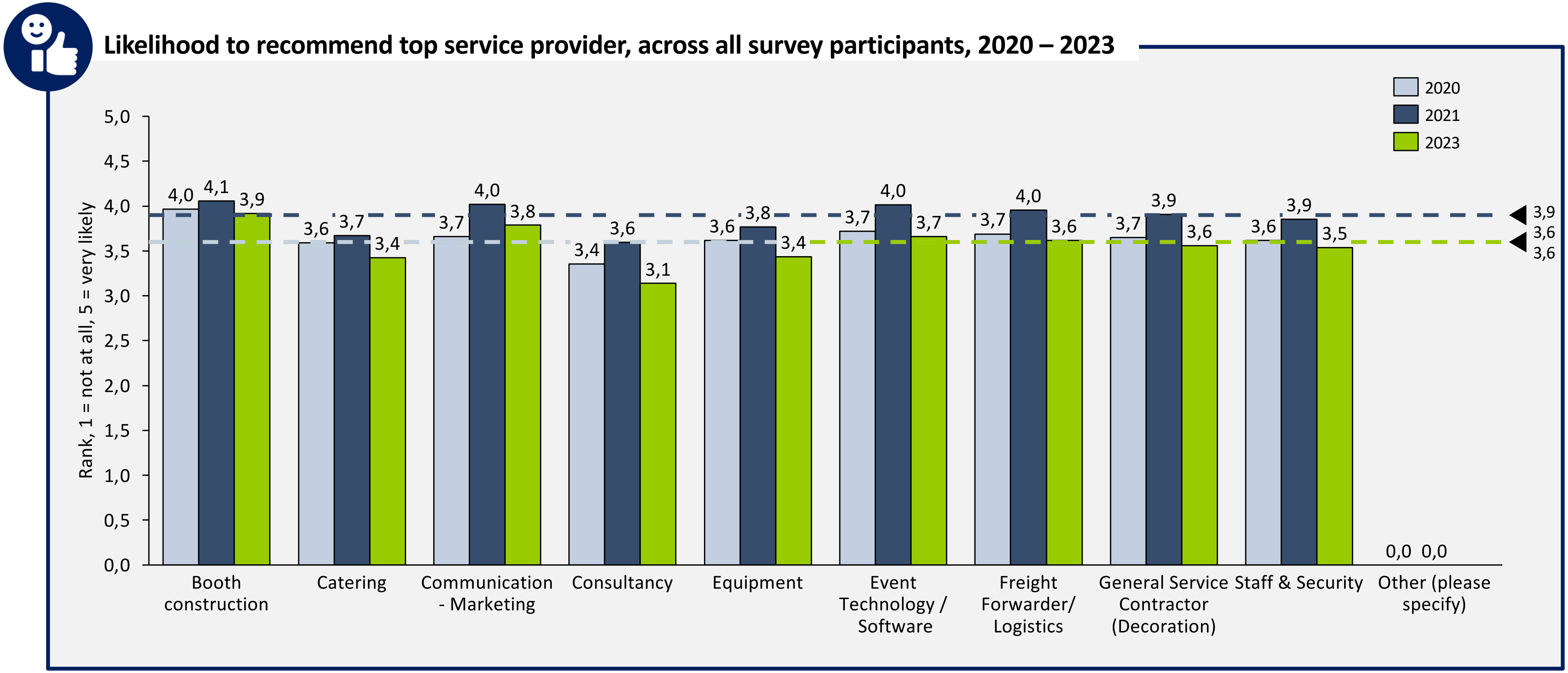
Question 7 – Key Take-aways

- 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, yet with both areas displaying a strong decline since the last survey
- Respondents in Europe place a larger emphasis on event technology and software than their counterparts in Asia-Pacific – a turnaround since the last survey

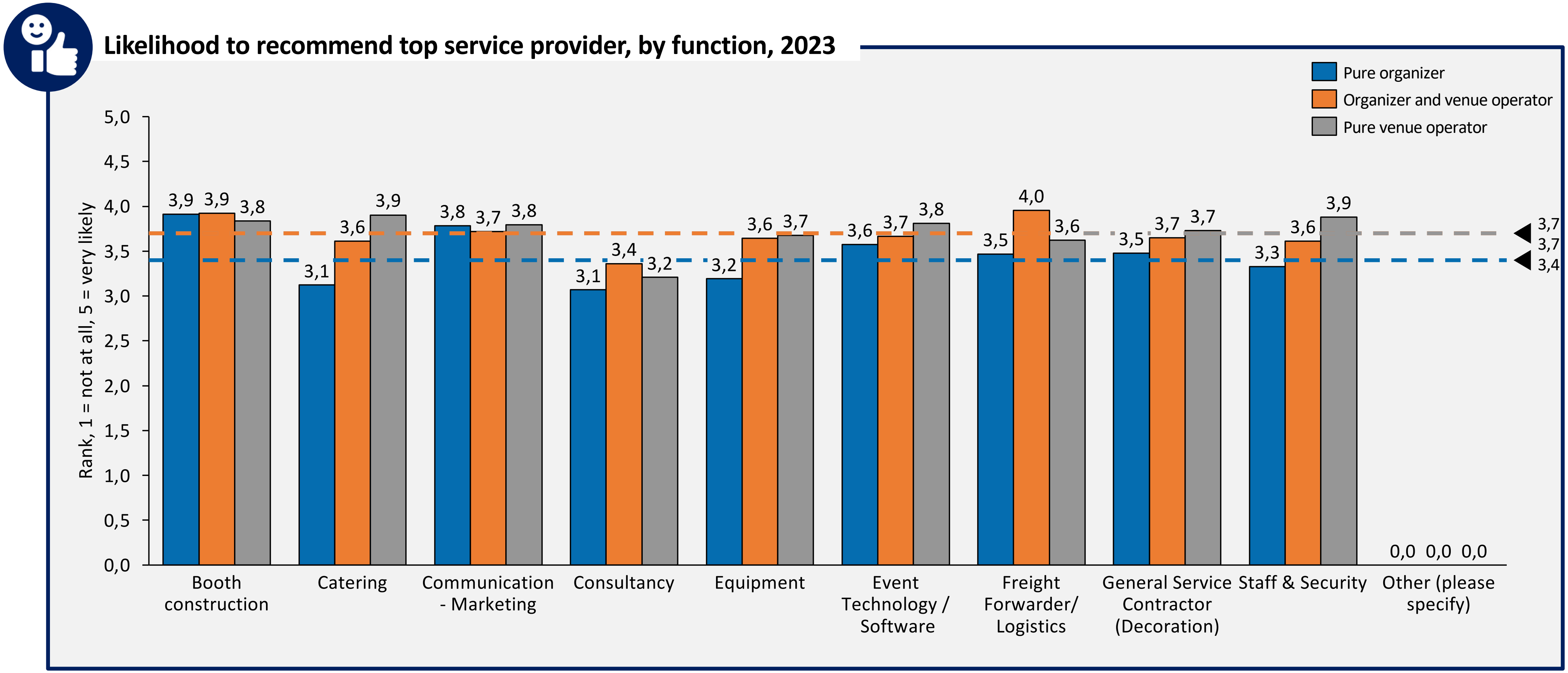
Question 8

***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 slightly fallen since the last survey

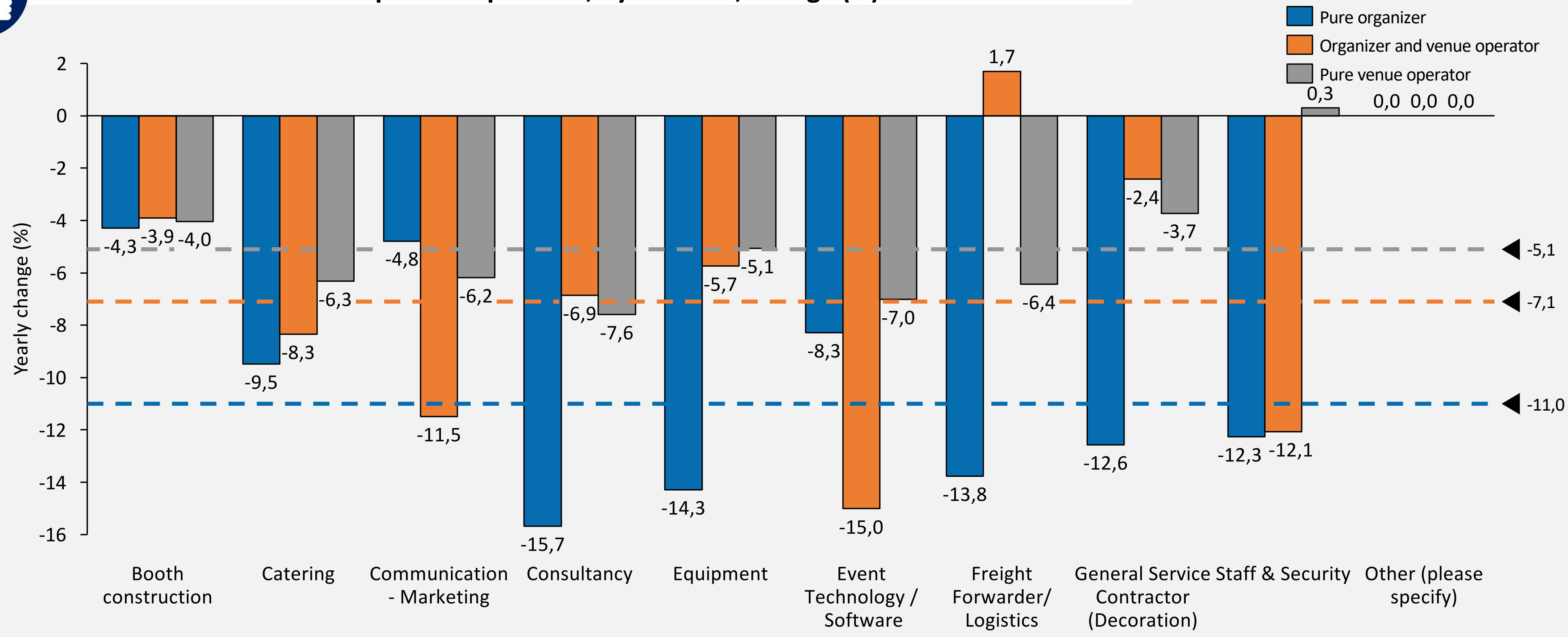


The likelihood to recommend the top service provider is fairly similar between function groups



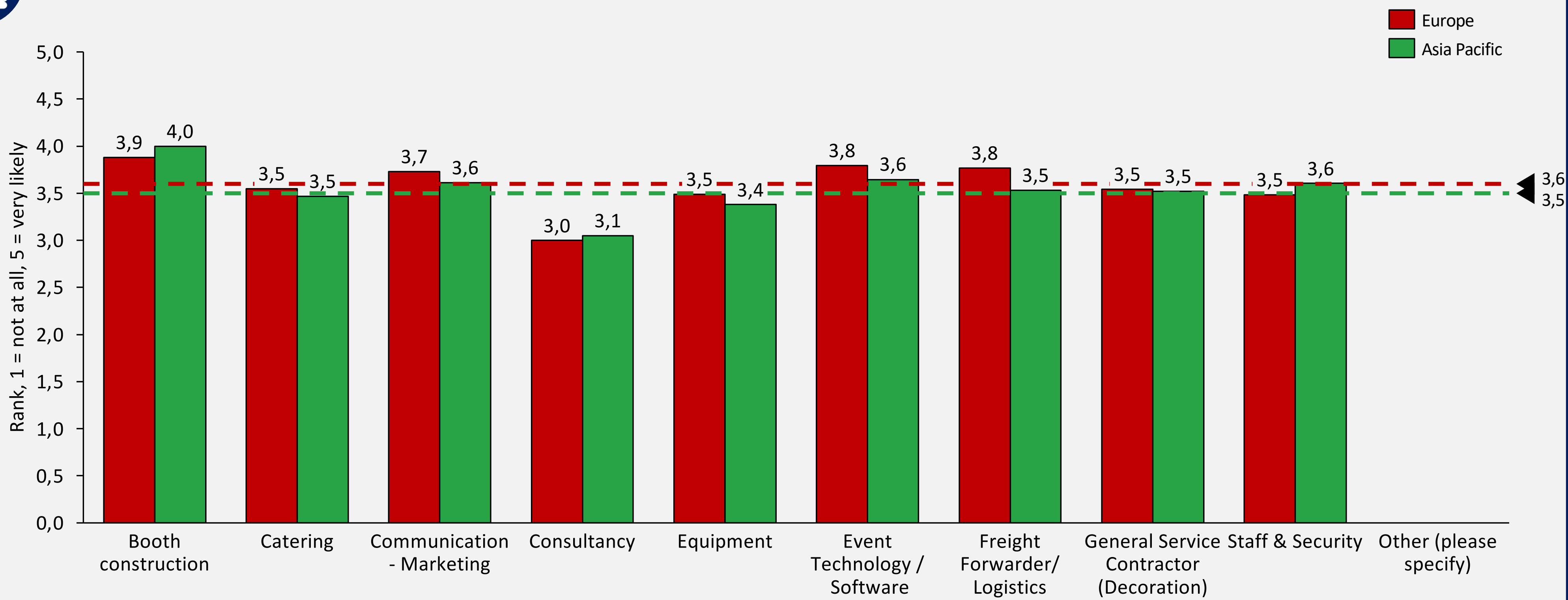
All target groups display a decrease in the likelihood to recommend the top service provider

Likelihood to recommend top service provider, by function, change (%) 2021 – 2023



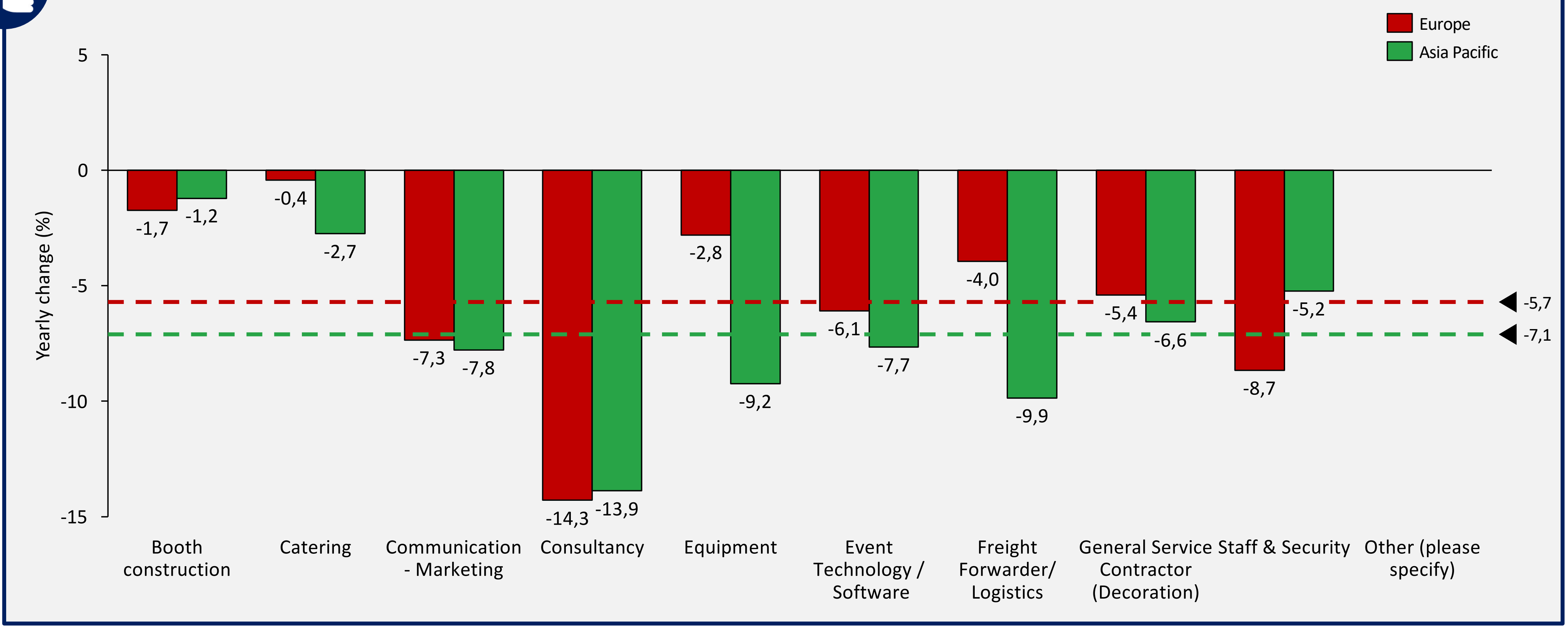
The likelihood to recommend the top service provider is identical between regions

Likelihood to recommend top service provider, by region, 2023



On average, both regions display a decrease in the likelihood to recommend the top service provider

Likelihood to recommend top service provider, by region, change (%) 2021 - 2023



Question 8 – Key Take-aways

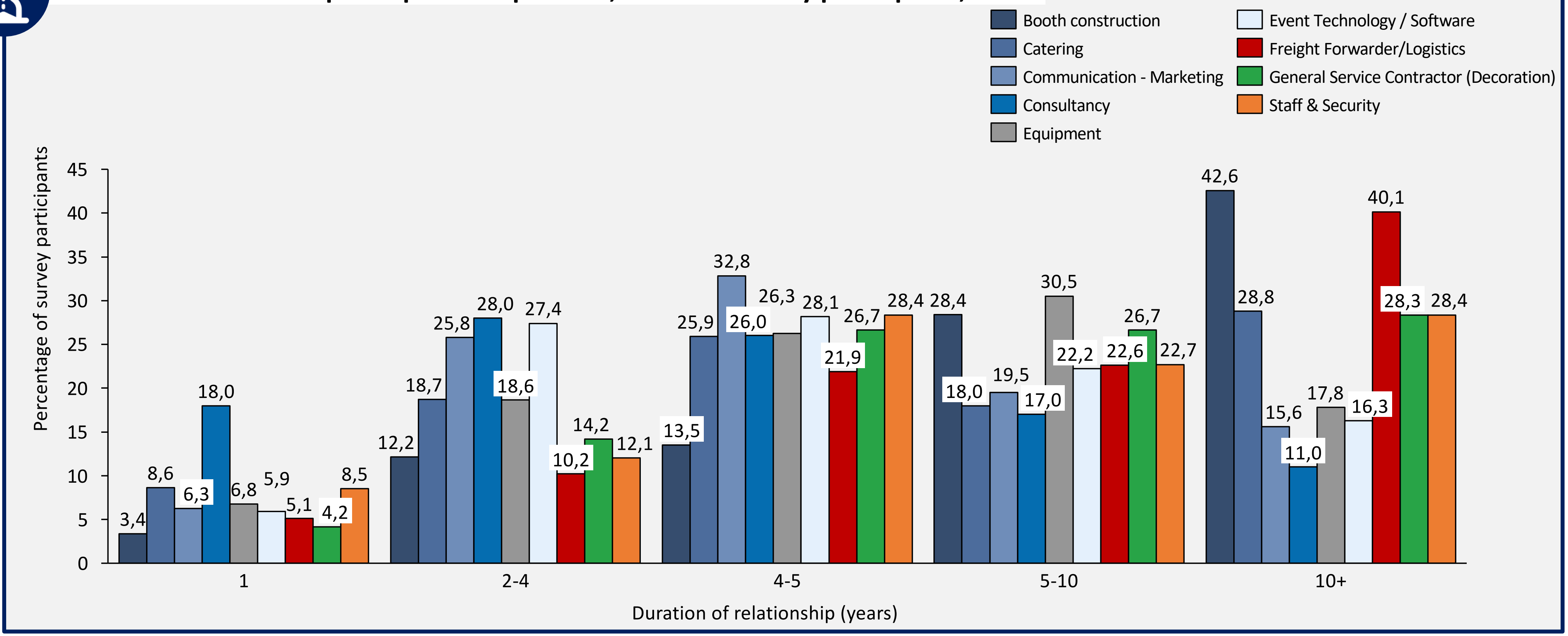
- The likelihood of survey respondents to recommend their most important service provider remains fairly high but has decreased from 3.9 to 3.6 (same score as 2020) on a scale from 1 - 5
- This score is closely linked to the overall satisfaction with the most relevant service provider
- Companies providing 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, 2023



Question 9 – Key Take-aways

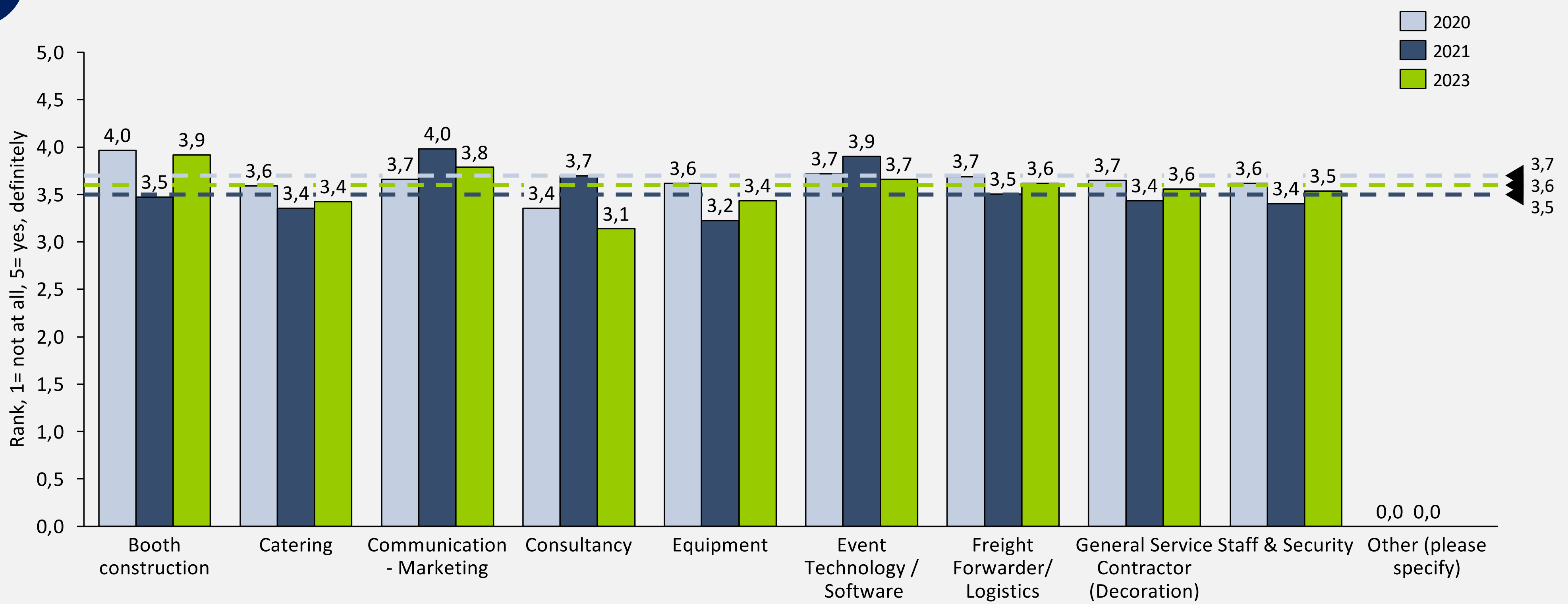
- There continues to be a discernible correlation between the duration of partnerships and the perceived value of these collaborations.
- Booth construction service providers maintain the longest-standing partnerships with their clients, with freight forwarding and logistics providers closely following suit.
- Interestingly, while marketing and communications services are significant for success, the duration of cooperation between clients and their service providers in this category tends to be relatively brief. This suggests that clients may be more inclined to switch service providers more frequently in this domain.
- A similar pattern emerges for consultants, where the average duration of collaborations is typically short-lived. This phenomenon can, to some extent, be attributed to the project-based nature of consultancy work.

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)*

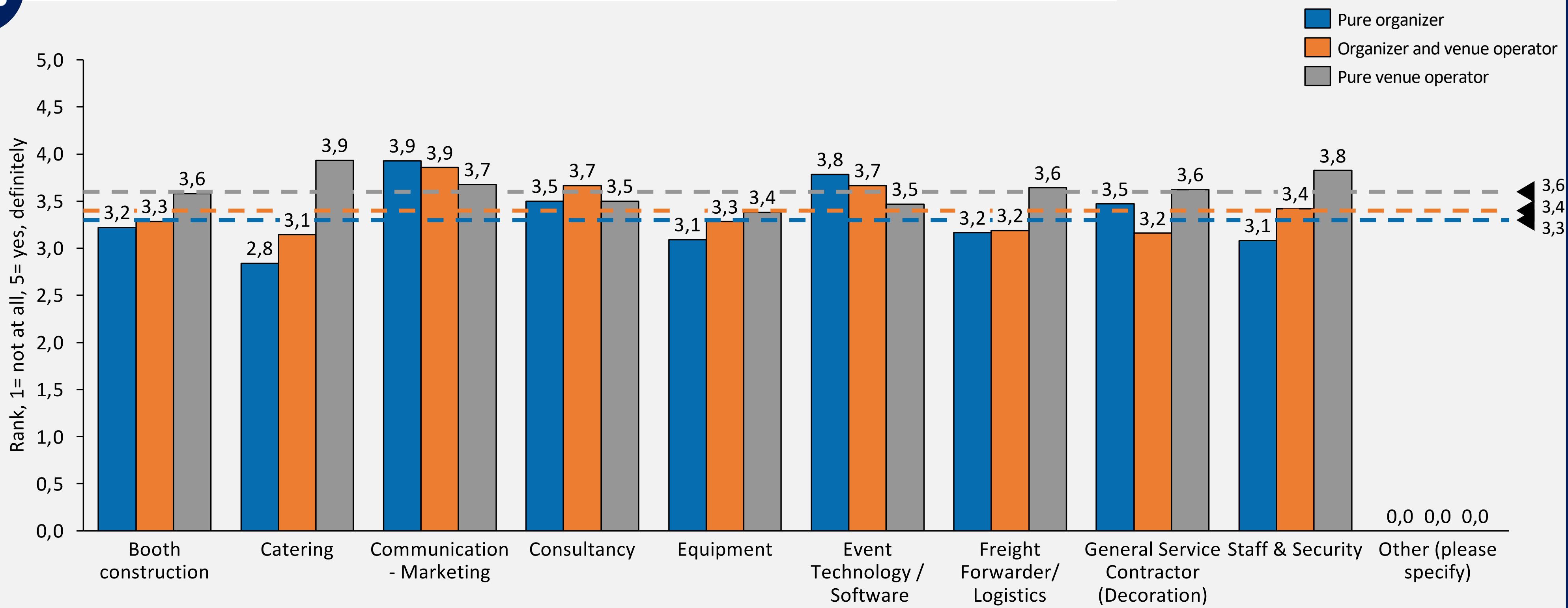
The perceived benefit from an increase in information sharing has slightly dropped over the last year

Perceived positive effect of information sharing with service providers, across all survey participants, 2020 – 2023



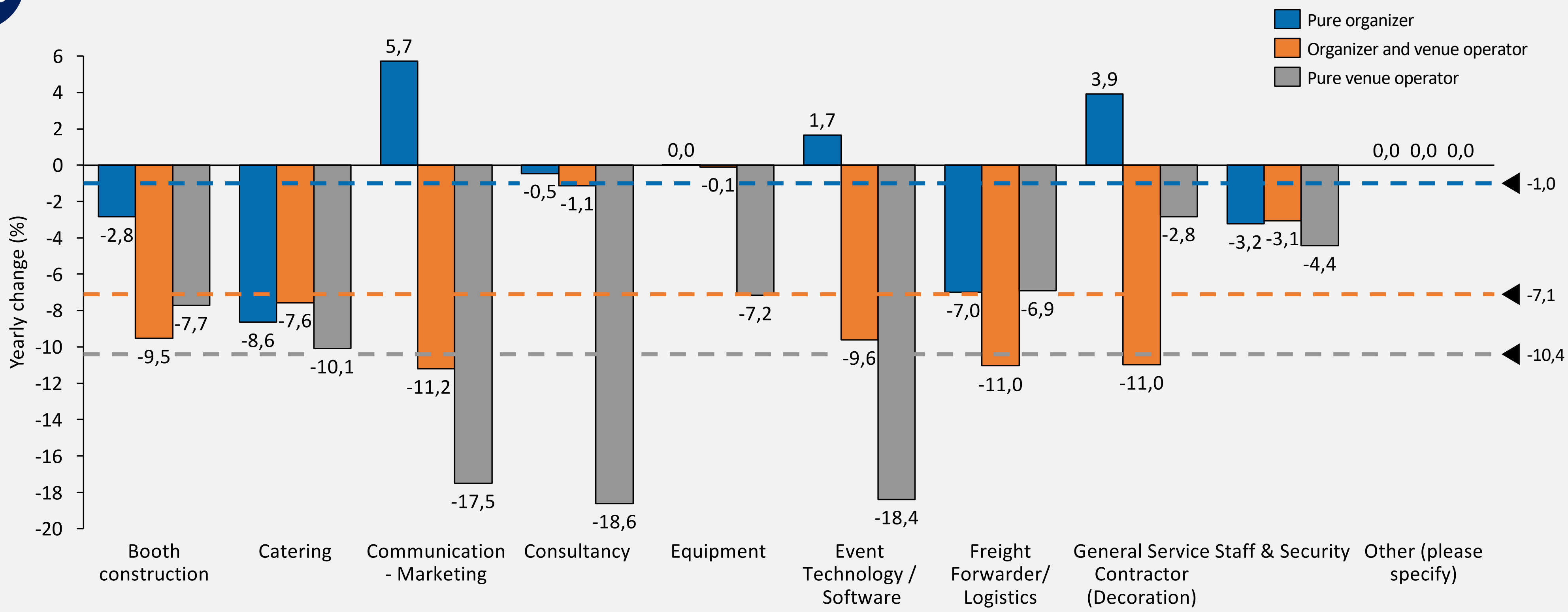
Pure venue operators perceive the largest benefit from an increase in information sharing

Perceived positive effect of information sharing with service providers, by function, 2023



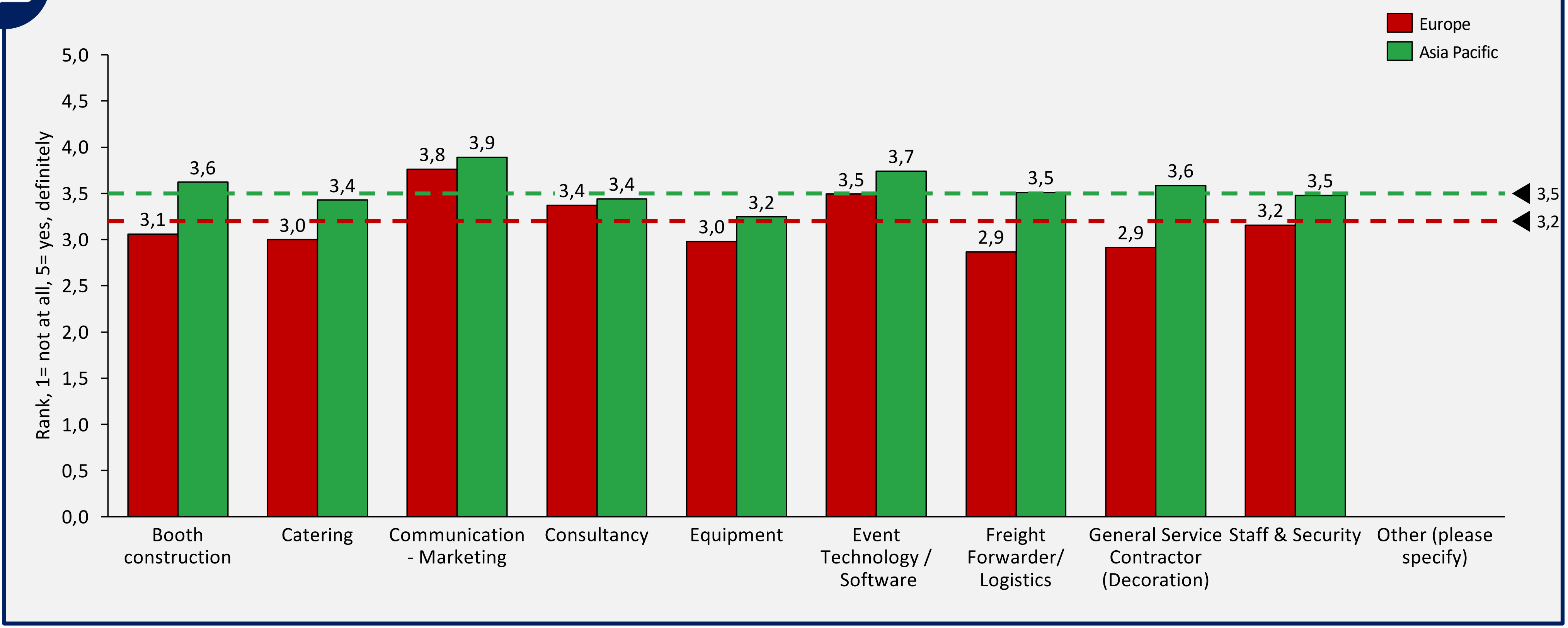
The perceived benefit of an increase in information sharing has dropped for pure organizers

Perceived positive effect of information sharing with service providers, by function, change (%) 2021 – 2023



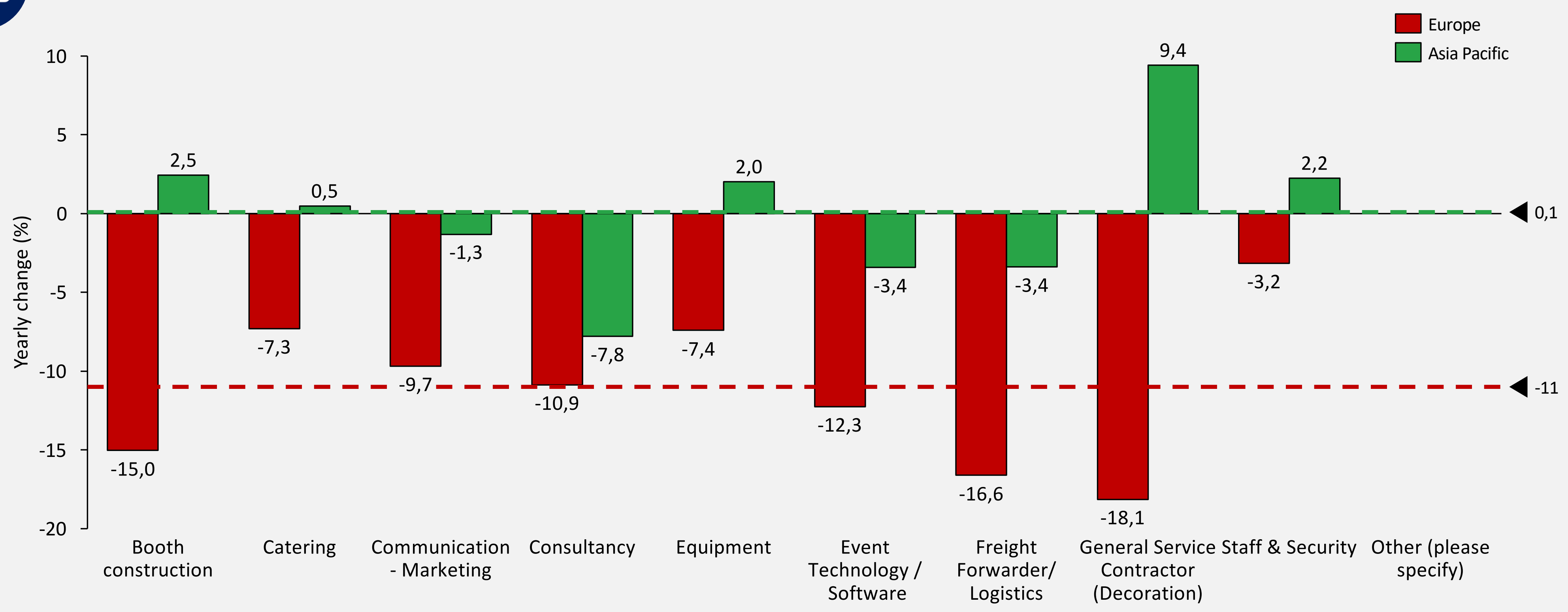
The perceived benefits from an increase in information sharing are slightly lower in Europe than in Asia

Perceived positive effect of information sharing with service providers, by region, 2023



Europe notes a sharp decline in the value of information-sharing

Perceived positive effect of information sharing with service providers, by region, change (%) 2021 - 2023



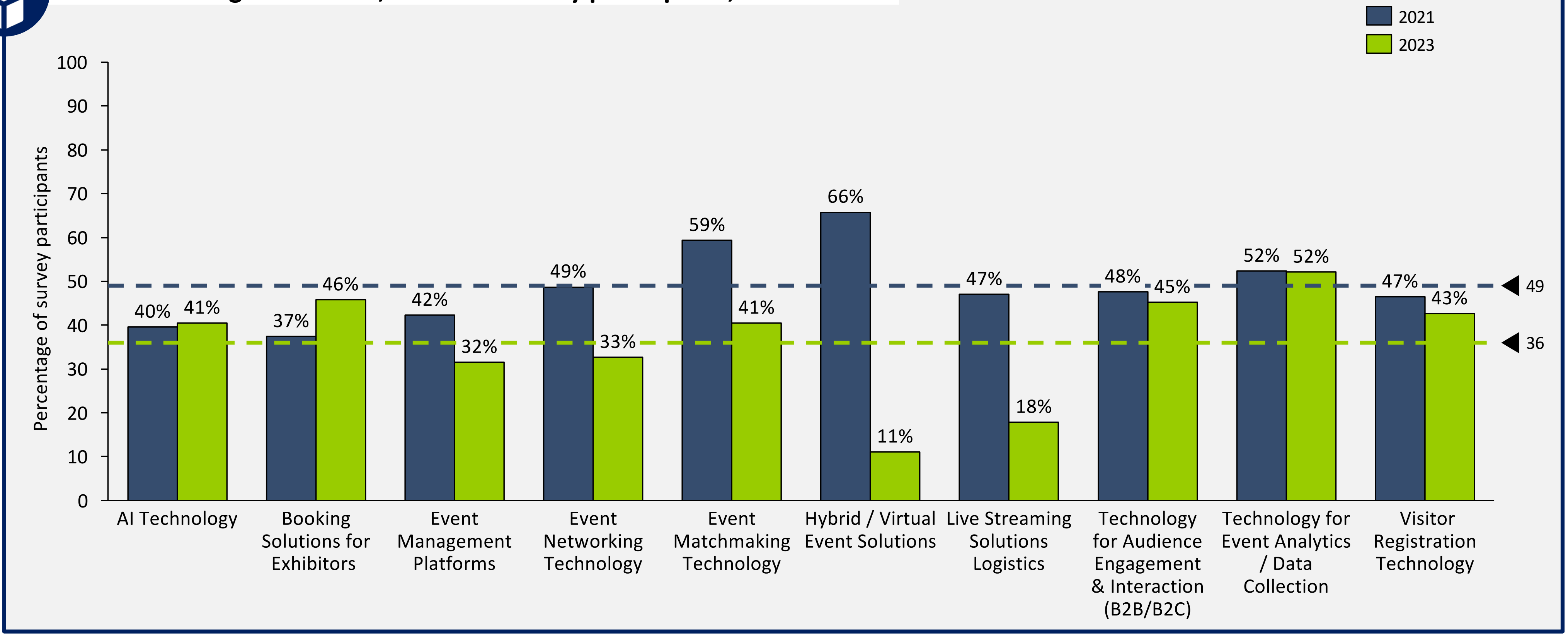
Question 10 – Key Take-aways

- There is still a prevailing belief in the potential benefits of enhancing information sharing among service providers and industry partners. However, it's worth noting that the significance of this idea has somewhat diminished in recent years
- Pure organizers exhibit the weakest decline in the importance of information sharing, and they already start from relatively low levels. This trend could be influenced by the ongoing discussions regarding data ownership and usage concerning virtual event platforms
- Pure venue operators believe most strongly that information sharing could improve event success
- The perceived benefits from an increase in information sharing are slightly lower in Europe than in Asia

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

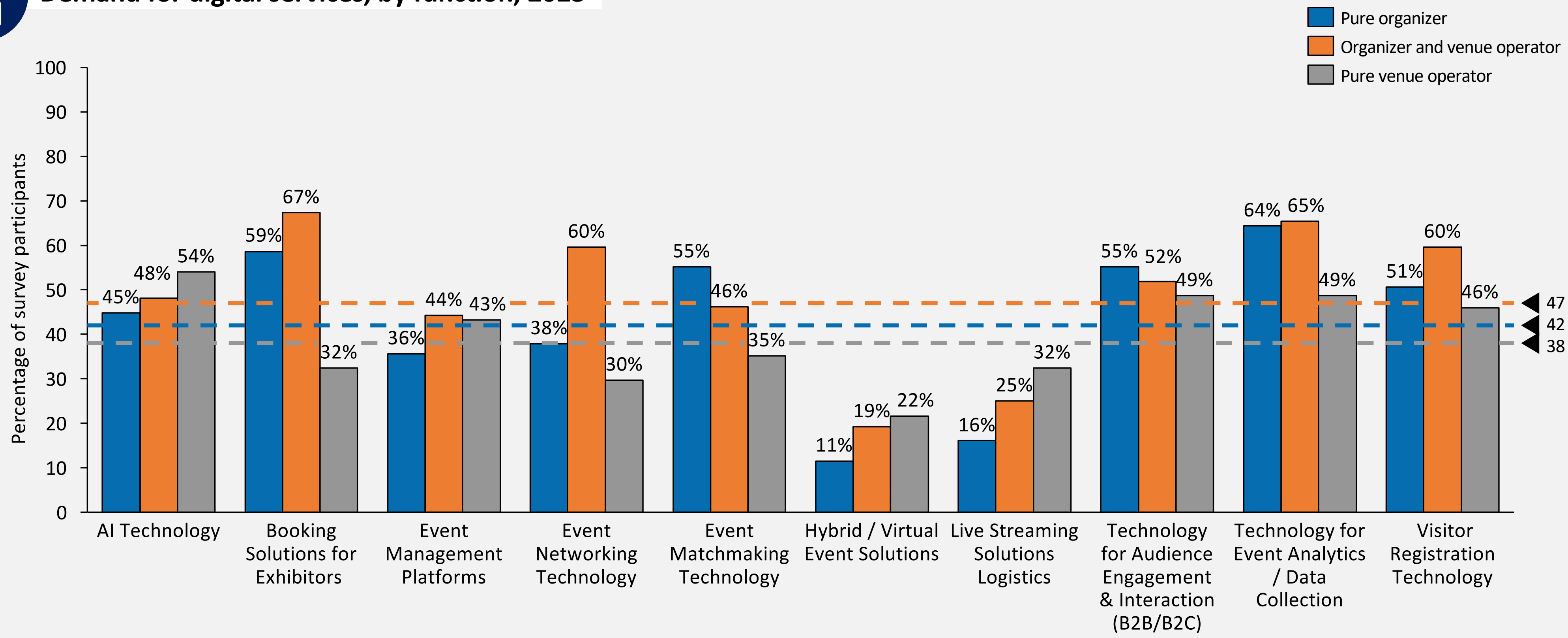
The demand for Hybrid/Virtual Event Solutions has seen a considerable drop

Demand for digital services, across all survey participants, 2020 – 2023



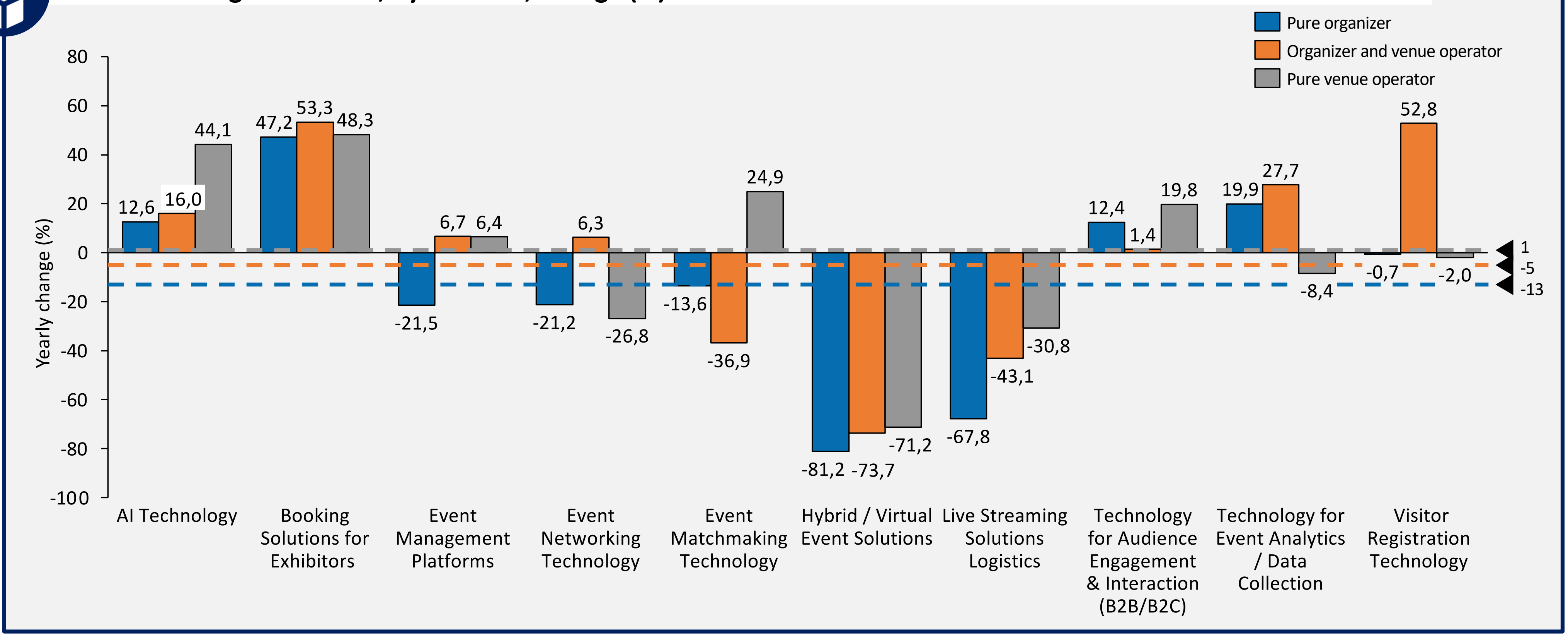
Pure venue operators have the lowest demand for digital services

Demand for digital services, by function, 2023



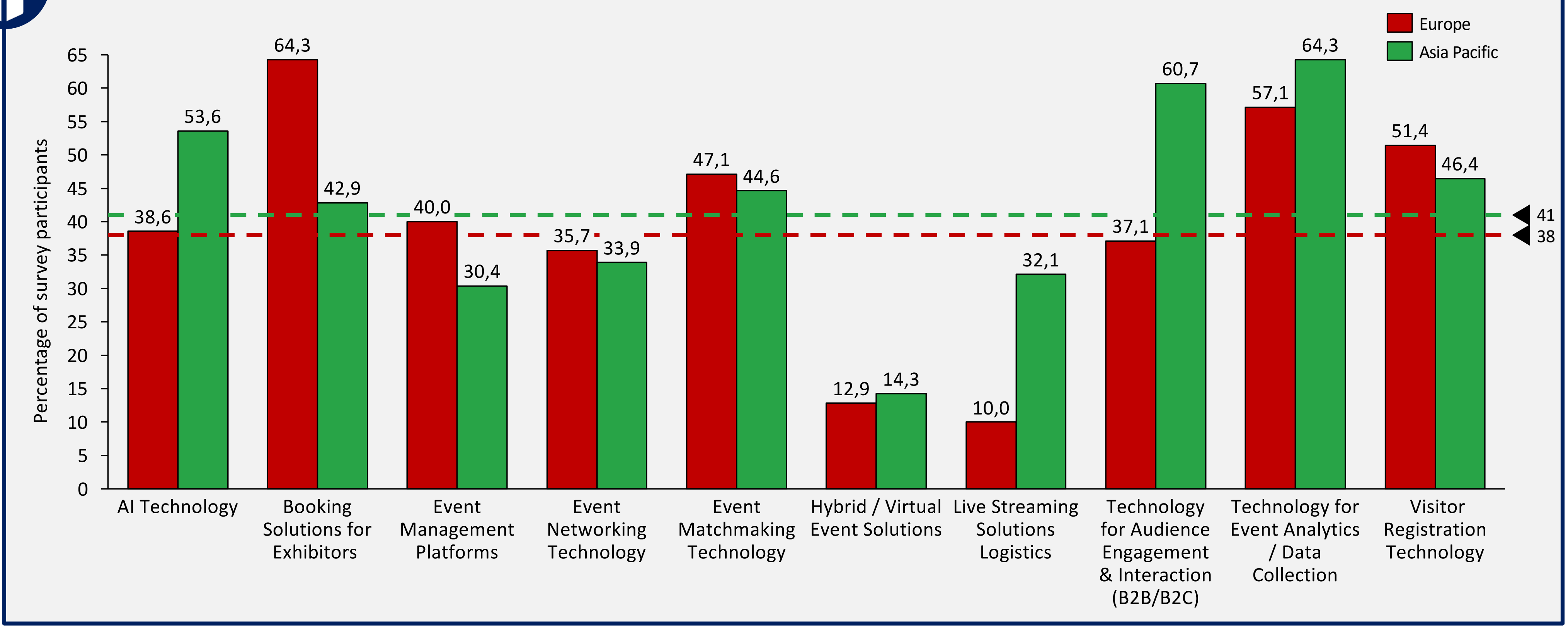
The drop in demand for digital services is most pronounced within the group of pure organizers, who are now focused back on live events

Demand for digital services, by function, change (%) 2021 – 2023



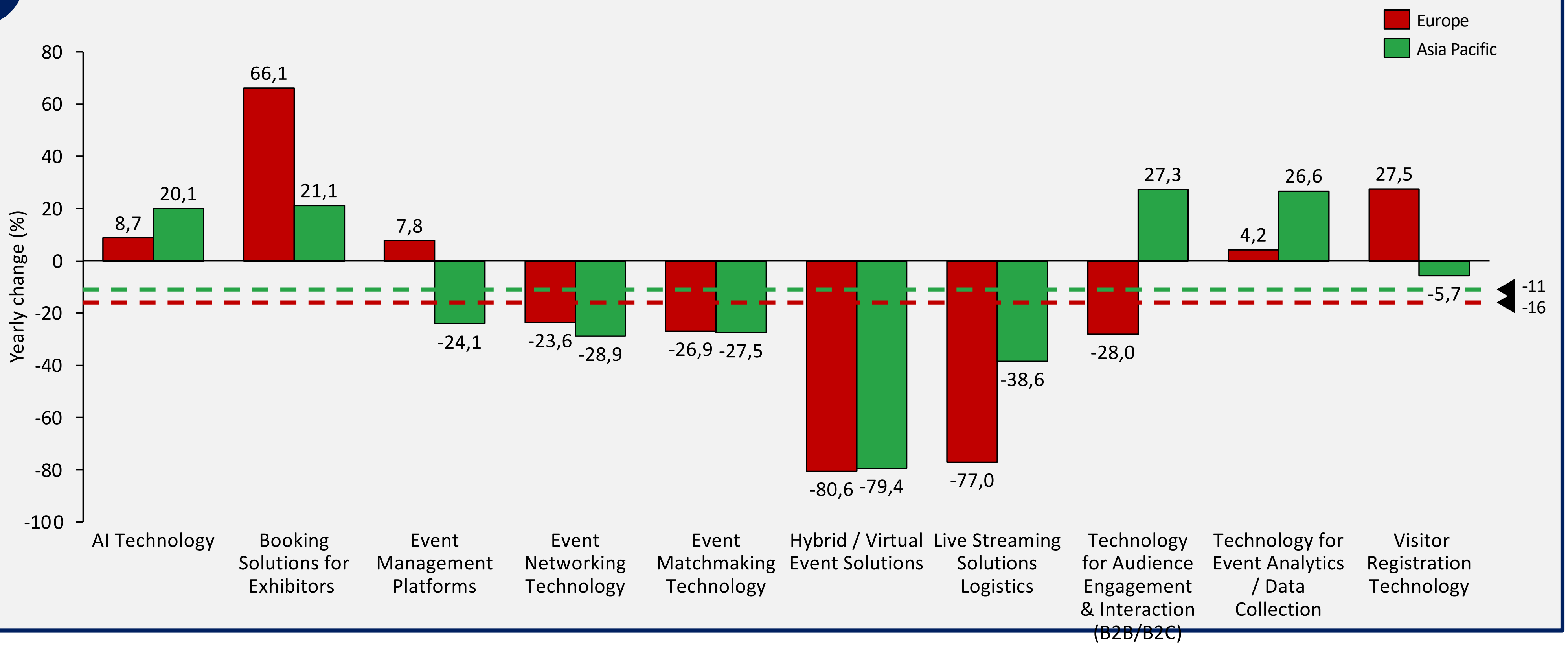
Asian Pacific countries have a slightly higher demand for digital services than their European counterparts

Demand for digital services, by region, 2023



However, the drop in demand for Hybrid/Virtual Event Solutions is similar between regions

Demand for digital services, by region, yearly change (%) 2021 - 2023



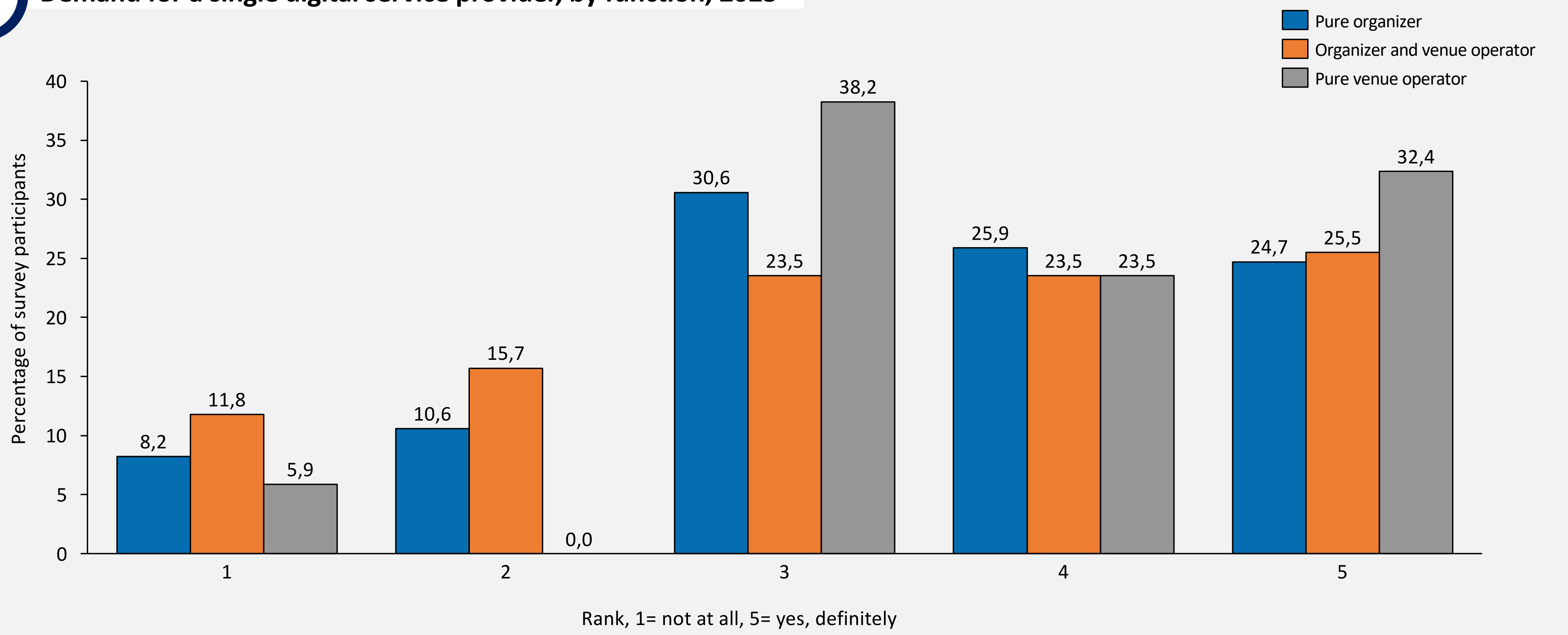
Question 11 – Key Take-aways

- Driven by a strong bounce-back from the pandemic, virtual and hybrid events solutions have noted a serious decline in demand
- In line with this trend is the fact that the demand for digital services is no longer highest amongst the pure organizers, moreover, is now highest within the group of organizers and venue operators. This can be explained by in increase in demand for technology that supports live events
- The demand for artificial intelligence is significantly higher in Asia-Pacific, suggesting a potentially more open-minded approach to the topic

***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)*

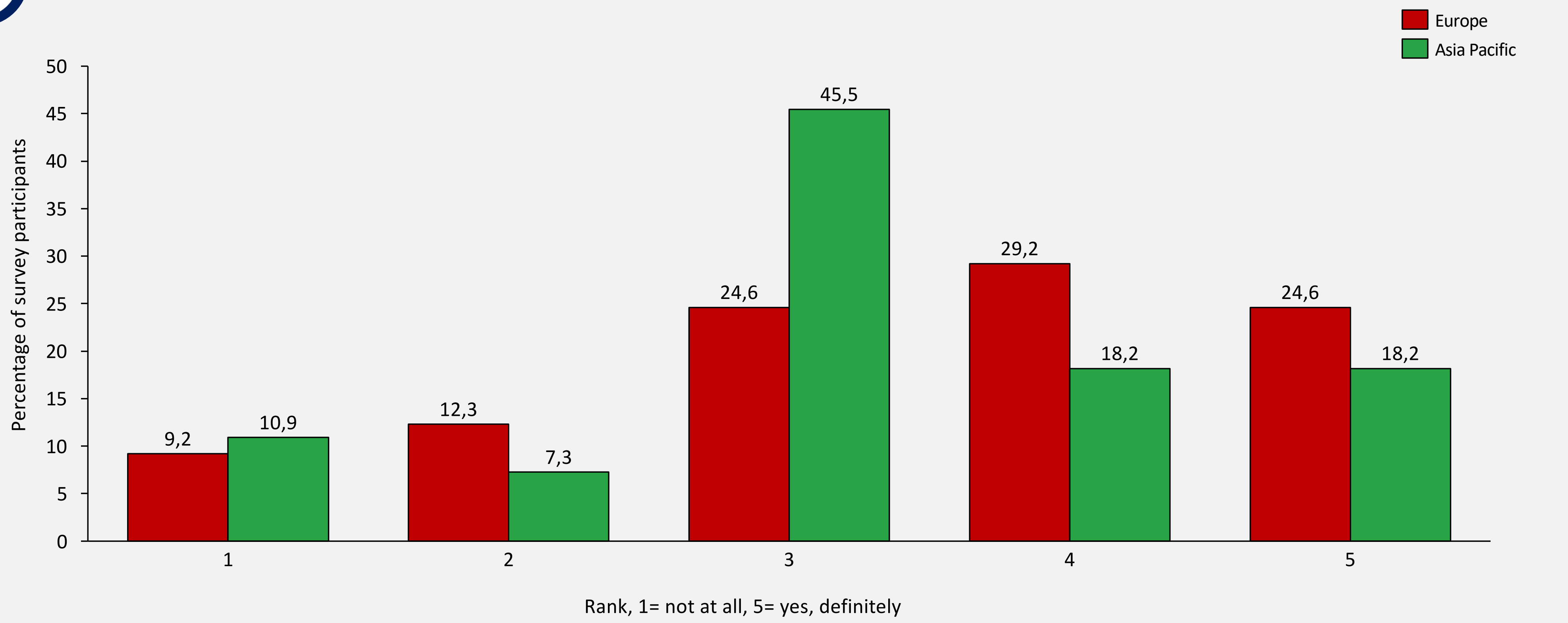
On average, the survey participants prefer to source digital services from one service provider

Demand for a single digital service provider, by function, 2023



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, 2023



Question 12 – Key Take-aways

- 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 overall demand for services has slightly increased
- Booth construction, alongside staff and security, remain the most relied upon service, which is probably relied upon so heavily due to it usually being outsourced (few organizations have in-house staff)
- In general, there has been a clear decrease 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 remains positive, however is in decline
- The demand for more innovation from service providers remains high, and satisfaction levels with regards to innovation have taken a strong hit
- Solutions for hybrid and virtual events have noted a strong decline in demand, most likely driven by the strong bounce back of face-to-face events
- 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