

CEIR Pulse Poll Trade Tariff Impact Survey

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Why This Survey?



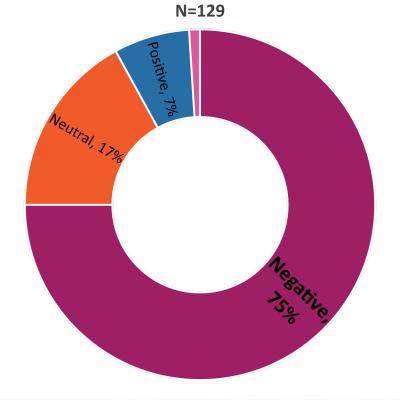
- Trade tariff policy causing uncertainty in the marketplace
- What impact is it having on US-based trade shows?
 - Positive, negative or no effect?



Source: Nancy Drapeau, AAPEX

Executive Perception of Impact on US-based Trade Shows

Impact of Trade Tariffs, Imposed or Threatened on US B2B Exhibition Industry?





Drilling Down to Brass Tacks

Observed Changes in Level of Participation in Exhibitions
Taking Place in 2018 through July 2019?

N=116

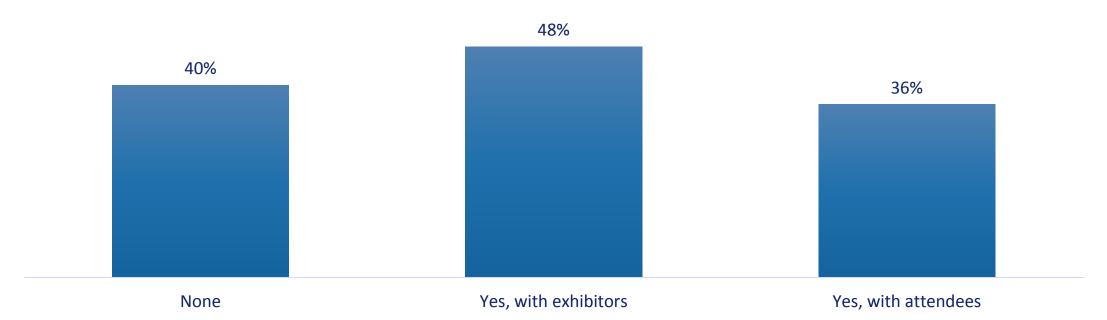




Exhibit Sales Are Taking a Hit

82% report decreased booth sales vs. 4% reporting increases

Asia, Domestic, EU where lost sales are sustained most

China, 80%
Domestic, 48%
European Union, 26%
ASEAN, 22%

Attendance Impacts Are Negative Too

76% report
decreased
registration results
vs. 5% reporting an
increase

Asia, Domestic, EU, North America, where registration declines evidenced most

China, 78%

Domestic, 38%

European Union, 38%

ASEAN, 34%

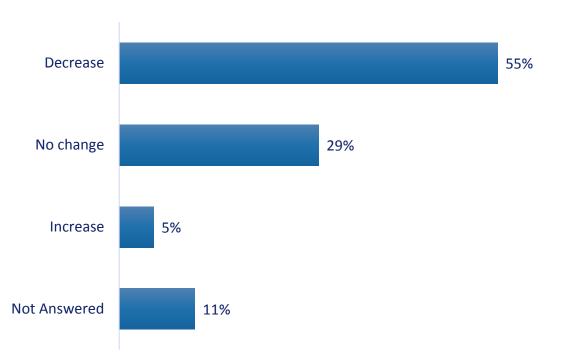
Mexico, 28%

Canada, 22%



Impact on the Bottom Line

Impact on Gross Revenues for US-based Exhibitions Impacted by Trade Tariffs N=65



PERCENTAGE CHANGE IN GROSS REVENUES

Includes those reporting declines, no change and increases in gross revenues, N=56

7.7% decline on average Median decline of 5.0%



US B2B Exhibitions Demographics Where Impact is Greatest

Sectors

- Consumer Goods/Retail, 31%
- Industrial/Heavy Machinery and Finished Business Inputs, 25%
- Business Services, 20%
- Building/Construction/Home and Repair, 18%
- Transportation, 17%
- Communications/IT, 15%
- Sporting Goods, Travel and Amusement, 14%

Geographic Scope of Participation

- International, 71%
- National, 45%

NSF of Paid Space – hitting all sizes though mid-to-larger shows hit more

45% between 100K and 499.9K NSF

of Qualified Attendees – hitting events of all sizes from small to large

• 68% with fewer than 25K attendees



Actions Taken in Response to Impact

Adjust to maintain growth, minimize negative impact, 35%

Redirect, adjust target markets - less China, more domestic, other international markets, 14%

F2F Marketing, Partnership Efforts, 9%

Enhanced aggressive exhibitor sales - expand, broaden, laxen billing terms, 9%

Enhanced, aggressive attendee marketing - expand, broaden reach, invest more, 8%

Aggressive marketing in general -expand, broaden reach, invest more, 5%

Creating new sources of revenue to offset losses, 3%

Lower revenue, space, projections, cost containment, 6%

Shifting to other options - new show launch, move event to visa friendly Canada, 2%

Nothing, no action, hold and wait, 8%



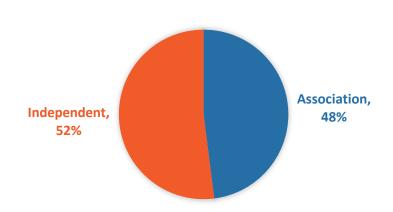
APPENDIX



Quick Poll Approach

- Fielded in August, 2019
- Sample from IAEE, SISO and Trade Show Executive

TYPE OF B2B EXHIBITION ORGANIZER N=129



Trade Tariff Survey Respondents N=129

