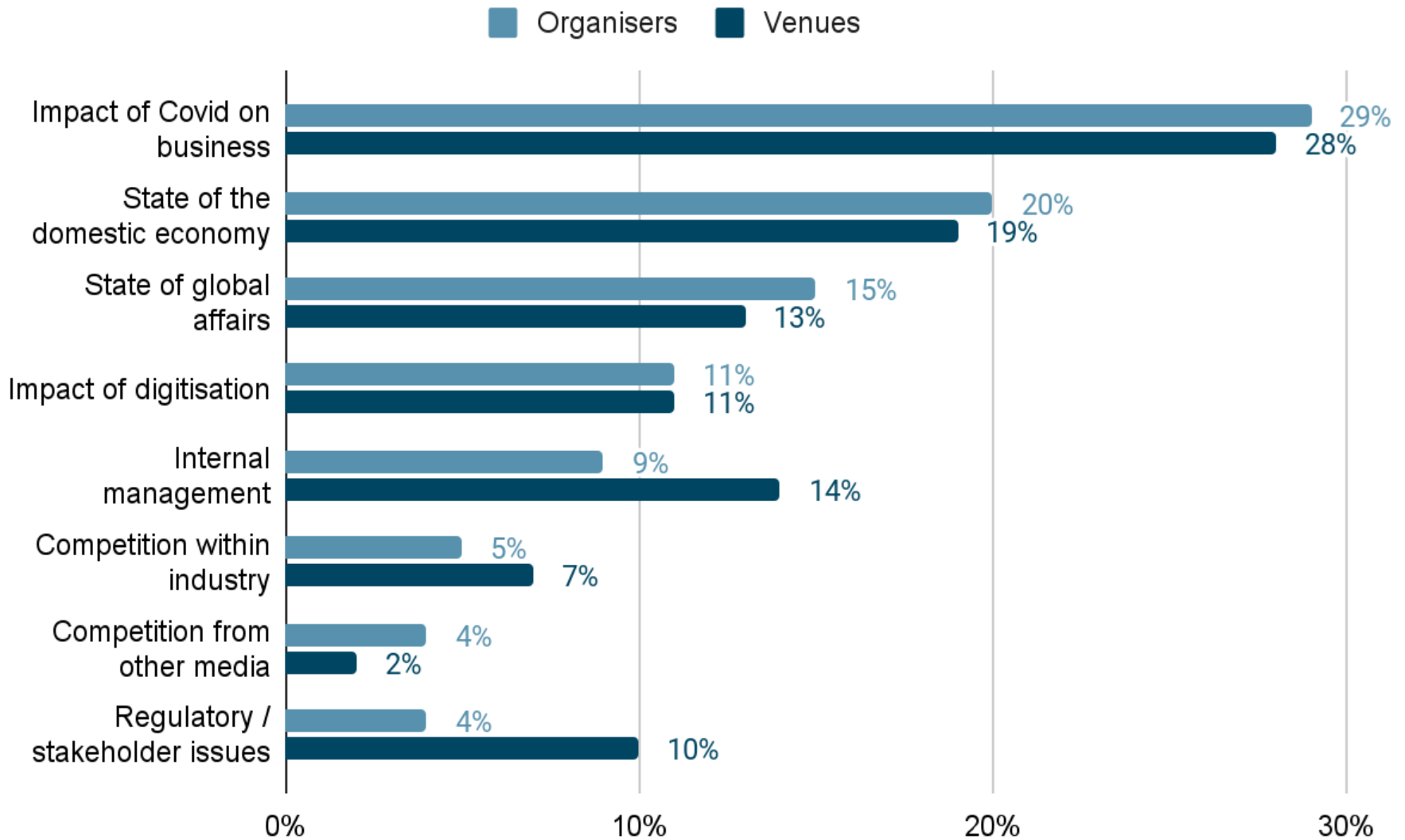


The current state of conferences, exhibitions and trade shows

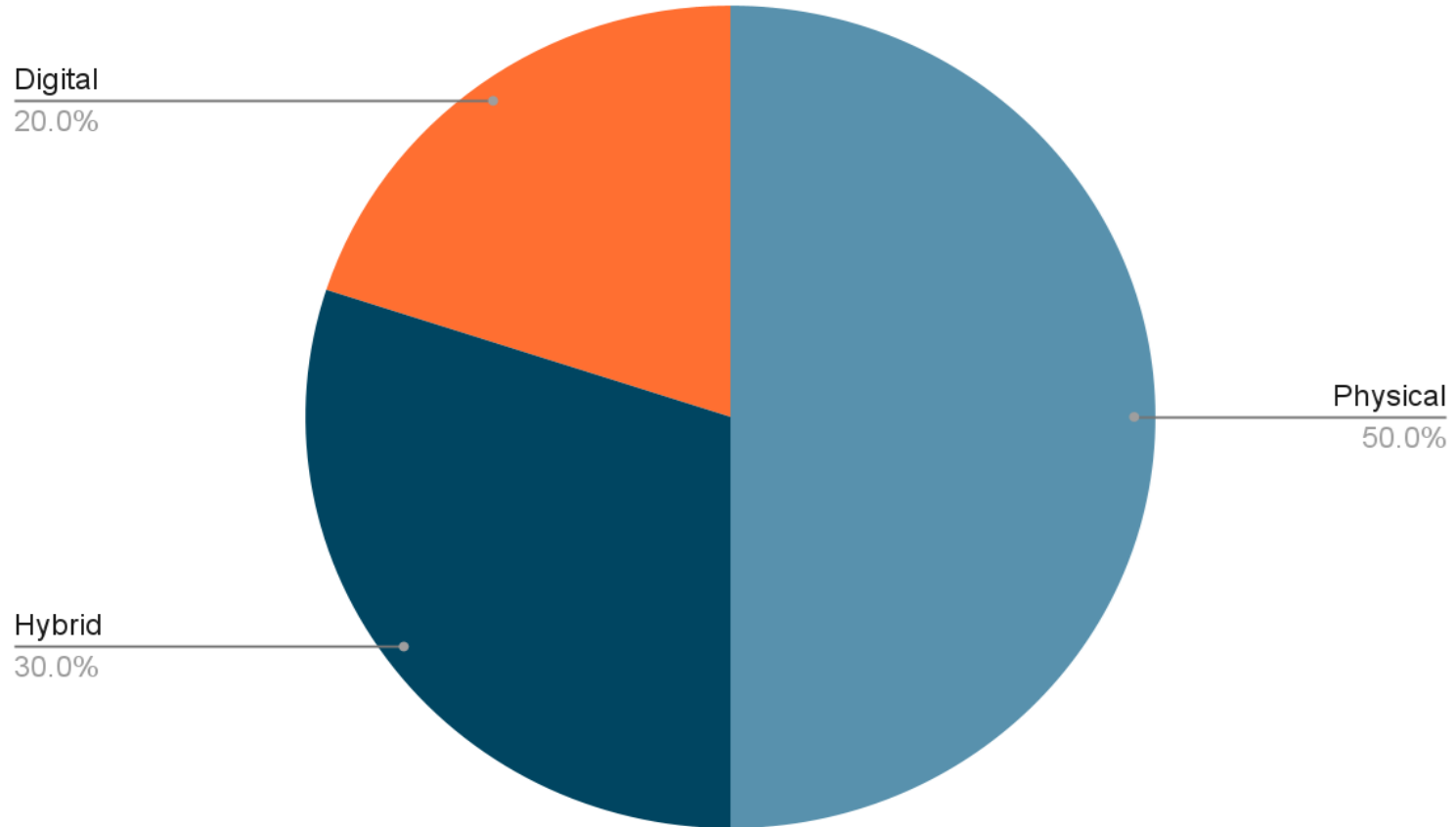
Exhibition industry structure & stresses

- PE owned/publicly quoted companies
- Privately owned companies
- Municipal owned trade shows & fairgrounds
- Association owned events: GSMA, IBC
- Corporate & company events

Most important current issues



2021 global event mix



- In terms of execution there was a 73% fall in space sales in 2020.
- In one year 50% of the Top 40 cumulative profits of the past five years were wiped out.

Expected source of income next 2 years

- 61% of companies said that physical & hybrid events will represent more than 50% of their income
- 59% expected digital to represent less than 10% of their revenues

Immediate challenges for organisers

- Backlog of pre-paid events
- Resetting of dates uncertain
- Venue availability crunch
- Staff retention & motivation challenges post furlow
- Cash retention & cashflow

Next stage challenges for organisers

- Maintaining, building & recruiting talent
- Insurance cover limitations
- Government support & appreciation
- Delivery on promises- cross border travel restrictions
- Delivery on promises: audience

Supply chain challenges

- Venue availability
- Extra costs of meeting regulations
- Capacity of key contractors
- Sustainability pressures

Is hybrid the answer?

- Challenge of selecting a platform
- Requirement to pay for physical space and hybrid platform
- Repurposing staff to provide a tailored service
- Review & adapt facilities for a different experience
- Can hybrid be as profitable as physical events?
- Focus on a 365 community

Hybrid in action



Key trends

- Data is the new oil- data acquisition is key
- Data strategy is an imperative
- Focus on domestic events
- Focus on experiential B2C events
- Repurposing of halls & venues
- Re-alignment of government MICE industry teams

What is the future?

- ROE rather than ROI-365
- Focus on engagement & amplification
- Experiential settings to attract new events & audiences
- Simplification of programmes & offerings
- Rebuild communities & catch-up on lost opportunities

Anticipated future needs of organisers

- Optimum flexibility in facilities and Food to Go
- Updated multimedia & broadband options
- Revised focus on new market opportunities- awards,gaming
- Differentiation from hotel ballrooms
- Characterful meeting spaces eg pods,charging stations
- Alternatives to the WFH and office options- 'third space'
- Sustainability KPI's rising up the agenda

Future opportunities for venues

Covid induced threats

- In prospect of reduced event sizes some facilities will appear outdated to adapt to the changing market environment

Required action

- Focus on venue quality over quantity in terms of exhibition space and conference numbers
- Venue digitalisation and sustainability

Long term outlook

- Better participant experience
- Better integration of trade shows & conferences

Thank you for your time

Should you wish to discuss any of the challenges I have briefly mentioned I can be contacted at:

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