



IAEE

Exhibitions and Events Mean Business

International
Association of
Exhibitions and Events®

FUTURE PATHWAYS



INTRODUCTION

Enter 2020 and we have found ourselves in the midst of a global pandemic that has resulted in devastating loss for our industry and the world. Short-term impact has changed how we connect, work, and do business. The long-term impact has yet to be determined. Yet the future is not completely unknown as IAEE knows one way to know the future... is to make it.

In 2016 IAEE embarked on a visioning project called "FutureScaping." This work identified catalysts of change, at the time, of new technologies, globalization, and a changing workforce. Deepening the conversation in 2019 a senior-level task force discussed show designs that optimize personal engagement, strategies to leverage global advancement, key ways to integrate adaptive learning for a changing industry, and transformative business-to-business (B2B) exhibition experiences.

Exhibition organizers, exhibitors, and suppliers are in need of actionable guidance that can help navigate shifts in the industry over the next five years. This IAEE Future Pathways field guide is designed to educate and inform industry stakeholders on the trends influencing the industry, and provide guidance actions we can take to adapt to the evolution of the event, exhibition and trade show industry.

THE VALUE OF EXHIBITIONS

It is recognized that there is an intrinsic value in exhibitions. At their core, they bring buyers and sellers together in a live face-to-face (F2F) setting to do business. But it is far more than that. For brands, exhibitions provide an opportunity to launch new products, collaborate with partners, test and curate their offerings, establish and build relationships with clients and customers, and of course, to facilitate commerce of products and solutions.

Additionally, exhibitions create immersive, experiential environments that invite attendees to explore, discover, engage, learn, and grow. Exhibitions provide an important platform for networking, collaboration, and innovation. Attendees are more than casual observers. They are active participants in the content and play a role in the broader story. Exhibitions foster community through both orchestrated and serendipitous collisions. The relationships are meaningful, and the impact is substantive. Exhibitions propel association missions and industry performance, and are a driving force for the global economy.

MOST IMPORTANT REASONS FOR ATTENDING 2018 ATTENDEE ROI PLAYBOOK, CEIR	
SHOP	98%
See New Technology	84%
New Product Introductions	82%
See, Touch, Interact with New Products	81%
Ability to Talk to Experts	79%
Idea Generation/Planning	75%
Relationships with Existing Suppliers	71%
Brand Comparisons	66%
Prospecting for Suppliers	61%
Find a Solution for an Existing Problem	60%
To Make a Purchase	36%
LEARN	97%
Keep up-to-date with Industry/Trends	87%
Professional Networking	76%
Personal Development	75%
Better Job Performance	68%
Seminars, Speakers	60%
For Continuing Education Credits, CMEs, etc.	36%

EXPERIENCE	73%
To Get Inspiration/Motivation/Recharge	66%
Participate in Membership Activities, e.g., chapter meetings	36%
VALUE / PRESTIGE	68%
Reputation of the Event	68%
LOGISTICS	52%
Convenient Location	52%
OTHER	66%
Competitive Intelligence	66%

From an exhibitor perspective, [CEIR](#) found events were highly valued for achieving the following objectives.

MARKETING OBJECTIVES	
Build/expand brand awareness	84%
Promotions targeting specific business sectors	82%
Promotions targeting specific geographic regions	82%
New product promotions, launches	81%
Giving target audiences chance to interact with product, service	81%
Reinforcing brand awareness	80%
Existing product or service promotions	78%
Promotions through product or service demonstrations	76%
Promotions targeting specific professionals in specific job functions	70%
Testing entrance into a new region	65%
Testing entrance into a new business sector	64%
SALES OBJECTIVES	
Growing sales leads in a new region	82%
Generating new sales leads in general	81%
Relationship management/engagement with prospective customers	80%
Relationship management/engagement with key accounts or customers	80%
Growing sales leads in a new business sector	74%
Existing customer relationship management/engagement	72%
Providing support to our distributors	68%
Providing support to our independent representatives	65%
Generating new sales or orders with existing customers	64%
Growing sales leads with professionals in a specific job function	62%
Generating sales or orders with prospective customers	58%

The posture to take in moving the exhibitions industry forward is an important one. We must be *proactive*. One must understand what makes this business segment special and examine those things which hold it back. It is imperative all stakeholders are truly transparent and honest with each other about what works, what does not work, and be committed to driving real sustainable change.

One's perspective should be objective, in that an outside-in view should be taken of challenges and opportunities, as much as proudly held inside-out positions.

To do this, the FutureScaping Committee adopted multiple points of view from both within and outside of the IAEE membership – from attendees, to brands, to exhibit houses, agencies, and suppliers, and of course association, independent and corporate exhibition and event organizers. The committee analyzed both the current state of exhibitions, as well as explored dozens of trends that impact, and will impact the industry moving forward. With this approach, an understanding of what the future of exhibitions might look like was developed, along with identifying several forces currently impacting the exhibitions industry, which must be understood, navigated, mitigated, and exploited in order to design the future of exhibitions and events.

THE TENETS OF FUTURE EXHIBITIONS

Throughout this work, we will share a series of trends and insights that will help each member of our community chart their own course for a successful journey to the future state of exhibitions and events. That said, we would be remiss if we did not share our vision of our mutual destination. And, while the guiding stars will be different for each of us based on where we are starting from, we believe the defining point on the horizon will incorporate the following tenets. These tenets are not in any order of importance.

<p>1</p>	<p>Those events and exhibitions which enjoy future success will be based first on attendee wants and needs. This means some level of personalization at scale. Whether it be solving a problem, providing educational opportunities, creating an environment for peer engagement and networking, granting access to experts, including sought-after destinations, or creating fun, entertainment-integrated experiences (e.g. 'festivalization') which attendees cannot get anywhere else – future events must begin (and end) with constructs that propel professional and personal growth for attendees, regardless of their demographics or psychographics.</p>
<p>ATTENDEE FIRST</p>	
<p>2</p>	<p>Brands are the commercial lifeblood of our industry. Everything that is incorporated in our future work must be for the benefit of delivering brand success. This includes listening to, and understanding the needs of each brand as we design our approach. Just as events must be personalized for attendees, they must be customized for brands. At the surface, it is connecting brands with their target audiences, but it is far greater than that. It includes a partner ecosystem, prospects, customers and advocates at every stage of the relationship cycle, a meeting of minds to create innovation and advance entire industries, and more. We must work together with brands to plan and develop our events to meet these diverse needs.</p>
<p>BRAND EMPOWERING</p>	
<p>3</p>	<p>Eliminating friction from exhibitions will contribute to both the attendee-first and brand empowerment tenets. For attendees, the end-to-end experience will be intuitive, and feel like it was curated and designed just for them, or by them (crowdsourcing) – from registration, to designing their own experience, to wayfinding, to expert and brand access, networking, and logistics. For brands, unlocking value from participation, engagement, augmentation, and sponsorship will be uncomplicated, and business models will be transparent. Leveraging existing and emerging technologies (Artificial Intelligence, automation, bots, etc.) will help. New models and processes will be required. Open, transparent communication will be paramount to success.</p>
<p>SIMPLE</p>	

4

FLEXIBLE

The “one-size-fits-all” approach our industry has leveraged for decades has proven to have diminishing returns over time and must evolve in order to have a role in the future. From convention centers to unconventional venues and spaces, from booths organized in a grid to natural, organic, multi-purpose/multi-use spaces, from formulaic keynotes and breakout sessions to innovative peer-based learning formats and even from our business models based on selling real estate and commoditized services, to identifying and defining new ways to articulate and monetize our value, the design of facilities and events should be radically different going forward. Different industries have different needs. Product-focused companies require fundamentally different engagements than solutions-driven enterprises. Experimentation will drive innovation and flexibility to address evolving needs.

5

EXPERIENTIAL

We have become all too familiar with the demise of physical retail and the downfall of the shopping mall. It is important we recognize the correlation to our work, which in many cases is akin to a temporary shopping mall. Those brands which have enjoyed continued success, and evolved their relationships with their consumers have reinvented this through experience. Our offering as an industry must rapidly engage a similar approach. People crave rewarding experiences. Experiences drive inter-personal relationships, which in turn drive growth. We need to create the indelible – environments which foster engagement, facilitate discovery and learning, entertain, and engage all the senses as well as the human spirit.

6

TECHNOLOGICALLY
INTEGRATED

Technology is no longer an add-on to exhibitions and events. From targeted persona-based marketing to registration and logistics, to pre-, during-, and post- event communications, to experiential engagement, to building relationships between brands and associations, to their audiences and members over time, technology is integral. There are some technologies which are tried and true, and other emerging technologies which will disrupt, define, and enable what our future looks like. We will explore some of these in the Trends discussions in later versions of this document.

7

TIME/SPACE
DISTRIBUTED

Events are typically a point in time. Business relationships are over a time spectrum. Additionally, travel behaviors are certain to ebb and flow based on the Seven Forces we will discuss later in this guidance. Events of the future may need to migrate from purely-centralized large-event models to hybrid or distributed models which spread engagements over the year, with events of different sizes, across geographic regions. Engagement may also happen beyond traditional business hours, 24/7/365.

8

CAMPAIGNABLE

We must recognize what we provide is just one (or a few) chapters in the story. The role of the exhibition in a community or business relationship will be dynamic based on association, industry, brand and audience. There is a plethora of other tactics deployed to advance these relationships where each play a role. Virtual events, email and direct marketing, social media, Search Engine Optimization (SEO), Search Engine Marketing (SEM), out-of-home (OOH) advertising, Advertising, PR, proprietary corporate events, and others all play a role. Understanding where we fit, and the inputs and outputs of our channel will not only improve the performance and value of events, but increase the impact of all touches to drive relationship performance, regardless of how it is defined.

9

SUSTAINABLE

Carbon neutrality will move from a goal or a talking point, to the expectation. The exhibition industry must move from recycled or reusable materials, to renewable energy, sustainably-sourced food and beverage, travel carbon offsets, and experience-integrated activities and contributions that provide a net negative carbon impact to the environment in order to satisfy environmentally conscience audiences, address government regulation, and mitigate climate change.

10

MEASURED
& OPTIMIZED

Understanding and optimizing performance of events and exhibitions will be a standard practice. KPIs and metrics will be determined and measured against established business goals. These will not be standardized, but flexible based on the objectives and execution of each and every event and exhibition, and further adapted by each brand or association based on their independent needs. That said, there will be benchmarks established for each set of metrics the industry can optimize against. Additionally, measurement will move beyond justification to objective optimization, designed to continuously improve performance over time through the evolution of tactics and experiences within each event or experience.

11

SAFETY

Safety starts with physical security (both violent and non-violent crime) but it does not end there. Attendees are increasingly concerned with privacy, identity protection and data security. Additionally, with the onset of COVID-19 and other future pandemics, prospective attendees are concerned with the safety of being in close-quarter public spaces, and the health and welfare of others. Show producers must have robust strategies to address all of these threats.

12	The event of the future will be as much a digital experience as it is face-to-face. Some events will be fully virtual, due to factors like: brand / audience preference, the evolution and availability of technology, travel issues, and disasters like pandemics. Most if not all other events will adopt virtual components, becoming hybrid in their approach – ranging from livestreaming general sessions and other content, to complementary digital experiences to broaden reach, to on-demand content offered to both physical attendees and virtual spectators.
VIRTUAL/HYBRID	
13	Current and prospective event attendees need to have confidence in the ability to participate and engage with other participants in an environment free of bias or harassment. Diversity of perspective, thought, and voice can only be accomplished with participants from a broad spectrum of backgrounds. Demographic diversity needs to reflect a global representation of gender identity, sexual orientation, race, disability, religion, geographic and socio-economic backgrounds.
DIVERSITY/EQUITY/ INCLUSIVITY	

We have categorized our findings into seven distinct but related forces:

1. Association/Independent Organizers
2. Industry Trends
3. Agency/Exhibit House
4. Political/Regulatory/Economic
5. Disasters
6. Brand/Exhibitor
7. Attendee/Consumer

FORCE 1

Association/Independent Organizers

Internal or external forces that propel or inhibit industry progress and adaptation to change for show management entities.

TRENDS IN THIS SECTION

Mergers & Acquisitions

SPONSORSHIP

CUSTOMIZATION

UNCONVENTIONAL VENUES

VIRTUAL / HYBRID EVENTS

FESTIVALIZATION

ACQUISITION

HOUSING

AUDIENCE INNOVATIVE

EVENTS WITHIN EVENTS

FORCE 2

Industry Trends

Marketing, event, exhibition, or digital trends that disrupt, augment, or amplify our craft.

TRENDS IN THIS SECTION

Immersive Environments
Event Apps
PERSONALIZATION
INTIMATE ENVIRONMENTS
MULTI-SENSORY EXPERIENCES
UNEXPECTED PRESENTATION FORMATS
Surprise & Delight
THE EMERGENCE OF 5G
AUGMENTED REALITY
Projection Mapping/ Facial Recognition
Artificial Intelligence
WATCH PARTIES
MIXED REALITY

EXCLUSIVITY
GAMES & NOSTALGIA
MAJOR HOUSING
ATTRACTIONS
TEXT MESSAGING
SOCIAL MEDIA
INTEGRATION
EVENT APPS
DEPENDABLE
HIGH-SPEED
WIFI
VIRTUAL REALITY
Holograms
Digital Signage & Notifications

RFID BEACONS
WEARABLE TECHNOLOGIES
ATTENDEE ENGAGEMENT
VOICE TECHNOLOGIES
INTERACTION AUTHENTICITY

FORCE 3

Agency/Exhibit House

Catalysts emerging from evolving exhibit houses, agencies, and industry supplier.

TRENDS IN THIS SECTION



FORCE 4

Political / Regulatory /
Economic

Macro trends that impact the industry which may or may not be influenced by industry advocacy.

TRENDS IN THIS SECTION

SECURITY & CYBERSECURITY



SUSTAINABILITY

FORCE 5

Disasters

Those influences we have no control over, but need to proactively plan for, address and mitigate.

TRENDS IN THIS SECTION

DISASTER PREPAREDNESS



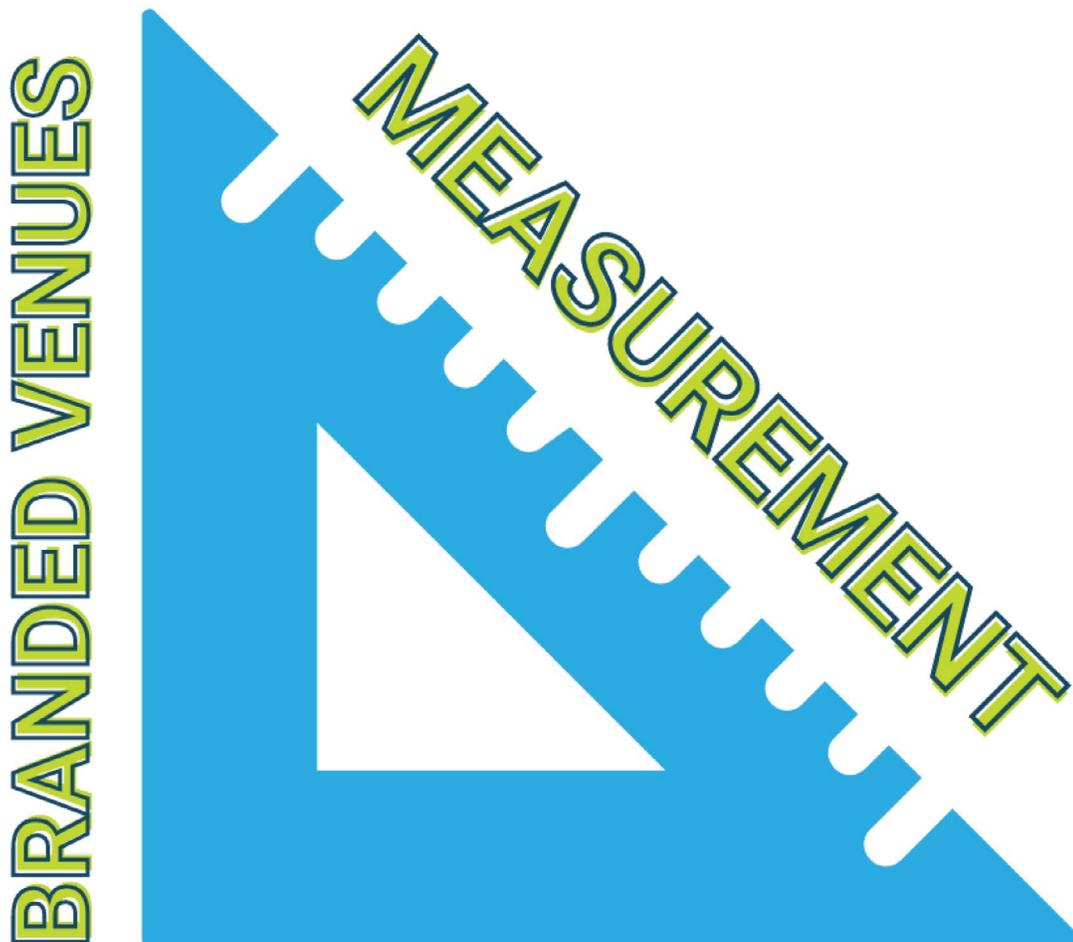
TOURISM & HOSPITALITY DISRUPTION

FORCE 6

Brand/Exhibitor

The primary drivers of the industry – business needs which create the need for change.

TRENDS IN THIS SECTION



FORCE 7

Attendee/Consumer

The reason for existence, wants, needs, habits, behaviors, social and cultural influences. End-users in the event marketplace.

TRENDS IN THIS SECTION CELEBRATING DIVERSITY

EVENTS WITH PURPOSE

Localization

Community EQUITY & INCLUSION

HEALTH & Building

WELLNESS DEVELOPING STUDENT PARTICIPANTS

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