CEIR Pulse Poll
Trade Tariff Impact Survey
Nancy Drapeau, PRC
Vice President of Research

Made possible through support from:
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?

- Negative: 75%
- Neutral: 17%
- Positive: 7%

N=129

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

N=116

- None: 40%
- Yes, with exhibitors: 48%
- Yes, with attendees: 36%
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

- Decrease: 55%
- No change: 29%
- Increase: 5%
- Not Answered: 11%

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%
### 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

<table>
<thead>
<tr>
<th>Category</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adjust to maintain growth, minimize negative impact, 35%</td>
<td>Redirect, adjust target markets - less China, more domestic, other international markets, 14%</td>
</tr>
<tr>
<td></td>
<td>F2F Marketing, Partnership Efforts, 9%</td>
</tr>
<tr>
<td></td>
<td>Enhanced aggressive exhibitor sales - expand, broaden, laxen billing terms, 9%</td>
</tr>
<tr>
<td></td>
<td>Enhanced, aggressive attendee marketing - expand, broaden reach, invest more, 8%</td>
</tr>
<tr>
<td></td>
<td>Aggressive marketing in general - expand, broaden reach, invest more, 5%</td>
</tr>
<tr>
<td></td>
<td>Creating new sources of revenue to offset losses, 3%</td>
</tr>
<tr>
<td>Lower revenue, space, projections, cost containment, 6%</td>
<td></td>
</tr>
<tr>
<td>Shifting to other options - new show launch, move event to visa friendly Canada, 2%</td>
<td></td>
</tr>
<tr>
<td>Nothing, no action, hold and wait, 8%</td>
<td></td>
</tr>
</tbody>
</table>
Quick Poll Approach

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

TYPE OF B2B EXHIBITION ORGANIZER
N=129

- Association, 48%
- Independent, 52%

Trade Tariff Survey Respondents
N=129

- C-Suite: 34%
- Executive/Senior Vice-President/Vice President: 19%
- Director: 15%
- Owner: 9%
- Exhibition/Trade Show/Exhibits/Event Manager: 5%
- Sales Management: 2%
- Exhibition/Trade Show/Exhibits/Event Director: 2%
- Exhibition/Trade Show/Exhibits/Event VP/Group VP: 2%
- Manager: 2%
- Marketing Management: 1%