



June 2023

## Summary of Study Findings:

### the impact of the crisis on new behaviour of international business customers at French trade shows

In 2022, professionals in the business tourism sector, gathered within the Copil (1) congress and trade shows group, collaborated to conduct a study on **new expectations and behaviours of international customers at international trade shows**, in response to the health crisis as well as the energy crisis and the resurgence of inflation.

The objectives of this study (2) were to identify the main decision criteria for companies participating as exhibitors and visitors at international trade fairs, and their evolution, as well as to understand their new expectations in order to **enable professionals and stakeholders in the industry to anticipate their needs**.

#### Physical trade fairs are highly favored, and allocated budgets are maintained

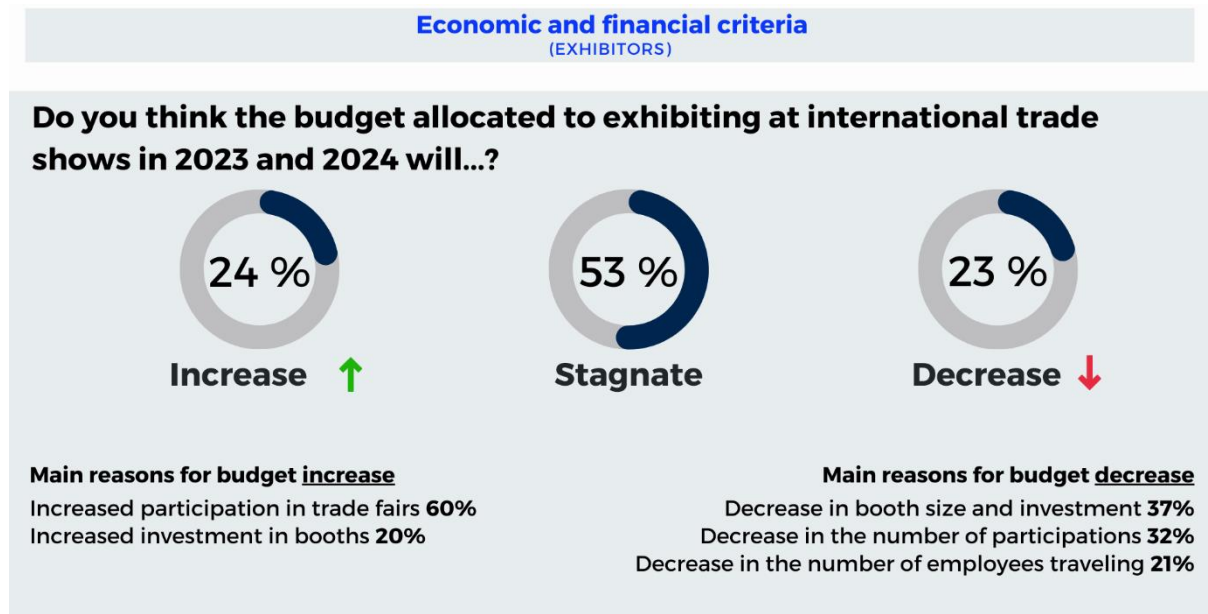
After the crisis period that heavily impacted professional events in 2020 and 2021, trade fairs have emerged as an essential means of conducting business. Nothing seems to replace face-to-face transactions and contacts. As a result, **74% of foreign companies intend to exhibit at an international trade fair in Paris or in France in 2023 or 2024**.

While the intention to visit trade show is more volatile, it remains significant, as **57.4% of surveyed professionals plan to visit an international trade show in France in 2023**. However, customers from major exporting countries (Asia and America) are more uncertain. The reasons highlighted by companies that declare not wanting to participate in an international trade show in Paris or France in 2023 or 2024 include the absence of an event in their industry sector in 2023, as well as budget constraints, lack of personnel, time constraints, participation in a competing trade fair (outside France), or uncertainty due to successive crises.



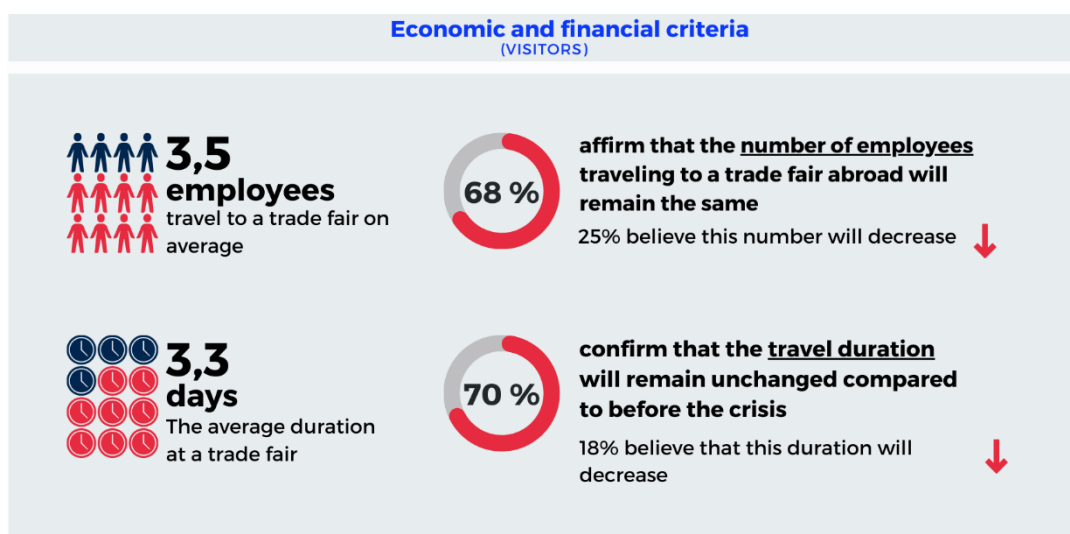
For a majority of foreign companies (53% of exhibitors and 57% of visitors), the budgets allocated for participation in international trade show in Paris and France remain unchanged. However, 24% of exhibitors are considering increasing their budget in order to participate in more trade shows. On the other hand, 23% are considering reducing their participation budget by decreasing the size and investment in their booth or reducing the number of trade fairs employees travel to.

Furthermore, professionals express concerns about the overall increase in costs, which could potentially lead them to reduce their booth size.



Moreover, foreign companies are planning to mobilize slightly fewer employees for visiting international trade shows in Paris and France. While 68% of them are assigning the same number of employees to international trade shows (an average of 3.5 people), 25.5% are reducing the number of employees dedicated to the visits.

As for the duration of travel for foreign visitors attending trade shows, 70% of the surveyed visitors believe it will remain the same, averaging 3.3 days. Additionally, 17.8% of them plan to shorten their trips due to budget reductions and increased transportation costs. It is worth noting that the previous study on the economic impact of trade shows conducted in 2011 indicated that foreign visitors spent an average of 4.1 days during their trips to visit trade shows in France.



Digital offerings represent a means of maintaining connections throughout the year but will never replace physical trade shows.

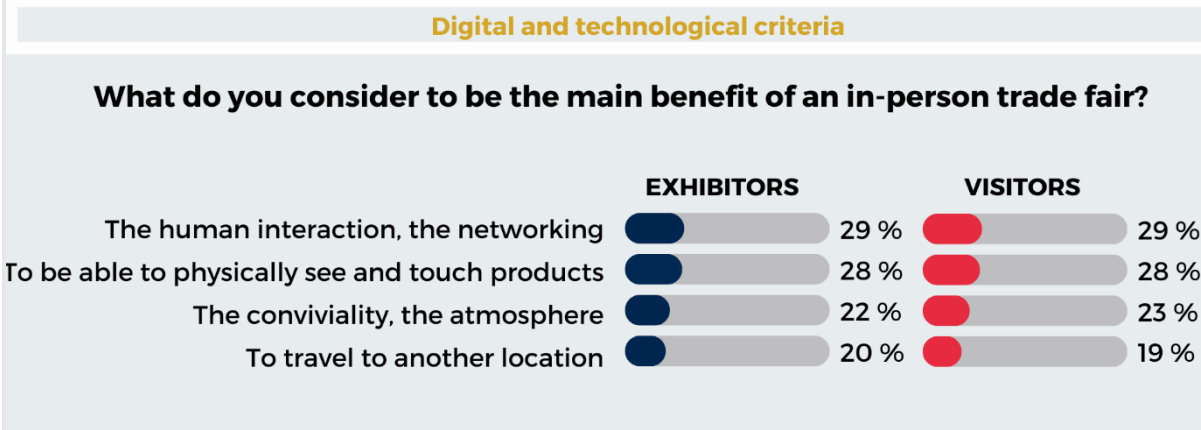
Online B2B meetings, year-round marketplaces, virtual trade show visits, on-demand access to conferences and panel discussions, webinars, and tutorials were already being offered by some international trade show organizers before the pandemic. However, the pandemic has accelerated the adoption of these technologies. Today, **these digital offerings are deemed useful by 93.2%** of foreign attendees of international trade shows.



However, for the vast majority of exhibitors and visitors, these digital offerings are seen **as a complement that allows them to maintain connections with their clients throughout the year**, or as a temporary tool that will never replace in-person trade shows. **Only 2%** consider it a means to avoid traveling to the physical trade show.



**Human interaction and networking** are cited as the main benefits of in-person trade shows for both exhibitors and visitors, followed by the ability to showcase, see, or touch products, which is particularly important in certain industries such as food, fashion, and home decor, as well as the construction sector.



**The environmental footprint of the trade show, a currently non-decisive criterion**

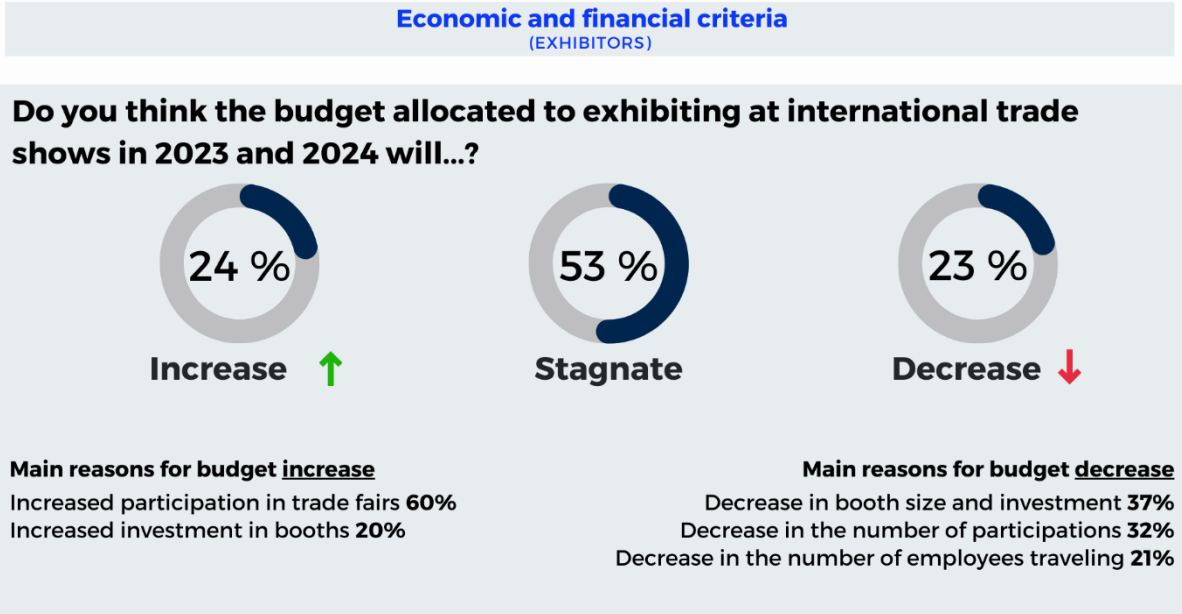
Today, the offerings of trade shows (exhibitors' products, innovations, content), the quality and quantity of visitors, as well as budget considerations (ROI, cost of booth and travel), are the decisive criteria that motivate foreign companies to attend international trade shows. The environmental footprint of the trade show is currently a non-determining criterion, as **only 5% of the foreign customers choose to participate in an environmentally friendly trade show.**

These criteria have changed little since the crisis, but exhibitors are paying even more attention to **the quality of visitors**, and visitors are taking into account **the health situation as well as the constraints and costs of travel**.

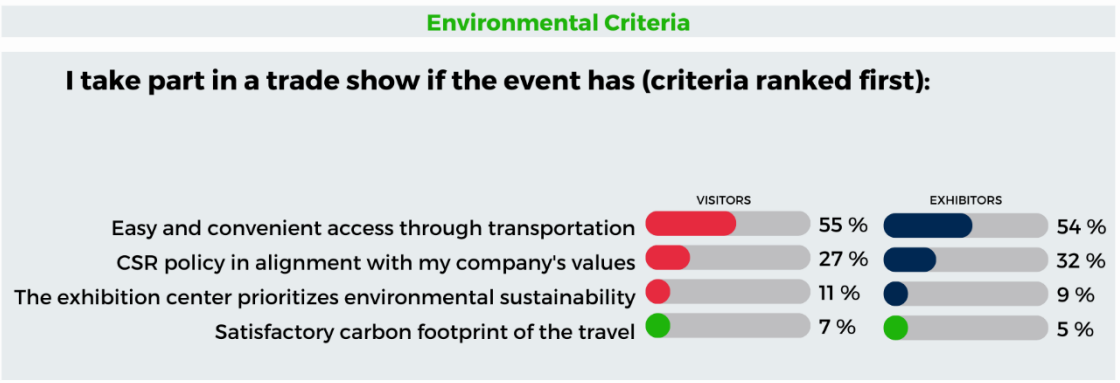
**Main decision criteria**

**What are the main decision criteria for your company to participate in a trade show in France?**

	EXHIBITORS		VISITORS		
Quality of the visitor profile	17%	1	21%	1	Exhibitors' offerings
ROI achieved	17%	2	18%	2	Innovations showcased
Quantity of visitors	14%	3	14%	3	Content and organization
Stand cost	13%	4	12%	4	Overall cost of travel
Travel cost	10%	5	8%	5	Comfort of the facilities
Content and organization	8%	6	7%	6	Touristic attractiveness of the city
Comfort of the facilities	6%	7	7%	7	Exhibition center environment
Environmental footprint of the trade show	5%	8	6%	8	Economic environment
Economic environment	4%	9	5%	9	Environmental footprint of the trade show
Exhibition center environment	3%	10			
Touristic attractiveness of the city	2%	11			



Among environmental aspects, **access to the venue via public transportation** is considered the most important aspect (by 55% of companies), ahead of the CSR policies of the exhibition center and the trade show. It should be noted that the companies attending trade shows are mostly SMEs, for whom the need to do business takes precedence over environmental concerns, and they are less subject to CSR imperatives, with disparities depending on the countries.



Furthermore, while more than a third of exhibitors and visitors state their intention to prioritize local trade shows (in the same country) in the coming years, it is primarily for reasons of time efficiency and cost-effectiveness, rather than environmental reasons.

**Visitors have an economic impact on the destination and their travel is not solely focused on business meetings.**

Among the activities surrounding the trade show, visitors primarily engage in professional meetings (subsidiaries, clients, prospects, internal meetings) and attend various events (meetings with other visitors, site visits, award ceremonies, product launches). These activities have changed little after the crisis.

**However, 37% of visitors extend their stay for leisure purposes**, 29% extend their business trip to neighboring countries, and 27% take the opportunity to work remote. Offering co-working spaces in exhibition centers, organizing "inspirational" visits related to their professional activities as some trade shows do, or developing team-building activities during the trade shows can be part of the new service offerings provided by industry operators.



In this regard, **the quality/price ratio of the destination, the quality of hotel offerings near the trade shows, and the conditions of safety and well-being** are also taken into account when deciding to visit a trade show in Paris and France.

<sup>(1)</sup> The Copil congrès et salons is a partnership committee chaired and led by the CCI Paris Île-de-France since 2010. It brings together key national and regional players in tourism and business events, including CCI Paris Île-de-France, Vîparis, Unimev, Promosalons, Atout France, Aéroport de Paris, CEP, CRT Ile-de-France, OTCP, and DGE-Ministère de l'Économie et des Finances. The committee provides studies and reports aiming to provide reliable and shared data to promote the attractiveness of France and the capital region in the congress and trade show sectors.

<sup>(2)</sup> The study was conducted by the Promosalons network, surveying 607 professionals from 22 countries (387 visitors, including 102 top buyers, and 220 exhibitors). The interviews were conducted by phone between November and December 2022. Detailed results are available upon request from the Copil.